Salon iris™

User's Guide

for Version 12

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Welcome to Salon Iris

getting to know the basics of the software

Getting Started

This User's Guide can be accessed at any time through Salon Iris by going to the **Help** drop-down menu and selecting **Table of Contents** or **View User's Guide**. You can also access support and technical articles on most of the topics covered by this guide and more by visiting http://support.Salon Iris.com.

Salon Iris is a powerful, easy to use software program that updates and prepares reports for clients, products, services, payroll, mailing, ordering, employees, and much more. Although designed primarily for salons, spas, and other similar businesses, Salon Iris provides the capability to customize database information and displays for use in a wide variety of business applications.

Salon Iris supports the following additional features:

- Integrated credit card processing with full support for all major credit cards
- Online appointment booking that allows your customers to book appointments via Internet
- Remote and mobile access
- QuickBooks integration
- Importing data files from other programs
- Exporting data to other programs

Visit our website at http://www.SalonIris.com for the latest information and new features.

Installing Salon Iris

1. Insert the Salon Iris CD into the CD/DVD ROM drive. The installation process should begin.
2. If you do not have a CD, download the software from http://www.SalonIris.com/software/support/first-time-setup/ and click the **Download Latest Version** link to start the download of the software.
3. The **InstallShield Wizard** screen will appear. Click **Next**.
4. The **License Agreement** screen will appear. Please carefully and slowly read over the license agreement. If you wish to accept the terms in the license agreement, select **I accept the terms in the license agreement** and click the **Next** button. If you do not accept the terms, Salon Iris will not install.
5. Leave the default destination folder as **C:\Program Files\Salon Iris** and click **Next**.
6. Click the **Install** button. Salon Iris will also automatically install SQL Server. This process may take some time.
7. Click the **Finish** button.
8. The Salon Iris icon will now appear on your computer's desktop. Double-click on the Salon Iris icon.
9. The **How Would You Like To Start?** screen will appear. If you are using the trial version select **Use the Free Version**. If you are using a purchased version of Salon Iris select **Enter Registration Info**.
10. Enter your Username and Password to register your software or click **Enter Serial Number** to register the software with the serial number that was provided to you when you purchased Salon Iris. This serial number can be found on your invoice. Be sure to keep your serial number in a safe place and do not lose it.
11. Click the **Register** button.
12. The **Let's Get Started** screen will appear.

13. Select which type of database that you would like to start with. You can select either of the following choices:
    - **Quickly Start with Sample Info**: select this choice if you would like to start using Salon Iris with some sample clients, products, and appointments. We recommend using the sample database with the trial of Salon Iris
    - **Jump Right In**: select this choice if you would like to start using Salon Iris with a totally blank database
    - **Restore a Backup**: select this choice if you have a database backup from another computer or if you're reinstalling Salon Iris and have a backup to restore
16. Click the **OK** button. If multiple copies of SQL are detected on your computer the **Select Server** screen will appear. If this is the case, press the **Auto Setup** button. Select the correct instance of SQL to connect to and press the **OK** button.
17. You are ready to begin using Salon Iris.
18. After you register Salon Iris, it will need to be activated. You will be automatically prompted to activate with the **Enter Registration Name** screen. The next time you close and reopen Salon Iris, it will walk you through activation. You can activate via Internet or via phone. Complete the step-by-step instructions that are that are shown on the Salon Iris screen. Follow the instructions for activation. If you are on a software subscription, you are not required to activate until you complete the payment plan.

If you are on a software subscription, you will receive a new temporary serial number each month. If you have elected to register the software with the temporary number, you will need to enter the new temporary serial each month when you receive it in your e-mail address on file with DaySmart Software, Inc. Registering the software with your Username and Password will eliminate the need to manually enter the serial number each month by automatically checking your account status. We highly recommend registering the software with your account credentials for this reason.

For instructions on setting up, installing Salon Iris and setting up network connections, please refer to the **Networking** section of this User's Guide for instructions.

Registering the Trial: if you have been using the trial version of Salon Iris, after you purchase you will receive a serial number.

1. Install Salon Iris as explained above.
2. Select **Register** from the **Help** drop-down.
3. Enter the name of the person or company that purchased the product.
4. Enter your serial number and click **OK**. If a notice appears that states your serial number is invalid, you should check the date and time on your computer's Windows settings, double-check the number, and try again before calling technical support.

After you register Salon Iris, it will need to be activated. The next time you close and re-open Salon Iris, it will walk you through activation.

If you had entered information in the trial mode, all of the information will be saved and you can begin entering additional clients.

Creating a New Database: once the software is registered you are ready to create a custom database. The database contains a list of all your employees, products, services, clients, appointments, and sales transactions. Whenever you restore a database or create a new blank database your current information including all clients, tickets, products, services, etc. since the last back up will be overwritten by the backup you are restoring or the new database you are creating.

1. Select **Database Controls** from the **File** drop-down menu.
2. Select one of the following choices:
   - **New Sample Database**: create a new database with sample clients, products, services, and sales transactions. The sample entries will help you quickly become familiar with some of the features in Salon Iris. This is the best option to select if you have never used Salon Iris before
   - **New Blank Database**: create a database that contains no sample information
3. With the database created you can begin entering data in any of the following information categories: employees, products, services, clients, gift certificates, coupons, and sales transactions (tickets). Refer to the appropriate sections of this User's Guide for more information on each of these topics.

It is recommended that you save daily backups of your database to USB memory sticks, external hard drives, or some other form of removable media. This will aid in the prevention of lost database information in the case that something happens to your computer or your computer's hard drive.

If your computer is currently connected to the Internet, Salon Iris can automatically check for available updates or if you are currently using the newest available version.

1. Select **Check for Update** from the **Help** drop-down menu.
2. Click the **Yes** button to check for the update, then follow the prompts to update Salon Iris.

Customizing and Configuring Salon Iris

Salon Iris allows you to customize the headings and icons you want displayed on each screen, i.e. on the **Clients** screen you can select to display the client name and address, or you can display the client name and phone number.

1. Go to the appropriate screen.
2. Click **Customize View** under **General Options** on the left-hand side.
3. The **Customize View** screen will appear.
4. The items shown on the left in the **Available** column are items available to display. Items shown on the right in the **Display** column are what will be displayed on that screen.
5. Use the **Add** and **Remove** buttons to add or remove items as desired.
6. Click the **Move Up** and **Move Down** buttons on the right of the screen to organize the items.
7. If you make a mistake you can click the **Restore to Default** button to restore default settings.
8. Click **OK** to save the changes.
9. Repeat the steps for each screen that you would like to customize display settings on.

Customize the Toolbar: customizing the toolbar allows you to format the icons displayed at the top of Salon Iris, i.e. you can display the **Packages** icon for convenient access, or remove it if your business does not offer packages.

1. Select **Customize Toolbar** from the **Tools** drop-down menu.
2. In the **Available Icons** column select the icons you would like your main screen to display. You can select from the following:

- **Dashboard**: navigate to the dashboard screen
- **Apt Book**: navigate to the appointment book
- **Tickets**: navigate to the tickets screen
- **Clients**: navigate to the clients screen
- **Client Info**: open the client info screen
- **Products**: navigate to the products screen
- **Services**: navigate to the services screen
- **Packages**: navigate to the packages screen
- **Employees**: navigate to the employees screen
- **Schedule**: navigate to the schedule (schedule both employees and resources)
- **Marketing**: navigate to the marketing screen
- **Messaging**: navigate to the messaging screen
- **Totals**: run the **Sales Total and Taxes** report
- **Client Wizard**: run the **Client Wizard** report
- **Payroll**: run a new **Payroll** report
- **Passwords**: open the password controls screen
- **Resources**: navigate to the resources screen
- **Reminders**: navigate to the reminders screen
- **Wait List**: navigate to the wait list screen
- **Gift Certs**: navigate to the gift certificates screen
- **Ledger**: navigate to the general ledger screen
- **Barcode**: open the barcode label printing screen
- **Ordering**: navigate to the ordering screen
- **Options**: open the options screen
- **Quotes**: navigate to the quotes and invoices screen
- **POs**: navigate to the POs screen
- **Tips**: navigate to the tips screen
- **Out**: password log out (password protection needs to be enabled)
- **Exit**: exit Salon Iris
- **Log In**: log in to the time clock
- **Log Out**: log out of the time clock
- **Online Booking**: open Online Booking settings screen (**Online Booking** needs to be enabled)
- **Cash**: open the cash drawer
- **Coupons**: navigate to the coupon screen
- **QuickBooks**: navigate to the QuickBooks integration screen
- **CC Trans**: navigate to the credit card transactions screen
- **Apt Check**: check for online appointment requests (**Online Booking** needs to be enabled)

3. You can use the **Select All** or **Deselect All** buttons to check or uncheck all the icon boxes.
4. Use the **Move Up** and **Move Down** buttons to change the order of how the icons are displayed. The top-most icon will be the left-most icon on the toolbar.
5. If you make a mistake you can click the **Restore Defaults** button to restore the default settings.
6. Check or un-check the following items In the **General** section as desired:

- **Show Toolbar**: display the toolbar
- **Show Tool Tips**: display a descriptive phrase when a mouse is over an icon
- **Show Captions**: display a description under each icon

7. Click **OK** to save the changes.

Options Overview

The **Options** screen is accessed by selecting **Options** from the **Tools** drop-down menu. The **Options** screen contains the following tabs and topics:

1. **General**: customize styles, gift card usage, and set Status Log options.
2. **Hardware Setup**: configure your crash drawer, receipt printer, and other hardware options.
3. **Credit Card Processing**: configure integrated credit card processing and credit based tips.
4. **Scheduling**: customize scheduling and appointment book options.
5. **Tickets**: customize ticket information, how they are printed, discount options, and rounding standards.
6. **Clients**:customize general client settings, picture options, and client document tracking.
7. **Taxes and Other**: configure product and service sales tax and client information security settings.

Options - General Tab

Startup and Style: customize the way Salon Iris starts and its overall appearance.

1. Click the **Startup** button.
2. The **Startup Options** screen will appear. Check or uncheck the following boxes as desired:
   - **Start Salon Iris when Windows starts**: launch Salon Iris when the computer is turned on
   - **Show Tip of the Day**: display "Tip of the Day" when Salon Iris starts
   - **Automatically check for updates every |____| day(s)**: choose how often the software checks for updates
3. Select the screen that will be shown when Salon Iris starts from the drop-down box next to **Startup screen**.
4. Click the **Select** button next to the **Country** field and select your country.
5. Click **OK**.
6. Click the **OK** button to return to the **General** tab of the **Options** screen.
7. Click the **Style** button.
8. The **Visual Style Options** screen will appear.
9. A style can be chosen from the **Visual Style** drop-down menu to provide a customized look and feel to Salon Iris. There are many to choose from, so choose the one that looks best to you. **Visual Style** can also be changed directly from the **Tools** drop down menu.
10. Click the **OK** button to return to the **General** tab of the **Options** screen.

Gift Cards: configure the way gift cards are reused and sold.

1. Click on the **Gift Card Setup** button. The **Gift Card Options** screen will appear.
2. Under the **Gift Card Reuse** section check the box that says **Allow gift cards to be re-sold to a different client after the balance reaches zero** if you would like to reuse, or resell gift cards once

they reach a balance of zero.

3. Under the **Batch Pre-Sale/Promotional Give-a-Way** section clicking the **Batch Pre-Sale** button will define a set of gift cards as sold without manually having to create a separate ticket for each card. This is useful when you want to give away a group of cards for a special sale or promotion. Cards selected when using this feature will not appear as income in the **Totals** report.
   a. Enter the starting ID of the gift card batch, i.e. 1000, and click **OK**.
   b. Enter the ending ID of the gift card batch, i.e. 1500, and click **OK**.
   c. Enter the amount of money to assign to each gift card, i.e. $5.00.
   d. When prompted by the **Confirm** screen select **Yes** to continue.
4. Under **Gift Card Expiration** select the desired settings for when you would like your gift cards to expire.
   - **Automatically assign an expiration date to a gift card when it is sold**: automatically sets the expiration date of a gift card to **|____|** day(s) from the original sale date
   - **Expiration dates must be assigned to gift cards**: gift card sales cannot be completed without entering an expiration date
5. Click **OK** to return to the **General** tab of the **Options** screen.

Status Log: view options pertaining to the status log.

1. Click the **Status Log Options** button.
2. The **Status Log Options** screen will appear.
3. The following options can be performed with the **Status Log**:
   - **View the Status Log**: view the **Status Log** on your computer
   - **Print the Status Log**: print a copy of the **Status Log**
   - **Clear the Status Log**: delete the information in the **Status Log**
   - **Send Status Log to DaySmart Software**: send the **Status Log** to Technical Support for review
4. Click **OK** to return to the **General** tab of the **Options** screen.

Options - Hardware Setup Tab

Cash Drawer: set up and configure your cash drawer.

1. Before configuring your specific cash drawer, choose how you would like your cash drawer to operate from these three settings:
   a. **Open the cash drawer when a ticket is closed**: after closing a ticket and completing a transaction the cash drawer will open. The cash drawer can only be opened from the computer that it is connected to.
   b. **Display a pop-up message after opening the cash drawer**: a pop-up will appear after the cash drawer is opened showing the tender and the change, if applicable.
   c. **Open cash drawer when settling tips**: if tips are not withheld and are settled with money from the till, the cash drawer will open at the time the tips are settled.
2. Click the **Configure Cash Drawer** button.
3. The **Configure Cash Drawer** screen will appear.
4. Choose the appropriate cash drawer settings from below:
   a. **I do not have a cash drawer**: if the business does not have or does not use a cash drawer

through the software.

b. **My cash drawer is connected to a USB receipt printer**: if the cash drawer does not connect directly to the computer and is instead connected to a USB receipt printer. Salon Iris officially only supports Epson receipt printers. Other USB receipt printers do work with Salon Iris, but they are not guaranteed.
    i. Make sure that your USB receipt printer is on and working properly. Drivers for USB receipt printers need to be installed before the printer or cash drawer will work.
    ii. Plug the cash drawer into the receipt printer using the cord that looks like a phone cord. This cord has a label at each end indicating which device it should be plugged into.
    iii. Make sure the **Opening Sequence** is correct. In most cases the default sequence is correct. If it is not correct, the **Opening Sequence** can usually be obtained from the manufacturer of the cash drawer.
    iv. Click the **Test Open Drawer** button.
    v. If the drawer does not open, then check the **enable legacy support** box.
    vi. Click the **Test Open Drawer** button.
    vii. Click **OK** to return to the **Hardware Setup** tab of the **Options** screen.

c. **My MMF cash drawer is connected directly to the computer using a USB cable**: if the MMF brand cash drawer is connected directly to the computer through a USB connection.
    i. Begin with Salon Iris closed on the computer.
    ii. Connect the power cable to the back of the cash drawer, and then plug the other end of the cable into a power outlet.
    iii. Connect the MMF cash drawer to your computer by connecting the USB cable to a USB port on your computer.
    iv. Open the software and return to the **Configure Cash Drawer** screen.
    v. In the **USB DIP Switch Number** field enter a **1**.
    vi. Click the **Test Open Drawer** button.
    vii. If your drawer does not open, review your USB DIP switch number settings in greater detail. On the back of the MMF USB interface cash drawer there are four small switches called DIP switches. DIP 1 should be in the Up, or OFF position, and DIP 2, DIP 3, and DIP 4 should be in the Down, or ON position. If for some reason your drawer was shipped to you with the DIP switches in positions other than described, unplug your cash drawer from the computer and make sure that you do not have the software open. Change your DIP positions to what is recommended above, plug the cash drawer back into the USB port on your computer, and test the connection.
    viii. Click **OK** to return to the **Hardware Setup** tab of the **Options** screen.

d. **My APG cash drawer is connected directly to the computer using a USB cable**: if the APG brand cash drawer is connected directly to the computer through a USB connection.
    i. Begin with Salon Iris closed on the computer.
    ii. Connect the power cable, normally black, to the back of the cash drawer by plugging it into the power jack, and then plug the other end of the cable into a power outlet.
    iii. Connect the APG cash drawer to your computer by connecting the USB cable, normally grey or tan, to a USB port on your computer. The USB cable may already be attached to the back of the cash drawer.

iv. Open the software and return to the **Configure Cash Drawer** screen
v. Click the **Test Open Drawer** button.
vi. Click **OK** to return to the **Hardware Setup** tab of the **Options** screen.

e. **My cash drawer is connected to the serial port or is connected to a serial Epson receipt printer**: if the cash drawer is connected directly to the computer through a serial connection, or if the cash drawer is connected to a serial Epson receipt printer.
    i. Automatic Setup:
        1. Connect the cash drawer to the nine-pin serial port on your computer.
        2. If the cash drawer connects through a serial receipt printer, plug the cash drawer into the receipt printer using the cord that looks like a phone cord.
        3. Click the **Auto Setup** button.
        4. The **Cash Drawer Setup Wizard** will appear.
        5. Click the **Next** button.
        6. Salon Iris will be try different combinations of COM Port options on your computer. Each combination will be tried for 5 seconds until all forty combinations are explored.
        7. Click the red **Stop** button once your cash drawer opens.
        8. Click **OK** to complete the setup.
        9. Click **OK** to return to the **Hardware Setup** tab of the **Options** screen.
    ii. Manual Setup:
        1. Connect the cash drawer to the nine-pin serial port on your computer.
        2. If the cash drawer connects through a serial receipt printer, plug the cash drawer into the receipt printer using the cord that looks like a phone cord.
        3. Enter the appropriate communication settings. With the exception of the COM Port #, the communication information should be provided by the manufacturer of the cash drawer. The COM Port # is determined by your Windows and hardware settings.
            - COM Port #
            - Baud Rate
            - Parity
            - Data Bits
            - Stop Bits
            - Opening Sequence
        4. You can click the **Reset to Default Values** button if you would like to reset the values.
        5. Click the **Test Open Drawer** button.
        6. Click **OK** to return to the **Hardware Setup** tab of the **Options** screen.

Receipt Printer: set up and configure your receipt printer.

1. Before configuring your specific receipt printer, choose how you would like your receipt printer to operate from these six settings:
    a. **Print receipt when ticket is closed**: a receipt will print after every ticket closes. A client and merchant receipt will always print following a credit card transaction.
    b. **and second copy**: a second copy of the receipt will print for company records.
    c. **Include employee name**: the employee's first name will print on the receipt.

   d. **Include employee last name**: the employee's last name will print on the receipt.
   e. **Include stock number**: the stock number of products will print on the receipt.
   f. **Include currency symbol**: currency symbols will print on the receipt.
2. Click the **Configure Receipt Printer** button.
3. The **Configure Receipt Printer** screen will appear.
4. **Settings**: choose the appropriate receipt printer settings from below:
   a. **Use default Windows printer**: print from the default printer assigned through your Windows **Devices and Printer** settings.
      i. Check to make sure you have a printer installed and selected as the default. This can be any 8.5" x 11" printer or receipt printer that you have set as the default.
         1. Click the **Start** button in the lower, left corner.
         2. Go to **Control Panel**.
         3. Open **Devices and Printers**.
         4. Right-click on the printer you would like as the default.
         5. Select **Set as default printer**.
      ii. Click the **Settings** button to check the **Font size** and **Margins**. Change these as desired.
      iii. The **Graphic to print on receipt** will be set to a default **Thank You.bmp**.
      iv. To upload a new graphic click the **Select** button and locate the image file on your computer. Graphic files must be in .jpg, .jpeg, or .bmp format.
      v. Click **Print Test Receipt**.
      vi. If the image doesn't appear as desired on the receipt, edit the graphic margins as needed with the **Top**, **Left**, **Height**, and **Width** options.
      vii. Click **OK**.
      viii. Click **OK** to return to the **Hardware Setup** tab of the **Options** screen.
   b. **Use standard full-size Windows printer or USB receipt printer**: print from any USB printer, full-size or receipt. USB printer drivers need to be installed for this setting to work. Most customers prefer this setting to **Use specific USB receipt printer** because the text on receipts prints darker.
      i. Install the USB printer drivers. The drivers are usually included on a CD with the printer, or they can be found at the manufacturer's website. Epson receipt printer drivers are also provided on Salon Iris's website: http://http://www.SalonIris.com/supportdownloads.aspx. Do not connect the USB printer to the computer until after the drivers have installed and you are prompted to do so. Failure to do this may result in installation complications.
      ii. After the drivers are installed connect the printer to a USB port on your computer.
      iii. Make sure the printer is plugged in, turned on, and that the printer has paper.
      iv. Click the **Select** button and choose your printer from the drop-down list.
      v. Click the **Settings** button to check the **Font size** and **Margins**. Change these as desired.
      vi. The **Graphic to print on receipt** will be set to a default **Thank You.bmp**.
      vii. To upload a new graphic click the **Select** button and locate the image file on your computer.
      viii. Click **Print Test Receipt**.
      ix. If the image doesn't appear as desired on the receipt, edit the graphic margins as needed with the **Top**, **Left**, **Height**, and **Width** options.
      x. Click **OK**.

xi. Click **OK** to return to the **Hardware Setup** tab of the **Options** screen.

c. **Use serial printer (no Windows driver needed)**: print from a printer connected through a serial port. When using a serial port receipt printer you do not need to install the Epson drivers. The printer driver is built into Salon Iris. If you are using a **serial to USB cable** the driver for the cable needs to be installed before the printer will print.
   i. Click the **Settings** button.
   ii. Enter the **COM Port #**. This is usually a value of 1, 2, 3, or 4. If you do not know the **COM Port #**, first try 1. If that does not work try 2, 3, 4, and so on.
   iii. The **Baud Rate**, **Parity**, **Data Bits**, and **Stop Bits** typically don't need to be changed from the default settings. Any different settings other than the default are provided by the printer manufacturer.
   iv. Enter the **Paper width**.
   v. Enter the **Blank lines after each receipt**. These will be the number of blank lines at the bottom of the receipt.
   vi. Enter the number of **End of line characters**, normally 10 and 13, where 10 is a line feed and 13 is a carriage return.
   vii. Enter the **End of receipt characters** and **Delay between lines**. These numbers are specified by the printer manufacturer.
   viii. Click the **Print Test Receipt** button to test the working printer settings.
   ix. If a receipt does not print repeat **Steps ii** through **viii** until a receipt prints.
   x. Click **OK**.
   xi. Click **OK** to return to the **Hardware Setup** tab of the **Options** screen.

d. **Use specific USB receipt printer (example: Epson TM-T88V)**: print through a USB receipt printer. USB printer drivers need to be installed for this setting to work.
   i. If you have not installed the printer driver already click the **Install Driver** button.
   ii. A message box will prompt you stating: *"NOTE: You do not need to install this driver if you are using a serial printer. Are you sure you wish to continue?"* If you are sure this is an Epson USB printer then select **Yes**.
   iii. You will be given two options for installing the USB printer driver:
      1. **Install USB printer driver from the Salon Iris CD**: if you are installing from the CD make sure the Salon Iris CD is in the CD/DVD drive. Select **Install USB printer driver from the Salon Iris CD** and click **OK**. A list of drivers for your system will be displayed. Select the printer that you have from the list and click **OK**.
      2. **Install USB printer driver from the Internet**: if you do not have the CD you can install the drivers from the Internet. Select **Install USB printer driver from the Internet** and click **OK**. This will take you to the http://www.SalonIris.com/supportdownloads.aspx web page with a list of drivers. Click on the **Epson Receipt Printer Driver for Epson TM-T88III, T88IV and T88V printers** link for the printer download driver setup file. After the driver setup file downloads, run the file. You will need to select your specific receipt printer from the drop-down list, as well as the USB connection type.
   iv. After the drivers are installed connect the printer to a USB port on your computer.
   v. Make sure the printer is plugged in, turned on, and that the printer has paper.

vi. Click the **Select** button and choose your printer from the drop-down list.
vii. Click the **Settings** button to check the **Paper width**. Change this as needed.
viii. Click the **Print Test Receipt** button.
ix. Click **OK**.
x. Click **OK** to return to the **Hardware Setup** tab of the **Options** screen.

5. **Text Settings**: you can print custom messages and information at the top and/or bottom of each receipt by entering the information in the **Text Settings** section.
   a. In the white boxes below **Top of Receipt Message** and **Bottom of Receipt Message** enter in any messages you would like printed on the receipt, i.e. Thank You, your business name, or a seasonal message.
   b. You also have the option of adding the following additional information:
      - **Date**
      - **Time**
      - **Ticket Number**
      - **Client First Name**
      - **Client Last Name**
      - **Client Number**
      - **Client Balance**
      - **Client Pre-Paid Service Balance**
      - **Created By**
      - **Loyalty Points**
      - **Tanning Minutes**
      - **Date Closed**
      - **Date Created**
      - **Client Address**
      - **Client City**
      - **Client State**
      - **Client Postal Code**
      - **Next 1-5 Appointment(s)**
      - **All Upcoming Appointments**
   c. Insert any of the previous listed items on your receipt:
      i. Choose where you would like to insert the information by left-clicking either the white box beneath **Top of Receipt Message** or in the white box below **Bottom of Receipt Message**. The box will change to yellow when it is selected.
      ii. Move the cursor to place you would like to insert the information.
      iii. From the drop-down list next to the **Insert** button, select the item that you would like printed on the ticket.
      iv. Click the **Insert** button and the item will be inserted on the receipt.
   d. Click the **Other** button to change the wording of how default information appears on the receipt, i.e. **Employee**, **Total**, etc.
   e. If you've made a mistake, click the **Restore Default Text** button to restore the receipt to its default settings.
   f. Click **OK** to return to the **Hardware Setup** tab of the **Options** screen.

6. **Dual Currency**: a second currency can be printed on receipts by entering in a conversion ratio. This feature is intended for countries that require dual currency amounts to be displayed on a customer's receipt.
   a. Enter the primary currency name in the **Primary currency name** field.
   b. Enter the secondary currency name in the **Secondary currency name** field.
   c. Enter the **Conversion ratio**.
   d. Click **OK** to return to the **Hardware Setup** tab of the **Options** screen.

Pole Display: set up your pole display.

1. Choose your pole display in the **Pole display** drop-down menu.
2. Plug the pole display into a USB port on your computer.
3. Click **Install Driver**.
4. The **Install Item** screen will appear.
5. Choose to install the driver from the following options:
   a. **Install pole display driver from the Salon Iris CD**: if you are installing from the CD make sure the Salon Iris CD is in the CD/DVD drive. Select **Install pole display driver from the Salon Iris CD** and click **OK**.
   b. **Install pole display driver from the Internet**: if you do not have the CD you can install the drivers from the Internet. Select **Install pole display driver from the Internet** and click **OK**. This will take you to the http://www.SalonIris.com/supportdownloads.aspx web page with a list of drivers. Click on the **Logic Controls Pole Display Driver for Windows** link for the pole display download driver setup file. After the driver setup file downloads, run the file.
6. Click **Show Test Message** once the driver is installed to verify that the device works.
7. Click **OK** to return to the **Hardware Setup** tab of the **Options** screen.

Options - Credit Card Processing Tab

Salon Iris has the option of using integrated credit card processing. To use credit card processing you must purchase a credit card processing license. If you have not already done so please contact Salon Iris Software, Inc. at (800) 423-8100 to set up an account. See the **Credit Card Processing Overview** secion of the User's Guide to enable the integrated credit card processing.

1. **Enable credit card processing**: turn credit card processing on.
2. **Hide credit card buttons on tickets screen**: hides the credit card buttons on the tickets screen if you do not currently accept credit card transactions.
3. **Show a pop-up message confirming the transaction was approved**: shows a pop-up confirmation message after a successful credit card transaction.
4. **Computer name or IP address**: Computer name or IP address, typically available at the top left corner of the Salon Iris window.
5. **Port #**: the port connection of the credit card processor.

Tips: you can customize how and if you would like tips to be available on tickets. Tips can be turned off for business that don't accept tips, customized for businesses that employ booth renters, or modified for better use within the business.

1. **Include a tip line only if one or more services are listed on a ticket**: this option will only provide a tip line if a ticket features one or more services. If a ticket only features products then no tip line will be available.
2. **Always include a tip line**: this option always provides a tip line.
3. **Never include a tip line**: this option never provides a tip line.
4. **Treat tips for booth renters as direct tips for credit card transactions**: this option is specific to those businesses that employ booth renters. If booth renters receive tips they will be treated as direct tips, or tips that are not added to the transaction.

Options - Scheduling Tab

Before modifying the **Scheduling Options**, select whether or not you want a service to display on the appointmenb book if the **Quantity Used** field is not 0.

Scheduling: customize the way tickets are scheduled on the appointment book.

1. Click the **Scheduling Options** button.
2. The **Ticket Options** screen will appear.
3. You have the two options for each of the five scheduling features:
   a. **Warn**: warn users when they attempt to do the following scheduling option.
   b. **Don't allow**: don't allow users to do the following scheduling option.
4. Check or uncheck the boxes as desired for the following five options:
   a. **Overlapping Appointments**: this is sometimes called double-booking and refers to when two or more appointments are booked at the same time.
   b. **Employee Not Working**: if the employee the ticket is for is not scheduled to work.
   c. **The Previous or Far Future Date**: the date scheduled on the ticket is before today's date or more than two years into the future.
   d. **Light Night/Early Morning**: the time scheduled on the ticket is before 8:00 AM or after 9:00 PM.
   e. **Service Limitations**: an employee on the ticket is selected to perform a service which he or she cannot perform due to service limitations.
5. Click **OK** to return to the **Scheduling** tab of the **Options** screen.

Drag-and-Drop: enable or disable the drag-and-drop settings. The **Drag-and-Drop** option allows you to take an appointment ticket in the appointment book and drag it over to a new time slot. Salon Iris gives you two options with this feature:

1. **Enable drag-and-drop**: turn **Drag-and-Drop** on or off.
2. **Warn before allowing drag-and-drop**: warn before an appointment is modified using the **Drag-and-Drop** feature.

Appointment Book Auto Refresh Rate: customize how often the appointment book refreshes when running in a network environment or using remote access.

1. Select the desired **Refresh rate** from the drop-down menu:
   - **(Never)**
   - **5 seconds**
   - **10 seconds**

- **30 seconds**
- **1 minute**
- **5 minutes**
- **10 minutes**
- **30 minutes**
- **60 minutes**

Options - Tickets Tab

General: customize how tickets are created and edited.

1. Click the **Ticket Options...** button.
2. The **Ticket Options** screen will appear.
    a. **General Options**
        - **Allow tickets to be voided**: voided tickets are completely canceled.
        - **Allow closed tickets to be edited**: tickets can be edited after they have been closed.
        - **Allow tickets to be deleted**: tickets can be deleted, completely removing them from the database.
        - **Bring up the 'Edit Client Info' screen every time a ticket is closed**: whenever a ticket is closed, the clients information is displayed and can be edited.
        - **Notify if a client has a birthday or anniversary within 5 days**: a pop-up notification will be displayed when you create a ticket for a client who has a birtday within the next 5 days.
        - **Notify if a client has a balance (amount owed or amount credited)**: a pop-up notification will be displayed if you create a ticket for a client with a balance.
        - **Keep ticket history after a ticket is deleted**: even if you have deleted a ticket, you will still be able to view a history of all changes made on that ticket.
        - **Remove History for Deleted Tickets Now**: if you have **Keep ticket history after a ticket is deleted** enabled, this button is used to remove all history files associated with deleted tickets. This can be useful in reducing the size of your current database.

    b. **Options When Creating a New Ticket**
        - **Allow 'Walk In' to be selected when searching for a client**: this will allow you to select 'Walk In' as a client to associate with a ticket.
        - **Do not prompt for the client's name. Always select 'Walk In' client**: when creating a ticket, the client will automatically set to 'Walk In' instead of allowing you to search for/add a client to the database.
        - **If no employee is selected, use |___| as the default employee**: the 'Employee' column will default to the selected employee when adding a product or service to a ticket
        - **When Creating a new ticket, use the following as the date scheduled**: this option allows you to select the default date that a ticket is scheduled for when create a ticket from the **Tickets** screen. You can choose from the following options:
            - **Today's date**: use the current day as the default scheduling day when adding new tickets
            - **Tomorrow's date**: use tomorrow as the default scheduling day when adding new tickets

- **Last date entered**: use the last day that a ticket was scheduled as the default scheduling day when adding new tickets
- **This date**: specify a date to be the default scheduling day when adding new tickets

c. **Options When Editing a Ticket**
- **Always base service/product commission on the full price of the service/product**: effects whether or not a discount applied to a ticket is considered when calculating an employees' commission.
- **Automatically update start times**: automatically change the start times when editing tickets
- **Show the 'Commission Based On' column**: shows the **Commission Based On** column on tickets. This column can be removed for privacy purposes
- **Show the 'Backbar' column**: shows the **Backbar** column on tickets. This column can be removed for privacy purposes
- **Require 'Referral' to be selected**: requires the ticket to have the **Referral** field selected
- **Require 'Created By' to be selected**: requires the ticket to have the **Created By** field selected
- **When selecting a service for a client that previously purchased the same service, use the price the client previously paid**: if a client paid a previous price for a specific service other than the listed retail price, then they will receive that same price whenever they purchase that service again
- **Warn when using a previous price**: warn users when a client is paying a price for a service other than the listed retail price
- **Prompt to rebook an appointment**: a pop-up will be displayed when closing a client's ticket asking if you would like to book another appointment for the client

3. Click **OK** to return to the **Tickets** tab of the **Options** screen.

Printing: customize how traveler tickets are printed. This does not affect the information printed on receipts. Traveler tickets are tickets that would be given to the client when they book their appointment. A copy may also be given to the employee providing the service for the client.

1. Click the **Printing Options** button.
2. The **Printing Options** screen will appear.
3. Check or uncheck the following boxes as desired:
   - **Address**: prints the client's address on the ticket
   - **Client comment**: prints any comments about the client on the ticket
   - **Client ID**: prints the client's ID on the ticket
   - **Date of birth**: prints the client's birthday on the ticket
   - **E-mail**: prints the client's E-mail on the ticket
   - **Employee's upcoming schedule**: prints the upcoming schedule for the employee the client has the appointment with on the ticket
   - **First visit**: prints the date of the client's first visit on the ticket
   - **History**: prints the client's purchase history on the ticket
   - **Home phone**: prints the client's home phone number on the ticket
   - **Last employee**: print's the last employee the client was serviced by on the ticket

- **Last visit**: prints the date of the client's last visit on the ticket
- **Mobile phone**: prints the client's mobile phone number on the ticket
- **Primary picture of client (if available)**: prints the associated picture of the client on the ticket
- **Ticket comment**: prints any ticket comments on the ticket
- **Work phone**: prints the client's work phone number on the ticket

4. Enter the number of previous products and services you would like to be printed on the ticket in the **Print up to** field.
5. Enter the preferred font size in the **Font size** field.
6. Click **OK** to return to the **Tickets** tab of the **Options** screen.

Discounts: set up your discount standards.

1. Click on **Discount Options** button to access the **Discount Options** screen.
2. The **Discount Options** screen will appear.
3. If you have a normal maximum shop discount, check the box to the left of **Limit discount amounts on products and services to** and enter the maximum discount percentage in the field on the right.
4. If you would like to designate one or more employees not subject to the above limitation press the **Selup Employee Permissions** button.
5. This will open the **Employee Passwords** screen. Please see the section labeled **Employee Passwords** for information on setting up employee password protection.
6. When finished setting up the proper **Employee Password** settings, click **OK** to return to the **Discount Options** screen
7. Click **OK** to return to the **Tickets** tab of the **Options** screen.

Rounding: Set up your rounding standards.

1. Click the **Rounding Options** button.
2. The **Rounding Options** screen will appear. **Rounding** enables you to **Round Down** or **Round Off** the ticket total currency figure to your choice of increment.
3. **Round Down**: Salon Iris will round the total down to the nearest dollar if under the set decimal amount, i.e. if you wish to round down totals like $7.09 to a straight $7.00, then enter $0.09 in the **Round Down** field.
4. **Round Off**: Salon Iris will round the total to the nearest decimal value, i.e. if you wish to round off $9.08 to $9.10 and $7.42 to $7.40, then enter $0.10 in the **Round Off** field.
5. Click on the **Test Rounding** button.
6. The **Test** screen will appear.
7. Enter a currency amount in the field at the bottom of the test screen and click the **OK** button to see the rounded figure. Since Salon Iris will round off totals after rounding down you should not have a value in the **Round Off** field when testing the **Round Down** function.
8. Click **OK** to return to the **Test** screen where you may repeat the rounding test procedure, or click **Cancel** to exit and return to the **Rounding Options** screen.
9. Click **OK** to return to the **Tickets** tab of the **Options** screen.

Options - Clients Tab

General: set up a general settings for clients.

1. Click the **Client Options** button.
2. The **Client Options** screen will appear.
3. In the **Item name** and **Units** fields you can enter in an item name and item units to associate with a specific service, i.e. the default item is Tanning and the default unit is Minutes. You can track the number of tanning minutes each client has purchased and the remaining minutes.
4. Enter a **Default SMS Provider** into the appropriate box as desired.
5. Check or uncheck the box **Automatically check the "Do not send promotional e-mails to this client" option when adding a new client** as desired.
6. Enter the **Default State**, **Default City**, and **Default Area Code** that will automatically appear each time you make a new client entry.
7. Click the **Set Default Phone Format** button to select a desired format for telephone numbers. Click **OK**.
8. Click **OK** to return to the **Clients** tab of the **Options** screen.

Pictures: open the picture manager and configure the way pictures are stored on your hard drive. See the **Pictures Overview** section of this User's Guide for complete instructions on managing pictures.

1. Click the **Storage Options** button.
2. The **Storage Options** screen will appear.
3. Select the **Compression Level** for JPEG pictures stored in your Salon Iris database. 100% is the best quality, but the largest file size. 0% is the smallest file size, but the worst quality. The recommended compression level is 80%.
4. In the **Image Resizing** section you can prevent your database from being bogged down by images that are too large. Make the appropriate selection. **If image width is more than** 1600 **pixels, make the image width** 1600 are the recommended settings.
5. Click **OK** to return to the **Clients** tab of the **Options** screen.

Document Tracking: allows you to add unique documents required for all or most clients.

1. Click the **Document Setup** button.
2. The **Document Tracking Options** screen will appear.
3. Click the **Add Document** button.
4. The **Add Document** screen will appear.
5. Type in the **Document name**, i.e. Service Agreement or Legal Disclaimer.
6. Select a **Document type** from the drop-down menu. If the specific document type is not in the drop-down menu click the **Edit** button.
7. The **Document Type** screen will appear.
8. Click **Add**, **Edit**, **Delete**, and **Add Blank** as needed to customize the document types.
9. Click **OK** to return to the **Add Document** screen.
10. Click the **Select** button to select the document off your computer's hard drive. Click **Open** to associate the document.
11. Click **OK** to return to the **Document Tracking Options** screen.
12. Repeat **Steps 3-11** for each document that you need to add.
13. You can use the **Edit Document**, **Remove Document**, and **Open Document** buttons to edit, remove,

and/or open the document(s).

14. Click **OK** to return to the **Clients** tab of the **Options** screen.

Options - Taxes and Other Tab

Sales Taxes: configure product and service sales taxes. It is a good idea to check with a C.P.A. about your area's federal and local sales taxes. Certain countries or U.S. states/cities/counties may base the Sales Tax 2 amount off the ticket total plus the Sales Tax 1 amount, or they may base the Sales Tax 3 amount off the ticket total plus the Sales Tax 1 plus Sales Tax 2 amount. Check the appropriate **COMPOUND TAX** boxes if you would like to do this.

1. Check or uncheck the boxes as desired:
   - **Warn if tax saved on the ticket is different than stored taxes**: warns the user if a ticket was created before the sales tax changes were made
   - **Warn if no sales tax information is entered**: warn the user if sales tax has been set up, but no sales tax has been entered on a product or service
2. Select which country you are in. Depending on the country, your sales tax is exclusive or inclusive to the price.
   - **United States, Canada, Mexico (tax exclusive to price)**:[22] the tax amount is added on to the price of the product or service at the point of sale. This is done by multiplying the sales amount by the tax rate and adding that to the total, i.e. a product cost of $75 with a 33% tax would come out to $100, or $75 + ($75 x 33%)
   - **UK, Europe, and Australia (tax inclusive to price)**: the tax amount is included in the final cost of the product already, i.e. a product cost of $100 with a 25% inclusive tax would mean that the product was $75 and the tax on the product was $25
     - The amount of tax is calculated by the formula [Collected Tax] = [Gross]*T/(T+1) where T is the tax rate.
     - When Salon Iris runs in VAT mode, the tax amount is recorded to 12 decimal places. This amount is saved in the database.
     - The **Totals** report uses the 12 decimal tax information from the tickets.
     - The tax amount on the tickets editing screen is not added to the total.
     - While on the **Ticket Information** screen clicking on the tax amount displays the full (non-rounded) tax amount.
3. Click the **Sales Tax Setup** button.
4. The **Sales Tax Setup** screen will appear.
5. **Enable** each sales tax to be applied.
6. Enter the **Name of this tax**.
7. Enter the product and/or service tax rates. (You may enter 0% if a tax is not applicable).
8. Repeat **steps 5-7** until all applicable sales taxes are entered.
9. Click **OK** to return to the **Other** tab of the **Options** screen.

Security: configure security settings.

1. Click the **Security Setup** button.
2. The **Security Options** screen will appear.

3. Check or uncheck the boxes as desired:
   - **Show client phone numbers when searching for a client, on the Tickets screen, and on the Appointment Book and when printing an open ticket**: shows client phone numbers on tickets and the appointment book
   - **Show client phone numbers when editing a client's information**: shows client phone numbers when editing client information
   - **Show client street address when searching for a client**: shows client addresses when doing a client search
   - **Allow client's address to be displayed on the Appointment Book**: allows for the client address to be visible on the **Appointment Book**
   - **Allow client's ID to be changed**: allows **Client ID**s to be changed
4. Click **OK** to return to the **Other** tab of the **Options** screen.

Dashboard Overview

The Dashboard is an interactive tool in Salon Iris that provides a snapshot of business performance and details about what's currently happening. Click the **Dashboard** button on the button bar or select **Dashboard** from the **Reports** drop-down to return to it at any time. It is divided into several sections:

- **Today**: the main screen of the Dashboard showing an overview of the day's current workload.
- **Business Summary**: the secondary screen of the Dashboard that provides metrics and sets/displays business performance goals.
- **Social Media**: connect Salon Iris with social platforms for quick updates and posting to social media accounts.
- **Training Videos**: opens a web browser to connect quickly to YouTube videos for training on diverse software functionality.
- **Online Help**: opens a web browser to the Salon Iris Online Support Center containing details support and technical documents.

Today

This screen is designed to provide a picture of the work day as well as a few controls to help navigate Salon Iris and manage the day's appointments from one convenient place. This is a recommended startup screen since it cannot be password protected.

1. **Upcoming Appointments**: provides a chrnological list of the day's appointments. QUickly check clients in for appointments just by clicking the checkbox for their appointment in this section.
2. **Today's Appointments**: displays the total number of appointments scheduled for today. Click to be taken to the **Appointment Book**.
3. **First Visit Clients**: displays the number of clients whose first visit is scheduled today. Click the number to view a list of these clients.
4. **Online Requests**: displays the total number of new requests from your **Online Booking** website waiting to be accepted or rejected.
5. **Needs Confirmation**: displays number of clients whose appointments are scheduled but do not have a

selection in the **Confirmed** field on their ticket.

6. **Setup Progress**: displays a chelckist of items to perform to have the fullest experience possible using Salon Iris. Click on each item to be taken to the area of the software used to complete the step.
7. **Business Productivity**: displays the amount of time with at least one appointment booked divided by the amount of time available. Availibility is determined by the working hours entered on the **Scheduleing** screen. Any **Time Blocks** you've created are considered unavailable time and do not factor into this calculation. Click to view a breakdown of the numbers listed by employee.
8. **Top Booked Services**: displays a bar graph showing the total number of each service booked for the day. Click each bar to view information about the appointments contaning the service.
9. **Due for Checkout**: displays a list of scheduled appointments that are due to be checked out. Click each item to be taken to the ticket for checkout.

Business Summary

This section is designed to provide a place to view financial information about the business. Quickly manage the goals of the business with the **Manage Goals** button in the upper right and view business progress over any date range simply using the **Run for:** drop-down in the upper left. The default view will always show today's information

1. **Business Productivity**: The amount of time with at least one appointment booked divided by the
2. **Sales Overview**: Ticket totals based on revenue from sales of services in the first column, retail products in the second, and the total of both in the third.
3. **Appointment Referrals**: Sales totals from tickets based on **Referral** types. You can set the referral type for a ticket in the **General** section, and its totals will be included in this report so you can see at a glance which referral methods are most effective.
4. **Sales Benchmarks**:
   - **Prebooked Clients %**: The percentage of clients who booked an appointment while finishing up a previous appointment.
   - **Average Service Sale**: The average service sales subtotal per ticket with at least one service on it. Taxes not included.
   - **Average Retail Per Ticket:** The average product sales subtotal per ticket with at least one product on it. Tickets may also contain services but do not have to. Taxes not included.
   - **Average Retail Per Service Ticket**: The average rpduct sales subtotal per ticket withat least one product on it, where the ticket includes one or more services. Taxes not included.
   - **Average Retail Per Retail Ticket**: The average product sales subtotal per ticket, where the ticket does not include any services. Taxes not included.
5. **Appointments** Total number of appointments closed within the specified date range.
6. **Clients Added**: Total number of clients added to Salon Iris during the specified date range.
7. **Online Requests**: Total number of appointment requests generated from your Online Booking site during the specified date range.
8. **Client Retention**: The percentage of clients who visited your business at least two times within a 90 day period. If the client's first visit was within the date range specified, that client will be considered in the "new client retention" rate. If the date range specified does not allow for at least 90 days of appointment history, the report is run for the past 90 days to ensure accuracy.

Database Controls

everything you need to know about managing your database

Database Overview

The Salon Iris database is a single file that contains most of the information you see. This includes the following items:

- Tickets (all sales history and future appointments)
- Clients
- Payroll (configuration and previous payrolls)
- Photos
- Products and services
- Employee schedules
- Gift certificates
- Gift cards
- Coupons
- Declared cash/close out and cash drawer balance entries
- Gum label settings
- Time clock entries
- Suppliers
- Quotes
- Purchase orders
- General ledger
- Activity log
- E-mail reminder configuration
- Time clock records

Salon Iris uses a Microsoft SQL Server database. The database is located in the Microsoft SQL Server Program File and is called SalonIris.mdf. The full location of the database is typically:

C:\Program Files\Microsoft SQL Server\MSSQL10_50.DSI\MSSQL\Data\SalonIris.mdf

It is highly recommended that you backup your database on a regular basis. Some businesses make backups every few hours, once a day, or once every few days. It is recommended that you save backups onto USB flash drives, or some other removable media so your database will be available even if something happens to your computer or your computer's hard drive.

The **Database Summary and Editing** screen is accessed by selecting **Database Summary** from the **File** drop-down menu and contains the following tabs and buttons:

1. **General**: brief database summary, delete tickets before a certain date, delete clients who haven't come in since a certain date.
2. **E-mail and Text Messages**: apply general mailing options for all clients, apply general E-mail options for all clients, apply general SMS options for all clients.
3. **Products and Services**: change general tax settings for all products, change general tax settings for all services, update wholesale prices, categories, and makes for products.
4. **Repair**: rebuild client information on tickets, rebuild price, product, and service information on tickets, rebuild employee IDs.

5. **Optimize Database**: repair corrupted database files, shrink database to smallest possible size.

Database Summary and Editing - General Tab

Summary: provides general information about when your database was created.

Delete: gives you the option of deleting old tickets and clients.

1. **Remove all tickets closed before**
   a. Select a date from the drop-down calendar that you would like to use as the cutoff for closed tickets.
   b. Click the **>>** button next to **Remove all tickets closed before** to delete closed tickets before the selected date.
2. **Delete all clients that have not been in since**
   a. Select a date from the drop-down calendar that you would like to use as the cutoff for the last time a client came in.
   b. Click the **>>** button next to **Delete all clients that have not been in since** to delete clients that have not been in since before the selected date.

Client Loyalty Points: gives you the option to reset all accumulated loyalty points to zero.

Database Summary and Editing - E-mail and Text Messages Tab

Marketing E-mails: the **Clear All** button will clear the "Send marketing e-mails to this client" option for all clients.

Appointment Notifications: apply general **"Send e-mail appointment notifications"** and **"Send text message notifications"** settings to all clients. Automatic **Appointment Reminders** can be sent via e-mail or SMS text messaging. Typically these options are selected on an individual basis, but they can be applied to or removed from all clients.

1. **E-mail** options for all clients:
   a. Click the **Set All** button to apply the **"Send e-mail appointment notifications"** selection to all clients.
   b. Click the **Clear All** button to remove the **"Send e-mail appointment notifications"** selection from all clients.
2. **Text Messages** options for all clients:
   a. Click the **Set All** button to apply the **"Send text message appointment notifications"** to all clients.
   b. Click the **Clear All** button to remove the **"Send text message appointment notifications"** from all clients.
3. **Delete**: delete all e-mail and text message bodies. This option will clear all sent items to decrease size and improve performance of the database.

Database Summary and Editing - Products and Services Tab

Change Taxable Status: taxes can be applied to products and services. Typically these tax settings are set on an individual basis, but they can be applied to or removed from all products and/or services.

- **>> Set all PRODUCTS to TAXABLE**: applies sales tax to all products
- **>> Set all PRODUCTS to NON-TAXABLE**: removes sales tax from all products
- **>> Set all SERVICES to TAXABLE**: applies sales tax to all services
- **>> Set all SERVICES to NON-TAXABLE**: removes sales tax from all services

Update Wholesale Price, Category, and Make: every time a ticket that contains a retail product is closed, Salon Iris will record the wholesale price, category, and make of that particular product. You can update the wholesale price, category, and/or make of a product to the latest recorded price, category, and/or make, i.e. if you change the category of a specific product while creating a ticket, you can use the **Update Wholesale Price, Category, and Make** button to update the category for the product, and all of the tickets containing that product in your database.

Database Summary and Editing - Repair Tab

Clients: rebuild and clean up any blank fields of the client information screen, or rebuild tickets with recently imported client information.

1. Click the **Rebuild Client Information on Tickets** button.
2. The **View Log File?** screen will appear.
3. Click **Yes** or **No**.
4. Clicking **Yes** will open up a .txt file showing the results of the rebuild.

Tickets: update ticket information that is used for reporting.

1. Click the **Rebuild Ticket Price, Product, and Service Count** button.
2. Ticket information will be updated to reflect current records.

Employees: rebuild all **Employee IDs** in the database based on employee name.

1. Click the **Rebuild Employee IDs** button.
2. The **All done.** screen will appear.
3. Click **OK** to return to the **Database Summary and Editing** screen.

Database Summary and Editing - Optimize Database Button

Files in your database can become corrupted at times. These errors typically occur when a computer is interrupted while writing information to the hard drive. This can happen when Windows locks, or when a program terminates or is improperly shut down. The **Optimize Database** and **Scan Disk** features can be used to repair or correct these problems.

Run Scan Disk: a more in depth, and consequently, longer running file scanning option that will check files and folders for errors, lost data clusters, and bad sectors.

1. If possible, make a backup before running the **Scan Disk** function.
2. Select **Database Summary** or **Database Controls** from the **File** drop-down menu.

3. Click the **Optimize Database** button.
4. The **Optimize Database** screen will appear.
5. Click the **Run Scan Disk** button.
6. You will be notified that the **Scan Disk** function may take a while to complete, and that your computer will need to be restarted after the **Scan Disk** finishes.
7. Click **Yes** to continue.
8. Restart your computer when the **Scan Disk** has finished.

Optimize Database: compress large databases to their smallest possible size.

1. If possible, make a backup before running the **Optimize Database** function.
2. Select **Database Summary** or **Database Controls** from the **File** drop-down menu.
3. Click **Optimize Database**.
4. The **Optimize Database** screen will appear.
5. Check **Reset all customized screen views** if desired. This will change all custom screen settings back to their default.
6. Check **Rebuild Database** if desired. This will remove all the information in your database temporarily and rewrite it to new tables to imrove performance and correct errors.
7. Click **Next**.
8. Click **OK** when the optimization is complete.

Database Backup Overview

It is highly recommended that you make backups of your database frequently. Some businesses make backups every few days, once a day, and some even backup information every few hours. It is also recommended that you save backups to USB flash drives or some other removable media device so that your database will be available even if something happens to your computer or your computer's hard drive.

The following information **IS** backed up:

- Tickets (all sales history and future appointments)
- Clients
- Payroll (configuration and previous payrolls)
- Photos
- Products and services
- Employee schedules
- Gift certificates
- Gift cards
- Coupons
- Close out and cash drawer balance entries
- Gum label settings
- Time clock entries
- Suppliers
- Quotes
- Purchase orders

- General ledger
- Activity log
- Time clock records

The following information **IS NOT** backed up:

- Local computer settings
- Program serial number
- Database password (if enabled)
- Employee password protection options
- Cash drawer settings
- Receipt printer settings
- Other miscellaneous information (Windows locations, default state and area code, etc.)

Automatic Backup: a system that automatically makes backups of your database throughout the day while Salon Iris is open. We highly recommend setting up a consistent **Automatic Backup** schedule to reduce the risk of information loss or damaged information.

1. Select **Backup and Restore** and then **Automatic Backup Settings** from the **File** drop-down menu.
2. The **Automatic Backup** screen will appear.
3. Check the **Enable automatic backup** option.
4. Either enter an amount, or use the arrows to select how many automatic backups to keep on file. We recommend keeping at least 25 automatic backup files. Once Salon Iris has created the set amount of Automatic Backups it will begin replacing the oldest backups with the newest backups.
5. Set the hourly and daily frequency for making backups:
   a. **Make automatic backups every |____| hour**: choose how often you would like an automatic backup created.
      - **24 hours a day**: makes backups for the chosen frequency of hours for 24 hours out of the day
      - **From |____| to |____|**: makes backups for the chosen frequency of hours between a set time during the day
   b. **on the following days**: choose the specific days that the auto backups will run.
6. Check **Make a backup when Salon Iris exits if the last backup was more than an hour ago** as desired.
7. Choose the location where the backup files save:
   a. You can manually type in the location where you would like the backup files to save.
   b. Click **Select** to browse for a new location where you would like the backup files to save.
   c. Click **Explore** to view the folder where the backup files save.
   d. Click **Default** to switch back to the default location for saving backup files.
8. Click **Backup Now** to make an immediate backup if desired.
9. Click **OK** to exit.

Database Backup: configure how often Salon Iris reminds you to make a backup. Making regular backups of your database is very important. We highly recommend making a backup at least once a day, and more if you are a busy business.

1. Check or uncheck the box **Ask me once a day if I would like to make a backup if it has been more**

than |____| days since my last backup as desired.
2. Select how many days you would like to go by before Salon Iris reminds you to make a backup. We highly recommend choosing **1 day**.

Backup to Another Location: it is highly recommended that you save backups an external drive, or some other form of external media.

1. Select **Backup and Restore** and then **Backup Database** from the **File** drop-down menu.
2. The **Backup** screen will appear.
3. Click **Next**.
4. Select where you would like to save the file.
    - **Hard Drive**: save a backup to a location on your local disk drive (typically the c:\ drive)
    - **USB Flash Drive**: save a backup to a removable disk or flash drive
    - **External Hard Drive**: save a backup to an external or portable hard drive
    - **CD/DVD Drive**: save a backup to a writable CD/DVD. We do not recommend that you attempt to "burn" a backup directly to a writable CD/DVD. If you would like to save backups on a writable CD/DVD, then you should first save the backup file to your hard drive. After the backup saves you should then write the backup from your hard drive to the CD/DVD using your CD/DVD writing software. We do not provide instructions on how to use your CD/DVD writing software.
5. Enter a file name for the data or use the suggested default name shown there when the window first opens.
6. Click the **Save** button.
7. The **All Done** screen will appear.
8. Click **OK** to finish.

It is highly recommended that you make multiple backups of your database on some type of removable media devices, and that you keep the backups in multiple locations. We recommend a backup drive for each day of the week: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday. Make a backup of the database each day on the corresponding drive. Each month we recommend taking the prior month's backups and storing them in multiple places, such as safety deposit boxes, safes, your home, and your business. Although it is impossible to guarantee that your database will never be lost, if you follow these instructions, your chance of data loss is greatly reduced.

Database Restoration Overview

Restoring a backup is quick and easy, and will allow you to recover your database information should your database encounter problems, or if you ever experience data loss. If you've had complete computer failure or a hard drive crash, then you can restore backup databases if they've been saved to some sort of external storage device.

Restoring from the last recorded Automatic Backup: this option will automatically choose the newest automatic backup to restore.

1. Select **Database Controls** from the File drop-down menu.
2. Click **Restore Database from Backup**.
3. Click the **Yes** button to restore your database from backup.

4. The **Restore Database** screen will appear.
5. Select **I would like to restore my last recorded automatic backup (recommended)**. Here you will also see the **Date and time** that the backup was created on, and the **Location** of the backup file. Use this information to determine if restoring from the last recorded automatic backup is the best option for you to restore a database.
6. Click the **Next** button.
7. The **Are You Sure?** screen will appear.
8. Click **Yes** to continue.
9. If you entered a database password, the **Password Required** screen will appear.
10. Enter your password and click **OK**.
11. Your database will be restored.
12. Click **OK**.

Restoring from an Automatic Backup: restore your database from an automatic backup made periodically by Salon Iris.

1. Select **Database Controls** from the **File** drop-down menu.
2. Click **Restore Database from Backup**.
3. Click the **Yes** button to restore your database from backup.
4. The **Restore Database** screen will appear.
5. In the **Backup Location** section, select **Restore a database from the automatic backup location**. If the **Automatic Backup** option is grayed out, then restoring from an automatic backup is not available because the **Automatic Backup** feature is probably turned off. We highly recommend that you keep the **Automatic Backup** feature turned on.
6. Click the **Next** button.
7. In the **Automatic Backup Files** section, all of your automatic backups will appear. Select the automatic backup to restore and click **Restore**.
8. The **Are You Sure?** screen will appear.
9. Click **Yes**.
10. If you entered a database password, the **Enter Database Password** screen will appear.
11. Enter your password and click **OK**.
12. Your database will be restored.
13. Click **OK**.

Restoring from a Backup Location: restore your database from a backup saved to an external location.

1. Select **Database Controls** from the **File** drop-down menu.
2. Select **Restore Database from Backup**.
3. Click the **Yes** button if you wish to restore the database.
4. Select **Restore a database from a specific location**.
5. Click **Next**.
6. Locate the backup file that you wish to restore on your computer or on the external drive.
7. Select the file to restore and click the **Open** button.
8. Click **Yes**.
9. If you entered a database password, the **Enter Database Password** screen will appear.

10. Enter your password and click **OK**.
11. Your database will be restored.
12. Click **OK**.

Restoring from an SQL Server database file: restore your database using the database .MDF and .LDF files, usually located in C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Data\.

1. Select **Database Controls** from the File drop-down menu.
2. Select **Restore Database from Backup**.
3. Click the **Yes** button if you wish to restore the database.
4. Select **I would like to restore my database using an SQL Server database file**.
5. Click Next.
6. Locate the .MDF file that you would like to restore from. Be sure that the matching LDF file is located in the same directory.
7. Select the file to restore and click the Open button.
8. Click Yes.
9. If you entered a database password, the **Enter Database Password** screen will appear.
10. Enter your password and click **OK**.
11. Your database will be restored.
12. Click OK.

Importing Overview

Salon Iris allows you to import lists of information that were created using other programs (such as another database program, Microsoft Excel, etc.).

A separate file is required for each list of information that can be imported and must be specially formatted. When importing files, **Name**, **FirstName**, **LastName**, and/or the **ID** in its various forms are required fields for the file to import properly. The following information can be imported:

- **Clients**
- **Client history**
- **Products**
- **Services**
- **Employees**
- **Suppliers**
- **Gift certificates**

Files must be saved in any one of the following formats:

- .txt (comma or tab delimited)
- .csv (comma or tab delimited)
- Excel, .xls
- Word, .doc
- Access
- Outlook

- We are also able to import quite a few other formats. E-mail support@daysmart.com if you would like to see if your format can be imported.

If you are using a format other than a .txt file, you must first convert your information to a text only .txt file. Most files (.csv, Outlook, Excel, Word, Access, etc.) are usually pretty easily converted to text files. The format for the individual .txt files is listed under the individual **Importing** sections.

Importing Clients

Column Name	**Description**	**Type**	**Example**
FirstName	First Name	Text	Mary
LastName	Last Name	Text	Smith
Address	Address	Text	123 Anystreet
Address2	Second line of address	Text	Apt. 201
City	City	Text	Anytown
State	State	Text	California
Zip	Zip or postal code	Text	12345-6789
E-Mail	E-mail address	Text	mary@email.com
HomePhone	Home phone number	Text	(555) 555-1212
WorkPhone	Work phone number	Text	(555) 555-1212
CellPhone	Cell phone number	Text	(555) 555-1212
Gender	Gender	Text (M for male, F for female)	F
Comment	General client comment	Text	Has two children
Class	Class or category. Short phrase describing the type of service the client frequents	Text	Tan
DateOfBirth	Date of birth	Date	2/1/1975
Anniversary	Date of anniversary	Date	5/7/1998
TotalVisits	Total number of visits	Number	54
FirstVisit	Date of first visit	Date	3/4/1997
LastVisit	Date of last visit	Date	10/5/2011
Mailing	Indicates if the client wants to receive mail or not	Text (TRUE for yes, FALSE for no)	FALSE
FirstEmployeeName	Name of the first employee to provide service to the client	Text	Bill Rogers
FirstEmployeeID	ID of the first employee to provide service to the client	Number	100
LastEmployeeName	Name of the last employee to provide service to the client	Text	Jenny Johnson
LastEmployeeID	ID of the last employee to provide service to the client	Number	101
	Balance the client owes. Positive number means the		

Balance	client owes money, negative number means the client has credit to use	Number	19.95
BalanceComment	Comment describing the balance	Text	Owes $19.95 from 10/2/2011 visit
ProductDiscountPercent	Default discount percentage on products	Number	10
ServiceDiscountPercent	Default discount percentage on services	Number	0
Link	Path and name of a file related to the client.	Text	c:\My Documents\Bill.xls
ClientHistory	Notes or other history	Text	Use color formula #123. Let set extra 5 min.
ClientID	ID number for the client	Number	1000
Title	Title before name, i.e. Mr., Mrs., Dr., etc.	Text	Mrs.
Item	The unit assigned from the **Options - Clients** tab	Text	minutes
ItemComment	Comment for the item described above	Text	Comments
IDCard	ID card number for the client	Number	1000

Example: a spreadsheet file might look like this:

FirstName	LastName	Address	City	State	Zip	HomePhone
Mary	Johnson	123 Myroad	Anytown	CA	12345	(555) 555-1212
Dylan	Warren	456 West Ave.	Beverly Hills	CA	90210	(555) 555-1212
Judy	Guller	7890 Parrot Drive	Lakeview	AZ	91875	(555) 555-1212

1. Save your information as a text-only tab delimited file.
2. Select **Import**, then **Clients** from the **File** drop-down menu.
3. Follow the prompts.
4. Salon Iris will automatically import your file and, depending on preferences, either add it to your existing list of clients, or overwrite your current list of clients with the imported file.

Importing Client Notes

Column Name	Description	Type	Example
ClientID	The client ID number	Text	1000
Date	Date	Date	10/3/2011
History	Client history	Text	10/1/2011 - Allergy to latex

Or, you can import the text file using the following format:

Column Name	Description	Type	Example
FirstName	First name of client	Text	Joe
LastName	Last name of client	Text	Williamson
Date	Date	Date	10/3/2011

History	Client history	Text	10/1/2011 - Allergy to latex

Example: a spreadsheet file might look like this:

FirstName	LastName	Date	History
Mary	Smith	8/8/2011	8/7/2011 - Recommended Brush to client
Michael	Jones	9/4/2011	8/30/2011 - Allergy to peanuts
Jane	Adams	9/25/2011	9/20/2011 - Client likes to water ski

1. Save your information as a text-only tab delimited file.
2. Select **Import**, then **Clients Formula Notes** from the **File** drop-down menu.
3. Follow the prompts.
4. Salon Iris will automatically import your file and add it to your existing client notes.

Importing Products

Column Name	**Description**	**Type**	**Example**
ID	Product ID or SKU number. The ID must be unique	Text	Sham100
Description	Description or name of product	Text	Lilac Shampoo
Category	Category	Text	Shampoo
Backbar	Backbar items are used in-house to support services. No commission is made on backbar items	Text (TRUE or FALSE)	TRUE
Make	Make	Text	Great's Shampoo
Size	Size	Text	12 oz
Wholesale	Wholesale Price	Number	4.50
Retail	Retail Price	Number	8.99
Tax1	Indicates if tax1 should be applied to product sales	Text (TRUE or FALSE)	TRUE
Tax2	Indicates if tax2 should be applied to product sales	Text (TRUE or FALSE)	FALSE
Tax3	Indicates if tax3 should be applied to product sales	Text (TRUE or FALSE)	FALSE
Inactive	Is the product inactive?	Text (TRUE or FALSE)	FALSE
Balance	Currency amount to automatically increase or decrease the client's balance	Number	1.00
Supplier	Supplier of the product	Text	My Supplier
StockCount	Current stock quantity	Number	4
ReorderAuto	Indicates if the product should be automatically added to the reorder list	Text (TRUE or FALSE)	TRUE
ReorderPoint	The stock quantity at which the product will be added to the reorder list	Number	5
ReorderQuantity	The quantity that will be added to the reorder list	Number	10

OnOrder	Quantity currently on order	Number	10
DateOrderHold	Keep this product off the reorder list until a specific date	Date	11/1/2011
OrderDate	Date put on order	Date	10/1/2011
CommissionBonus	Currency amount added as a commission bonus	Number	2.00

Example: a spreadsheet file might look like this:

ID	Name	Retail	Tax1	Stock
Sham100	Lilac Shampoo	8.99	TRUE	5
Sham101	Rose Shampoo	8.99	TRUE	3
1234567890	Comb	3.99	TRUE	10

1. Save your information as a text-only tab delimited file.
2. Select **Import**, then **Products** from the **File** drop-down menu.
3. Follow the prompts.
4. Salon Iris will automatically import your file and, depending on preferences, either add it to your existing list of products, or overwrite your current list of products with the imported file.

Importing Services

Column Name	Description	Type	Example
ID	ID	Text	Color
Description	Description	Text	Color Service
Category	Category	Text	Hair Styling
Backbar	Backbar amount taken out before commission determined	Number	3.50
Price	Price	Number	45
Tax1	Indicates if tax1 should be applied to service sales	Text (TRUE or FALSE)	FALSE
Tax2	Indicates if tax2 should be applied to service sales	Text (TRUE or FALSE)	FALSE
Tax3	Indicates if tax3 should be applied to service sales	Text (TRUE or FALSE)	FALSE
Setup	Setup duration (length of time)	Number	45
Process	Process duration (length of time)	Number	30
Finish	Finish duration (length of time)	Number	15
Inactive	Is the service inactive?	Text (TRUE or FALSE)	FALSE
Link1	Link to a specific product used for the service	Text	Sham100
Link2	Link to a specific product used for the service	Text	Cond100
Link3	Link to a specific product used for the service	Text	Hydrator

Balance	Currency amount to automatically increase or decrease the client's balance	Number	0
CommissionBonus	Currency amount added as a commission bonus	Number	10

Example: a spreadsheet file might look like this:

ID	Description	Price	Setup
HCMen	Men's Haircut	20.00	30
HCWomen	Women's Haircut	35.00	45
HCKids	Children's Haircut	12.00	20

1. Save your information as a text-only tab delimited file.
2. Select **Import**, then **Services** from the **File** drop-down menu.
3. Follow the prompts.
4. Salon Iris will automatically import your file and, depending on preferences, either add it to your existing list of services, or overwrite your current list of services with the imported file.

Importing Employees

Column Name	**Description**	**Type**	**Example**
FirstName	First name of employee	Text	Rita
LastName	Last name of employee	Text	Doe
Employee ID	ID number	Number	1000
Address	Address	Text	100 Park St
Address2	Second line of address	Text	Apt. 100
City	City	Text	Middleville
State	State	Text	FL
ZIP	ZIP or postal code	Text	44444
Phone	Phone number	Text	(555) 555-1212
CellPhone	Mobile phone number	Text	(555) 555-1212
E-Mail	E-mail address	Text	rita@email.com
Gender	Gender	Text (M for male, F for female)	F
Comment	Employee comments	Text	Wants Saturdays off
DateOfBirth	Date of birth	Date	5/10/1975
DateOfHire	Date of hire	Date	2/7/2002
W2Local	City name if local withholding tax is being deducted	Text	Anytown
W2State	State name if state withholding tax is being deducted	Text	FL
Active	Is the employee actively employed?	TRUE or FALSE	TRUE
Independent	Is the employee a booth renter?	TRUE or FALSE	FALSE
SSN	Social Security Number	Text	000-00-0000

Example: a spreadsheet file might look like this:

FirstName	LastName	Address	City	State	ZIP
John	James	456 Cut Rd	Anytown	FL	44444
Tina	Waters	6789 North St	Anytown Heights	FL	44446

1. Save your information as a text-only tab delimited file.
2. Select **Import**, then **Employees** from the **File** drop-down menu.
3. Follow the prompts.
4. Salon Iris will automatically import your file and, depending on preferences, either add it to your existing list of employees, or overwrite your current list of employees with the imported file.

Importing Suppliers

Column Name	Description	Type	Example
Name	Name of the supplier	Text	ABC Distributions
FirstName	First name of the primary contact person	Text	Mark
LastName	Last name of the primary contact person	Text	Albert
Address	Address	Text	123 Mystreet
City	City	Text	Mytown
State	State	Text	CA
Zip	ZIP or postal code	Text	12345
E-Mail	E-mail address	Text	abcdistributions@email.com
Phone	General phone number	Text	(555) 555-1212
TollFree	Toll free phone number	Text	(800) 555-1212
Cell	Mobile phone number	Text	(555) 555-1212
Fax	Fax phone number	Text	(555) 555-1212
Comment	General comments	Text	Doesn't ship after 5pm Friday
Products	List of products the supplier supplies	Text	Sham100, Cond100
Total	Current amount owed to or from the supplier	Number	120.50
Check	Name that should appear on the "To" section when printing checks	Text	ABC Service, Inc.
SupplierID	ID number for the supplier	Number	1000
History	History and other information	Text	Started account on Jan. 10, 1998. This supplier only ships UPS

Example: a spreadsheet file might look like this:

Name	FirstName	LastName	Address	City	State	Zip
Lakeview Systems	Bill	Wayne	2020 Elm St	Harborview	WA	98765

Pro Distributor	Karen	Lockford	9000 Avondale	Cheesetown	WI	43210

1. Save your information as a text-only tab delimited file.
2. Select **Import**, then **Suppliers** from the **File** drop-down menu.
3. Follow the prompts.
4. Salon Iris will automatically import your file and, depending on preferences, either add it to your existing list of suppliers, or overwrite your current list of suppliers with the imported file.

Importing Gift Certificates

Column Name	**Description**	**Type**	**Example**
GiftCertID	The gift certificate ID number	Number	1000
OriginalAmount	The original amount on the gift certificate	Number	100.00
Balance	The current amount on the gift certificate	Number	50.00
FromFirstName	First name of who the gift certificate is from	Text	Larry
FromLastName	Last name of who the gift certificate is from	Text	Jones
ToFirstName	First name of who the gift certificate is for	Text	Kerry
ToLastName	Last name of who the gift certificate is for	Text	Williams
DateCreated	Date the gift certificate was created	Date	8/10/2011
GiftCertComment	Comments or additional information	Text	Birthday gift

Example: **GiftCertID** must be a numerical value. A spreadsheet file might look like this:

GiftCertID	OriginalAmount	Balance	ToFirstName	ToLastName	DateCreated
1000	75.00	25.00	Joe	Teddy	8/4/2011
1001	25.00	0.00	Amy	Jonas	1/24/2011
1002	50.00	50.00	Jacob	Jackson	10/1/2011

Perform the following steps to import your data file:

1. Save your information as a text-only tab delimited file.
2. From any Salon Iris main screen click the **File** drop-down menu.
3. Select **Import**, then **Gift Certificates**.
4. Follow the prompts.
5. Salon Iris will automatically import your file and, depending on preferences, either add it to your existing list of gift certificates, or overwrite your current list of gift certificates with the imported file. The amount in gift certificates is NOT added to your business' income and is not shown on the Totals report. This function is meant to track a list of existing gift certificates that you have already sold.

Exporting Overview

You can export information to a spreadsheet or word processing file for viewing, comparisons, or numerical manipulations.

1. Select **Export to Text File** from the **Tools** drop-down menu.
2. The **Export Database Information to a File** screen will appear.
3. Check the box for the information you would like to export:
    - **Activity log**
    - **Clients**
    - **Coupons**
    - **Employee schedule**
    - **Employees**
    - **Gum Label Formats**
    - **Products**
    - **Services**
    - **Tickets**
    - **Time Clock**
    - **Tips**
    - **Suppliers**
    - **Wait List**
4. Click the **Export** button.
5. Select a file and directory to save the data to and click **Save**.
6. Open the file through your spreadsheet or word processing application.

Password Protection Overview

You may use password protection to assure privacy for any or all of the Salon Iris main screens and reports, as well as many specific features. Employee access to screens may be set up and each employee may have a unique password. Password protection for individual employees and screens is optional.

A password can be set for the entire Salon Iris database as well. This password can be set when Salon Iris is first installed, or it may be set or changed from within Salon Iris after installation. Database password protection is controlled by Microsoft SQL. Salon Iris Software, Inc. does not guarantee replacements for lost passwords. Be sure to write down your database password and keep it in a safe place.

1. Select **Password Setup** from the **Tools** drop-down menu.
2. The **Password Controls** screen will appear. It is divided into three sections:
    - **Database Password Protection**: password protect the entire database
    - **Employee Access**: control employee access to specific screens, reports and features
    - **Password Log In/Log Out Settings**: choose whether you would like the password entered for every screen, or if you would like the password to store and automatically log the user out after a set time

Database Password Protection: Password protection is applied to your database to keep it from being accessed by another program or unauthorized persons who should not be able to access this information. You will be prompted to enter a password when you start Salon Iris or restore a database from backup. You will also be prompted to enter a password if you attempt to access the Salon Iris database with another program, such as SQL. There are four options for database password protection. If a database password has not been set, then there will only be one option: **Set Database Password**.

1. **Set Database Password**: initially set a database password.
    a. Click the **Set Database Password** button in the **Database Password Protection** section.
    b. The **Set Database Password** screen will appear.
    c. Enter the password in each of the two boxes as prompted.
    d. Click **OK**.
2. **Change Database Password**: change the database password from a previously set password.
    a. Click the **Change Database Password** button in the **Database Password Protection** section.
    b. The **Password** screen will appear.
    c. Enter the old password and click **OK**.
    d. Enter a new password in each of the two boxes as prompted.
    e. Click **OK**.
3. **Clear Database Password**: remove database password protection.
    a. Click the **Clear Database Password** button in the **Database Password Protection** section.
    b. Enter the current password in the prompt.
    c. Click **OK**.
4. **Remember the database password on this computer on startup**: if this box is checked, you will not be prompted to enter the database password when Salon Iris opens. This will only remember the password on the current database. If the database is restored from a backup, or if the database is loaded on a different computer the password will not be remembered.

Employee Access: password protection can be applied to many of the screens and functions in Salon Iris. Each employee can be granted custom access to these screens and functions.

1. Select **Password Setup** from the **Tools** drop-down menu.
2. The **Password Controls** screen will appear.
3. In the **Employee Access** section, check the **Enable employee password protection on this computer** box.
4. Click the **Edit Passwords** button.
5. The **Employee Passwords** screen will appear.
6. Double-click to enter employee passwords. You have the additional options of allowing employees to change their own passwords from the **Time Clock Log In** and **Log Out** screens, and hiding employee passwords from other employees.
7. Click **OK** to return to the **Password Controls** screen.
8. Click the **Edit Access** button.
9. The **Employee Passwords** screen will appear.
10. For each option that you would like to restrict access to for employees, check the box in the **Require Password** column on the row that corresponds with the restricted option. This will require the employee to enter his or her password to access this feature, and block some employees from accessing this feature completely. If password protection is enabled, make sure to protect the **Password Editing** feature so employees cannot get into this screen and change password settings.
11. Underneath each employee's name, <u>uncheck</u> the box if that employee is <u>not</u> allowed access to this

screen or feature. If the employee should be allowed access to this screen or feature, the box under that employee's name should be checked. We recommend having all the important financial screens password protected, as well as establishing different levels of password protection for different employees.

12. Repeat **Steps 10** and **11** for each screen/feature/report to be password protected.
13. Click **OK**.

New Employee Button: you can use the **New Employee** button on the **Password Controls** screen to select an employee and have his or her CURRENT password access information used as the default setting for all new employees. In other words, when you add a new employee, his or her password information will be automatically set to the selected employee's access.

These password settings are a 'snapshot' of the default employee you are selecting. Future changes to the default employee's password settings are not automatically updated. To update changes you need to re-select the default employee.

1. Click the **New Employee** button.
2. If this is the first time selecting default **New Employee** password settings, read the message and click **OK**.
3. The **Select Employee** screen will appear.
4. Select the employee with the CURRENT password access information that you would like used as a default for new employees.
5. Click the **OK** button to return to the **Password Controls** screen.
6. Click the **OK** button to save the password settings.

Password Log In/Log Out Settings: Salon Iris can be set to remember, or not remember the employee that is logged in.

- **Remember which employee is logged in**: Salon Iris will ask for the employee's name and password to be entered the first time a password protected feature is accessed. The employee will be able to use the software according to his or her allowed access without entering his or her name and password again. The employee will have to **Log Out** from Salon Iris by going to the **Tools** drop-down menu and selecting **Password Log Out**
- **Do not remember which employee is logged in**: Salon Iris will ask for the employee name and password every time a restricted feature is accessed. This will provide greater security, but also slow down employees using the software if numerous features are password protected. If you have **Do not remember which employee is logged in** checked, but still have **Automatic Logout** enabled, then Salon Iris will return to the selected startup screen after periods of inactivity. Disable **Automatic Logout** to stop this

If you have Salon Iris remember which employee is logged in, it's a good safeguard to have the employees be automatically logged out after a period of software inactivity. If an employee forgets to log out, this will minimize the possibility of another employee accessing screens he or she is not supposed to.

1. Check the box labeled **Enable automatic logout** in the **Automatic Log Out** section.
2. Enter the time of inactivity you would like to cause the employee to be logged out automatically.
3. Click **OK** to save this setting.

Activity Log

You can track most major database events including ticket, client, product, and service additions/modifications/deletions with the **Activity Log** feature. The **Employee Name** and the **Employee ID** are only recorded with the corresponding activity if employees are required to log in using a password AND you set your password log in/log out settings to remember which employee is logged in.

1. Select **Activity Log** from the **Tools** drop-down menu.
2. The **Log** screen will appear.
3. You can check which employees performed tasks, and the date and time the activity was performed.
4. You can modify the information that appears from the **Log** screen.
    a. Click the **Activity Log Options** button.
    b. The **Log Options** screen will appear.
    c. Check and uncheck the following boxes as desired:
        - **Tickets**
        - **Clients**
        - **Products and services**
    d. Select the number of days to record activity for.
    e. You may press the **Clear Log Now** button in the **Clear Information** section to clear the activity log.
    f. Click **OK** to return to the **Activity Log**.

Employees and Scheduling

maintaining your employees and their schedules

Employee Overview

The **Employees** screen shows the identification number, name, and contact information for all your business' employees.

To access the **Employees** screen, click the **Employees** button/icon, or select **Edit Employees** from the **Employees** drop-down menu.

Add or Edit an Employee: adding an employee and editing an employee is simple and quick with Salon Iris.

1. Click **Add Employee** to add a new employee, or click the **Edit Employee** button or double-click on the employee in the list to select an employee.
2. The **Employee** screen will appear. It has eight tabs:
    - **Contact**: all the necessary contact information
    - **Services Limitations**: used to limit the services that an employee can perform
    - **Display Options**: if the employee should appear on the scheduling screen and appointment book
    - **W2 and 1099**: enter local and state tax withholdings
    - **Booth Renter**: if the employee is not directly employed, and earns all profit from their individual sales
    - **Education and Certificates**: add any specialized certificates or educational degrees to the employees
    - **ID Card**: associate an ID Card to an employee
3. Enter or edit the appropriate information in the various tabs.
4. Click **OK** to return to the **Employees** screen.

Delete an Employee

NOTE: Once an employee has been scheduled an appointment, that employee can no longer be deleted from the database.

1. Highlight the employee to be deleted.
2. Click the **Delete Employee** button located on the upper-left of the **Employees** screen.
3. The **Are You Sure?** screen will appear.
4. Click the **Yes** button to delete the employee from the database.

You can use the **View Deleted Employees** button to view deleted employees or undelete them.

Employee - Contact Tab

1. Click the **Contact** tab.
2. Enter the appropriate general information: name, phone number, social security number, address, city, state, ZIP code, date of hire, birth date, last day of work, comments, gender, e-mail address, emergency contact, etc.
3. If you would like to be able to display employees by category on the appointment book, select a **Category** for the employee, i.e. technician, stylist, etc.
4. You may create any new categories to suit business needs.
    a. Click the **Edit** button next to the **Category** field.

   b. The **Employee Resource Categories** screen will appear.
   c. Clicking the **Add** button to add a new category.
   d. Use the **Move Up** and **Move Down** buttons to organize the list as needed. We recommend keeping a **(blank)** field on the top of the list.
   e. Click **OK** to return to the **Contact** tab.
5. An **Employee Contact Information** report can be generated by performing the following steps:
   a. Select **View Employee Contact Information** from the **Employees** drop-down menu.
   b. The **Employee Contact Information** screen will appear.
   c. You can copy this information to the clipboard, save to a file, print, or close the information from this screen by using the **File** drop-down menu.

Employee - Service Limitations Tab

Using individual services or service categories, limitations can be set for the services that an employee is able to perform on the **Service Limitations** tab. The service limitations you set will be used to determine what is displayed when adding or editing a ticket and searching for a product or service; the **Look Up** screen that appears when searching for a **Product ID** or **Service ID** on the **Ticket Information** screen will only display those services that the employee can perform.

1. Click the **Services Limitations** tab.
2. Select **This employee CANNOT perform all services (select for more details)**.
3. Select the service or services the employee CAN perform by clicking on the **Add Service** button.
4. The **Look Up** screen will appear.
5. Select the service and click the **OK** button.
6. Repeat **Steps 3-5** for each service.
7. To add categories of services the employee can perform, select the service category from the **Available Categories** section and click the **Add>>** button to add the category to the **Used Categories** section.
8. Repeat **Step 7** for each service category to add.
9. Click **OK** to return to the **Employees** screen.

Employee - Display Options Tab

1. Click the **Display Options** tab.
2. Check or uncheck the following boxes as appropriate:
   - **Active: This person is currently employed at this business**: uncheck this if an employee has temporary leave, and you would like to keep an employee on the books while they are gone
   - **Show employee when using the Ticket Search feature**: if you would like the employee to be included on ticket searches
   - **Show employee on the Scheduling screen**: employee will be listed on schedule
   - **Show employee on the Appointment Book**: employee appears on the appointment book
   - **Show employee on the Ticket Modify screen**: employee will appear on the ticket screen when adding or modifying tickets

3. Enter the employee's **Name on Appointment Book** if this is to be different from the employee's full name.
4. Click **OK** to return to the **Employees** screen.

Employee - W2 and 1099 Tab

Salon Iris allows you to export payroll information. The **W2 and 1099** tab allows you to enter the city and state included in the deductions.

1. Click the **W2 and 1099** tab.
2. Enter the city and state.
3. Click **OK** to return to the **Employees** screen.

Employee - Booth Renter Tab

Typically booth renters are not considered regular employees. They rent space and have their own account for their specific sales. See the **Booth Renter Overview** section of this User's Guide for more information.

1. Click the **Booth Renter** tab.
2. You can select **This person is a booth renter**.
3. If they have provided you with their **Merchant ID** enter it in the **Merchant ID** field.
4. Click **OK** to return to the **Employees** screen.

Employee - Education and Certificates Tab

1. Click the **Education and Certificates** tab.
2. Click the **Edit Default Certificate Types** button.
3. The **Employee Certificates** screen will appear.
4. Click the **Add** button to add in a certificate type, i.e. College Degree.
5. Click **OK** to return to the **Education and Certificates** tab.
6. You can list any degrees, certificates, and educational levels for each employee.
7. Click **OK** to return to the **Employees** screen.

Employee - ID Card Tab

You must purchase the following items to use the employee ID cards:

- **Employee ID cards**: You can get them printed from Salon Iris Software. To order, please call (800) 423-8100. You can also have them printed from another source. Just be sure the magnetic encoding portion starts with .E and includes a 30 digit number. For example, the magnetic encoding would be .E0123456789101112131415161718l9. Also, the magnetic encoding should be able to be read with track 1 and track 2 readers.
- **Magnetic card reader**: To order one, please call (800) 423-8100. If you purchased a credit card or a gift card reader from Salon Iris Software, it will read employee ID cards.

ID cards can be used in the place of a password on any screen that's protected. Employees can be assigned both a password and an employee ID card.

1. Click the **ID Card** tab.
2. Click the **Enable** button.
3. A window will appear prompting you to swipe the employee ID card.
4. Swipe the card.
5. This card is now assigned to the employee.
6. Click **OK**.
7. The employee can now swipe the ID card instead of typing in a password.
8. Click **OK** to return to the **Employees** screen.

Resources Overview

A resource is any object that is used to support your business. The purpose of the **Resources** feature in Salon Iris is to allow you to schedule and track the use of your resources in the Salon Iris **Appointment Book** feature.

Examples of resources include:

- Rooms
- Tables
- Other machines that are used to perform services

The **Resource** screen is where you add, edit, and delete resources. To access the **Resources** screen, click **Edit Resources** from the **Employees** pull-down menu.

Add or Edit a Resource: Creating and editing resources is quick and easy within Salon Iris.

1. Click **Add Resource** to create a new Resource, or click the **Edit Resource** button or double-click on a resource in the list to select a resource to edit.
2. The **Add/Edit Resource** screen will appear. It has four different sections:
    a. **General:** Add/Edit general information relating to the resource.
        - **Resource ID:** this is the ID number associated with the resource. This value cannot be changed.
        - **Name:** a way to easily identify the resource.
        - **Max Occupancy:** the maximum amount of concurrent appointments that can be booked for this resource.
        - **Comment:** any general notes to associate to this resource.

    b. **Linked Services:** The services that will automatically populate the appointment book for this resource, up to its **Max occupancy.** To link a service to resource, please take the following steps:
        i. Click **Add Service Link.** The Service Look Up screen will appear.
        ii. Select the Service that you would like to link to this resource, and click **OK**.
        iii. Repeat this process for each service that you would like to link to this resource.

    c. **Contact Information:** shows contact information for the person in charge of maintaining this resource (if applicable).

d. **Display Options:** control how the resource is displayed in various screens of the software.
   - **Show resource when using the Ticket Search feature:** When searching for a service, this allows you to only show services that are linked to a specific resource.
   - **Show resource on the Scheduling screen:** displays the resource when modifying items on the **Scheduling** Screen.
   - **Show resource on the Appointment Book:** displays the resource as a column on the **Appointment Book.**

Managing Resources

Scheduling a Resource to be used on an open ticket: Salon Iris has the ability to reserve a time slot for the use of a resource that is required to perform a service. For example, Haircut requires the use of Room 1 to be performed. To schedule a resource to be used, perform the following steps:

1. First, you should link all resources that can be used with a service for each service that requires a resource be used (if you have already done this, skip to step 2). To do this, perform the following steps:
   a. Edit the service and click the **Linked Resources** tab.
   b. The **Available Resources** section will display all resources that you have entered. If no resources are shown, exit out of the services screen, go to the **Resources** screen and create your resources. If you have resources shown, proceed to step c.
   c. Click on the resource to link to this service and click the **Add** button. The resources will now be shown in the **Linked Resources** section. For example, you may want to link Full Color to Resource 1. If you have more than one massage table, you can link Full Color to Resource 1, Resource 2, and Resource 3.
   d. If you have more than one resource selected in the **Linked Resources** section, you have two options as how to schedule the resource:
      - **Auto-populate resource based on availability**. Salon Iris will look at the schedule of the first resource in the **Linked Resources** section and if the first resource's schedule is busy, it will look at the 2nd resource, 3rd resource, etc. until an opening is found.
      - **Prompt me for which resource to use based on availability**. Salon Iris will look at the schedules of all the resources listed to the **Linked Resources** section and prompt you for which resource to use.
      - Click **Save** when finished linking the resources to the service.
2. Add a ticket as you normally would. On the **Ticket Information** screen, in the **ID** column, type in the **Service ID** that you wish to schedule.
3. When you type in the **Service ID** (that has a resource linked to it), Salon Iris will automatically add the linked resource to the ticket, depending on what you have selected on the service for how to schedule the resource (this is explained in bullet options above in step 1). This can be seen by clicking the **Manage Resources** button.
4. Continue to schedule the ticket as you normally would.

NOTE: If you would like to manually choose which service you would like to use for a service that is linked to multiple resources, you can do so by going to the **Linked Resources** tab when editing a service, and selecting **Prompt me for which resource to use based on availability**.

Scheduling Overview

Scheduling allows you to enter your employees' working schedules by hours and days off, as well as the operating hours of any resources you use. This information is extremely useful in conjunction with the **Appointment Book** feature.

You can access the **Scheduling** feature by clicking the **Schedule** button/icon, or by selecting **Scheduling** from the **Employees** drop-down menu.

Color Codes: the **Scheduling** screen can be color coded for employee and resources non-availability. The color codes include:

- **Working**
- **Off: Regular Day**
- **Off: Vacation Day**
- **Off: Illness**
- **Off: Personal Business**
- **Off: Other Reason**
- **No Schedule Entered**

1. Double-click on the box containing the item to change the color for in the **Color Codes** section at the bottom of the **Scheduling** screen, i.e. the **Working** box.
2. The **Color** screen will appear.
3. Select the new color and click **OK**.
4. Repeat **Steps 1-3** to change the color for the remaining items if desired.

Copy Employee Schedules: Salon Iris has the ability to copy one employee's schedule to one or more other employees. This saves time when several employees have similar schedules.

1. Click the **Copy Schedules** button under the **General Options** menu on the left.
2. In the **Source employee** field, select the employee with the schedule that will be copied to other employees.
3. In the **Start date** field, select the beginning of the copy range.
4. In the **End date** field, select the last date of the copy range.
5. In the box labeled **Copy schedule to**, select the employees to receive the same schedule as the source employee.
6. Click **Copy**.
7. Click **OK** and then **Close** to return the **Scheduling** screen.

Schedule Working Days: working days are the normally scheduled days and times that a single employee will be working.

1. Go to the **Date** section at the bottom of the **Scheduling** screen and select from the following display choices:
    - **Upcoming week**: displays a week from the current date on your computer clock
    - **Single date**: select a single date from the calendar
    - **Range**: select a range of dates from start to end on the calendar
2. The names of employees selected for scheduling will appear on the left of the white grid in a column.

3. Click to highlight the cell in the same row that the employee's name is found, underneath the appropriate date.
4. Click the **Edit Schedule** button in the upper-left portion of the screen.
5. The **Modify Schedule** screen will appear.
6. Select **Working** under the **Status** section.
7. In the **Working Hours** section, click the mouse on the **Start** field and enter the employee's normal starting time. If it is a morning starting time, you must enter AM or "a".
8. Enter the employee's ending time in the **End** field.
9. Click the **Add** button.
10. Only enter in the times the employee is working. Do not include non-working times such as lunches and breaks. For example, entering 9:00 AM to 12:00 PM then 1:00 PM to 5:00 PM will indicate that the employee is gone from noon to 1:00 PM. You can add multiple start and ending times for an employee to reflect lunch hours or other time off. Continue adding start and end times until you have entered the employee's schedule for that day.
11. Click **OK** to return to the **Scheduling** screen.

Scheduling Off Days: off days can be scheduled for a variety of reasons: sickness, vacation, personal business, etc. You can quickly and easily mark a group of days as days off. Select the appropriate days by first clicking the mouse under the appropriate day. Hold the **Shift** key down and then click the mouse in the appropriate ending day box. Click the **Mark as Day(s) Off** button. Click **Yes** to mark these as days off. Days off can also be scheduled as recurring days the same as regularly worked days.

1. The names of employees selected for scheduling will appear on the left of the white grid in a column.
2. Click to highlight the cell in the same row that the employee's name is found, underneath the appropriate date.
3. Click the **Edit Schedule** button in the upper left portion of the screen.
4. The **Modify Schedule** window will appear.
5. Select from the following off choices in the **Status** section:
   - **Off: Regular Day**: regularly scheduled day off
   - **Off: Vacation Day**: scheduled vacation day off
   - **Off: Illness**: unplanned sick day off
   - **Off: Personal Business**: scheduled personal day off, or unplanned personal day off
   - **Off: Other Reason**: day off for reasons other than those listed
7. Click **OK** to return to the **Scheduling** screen.

Scheduling Recurring Days: Salon Iris allows you to enter schedules on a day-to-day basis, but you can also enter a recurring schedule to avoid entering the same schedule over and over.

1. The names of employees selected for scheduling will appear on the left of the white grid in a column.
2. Click to highlight the cell in the same row that the employee's name is found, underneath the appropriate date.
3. Click the **Edit Schedule** button in the upper left portion of the screen.
4. The **Modify Schedule** window will appear.
5. Select if the employee is working or off under the **Status** section.
6. In the **Working Hours** section, click the mouse on the **Start** field and enter the employee's starting time.

7. In the **End** field, enter the employee's ending time.
8. Click the **Add** button.
9. You can add multiple start and ending times for an employee to reflect lunch hours or other time off. Continue adding start and end times until you have entered the employee's schedule for that day.
10. Click the **Recurring** button toward the top of the **Modify Schedule** screen in the **Date** section.
11. The **Recurring Dates** screen will appear.
12. Click the **Add Multiple Dates** button.
13. The **Add Multiple Dates** screen will appear.
14. Select the start of recurrence and end of recurrence dates.
15. In the **Recurrence** section, select if you want the recurrence to be:
    - **Daily**: the selected schedule will occur every day
    - **Weekly**: the selected schedule will occur on the selected day(s) of the week each week
    - **Monthly**: the selected schedule will occur on the selected day for the selected amount of months
16. Select the reccurence start date.
17. Select either the amount of recurrences to schedule or a recurrence end date. You can click the **Test** button to view the dates that will be added.
18. Click **OK** when done to return to the **Recurring Dates** screen.
19. Click **OK** to return to the **Modify Schedule** screen.
20. Click **OK** to return to the **Scheduling** screen.

Scheduling Common Days: Salon Iris has a feature that simplifies scheduling days that are common to multiple employees, such as holidays.

1. On the common day, such as a holiday, enter in the schedule for the first employee. The employee's schedule may most likely be **Off: Other Reason**, such as holiday.
2. Click the grid cell that you would like to copy the schedule from.
3. Click the **Copy Grid Cell** button.
4. Click in the grid cell that you would like the schedule copied to. To select multiple cells to copy to, click in the first grid cell that you would like the schedule copied to, hold down the **Shift** key while moving the mouse to highlight all cells that you desire.
5. Click the **Paste Grid Cell** button.

Booth Renter Overview

A booth renter is a worker who is not directly employed by your business, but works inside your business and performs services for clients. Usually, the booth renter collects payment for services from the clients directly and pays your business a monthly or yearly rental fee.

Some businesses may choose not to have the booth renter's income appear in the business' totals. This is usually done for tax accounting because each booth renter is responsible for paying his or her own business taxes. When running your business' totals, you may or may not choose to have each booth renter's totals appear.

Salon Iris allows you to do the following with booth renters:

- Record the employee as a booth renter
- Schedule the booth renter
- Close the booth renter's tickets separately
- Each booth renter can view his or her own totals separately
- The booth renter's income is kept separate from your business' income
- Track the booth renter's payment (rent) to your business

Booth Renter Setup:

1. Click the **Employee** button/icon,
2. Select the employee that is a booth renter.
3. Click the **Edit Employee** button.
4. Select the **This person is a booth renter** box on the **Booth Renter** tab.
5. Click **OK**.

When scheduling a booth renter's appointments or work schedule, the process is treated like any other employee.

Credit Card Processing for Booth Renters: Salon Iris allows you to associate separate merchant accounts for individual booth renters. You must be using XCharge software and Global Payments as your merchant account to take advantage of this feature.

1. Click the **Employee** button/icon,
2. Select the employee that is the booth renter.
3. Click the **Edit Employee** button.
4. Click the **Booth Renter** tab.
5. Enter their separate XCharge merchant ID in the **Merchant ID** field.
6. Click **OK**.

If you are not using XCharge, contact your processing company for instructions on ringing up booth renter credit card transactions.

Booth Renter Tracking and Reporting

Because you have the option to keep a booth renter's totals separate from the business' totals, if a booth renter is selected as an employee on a ticket, all products and services listed on that ticket must be for the same booth renter. In other words, if a booth renter is selected on a ticket, no other employee can be on the same ticket, and the booth renter should have all the products and services listed under his or her name. This is a requirement due to the way database information is stored.

If you have a client who is, for example, purchasing services from a booth renter and products from your business, you should do the following:

1. Make one ticket for the booth renter and list the services performed. Make sure the booth renter is listed in the **Employee** column on the **Ticket Information** screen.
2. Close the ticket.
3. Add a second ticket for the products, and on the **Ticket Information** screen in the **Employee** column select **None** or the business employee performing the sale.

4. Close the ticket. By selecting **None** or a regular business employee, the products sold will automatically be shown on your business' totals.

By performing **Steps 1-5** above, your business will show the products purchased as income and will give you the option not to show the booth renter's income.

Viewing Booth Renter Totals: you can set up Salon Iris so each booth renter can only view his or her totals.

1. Select **More Reports** from the **Reports** drop-down menu.
2. Select **Totals**.
3. Select **My Totals Report**, report #108. To use this report you must have password protection enabled and also have this report set up to require a password, while still allowing booth renters to have access to it.
4. The appropriate booth renter will enter his or her ID and password to access the **Totals** report.
5. The **Sales Totals** screen will appear.
6. Select the appropriate time and date ranges and click **OK**.
7. The booth renter's totals will appear.

Separating Booth Renters From Your Totals: when a person is a booth renter, you have the option of keeping his or her totals separate from the business' totals.

1. Click the **Totals** button/icon.
2. Select the appropriate date, time, employee parameters, and leave the **Include all booth renters** parameter unchecked.
3. Click **OK**.

See the **Reporting** chapter of this User's Guide for more information on totals and totals reporting.

Tracking Booth Renter Payments to Your Business: you can easily do a deduction, i.e. rent, etc., for a booth renter's payment to your business.

1. Select **Payroll Configuration** from the **Accounting** drop-down menu.
2. Double-click the **Booth Renter** field in the **Deduction** section.
3. Enter the appropriate deductions.
4. Click **OK**.
5. Continue to configure payroll as desired according to the **Payroll** chapter of this User's Guide.

The set deduction amount will come out of the booth renter's pay whenever a new **Payroll** has been run.

Reminders Overview

Salon Iris allows you to easily add in reminders for employees. Each reminder can be marked as **Complete** or **Incomplete** and can be associated with a client or a ticket. The **Auto-Notify** feature will automatically notify you until a reminder is complete.

You can access the **Reminders** screen by clicking the **Reminders** button/icon, or by selecting **Reminders** from the **Employees** drop-down menu. You can also add a reminder for a ticket from the **Ticket Information** screen. Click the **Special** button, then **Reminders**, and **Add Reminder for this Ticket**.

Adding or Editing a Reminder

1. Click the **Add Reminder** button, or highlight the reminder and click the **Edit Reminder** button.
2. Select the status as **Complete** or **Incomplete**.
3. Enter the title and select the **Employee** that this reminder is for.
4. Select the category from the drop-down menu. Perform the following to add or modify categories:
    a. Click the **Edit** button.
    b. Use the **Add**, **Edit**, and **Delete** buttons as needed.
    c. Click **OK**.
5. Select the priority from the drop-down menu.
6. Select the start and due date and enter in any notes.
7. If desired, click the **Associate This Reminder with a Client** button.
8. The **Find Client** screen will appear.
9. Type in the client's name and select the client. Optionally, you can check the **Show me this reminder whenever this client or a ticket with this client is modified** box.
10. If desired, click the **Associate This Reminder with a Ticket** button.
11. Select the ticket and click **OK**. Optionally, you can select the **Show me this reminder whenever this ticket is modified**.
12. In the **Auto-Notify** section, select whether or not you want to be notified until the reminder is complete or not to be notified of the reminder.
13. Click **OK**.
14. If you wish to be notified until the reminder is complete, you will be notified according to your **Notify Schedule** settings.

Deleting a Reminder

1. Highlight the reminder and click **Delete Reminder**.
2. The **Are You Sure?** screen will appear.
3. Click **Yes**.

Notify Schedule: the settings you establish for the notify schedule will determine how frequently you are notified.

1. Click the **Notify Schedule** button or select **Notify Schedule** from the **Tools** drop-down menu.
2. The **Notify Schedule** screen will appear.
3. In the **Frequency** section, select when to be notified from one of the following options:
    - When the software starts.
    - Select a time from the drop-down menu.
    - Every 15 mins., 30 mins., 1 hour, 2 hours, or 4 hours.
    - Or, select not to be notified of reminders.
4. In the **Reminders to Include** section, select if you want to include all reminders, or only include reminders that have a due date less than a certain amount of time from today.
5. Select to display the notification as a separate window or display as a pop-up window in the **Display** section.
6. Click **OK** when finished.

Marking a Reminder as Complete

1. Highlight the reminder and click **Edit Reminder**.

2. Change the **Status** field to **Complete**.
3. Click **OK**.
4. You will no longer be notified of having to complete this reminder.

Services

taking control of the services you offer

Services Overview

To access the **Services** screen, click on the **Services** button/icon located at the top of the Salon Iris main screen, or select **Edit Services** from the **Products and Services** drop-down menu.

When adding or editing a service, the **Add Service/Edit Service** screen is divided into six main tabs:

1. **General**: the service is tracked by numerous headings and identifiers: **Service ID**, **Description**, etc.
2. **Bonus & Backbar**: in this section you can enter backbar and commission bonus amounts. Backbar is the cost of the materials used for the service. See the **Backbar Overview** section in this User's Guide for more information on backbar.
3. **Pre-Paid Quantities**: when a service is sold, you can specify the default value a customer is purchasing and using. For example, a **Quantity Purchased** amount of **5** and **Quantity Used** amount of **1** will indicate that the client will purchase five of these services ahead of time, and then come in and use the service balance one at a time for five visits before having to pay for the service again. For pre-paid services, the total price should be divided by the **Quantity Purchased** field. i.e., if a service includes five Haircut to be used over the course of five appointments and costs a total of $100, the Haircut price would be $20. The price of $20 will be multiplied by the **Quantity Purchased** field on the ticket, in this case five, to equal $100.
4. **Commission**: you can set exceptions for the commission rate of the service. Or when the dual commission system is used you can set up the commission received when this service is sold or performed. See the **Payroll Overview** section of this User's Guide for more details on commission.
5. **Linked Resources**: for ease of scheduling, resources (such as rooms, tables, machines, etc.) can be linked with a service. Whenever a service is scheduled, the resource will automatically appear on the open ticket and prevent you from having to enter in the resource separately.
6. **Other**: contains other miscellaneous items relating to services, such as **Product Links**, **Tanning**, and **Loyalty Points**.

Adding or Editing a Service

1. Click the **Add Service** button, or highlight the service to edit and click the **Edit Service** button.
2. The **Add Service/Edit Service** screen will appear.
3. Enter the appropriate information into each of the eight tabbed areas.
4. Click **Save** to save the changes. If you change a service price or backbar amount for a service, you will be automatically prompted if you want to update all open tickets with this new price.

Deleting a Service

NOTE: Once a service has been added to a ticket, the service cannot be deleted from the database.

1. Highlight the service to be deleted.
2. Click the **Delete Service** button located in the upper-left of the **Services** screen.
3. The **Are You Sure?** screen will appear.
4. Click the **Yes** button to permanently delete the item from the database.

Mark Up Services: the price of one or more services can be easily increased or decreased by a straight percentage. This makes "across the board" price changes simple.

1. Highlight the services to be marked up. To select multiple but not all services, hold the **Ctrl** key and select each service with the mouse.
2. Click the **Markup** button on the left-hand side of the screen.
3. Confirm your selections and click **Yes**.
4. Enter the percentage amount you wish to increase each service. If you would like to decrease the price, enter a negative number.
5. Click **OK**.
6. Confirm that you have entered the correct percentage, and click **Yes**.

Printing a List of Services: you can use the **Print Preview** or **Properties** buttons from the **Printing Options** screen to better customize your printing settings.

1. Click the **Customize View** button on the left to add or remove columns as desired.
2. You can use the **Add**, **Remove**, and **Move Up** and **Move Down** buttons to customize the information to view.
3. Click **OK** to return to the **Services** screen.
4. Sort to the desired display by clicking a column heading, such as **Service ID**.
5. Click the **Print List** button.
6. The **Printing Options** screen will appear.
7. Enter your print option selections and then click **Print**.

Services - General Tab

1. Click the **General** tab.
2. Enter the following items:
    a. **Service ID**: up to an 18-digit alpha numeric identification. Typically these are shorter to be easily remembered.
    b. **Description**: a longer service description.
    c. **Price**: the price charged for the service. If this is a pre-paid service, this is the price per visit.
    d. **Exceptions**: if the service has price exceptions for specific employees.
    e. **Category**: the service category. Services categories need to be used if you plan on color coding the **Appointment Book**.
    f. **This service is inactive and is no longer sold**: if the service is no longer provided.
    g. **Include this service in the Favorites list**: used if you would like to add this service to a list of your most frequently sold services.
    h. **Apply Sales Tax to this service**: used if a sales tax will be applied to this service.
    i. **This is a multiple day service**: if the service last more than one day.
    j. **This is a single day service**: the service can be performed in one day.
    k. **Length of Time**: the time it takes to perform a service including the processing time. Processing time may or may not be selected, i.e. most services have no processing time, but Haircut requires 30 mins. to process before the employee can continue on with the service. In this case Haircut may have a 30 minute setup time, a 30 minute processing time, which the client is not actively being serviced, and a 30 minute finish time.
    l. **Exceptions**: if the service has time exceptions for specific employees, i.e. some employees

perform the service faster or slower.

3. To use **Service Category Color Codes** on the appointment book, a **Category** must be selected services. You may add any number of additional categories.
    a. Click the **Edit** button.
    b. The **Services Category** screen will appear.
    c. Click the **Add** button to add a new category.
    d. Enter a category name.
    e. Click **OK**
    f. Use the **Move Up** and **Move Down** to organize as desired.
    g. Repeat **Steps 3-6** as needed.
    h. Click **OK** to return to the **Edit Service** screen.
4. Click **Save** to return to the **Services** screen.
    - **Don't change client's remaining Tanning Minutes**: purchasing this service will not change a client's tanning minutes balance
    - **Add to the client's Tanning Minutes**: purchasing this service will add X tanning minutes to the client's balance
    - **Subtract from the client's Tanning Minutes**: purchasing this service will subtract X tanning minutes from the client's balance
3. In the **Balance** section you may select from the following choices **When this service is sold**:
    - **Don't change client's balance**: the client's balance with the business won't change
    - **Add to the client's balance**: add X amount to the client's spending balance, or decrease the client's owed debt to the business
    - **Subtract from the client's balance**: subtract X amount from the client's spending balance, or increase the client's owed debt to the business
4. Click **Save** to return to the **Services** screen.

Services - Bonus & Backbar Tab

1. Click the **Bonus & Backbar** tab.
2. Enter the backbar amount in the **Backbar** field. Backbar is the amount of product used to perform a service. The backbar amount is deducted from the amount the employee will receive commission on for this service.
3. Enter the commission bonus amount, if any, in the **Bonus** field. The commission bonus is the amount of money the employee will receive, or lose, for each service sold in addition to the commission configured in payroll.
4. To enter a bonus or backbar exception, click the **Exceptions** button in the appropriate field.
5. Click **Save** to return to the **Services** screen.

Services - Pre-Paid Quantities Tab

1. Click the **Pre-Paid Quantities** tab.
2. Enter the total number of **Services** that are purchased on the first visit in the **Quantity Purchased** field.

3. Enter the number of **Services** used during each remaining visit In the **Quantity Used** field. Usually this amount is **1**.
4. Click **Save** to return to the **Services** screen.

Services - Commission Tab

1. Click the **Commission** tab. See the **Payroll Overview** section of this User's Guide for more instructions on **Commission**.
2. Enter any employee **Commission** exceptions for this service. This is typically used when an employee is specially trained to perform a specific service, or has a reputation for performing the service exceptionally well.
3. Click **Save** to return to the **Services** screen.

Services - Linked Resources Tab

1. Click the **Linked Resources** tab
2. The **Available Resources** section will display all resources that you have entered. If no resources are shown, exit out of the **Services** screen and go to the **Resources** screen to create your resources.
3. Click on the resource to link to this service.
4. Click the **Add** button.
5. The resource will now be shown in the **Linked Resources** section. If you have more than one resource that can be used for a single service, you can link the service to each of the available resources, and you'll be able to choose one to for the service when it is booked.
6. If you have more than one resource selected in the **Linked Resources** section, you have two options to schedule them:
    - **Auto-populate resource based on availability**: Salon Iris will look at the schedule of the first resource in the **Linked Resources** section, and if the first resource's schedule is busy, it will look at the 2nd resource, 3rd resource, etc. until an opening is found
    - **Prompt me for which resource to use based on availability**: Salon Iris will look at the schedules of all the resources listed in the **Linked Resources** section and prompt you for which resource to use
7. Click **Save** to return to the **Services** screen.

Services - Other Tab

1. Click the **Other** tab
2. The **Product Links** section allows you to link products to this service, in the case that performing the service requires the use of various products.
3. In the **Tanning** section, use the **When this service is sold** drop-down box and select from the following choices:
    - **Don't change client's remaining Tanning Minutes**: purchasing this service will not change a client's tanning minutes
    - **Add to the client's Tanning Minutes**: purchasing this service will add X tanning minutes to the

client's balance
- **Subtract from the client's Tanning Minutes**: purchasing this service will subtract X tanning minutes from the client's balance
- Click **Save** to return to the services screen.

4. In the **Loyalty Points** section, you can configure how many **Loyalty Points** a client will receive when purchasing the product or service.

Packages Overview

Salon Iris makes tracking packages easy. You can enter in a group of services and products in a single transaction. For example, you may want to make a package called, "Deluxe Service Package" where your client receives Haircut, Full Color, and Gel. The services and products would all be listed under the "Deluxe Service Package" package ID. On the open ticket, you would simply type in the package ID for the "Deluxe Service Package," and the services and products would all appear.

To add, edit, or delete a package click the **Packages** button/icon, or select **Edit Packages** from the **Products and Services** drop-down menu.

Adding or Editing a Package: the **Packages** function should be used for items that contain different products and/or services that will be redeemed in a single visit. If what you are thinking of as a "package" is merely a collection of the same service that will be used on different days, i.e. four Manicure to be used on different days, then you should use the **Pre-Paid Quantities** tab on the **Add/Edit Service** screen to track the customer's pre-paid quantity. However, packages can contain pre-paid services if desired.

1. Click the **Add Package** button, or highlight the appropriate package and click the **Edit Package** button.
2. The **Add/Edit Package** screen will appear.
3. Enter the following information:
   - **Package ID**: up to an 18 alphanumeric code to designate the package
   - **Description**: a longer description of the package name
   - **Comments**: any applicable comments about the package
4. Select the **Category** if desired. New categories may be added by clicking the **Edit** button.
5. Click the **Add Item by Searching** button and the **Look Up** screen will appear. Select your item and click **OK**.
6. You can also click the **Add Item by ID** button and type in the service or product ID and click **OK**.
7. Continue adding products and/or services until your package is complete.
8. You have the option to customize how you price packages. You can do a package price adjustment in any of the three following ways:
   a. **Force**: force the sum of all items to equal an exact amount. The **Enter Package Price** screen will appear. Enter in the price of the package and click **OK**. This feature is useful if you would like to offer several products and/or services for an even amount such as $100.
   b. **Percent Discount**: apply a straight percentage discount. The **Enter Percent Discount** screen will appear. Enter in the percent discount and click **OK**. This feature is useful if you would like to offer several products and/or services with a specific discount off the retail price, i.e. 25% off.
   c. **Full Price**: reset prices to their original amount. You can use this button if you make a mistake when applying the percent discount or forced package amount.

9. Click **Save** when finished.

Deleting a Package

1. Click on the package you wish to delete.
2. Click the **Delete Package** button.
3. The **Are You Sure?** screen will appear.
4. Confirm that you would like to delete the package and click **Yes**.

Products and Inventory

maintaining and controlling inventory flow

Products Overview

To access the **Products** screen, click the **Products** button/icon or select **Edit Products** from the **Products and Services** drop-down menu.

When adding or editing a product, the **Add Product/Edit Product** screen is divided into seven main tabs:

1. **General**: product and pricing information.
2. **Ordering**: set reorder points and quantities. Salon Iris will automatically add low stock count items to be ordered based on your settings, but all orders must be approved and submitted to a vendor or a supplier.
3. **Balances**: add or subtract from a client's tanning minutes or a client's balance when the ticket is closed.
4. **Aliases**: use up to three different product aliases. This is useful if a supplier changes UPCs for a product that you already have in stock.
5. **Custom**: add up to three custom description fields. Custom fields can be used to organize products for printing or other purposes.
6. **Loyalty Points**: loyalty points are given when a product is sold. See the **Loyalty Points Overview** section of this User's Guide for complete instructions.
7. **Commission And Bonus**: set the bonus an employee will gain or lose by selling the product, as well as commission and bonus exceptions.

Adding or Editing a Product

1. Click the **Add Product** button, or highlight the product to edit and click the **Edit Product** button.
2. The **Add Product/Edit Product** screen will appear.
3. Enter the appropriate information into each of the seven tabbed areas.
4. Click **Save** to save the changes. To add another product instead of returning to the **Products** screen, click the **Save and Add Another** button.

Deleting a Product

NOTE: You can only delete a product if it has not been added to a ticket previously. Once it has been used, the product is permanently saved to the database.

1. Click to highlight the product to be deleted.
2. Click the **Delete Product** button located at the upper-left of the **Products** screen.
3. The **Are You Sure?** screen will appear.
4. Click the **Yes** button to permanently delete the product from the database.

Markup Products: The price of one or more products can be easily increased or decreased by a percentage. This makes "across the board" price changes simple.

1. Highlight the products to be marked up. To select multiple but not all products, hold the **Ctrl** key and select each product with the mouse.
2. Click the **Markup** button on the left-hand side of the screen.
3. Confirm your selections and click **Yes**.
4. Enter the percentage amount that you wish to increase each product. Enter a negative number if you

would like to decrease the price.

5. Click **OK**.
6. Confirm that you have entered the correct percentage, and click **Yes**.

Searching for Products: there are two methods to search for products

1. **Single product search**: quickly search for a single product.
   a. Select **Search** from the **Products and Services** drop-down menu.
   b. The **Look Up** screen will appear.
   c. Enter either the ID or the description of the product.
   d. Search results will automatically generate based on the information provided.
2. **Multiple product search**: search for multiple products at one time.
   a. Go to the **Products** screen.
   b. Type any information relating to a product in the search field to filter the search results.
   c. Alternatively, click the **Advanced Search** button to perform a more refined search.
      - **ID**: brings up product(s) by part or all of the ID
      - **Description**: brings up product(s) by part or all of the description
      - **Make**: brings up product(s) of a specific make
      - **Category**: brings up product(s) of a specific category
      - **Supplier**: brings up product(s) from a specific supplier
      - **Status**: narrow results by active, inactive, or both
      - **Taxable**: narrow results by taxable, non-taxable, or both
      - **Type**: narrow results by retail, backbar, or both
   d. Search results will automatically generate based on the information provided.

Products - General Tab

1. Click the **General** tab.
2. Enter the following items.
   a. **Product ID**: enter an ID up to 18 alphanumeric characters in length. You can create a number, or you can use a barcode scanner to enter product SKU.
   b. **Description**: enter a short detailed description of the product.
   c. **Make**: enter the product **Make** or brand. Click the **Edit** button to add or edit makes.
   d. **Category**: enter the product **Category**. Click the **Edit** button to add or edit categories.
   e. **Size**: optionally enter a product **Size**, i.e. 6oz, Small, etc.
   f. **Wholesale Price**: enter the price that you pay when ordering the product.
   g. **Retail Price**: enter the price that you charge customers for the product.
   h. **Supplier**: select the **Supplier** from the drop-down menu. See the **Suppliers Overview** section for more information.
   i. **Quantity in stock**: enter the current stock count of the product.
   j. **This product is a backbar product and is used to support services**
   k. **This product is inactive and is no longer sold**
   l. **Include this product in the Favorite list**: use this to add the product to a list of your most frequently sold/used items.

m. **Apply Sales Tax to this product**: if the product is taxable.
3. Click **Save** to return to the **Products** screen.

Products - Ordering Tab

1. Click the **Ordering** tab.
2. Check the box labeled **Auto Reorder** if the product is to be automatically reordered. If this box is selected, Salon Iris will automatically place this product on the **Ordering** screen when the quantity in stock equals or is less than the reorder point.
3. Enter the **Reorder Point**. This number will tell Salon Iris when to add the product to the order list.
4. Enter the **Reorder Quantity**. This is the quantity that will be added to the order list.
5. If you would like to keep this item off the ordering screen until a certain date, enter the appropriate date in the **Hold Order Until** field.
6. In the box on the right, any active purchase orders associated with this product will appear.
7. Click **Save** to return to the **Products** screen.

Products - Balances Tab

1. Click the **Balances** tab.
2. If applicable, enter the appropriate tanning information.
3. Select the following from the drop-down menu for when a product is sold:
   - **Don't change client's remaining Tanning Minutes**: purchasing this product will not change a client's tanning minutes balance
   - **Add to the client's Tanning Minutes**: purchasing this product will add X tanning minutes to the client's balance
   - **Subtract from the client's Tanning Minutes**: purchasing this product will subtract X tanning minutes from the client's balance
6. Click **Save** to return to the **Products** screen.

Products - Aliases Tab

1. Click the **Aliases** tab.
2. Enter up to three different aliases containing no more than 18 alphanumeric characters.
   - Aliases allow a single product to have more than one **Product ID**.
   - A common use for this feature is to allow products with printed labels containing old ID's to bring up the same newer product when scanned. This often happens when a product supplier changes a product's SKU or barcode label and you still have the same product with the original ID on your shelf.
3. Click **Save** to return to the **Products** screen.

Products - Custom Tab

1. Click the **Custom** tab.
2. Enter up to three user defined fields.
   - These fields can be used to store any special pieces of information associated with this product.
   - These fields are automatically updated when importing information from a data collector.
3. Click **Save** to return to the **Products** screen.

Products - Loyalty Points Tab

1. Click the **Loyalty Points** tab. See the **Loyalty Points Overview** section of the User's Guide for complete instructions.
2. Enter the number of **Loyalty Points** the client earns with each purchase of this product.
3. Click **Save** to return to the **Products** screen.

Products - Commission And Bonus Tab

1. Click the **Commission And Bonus** tab.
2. Click the **Exceptions** button under **Commission** to enter any employee commission exceptions when they sell this product.
3. If applicable, enter the amount of money the employee will receive or lose for each sale of this product in the **Bonus** field.
4. Click the **Exceptions** button under **Bonus** to enter any employee bonus exceptions when they sell this product.
5. Click **Save** to return to the **Products** screen.

Backbar Products Overview

Backbar represents the amount of the store's supplies that are used to perform in-shop services. For each service performed by an employee, that employee may earn a commission based on a formula of (price minus backbar) times commission percentage, or (Price$ - Backbar$) x Commission%.

For example, if a store charges its clients $50 for Haircut and pays its employees 50% commission for all services. The store owner estimates that during a typical Haircut, $10 worth of Gel is used. The store owner may create a service in Salon Iris called Haircut with a price of $50 and a backbar of $10. Based on the above formula, the employee would earn ($50-$10) x 50%, or $20 in commission.

Tracking Backbar Product Inventory: the recommended way to track backbar product inventory is shown below:

1. Add a ticket.
2. When it asks for which client this ticket is for, click the **Backbar** button on the **Find Client** screen.
3. Enter all backbar products that you wish to remove from inventory in the **ID** field. Because backbar was selected for the client, Salon Iris will change the price to $0.
4. Close the ticket.
5. The items will be taken out of inventory.

6. Backbar is accounted for as **General Ledger** payments made to suppliers on your **Profit and Loss** report.
7. If you wish to run a report to see how much your store has used in backbar products, perform the following steps:
    a. Go to the **Reports** drop-down menu.
    b. Select **More Reports**, and then select **Products**.
    c. Select **Backbar Product Usage - Grouped by Category**, Report #94.
    d. Select the range of dates.
    e. Click **OK**.
    f. Report #94 allows you to view the total quantity and wholesale price of backbar products used.
8. You can also search for the **"Back Bar"** client to view a total spent on backbar items and all products that were taken out of inventory and used for backbar.

Barcode and Printing Overview

Barcode Scanner: when purchasing a barcode scanner, you should purchase a USB barcode scanner. They are easy to install and use.

You can use a barcode scanner to enter product IDs when adding products to inventory and when adding products to tickets. For more information on editing tickets, see the **Tickets Overview** section.

Salon Iris carries a barcode scanner for purchase, and they are carried at many retail hardware distributors. You can check our website for more information: http://www.SalonIris.com/hardwarepricing.aspx.

Printing Product Labels: Salon Iris can print labels for your products using your printer and gum label sheets. Optionally, these labels may contain barcode symbols for use with products that do not have pre-existing barcode labels.

1. Click the **Print Barcode Labels** button/icon or select **Print Barcode Labels** from the **Product and Services** drop-down menu.
2. The **Select Labels to Print** screen will appear.
3. Your products will appear in the **List of Items** section.
4. Highlight a product and click **Add Selected Items** for products you wish to print barcodes for.
5. Enter the quantity of barcode labels to print in the **Quantity to Print** column.
6. Click the **Next** button.
7. Select the type and size of label you want the barcode labels printed on in the **Select Type of Label to Use** section.
8. Select the bar code style In the **Barcode Type** section. It is recommended to keep the setting on **Code 128 Auto**.
9. Optionally, type in a message to include on the labels in the **Message** section.
10. In the **Other Items to Include** section, select which items you wish to include on the labels: Bar code symbol, ID, Description, and/or Price.
11. Click the **Print** button.
12. The **Information** screen will appear.
13. If you click the **Print** button on the **Information** screen, it will print out the following note: "If your

labels do not print properly, you can adjust all margins and spacing by pressing the **Edit Label** button on the previous screen." The size of the barcode symbol can also be edited on this screen.

14. Click **OK** to print your labels.

In the **Search** section, you can select to display services also. Labels can be printed for services. Some businesses find it useful to print single sheets containing ID's and/or barcode symbols for their services that they can keep near the register to speed up creating tickets.

Editing a Gum Label: editing the format of gum labels is available any time you print them. You may also modify and/or add to the list of available label formats. You can modify labels after performing **Step 7** in the above steps for **Printing Product Labels**.

1. Click the **Edit Label** button In the **Select Type of Label to Use** section.
2. The **Edit Label** screen will appear.
3. Make the appropriate changes to the label settings.
4. Click **Select** next to the **Printer Name** field to select a specialized printer if needed.
5. Click the **Generate Test Document** button to view the changes that you have made.
6. Click **OK** to return to the **Print Labels** screen.

Printing to a Dymo Label Printer: when printing Dymo labels that are one inch high, make sure the **Paper Size** option in the Dymo printer driver is set to a label that is one inch high. The default is 30252, which is 1" high by 2 1/8" wide.

1. Open the **Devices and Printers** on your Windows desktop.
2. Right-click on the Dymo printer and select **Properties**.
3. Click the **Printing Preferences** button.
4. Click the **Advanced** button.
5. You will now see the **Paper Size** option.
6. Select **30332 1 in x 1 in**.

Inventory Overview

Salon Iris tracks your inventory. You can count your current inventory in three different ways:

1. **By Hand**: you can manually count your inventory and adjust the quantity in stock on the **Products** screen.
2. **With a Barcode Scanner**: you can use your barcode scanner to count products. The products that are scanned will be automatically added to your current inventory count.
3. **With a Data Collector**: you can use a wireless data collector to scan in products. The products that are scanned can be automatically added to your current inventory count OR your entire inventory counts can be overwritten. The advantage of using a data collector over a barcode scanner is that the data collector allows you to take all data remotely and upload it into Salon Iris. A barcode scanner requires you to be on a Salon Iris screen while counting inventory.

Updating your inventory will not create or keep a history of previous inventory totals for loss or shrink data. It is best to save the inventory totals before doing an inventory count, and compare the totals after the inventory is updated.

Counting Inventory by Hand

1. Click the **Products** button/icon or select **Edit Products** from the **Products and Services** drop-down menu.
2. From the **Products** screen, print a list of current product quantities.
3. Manually count your store inventory and compare the inventory counts to the printed list.
4. Make the quantity adjustments in Salon Iris from the **Edit Product** screen.

Counting Inventory Using a Barcode Scanner

1. Select **Update Inventory with Barcode Scanner** from the **Products and Services** drop-down menu.
2. The **Barcode Inventory Update** screen will appear.
3. Take the mouse and click in the **ID** column.
4. Scan in the product using the barcode scanner.
5. Enter the quantity.
6. Click **OK**.
7. Repeat **Steps 3-6** for each product.
8. You can print barcode labels for your new products before updating your inventory counts. Simply click the **Print Barcode Labels** button and Salon Iris will automatically know the quantity of labels to print for the items just scanned.
9. Click the **Update Inventory** button when finished scanning.

Counting Inventory with a Data Collector: You can purchase a wireless data collector and use it to count your inventory. The quantity of products scanned can be added to the existing Salon Iris database inventory or you can overwrite existing inventory counts.

1. Turn the data collector on by pressing the orange **ON** button located in the lower right-hand corner of the data collector.
2. Remove the data collector from its stand.
3. Press the **ESC** key if necessary until the main menu appears.
4. There should be three options:
    - **Collect Data**: collects the scanned data
    - **Upload Data**: upload the scanned data to Salon Iris
    - **Utilities**: other features on the data collector
5. Press **1** for the **Collect Data** option.
6. Press the large yellow button located in the center of the data collector and scan your first product. You should see a red light appear while scanning.
7. If desired, change the **Qty** (Quantity) of product by typing in the amount and then pressing the **Return** button. The **Return** button is yellow and has a sideways arrow on it.
8. Repeat **Step 6** and **Step 7** until all products are scanned.
9. Press the **ESC** button until you are at the menu that shows the following three options:
    - **Collect Data**
    - **Upload Data**
    - **Utilities**
10. Press **2** for **Upload Data** and return the data collector to its base. Be sure it is placed firmly on its base and is properly connected.

11. Select **Acquire Inventory From Data Collector** from the Salon Iris **Products and Services** drop-down menu.
12. The **Data Collector** screen will appear.
13. Select the **COM Port**, i.e. COM1 or COM2, that your data collector is plugged into.
14. Click **Add Inventory** to add the counted inventory to your existing inventory.
15. Click **Re-inventory** if you would like to replace your existing inventory with the information recorded in the data collector.
16. Click the **Receive From Data Collector** button.
17. Your business' current stock count, quantity counted with the data collector, and discrepancy will appear. The **Discrepancy** column shows the current stock count minus the quantity just counted with the data collector.
18. Make any desired changes and click the **Update Inventory** button.
19. After your inventory is updated, it is a good idea to delete any product counts in the data collector. Simply Press **1** to delete all data. This will avoid any double counting of inventory in the future.

Suppliers Overview

The **Suppliers** screen facilitates tracking of suppliers transactions. You can add, edit, print, and associate products with suppliers that you enter on the **Suppliers** screen. To access the **Suppliers** screen, select **Edit Suppliers** from the **Products and Services** drop-down menu.

Adding or Editing a Supplier

1. Click the **Add Supplier** button, or highlight the supplier to edit and click the **Edit Supplier** button.
2. The **Add Supplier/Edit Supplier** screen will appear.
3. Enter the supplier's information: name, address, phone number, products supplied, e-mail address, etc.
4. In the **Comments and Notes** section, you may optionally enter in the currency amount that you have spent with this particular supplier.
5. You can click the **History and Other Notes** button to enter the dates of orders, what was ordered, and the status of the order.
6. Optionally, enter information in the **Print on check as** field. This information is for the **To** section when creating a check for a supplier.
7. Click **Save** to exit back to the **Suppliers** screen, or **Save and Add Another** to continue adding suppliers.

Deleting a Supplier

1. Click to highlight a supplier.
2. Click the **Delete Supplier** button.
3. The **Are You Sure?** screen will appear.
4. Click **Yes** to permanently delete the supplier from the database.

Viewing and Editing Supplier History: you can record any type of text you wish regarding supplier history and information.

1. Click to highlight a supplier.

2. Click the **Edit Supplier** button.
3. The **Edit Supplier** screen will appear.
4. Click the **History and Other Notes** button located at the bottom of the **Edit Supplier** screen.
5. The **Supplier History** screen will appear.
6. To add supplier history, type the information on the screen.
7. Click **Print** to print the supplier history.
8. Click **OK** to exit the **Supplier History** screen.

Printing Suppliers

1. You can sort and customize the list of suppliers to include certain fields.
    a. Click **Customize View** in the left-hand column.
    b. Use the **Add** and **Remove**, and the **Move Up** and **Move Down** buttons as needed to make the desired changes to the **Selected** section.
    c. Click the **OK** button to return to the **Suppliers** screen.
2. Click on the column headings, i.e. **Name**, to alphabetically sort by that column.
3. Click the **Print List** button.
4. The **Print Options** screen will appear.
5. Select the printer and page range options.
6. Click **Print**.

Ordering Overview

Salon Iris can help you manage your product ordering by keeping an organized list of all the products that need to be ordered, as well as providing you with purchase orders that can be e-mailed, faxed, or mailed directly to your suppliers. Once a purchase order is created and saved, it can be found by selecting **Edit Purchase Orders** from the **Accounting** drop-down menu.

To access the **Product Ordering** screen click the **Ordering** button/icon or select **Product Ordering** from the **Products and Services** drop-down menu.

1. Click the **Products** button/icon or select **Edit Products** from the **Products and Services** drop-down menu.
2. Double-click the product to order, or highlight the product and click the **Edit Product** button.
3. Click the **Ordering** tab.
4. Click the **Order this Product Now** button.
5. The **Add Purchase Order** window will open. Once completed, submit to **Supplier** for order fulfillment.

Setting Products For Auto Reordering: automatically add products to the **Products the Need to be Ordered** list when they reach a certain stock level.

1. Click the **Product** button/icon or select **Edit Products** from the **Products and Services** drop-down menu.
2. Either double-click on the product, or highlight the product and click the **Edit Product** button.
3. Click the **Ordering** tab.
4. Check the **Auto Reorder** box. This product will be added to the reorder list when the quantity in stock is equal to or less than the reorder point.

5. Enter the product **Reorder Point**.
6. Enter the **Reorder Quantity**, or the number of products to order.
7. Optionally check the **Hold Order Until** box to not reorder products until a certain date.
8. Click **Save** when finished.

When your product count falls below the reorder point entered in **Step 5**, you will receive a pop-up message if the **Pop-up Product Reordering** option is enabled, and the product will be automatically added to the **Products that Need to be Ordered** list.

Pop-Up Product Reordering Options: an pop-up message can be set to appear when one or more products need to be reordered. You can click the top of the pop-up reordering reminder window and drag it to keep it from disappearing.

1. Select **Pop-Up Reorder Options** from the **Tools** drop-down menu.
2. Select the notification options you prefer.
    - **Every time a ticket is closed**: displays the pop-up reorder reminder every time a ticket is closed
    - **Every |___| hours**: displays the pop-up reorder reminder at a selected hourly interval
    - **Once a day**: only displays the pop-up reorder reminder once per day
    - **Do not show pop-up reorder reminder**: disables the pop-up reorder reminder
3. Click **OK**.

Ordering Products

1. Click the **Ordering** button/icon or select **Product Ordering** from the **Products and Services** drop-down menu.
2. In the **Display** section, select **Products that need to be ordered**. Inactive products will not appear on the **Ordering** screen.
3. A list of products that need to be ordered will appear. Any product from this list can be added to a purchase order, or PO. If you wish to take a product off the **Ordering** screen, uncheck the **Auto Reorder** box on that product.
4. Highlight the items to add to the purchase order and click the **Order Items** button, or double-click on a product that you would like to place on order. To put several products on the same purchase order, click to highlight all items that need to be ordered by clicking the left mouse button while holding the **Ctrl** key, then press the **Order Items** button. A purchase order with all items that you have highlighted will be created.
5. The **Add Purchase Order** screen will appear.
6. The description, size, make, category, wholesale price, and quantity ordered will automatically populate.
7. The quantity ordered is calculated by adding the reorder quantity plus the reorder point minus the stock count.
8. Select the supplier from the drop-down list in the **Supplier Information** section.
9. Leave the status as **Open**.
10. Optionally set a **Date due** date.
11. Click the **Save** button and the product will be shown as being put on order.
12. You will be returned to the **Ordering** screen.
13. In the **Show** field, you can select from the following choices to view the status of your product

ordering:

- **Products that need to be ordered**: products that need to be ordered
- **Products on order**: products that have been added to purchase orders
    - **All orders**: all purchase orders
    - **Orders in process**: products that have been added to purchase orders but not received
    - **Complete orders**: products that have been added to purchase orders that have been received
    - **Incomplete orders**: products that have been added to purchase orders, but only some have been received

10. To physically place the order after the purchase order has been saved, you should call, fax, or e-mail the supplier the purchase order. You can e-mail a purchase order to a supplier from the **Purchase Orders** screen.
11. Click the **POs** button or select **Edit Purchase Orders** from the **Accounting** drop-down menu.
12. Highlight the purchase order to e-mail.
13. Click the **E-mail PO** button.

Printing Products on Order

1. Go to the **Product Ordering** screen.
2. Make the appropriate products on order selection in the **Display** section.
3. Click the **Customize View** button on the left to add or remove columns as desired.
4. You can use the **Add**, **Remove**, and **Move Up** and **Move Down** buttons to customize the information to view.
5. Click **OK** to return to the **Product Ordering** screen.
6. Sort to the desired display by clicking a column heading, such as **Product ID**.
7. Click the **Print List** button.
8. The **Print Options** window will appear.
9. Make the appropriate print option selections and click **Print**.

Receiving Ordered Products

1. Go to the **Product Ordering** screen.
2. Select **Products on order** in the **Show** field.
3. Select **Orders in process**.
4. Double-click on the purchase order with the products you received.
5. The **Edit Purchase Order** screen will appear.
6. Enter the quantity of the product received in the **Qty Received** column.
7. Edit any fields that may have changed, i.e. you can edit the shipping and wholesale prices if they have changed.
8. If the quantity received is greater to or equal to the quantity ordered, the **Status** column will be changed to **Complete**.
9. Change the PO **Status** to **Closed**.
10. Optionally select a **Date closed** date.
11. If the quantity received is less than the quantity ordered, the **Status** column will be listed as **Incomplete**, and the purchase order status should remain **Open**.

12. Click the **This PO has been paid** box if this purchase order has been paid for already.
13. Click the **Add items to general ledger** box if you would like to add these items to the general ledger.
14. Click the **Save** button.
15. Your stock count will automatically update and the quantity received will add to the current quantity in stock.
16. If you selected **Add items to general ledger** the **Edit Ledger Entry** screen will appear.
17. Fill out the information and click **Save**. See the **General Ledger Overview** section for more information on ledger entries.

If you have numerous products on the purchase order and you wish to mark them all as being received, simply click the **Mark All Received** button and save the purchase order as you normally would.

To easily print your own barcode labels for the products on the purchase order, click the **Print Labels** button to go to the **Print Barcode Labels** screen.

Purchase Orders Overview

You have the ability to create, edit, delete, print, and e-mail purchase orders. A purchase order, or PO, is a commercial document used to request someone to supply something in return for payment. PO's are typically sent to suppliers when ordering products.

The **PO** screen can be accessed by clicking the **POs** button/icon, or by selecting **Edit Purchase Orders** from the **Accounting** drop-down menu.

Purchase Orders can be organized according to status, date, or supplier name.

Adding or Editing a Purchase Order: purchase orders are also added when the product is put on order from the **Ordering** screen.

1. Click the **Add PO** button, or highlight the PO to edit and click the **Edit PO** button.
2. The **Add Purchase Order/Edit Purchase Order** screen will appear.
3. Select the date created in the **Date created** field. The current date will appear by default.
4. Optionally select a **Date due**.
5. Select the **Status** as one of the following:
    - **Open**: the PO is still open and you are awaiting receipt of products on the PO or you need to pay the supplier
    - **Closed**: once items are received and you have made the payment to the supplier the PO is considered closed. You can optionally check the **Add items to the General Ledger** box if you would like to add the items on the PO to the General Ledger
6. Type in the product ID in the **ID** column. If you want to search for the ID in the **ID** column, double-click the space, select your product from the list, and click **OK**.
7. After selecting a product ID, the following columns will automatically populate: **Description**, **Make**, **Size**, **Category**, and **Wholesale Price**. These columns' values are based on what you have entered from the **Products** screen.
8. Enter the quantity you would like to order in the **QTY Ordered** column.
9. Repeat **Steps 6-8** for each item to add to the PO.
10. Enter the shipping cost.

11. Select the supplier that the PO is going to in the **Supplier Information** section. If the supplier has already been added to the database, the appropriate fields will populate when the supplier is selected. You can add a new supplier by clicking the **Add Supplier** button.
12. Click the **Save** button.
13. To physically place the order with the supplier, you can now e-mail, fax, or call the supplier with the purchase order.

Deleting a Purchase Order: if a purchase order is deleted and products are set for auto-reordering, the deleted products will be added back to the **Products that need to be ordered** list.

1. Use the **Search by Status** and **Date Range** sections to display the appropriate POs. It is ok to leave those sections set at **All**.
2. Highlight the appropriate PO.
3. Click the **Delete PO** button.
4. The **Are You Sure?** screen will appear.
5. Verify your selection and click **Yes** to permanently delete the PO from the database.

E-mailing a Purchase Order:

1. Highlight the appropriate PO to e-mail.
2. Click the **E-mail PO** button.
3. The **E-mail** screen will appear.
4. Most of the fields will be auto-populated based on the supplier entry. Enter the following information if any fields are missing:
    - **Name**: your contact at the supplier
    - **E-mail**: the contact e-mail address
    - **Subject**: the subject matter of the e-mail
    - **E-mail To Body**: the body of the e-mail
    - **E-mail From Body**: if you wish to include any message in the 'From' section of the purchase order
5. Click **Send** to send the purchase order via e-mail.
6. Click **OK**.

Printing Purchase Orders: before printing a purchase order, the print format must be set up.

1. Click the **Print Setup** button.
2. The **Purchase Order Print Setup** screen will appear.
3. Modify the following information to suit your needs:
    - **From**: this field should contain your business information
    - **Comment**: any other comments you would like to include
    - **Graphic file**: if you would like to print a graphic on the purchase order, i.e. a company logo, click the **Select** button to choose the fill from your computer.
    - **Top**: graphic's distance from the top of the PO
    - **Left**: graphic's distance from the left side of the PO
    - **Height**: graphic's height
    - **Width**: graphic's width
4. Click **OK**.

There are two ways to print an existing purchase order or purchase orders.

1. **Individual PO**
   a. Click to highlight the purchase order.
   b. Click the **Print Single PO** button.
   c. The **Printing Options** screen will appear.
   d. Make the appropriate printer and page selections and click the **Print** button.
2. **PO List**
   a. Click the **Customize View** button.
   b. Use the **Add** and **Remove**, and the **Move Up** and **Move Down** buttons to organize the **Display** column.
   c. Click **OK** to return to the **Purchase Orders** screen.
   d. Click on a column heading to organize the list as desired.
   e. Click the **Print List** button.
   f. The **Printing Options** screen will appear.
   g. Make the appropriate printer and page selections and click the **Print** button.

Clients

keeping track of client information

Clients Overview

Maintain a record of your clients, including their previous visits to your business, purchases, history, notes, and photographs. Client information can be reviewed and printed to support appointments, and it can be used to tailor marketing campaigns to meet specific needs.

To access the **Clients** screen, click the **Clients** button/icon or select **Edit Clients** from the **Clients** drop-down menu.

When adding or editing a client, the **Add Client/Edit Client** screen is divided into seven main tabs:

1. **Contact Information**: address, phone number, e-mail address, birthday, anniversary, and other details.
2. **History**: client notes, visit and no show history, preferred employee, pre-paid balances, and many other details.
3. **Balance and Loyalty Points**: client credit balance, and current loyalty points earned.
4. **Document Tracking**: the completion status of required documents, and linked customer specific documents.
5. **Marketing**: how your clients find you.
6. **Pictures and Other**: store pictures, create a pop-up alert notifications, set a default discount, and store family information.

There are three client information buttons available at the bottom of each tab:

1. **Formula History**: this button brings up a detailed formula history screen.
2. **Purchase History**: this button is not available until after you first save the client to the database. This button brings up detailed purchase and appointment history screen. It is divided into seven tabs:
   a. **Upcoming Appointments**: all upcoming appointments.
   b. **Previous Products**: a list of previous product purchases.
   c. **Previous Services**: a list of previous service purchases.
   d. **Previous Other**: a list of other transactions, such as gift certificates, returns, etc.
   e. **No Shows**: a list of appointments that the client never showed up for.
   f. **Canceled**: a list of appointments the client canceled.
   g. **Voided**: voided tickets that the client is listed on.
3. **Pre-Paid Service**: brings up a screen detailing the client's pre-paid services.

Adding or Editing a Client

1. Click the **Add Client** button, or highlight the client to be edited and click the **Edit Client** button.
2. The **Add Client/Edit Client** screen will appear.
3. If it's a new client, a **Client ID** will be automatically assigned.
4. Enter the appropriate information in the various tabs.
5. Click the **Save** button.

Deleting a Client

NOTE: Once a client has been associated with a ticket, that client can no longer be deleted from the database.

1. Click to highlight the client to be deleted.
2. Click the **Delete Client** button.
3. Click the **Yes** button to permanently delete the client from the database.

Searching for Clients: there are two ways to search for clients

1. **Clients** button/icon: search for a client or list of clients based on a number of different search filters. All clients that meet the search criteria appear in the **Clients Table**.
   a. Click the **Clients** button/icon or select **Edit Clients** from the **Clients** drop-down menu.
   b. Type any client information in the search field to search the client list.
   c. Alternatively, click the **Advanced Search** button to perform a more refined search.
      - **Client ID**: narrow results by Client ID
      - **First name**: narrow results by first name
      - **Last name**: narrow results by last name
      - **City**: narrow results by city
      - **E-mail**: narrow results by e-mail
      - **Phone number**: narrow results by phone number
      - **Category/class**: narrow results by client category or class
      - **Referral type**: narrow results by referral type
      - **Show only active clients**: include only clients marked as active
      - **Only clients with pictures**: include only clients with pictures in search
      - **Last visit**: include only clients with a last visit on, before, or after a specified date
   d. Enter information about the client as needed to define the search, i.e. entering "Mary" as a **First name** will produce a list of all clients named "Mary"; entering a **First name** of "M" and a **Last name** of "Jones" will produce a list of all clients with the last name "Jones" and a first name beginning with "M".
   e. Leaving a field or fields blank causes the search to ignore that subject as a criterion.
   f. To return to the full clients list, click **Clear Search**.
2. **Client Info** button/icon: search for a single client according to name, or partial name, and phone number to view his or her information. The **Client Info** button/icon is useful for locating and reviewing information for a specific client. Since a photograph of the client can be included in Client Information, this feature can also be used to confirm the identity of a client.
   a. Click the **Client Info** button/icon or select **View Client Information** from the **Clients** drop-down menu.
   b. The **Find Client** screen will appear.
   c. Use the search options to find the client.
   d. Click **OK**.
   e. This screen will show a complete current history of the client.
   f. Click **OK** when finished viewing the information.

Client ID Card: you can track each customer by his or her driver's license, or with another ID card. This allows for easy searching for a client's information.

1. Add or edit a client for whom you wish to store a Client ID card.
2. The **Client Information** screen will appear.

3. On the **Contact Information** tab, next to the **Drivers Lic or ID Card** field, click the **Scan** button.
4. Swipe the license or ID card through your magnetic stripe reader, or scan the ID card with a barcode scanner.
5. Click **Save**.

Once you store a client's ID card information, you can look up the client up by clicking the **Client Info** button/icon or when adding a ticket on the **Find Client** screen. Click the **Card** button and swipe or scan the card to bring up the client information.

Merging Clients: you can merge two clients that have the same or similar information.

1. Select **Merge Clients** from the **Clients** drop-down menu.
2. Click the **Select Client 'A'** button to select the first client.
3. The **Find Client** screen will appear.
4. Use the search options to find the client and click **OK**.
5. Click the **Select Client 'B'** button to select the second client.
6. Repeat **Steps 3-4**.
7. Information that is different between **Client A** and **Client B** will be highlighted in red.
8. For items in red, you must select the appropriate information between **Client A** or **Client B**. Once the selection is made, the information selected will turn from red to yellow. Yellow boxes indicate the information used when the clients are merged. All information in boxes that are not yellow will be discarded when the two clients are merged.
9. Click the **Merge** button and click **OK**.

Printing a List of Client Information

1. Click the **Customize View** button on the left to add or remove columns as desired.
2. You can use the **Add**, **Remove**, and **Move Up** and **Move Down** buttons to customize the information to view.
3. Click **OK** to return to the **Clients** screen.
4. You can limit the information to print using the **Search** and/or **Status** sections.
5. Sort to the desired display by clicking a column heading, such as **Client ID**.
6. Click the **Print List** button.
7. The **Printing Options** screen will appear.
8. Make your printer and page selections and click **Print**.

Clients - Contact Information Tab

1. Click the **Contact Information** tab.
2. Enter the appropriate information in each field:
    a. **General**
        i. **Client ID**: auto-populates. Click the **Change ID** button to assign a different ID.
        ii. **First name**: client's first name.
        iii. **Last name**: client's last name.
        iv. **This client is inactive**: check this box if the client is no longer active.
    b. **Phone**

   i. **Home**: client's home phone number.
   ii. **Work**: client's work phone number.
   iii. **Mobile**: client's mobile phone number.
   iv. **Auto Format**: check this box to have phone numbers auto format after entering the numbers in. Click the **Format** button to change the auto format style.
   v. **Set as Primary Number**: check the box for the primary contact number.

c. **Address**
   i. **Address**: client's address. Click the **Show Address Line 2** button to add a second address line for P.O. Box or Apartment information.
   ii. **ZIP**: client's postal code.
   iii. **City**: client's city.
   iv. **State**: client's state.
   v. **Determine city and state based on ZIP**: check this box to have the **City** and **State** fields auto-populate after entering the **ZIP**.

d. **Miscellaneous**
   i. **Gender**: client's gender.
   ii. **Title**: client's title. Click the **Edit** button to customize the **Title** list.
   iii. **Occupation**: client's occupation. Click the **Edit** button to customize the **Occupation** list.
   iv. **Birthday**: click **Select** to enter the client's birthday. Click the **Show Year** button to include the birth year. Click **Clear** to remove the birthday information.
   v. **Anniversary**: click **Select** to enter the client's anniversary. Click the **Show Year** button to add the year they were married. Click **Clear** to remove the anniversary information.

e. **Reference**
   i. **E-mail**: client's e-mail address. Click the **E-mail** button to the right of the field to e-mail the client directly through Salon Iris.
   ii. **SMS text number**: client's SMS text number. This will be the client's mobile phone number with area code and the SMS gateway, i.e. @txt.att.net.
   iii. **Driver's license or ID card**: add an ID card for ease of client look up.
   iv. **Category and class**: add any number of client categories and classes. Click the **Edit** button to set the categories list.
   v. **File link**: Salon Iris will link to a file from your computer to the client. Click the **Select** button next to the **File link** field, select the file off your computer and click **Open** to save the file to the client. Click the **Open** button next to **Select** to view the file.
   vi. **Comment**: add a comment about the comment, i.e. Frequently late for appointments, etc.
   vii. **Show comment when creating or editing a ticket**: check the box to show the client comment when creating or editing tickets.

f. **Contact Options**
   i. **Do not send promotional e-mails to this client**: client will be excluded when generating e-mail marketing campaigns.
   ii. **Do not send postal mail to this client**: client will be excluded when generating postal mail marketing campaigns.
   iii. **Do not call this client by phone**: check this box if the client requests not to be called.
   iv. Send appointment reminders to: **E-mail address**: check this box to send automatic

appointment reminders to the client's e-mail address.

v. Send appointment reminders to: **SMS address**: check this box to send automatic appointment reminders to the client's SMS text address.

vi. **Primary contact**: check this box if the client is the primary contact for a family unit.

3. Click **Save** to return to the **Clients** screen.

Clients - History Tab

1. Click the **History** tab.
2. The history information is divided into six sections:
   a. **Totals**: the total amount (including sales tax) that the client has spent.
   b. **Visit History**: shows the date of the first and last visits, and the total number of client visits.
   c. **First Employee to See Client**: the first employee to service the client. Click **Select** to choose a different employee than the one shown.
   d. **Last Employee to See Client**: the last employee to service the client. Click **Select** to choose a different employee than the one shown.
   e. **Preferred Employee**: set an employee that the client prefers for services. Click **Select** to choose the preferred employee.
   f. **No Show**: if the client was a no show for the last scheduled appointment, this box will be checked. A risk factor is listed calculated on the number of scheduled appointments vs. no shows. Click the **View No Show Report** button to view a list of recent no shows.
3. Click **Save** to return to the **Clients** screen.

Clients - Balance and Loyalty Points Tab

1. Click the **Balance and Loyalty Points** tab.
2. The tab is divided into two sections:
   a. **Balance**: view the balance the client owes, if any, or the business owes the client, along with an explanation of what is owed. Balances are tracked automatically when a ticket affecting the client's balance is closed. You can click the **View Balance History** button to view all credits/debits applied to the client's account. You can make manual adjustments to the client's balance if needed.
      i. Choose to make the adjustment to the client's balance from the following buttons:
         - **Set to Exact Value**: set a client's balance to an exact amount
         - **Adjust by Adding Credit**: add to the client's credit, or remove the amount of money a client owes the business
         - **Adjust by Removing Credit**: reduce the client's credit, or add to the amount of money a client owes the business
      ii. After clicking one of the above buttons, enter the proper numerical amount.
      iii. Click **OK** to return to the **Balance and Loyalty Points** tab.
   b. **Loyalty Points**: view the current loyalty points balance of the client. Loyalty points are tracked automatically when a ticket affecting the client's balance is closed, but they need to be actively utilized before they can be tracked. See the **Marketing Chapter** for more information on how

loyalty points are used. You can click the **View Loyalty Point History** button to view how the loyalty points have been earned and used. You can make manual adjustments to the client's balance if needed.

i. Choose to make the adjustment to the client's loyalty points from the following buttons:
    - **Set to Exact Value**: set a client's loyalty points to an exact amount
    - **Increase Points**: add to the total number of loyalty points
    - **Decrease Points**: reduce the total number of loyalty points

ii. After clicking one of the above buttons, enter the proper numerical amount.

iii. Click **OK** to return to the **Balance and Loyalty Points** tab.

3. Click **Save** to return to the **Clients** screen.

Clients - Document Tracking Tab

1. Click the **Document Tracking** tab.
2. There are two options for tracking customer documents and information:
    a. **Generic Document Information**: track the completion status of any generic document that has already been entered; see the **Options Overview** section for more information on adding generic client documents.
        i. The name(s) of the document(s) that you can track the completion status for will be listed under every client. Highlight the document and click the **Edit Status** button.
        ii. The **Edit Document Status** screen will appear.
        iii. Choose one of the following selections from the **Current Status** drop-down list:
            - **Incomplete**: not started
            - **Complete**: finished
            - **Pending**: awaiting approval
            - **In Process**: started but not finished
            - **Unknown**: no known status
        iv. You can change or add status options with the **Edit** button next to the **Current Status** field.
        v. Beneath the **Current Status** field, you can track up to four records of past histories for this document, i.e. you can enter in a status of **Pending** for 3/1/11 and **In Process** for 4/1/11.
        vi. Repeat **Steps i-iii** for each generic document.
        vii. Click the **OK** button to return to the **Document Tracking** tab.
    b. **Unique Document Information**: documents unique to the specific client. Link complete folders, and specific documents that can be opened directly through Salon Iris. You can set an unlimited number of unique documents that can be assigned to each client in the **Unique Document Information** section.
        i. To link a folder directly to the client, click the **Select** button next to **Folder Location**.
        ii. Locate the appropriate folder on your computer and click **OK**.
        iii. Click the **Add Document** button to add a specific document.
        iv. The **Add Document** screen will appear.
        v. Type in the document name, i.e. Service Agreement or Legal Disclaimer.
        vi. Select the document type from the drop-down list.
        vii. Click the **Edit** button to create a type that's not currently listed.

viii. Click the **Select** button to select the document off of your computer and click **Open**.
ix. Click **OK** when finished to return to the **Document Tracking Options** screen.
x. Repeat **Steps iii-ix** for each unique document to add.
xi. To remove or edit a document, highlight the desired document and click the **Edit Document** button or the **Remove Document** button.
xii. Click **Open Document** to open the document from Salon Iris. You must already have a program capable of opening the linked file type.
xiii. Click the **Edit Status** button to change the completion status of the unique document if desired.

3. Click **Save** to return to the **Clients** screen.

Clients - Tanning Tab

The client's tanning minutes information is automatically updated when a ticket is closed that features a service or product that increases or decreases the tanning minutes balance. Tanning can be any service that is provided on a minutes to minutes basis. Both tanning and minutes can be changed to better suit the needs of your business. Tanning minutes can be manually adjusted if needed.

1. Click the **Tanning** tab.
2. Manually change the Minutes balance to a number of your choosing by clicking in the **Balance** field and entering a number.
3. Adjust the number in single steps using the arrows next to the **Balance** field.
4. Use the **Adjust** button to adjust the balance by a defined number: positive adds minutes, and negative subtracts minutes.
5. Use the **Clear** button to reduce the minutes to zero.
6. Click **Save** to return to the **Clients** screen.

Clients - Marketing Tab

1. Click the **Marketing** tab.
2. The **Marketing** tab allows you to track how new clients are referred to your business in two ways:
   a. **Client Referral**: if the new client was referred by a current client.
      i. Click the **Select** button to select the client that referred this client to your business.
      ii. Select the appropriate client from the list and click **OK**.
      iii. Check the **The above client has received credit for referring this client.** box if the referring client has already received credit. If not, leave this box unchecked. Report #58 (Client Referrals - Not Credited) can be run later to check for referrals not credited.
   b. **Marketing Referral**: if the new client was referred to your business by some other means.
      i. Select how the client heard about your business from the list of **Referral Types**.
      ii. Use the **Edit** button to customize your list of **Referral Types**.
      iii. Click the **Add** button for each type of marketing referral that you would like to appear.
      iv. Click **OK** when finished to return to the **Marketing** tab.
3. Click **Save** to return to the **Clients** screen.

Clients - Pictures and Other Tab

1. Click the **Pictures and Other** tab.
2. The **Pictures and Other** tab is divided into six sections:
    a. **Pictures**: manage client photos.
        i. Click the **Manage Pictures** button.
        ii. The **Picture Manager** screen will appear.
        iii. Pictures can be imported from the computer, a camera, or a scanner.
        iv. Organize your pictures by type and category, and filter by date.
        v. For more information on picture management, see the **Pictures Overview** section.
        vi. Click **Close** to return to the **Pictures and Other** tab.
    b. **Reminders**: manage specific client reminders.
        i. Click **Add Reminder** to add a reminder to the client.
        ii. The **Add Reminder** screen will appear.
        iii. Enter the pertinent information regarding the reminder.
        iv. For more information on reminders, see the **Reminders Overview** section in the **Employees and Scheduling** chapter.
        v. Click **OK** to return to the **Pictures and Other** tab.
        vi. Click **View Reminders** to see all the reminders associated with this specific client.
        vii. Click **OK** to return to the **Pictures and Other** tab.
    c. **Secure Information**: encrypt important client information.
        i. Click the **Edit Secure Information** button.
        ii. The **Encrypted Client Information** screen will appear.
        iii. Enter the secure client information. This information is encrypted in the database.
        iv. Optionally add a date stamp by clicking the **Insert Date Stamp** button.
        v. Click **OK** to return to the **Pictures and Other** tab.
    d. **Default Discount**: set standard service and product discounts specific to this client. This can be used for clients that are members, premium clients, etc.
    e. **Family**: set spouse and children names for quick reference.
    f. **Pop-Up Alert**: enter alerts that will pop-up every time the client is added to a ticket, or a ticket with the client is edited. The pop-up alerts can be used for medical alerts, or any other pertinent information connected to the client.
3. Click **Save** to return to the **Clients** screen.

Client Balances and Tanning Minutes Overview

Client Balances: Each client can have an associated balance with the business, either an amount due or an amount of credit. There are three ways to adjust a client's balance.

1. **Adjusting Balances with Products and Services**: when a product or service is purchased the client's balance can be updated if that product or service has been set up to make adjustments to the balance. See the **Products Overview** or the **Services Overview** sections for more information. The balance will be updated when the ticket containing the product or service is closed.

   a. Create a product or service with the appropriate balance selection.
   b. Select **Add New Ticket** from the **Tickets** drop-down menu. See the **Tickets Overview** section in the **Appointment Book** chapter for more instructions on creating tickets.
   c. Select the client that requires a balance adjustment.
   d. Enter the appropriate product or service that uses the balance updating feature.
   e. Enter in the remaining information on the ticket and close it.
   f. When the ticket is closed, the adjustment to the balance will be added to the client's record.
2. **Special Button**: from the **Tickets** screen you can add credit to a client's balance, use a client's available credit, and add the amount due to the client's balance with the **Special** button.
   a. **Adding Credit with the Special Button**: adding credit to a client's balance is useful if the client is putting a down payment or a deposit on a procedure or service that your business offers. It can also be used if the client wants to pay off his or her balance. The client's added credit will appear in the **Credits Added** field of the **Totals** report.
      i. Select **Add New Ticket** from the **Tickets** drop-down menu.
      ii. Select the client's name in the **Find Client** screen.
      iii. Click the **Special** button on the **Ticket Information** screen.
      iv. Select **Client Balance**. If a booth renter is selected on the ticket as performing the service or selling the product, the **Client Balance** feature is disabled.
      v. Select **Add Additional Credit/Pay Off Balance**.
      vi. The **Enter Credit Amount** screen will appear.
      vii. Enter in the amount and click **OK**.
      viii. Close the ticket.
   b. **Using Available Credit with the Special Button**: use the current available credit to pay off a ticket's balance.
      i. Select **Add New Ticket** from the **Tickets** drop-down menu.
      ii. Enter a product or service.
      iii. Click the **Special** button.
      iv. Select **Client Balance**.
      v. Select **Use Available Credit**.
      vi. The **Enter Credit Amount** screen will appear.
      vii. Enter in the amount of credit to use and click **OK**.
      viii. The ticket will be adjusted by the appropriate amount.
      ix. Close the ticket.
   c. **Adding the Amount Due to a Client's Balance**: sometimes you may wish to add the amount from a purchase to a client's balance. This may happen if a loyal customer forgets his or her wallet. You can add the amount due to the client's balance, and the next time the client comes in he or she can pay you. The amount due that was added to the client's balance will appear in the **Credits Used** section of the **Totals** report.
      i. Select **Add New Ticket** from the **Tickets** drop-down menu.
      ii. Add a product or service.
      iii. Enter the available tender amount if any. This could be $0 or an amount due that is less than the total tender being paid.
      iv. Click the **Special** button.

v. Select **Client Balance**. If a booth renter is selected on the ticket as performing the service or selling the product, the **Client Balance** feature is disabled.
vi. Select **Close Ticket And Add Amount Due to Client's Balance**.
vii. The **Tender Less Than Total** warning will appear.
viii. Click the **Record Amount Due** button to close the ticket and add the amount due to the client's balance.

3. **Manually Adjusting Balances**: sometimes you may not want to create a ticket to adjust a client's balance. The balance can be manually changed through the client's profile on the **Balance and Loyalty** tab.
    a. Click the **Clients** button/icon or select **Edit Client** from the **Clients** drop-down menu.
    b. Double-click the client, or highlight the desired client and click **Edit Client** button.
    c. The **Client Information** screen will appear.
    d. Click the **Balance and Loyalty Points** tab to view the balance the client owes or has available.
    e. Make the manual adjustments with the following buttons:
        - **Set to Exact Value**: set the balance to an exact value
        - **Adjust by Adding Credit**: credit the client with a balance to use for later purchases
        - **Adjust by Removing Credit**: debit the client with a balance owed to the business
    f. Click **Save** to exit.

Tanning Minutes: track the number of tanning minutes for each client, as well as the total number of tanning minutes each client has purchased or used. The item and the units can be changed. For example, "minutes" can be changed to "visits", and "tanning" can be changed to any other word that describes services that your business offers. There are two ways to adjust a client's tanning minutes balance.

1. Select **Options** from the **Tools** drop-down menu.
2. Click the **Clients** tab
3. Click the **Client Options** button.
4. Change the **Item name** and the **Units**.
5. Click **OK** to save the changes.

There are two ways to track tanning minutes:

1. **Automatically with Products and Services**: you must first create a product ID or service ID to automatically update a client's tanning minutes when that item or service is sold. See the **Products Overview** or **Services Overview** sections for more details on how to do this.
    a. Select **Add New Ticket** from the **Tickets** drop-down menu.
    b. Select the client whom the tanning minutes balance is being changed for.
    c. Enter the appropriate product ID or service ID configured to automatically update a client's tanning minutes when that item is sold. If this is a feature that your business will be using, it is recommended that separate products or services be created to add and subtract specific amounts of tanning minutes. This will not only reflect in totals and sales, but it will also allow better minutes management.
    d. When the ticket is closed, the appropriate amount of tanning minutes will be added or subtracted.
2. **Manually Adjust Tanning Minutes**: Sometimes you may not want to create a ticket to adjust the minutes. Instead, you may wish to quickly access the client information and adjust the minutes.

a. Add or edit the appropriate client.
b. The **Client Information** screen will appear.
c. Click the **Tanning** tab.
d. Use the **Adjust** and **Clear Balance** buttons appropriately to change the number of tanning minutes remaining.
e. Click **Save**.

Client No Show Overview

A client is considered as a no show if he or she does not show up for his or her appointment and does not call to cancel or reschedule.

1. If a client fails to appear for a scheduled appointment, open the scheduled appointment ticket.
2. Click the **No Show** button.
3. The **Mark Ticket No Show** screen will appear.
4. Enter a comment if desired.
5. Click **OK**.
6. The ticket will be closed and the no show will be recorded in the client's history.

Viewing a Client's No Show History

1. Click the **Clients** button/icon or select **Edit Clients** from the **Clients** drop-down menu.
2. Double-click the client, or highlight the desired client and click the **Edit Client** button.
3. Click the **History** tab.
4. The total **No Shows** vs. appointments made will be displayed in red text.
5. Click the **View No Show Report** button.
6. Review the information and click **OK**.
7. Click **Save** when finished.

Run a No Show Report: generate a list of all client no shows.

1. Select **More Reports** from the **Reports** drop-down menu.
2. Select **Clients**.
3. Select **No Show Reports for All Clients** (Report #111).
4. Select the range of dates.
5. Click the **OK** button.
6. Click the **OK** button when finished.

NOTE: Once you have created a ticket associated with a pet, that pet can no longer be deleted from the database.

Pictures Manager Overview

Salon Iris allows you to take and store pictures of clients. These pictures may be recalled for reference when looking up a client and may be shown for reference when printing out an open ticket. Additionally, client "before" and "after" pictures can be taken. Your pictures are stored directly in your Salon Iris database, so you do not have to worry about making separate backups of them. You can store your photos in your database as .bmp or .jpg files.

Obtaining Pictures: pictures may be added to your database in the following ways:

1. By taking a client's picture using an image capture device, such as a camera or scanner that is connected directly to your computer.
2. By importing a client's picture from a pre-existing file.

Picture Manager: you can have multiple pictures assigned to each client using the **Picture Manager**, giving you the ability to track and manage your pictures. You can access the **Picture Manager** feature in any of the following ways:

- While editing a client, click the **Pictures and Other** tab, then click the **Manage Pictures** button.
- While on the **Ticket Information** screen, click the **Pictures** button.
- From the **Tools** drop-down menu, select **Options**, and then click the **Clients** tab.
- Select **Picture Manager** from the **Clients** drop-down menu.

There are nine major buttons on the **Picture Manager** screen:

1. **Take**: take a picture directly through Salon Iris. If your computer system has more than one capture device installed, such as a camera and a scanner, you must select the appropriate capture device before taking a picture. This procedure is rarely required after initial system setup.
   a. Make sure your device is connected to the computer.
   b. Click the **Take** button.
   c. Select your device from the Device drop-down menu.
   d. You should now see a display of your capture device.
   e. Select the picture size from the Resolution drop-down menu. A larger resolution will produce a better quality picture, but the file size will also increase.
   f. Click Take Picture.
   g. The **Add Picture** screen will appear.
   h. Select the picture type in the **Picture type** field from:
      - **General**: generic category
      - **Before Picture**: before a service is performed
      - **After Picture**: after a service is completed
   I. The category will be listed as **Default** in the **Picture category** field. Select a new category from the drop-down list, or add a new picture category.
      i. Click the **Edit** button.
      ii. The **Picture Categories** screen will appear.
      iii. Click **Add**.
      iv. Type in your category name, such as Haircut.
      v. Click **OK**.
      vi. Repeat **Steps iii-v** for each picture category to add.
      vii. Click **OK** to return to the **Add Picture** screen.
   m. Type the picture name in the **Picture name** field.
   n. If desired, check the **Make primary client picture** box, to make this the main picture for your client.
   o. Click the **Save Picture** button.

2. **Import**: allows you to import pictures that you have saved in another location.
    a. Click the **Import** button.
    b. The **Select Picture to Import** window will appear.
    c. Select the appropriate picture to import.
    d. Click **Open**.
    e. The **Add Picture** screen will appear with the imported picture.
    f. Select the **Picture type**.
    g. Select the **Picture category**.
    h. Type in a **Picture name**.
    i. Assign the picture to a ticket if desired with the **Change Ticket** button.
    j. Assign the picture to a client if desired with the **Change Client** button.
    k. Check the **Make primary client picture** box if desired.
    l. Click **Save Picture**.
3. **Edit**: allows you to edit picture settings.
    a. Select the picture to edit and click the **Edit** button.
    b. The **Edit Picture** screen will appear.
    c. Make any appropriate changes and click **Save Picture**.
4. **Delete**: allows you to delete a picture.
    a. Select the picture to delete and click the **Delete** button.
    b. The **Delete Pictures?** screen will appear.
    c. Confirm your selection and click **Yes** to permanently delete the picture from the database.
5. **Rename**: allows you to rename a picture.
    a. Select the picture to rename and click the **Rename** button.
    b. Enter the new name of the picture.
    c. Click **OK**.
6. **Enlarge**: allows you to view the picture at full size.
    a. Select the picture to enlarge and click the **Enlarge** button.
    b. Click the **Close** button to return to the **Pictures Manager** screen.
8. **Print**: allows you to print pictures. You can print a selection, all visible pictures, or all pictures.
    a. **Print Selection**: use this option to print a single picture, or many pictures of your choice.
        i. Organize your pictures to suit your printing needs using the **Filter** options.
        ii. Hold down **Ctrl** on the keyboard and select the pictures to print.
        iii. Click **Print**.
        iv. Select **Selection**.
        v. The **Printing Options** screen will appear.
        vi. Make your printer and page selections and click **Print**.
        vii. Only the pictures that you selected will print.
    b. **Print All Visible Pictures**: use this option to print specific picture categories or types.
        i. Organize your pictures to suit your printing needs using the **Filter** options.
        ii. Click **Print**.
        iii. Select **All Visible Pictures**.
        iv. The **Printing Options** screen will appear.

   v. Make your printer and page selections and click **Print**.
   vi. All visible pictures will print.
   c. **Print All Pictures**: use this option to print every picture in your database.
      i. Click **Print**.
      ii. Select **All Pictures**.
      iii. The **Printing Options** screen will appear.
      iv. Make your printer and page selections and click **Print**.
      v. Every picture stored in your database will print.
9. **Export**: allows you to export a picture one at a time to a location on your computer. This allows you to provide a client with a picture that may be taken home, i.e. if you perform a dramatic dye job, you can give the client a picture saved to a thumb drive. The client can then use that picture to e-mail to friends or use on social media sites.
   a. Select the picture to export.
   b. Click the **Export** button.
   c. Select the appropriate location to save it to.
   d. Enter a file name.
   e. Click **Save**.
10. **Views**: allows you to select how to view your stored pictures. You can select from the following choices:
    - **Details**: shows name, title, size, and other important information
    - **Tiles**: shows a thumbnail image of each picture with picture name, type, and category
    - **List**: shows pictures as a list of the picture names
    - **Small Icons**: shows a thumbnail image of each picture along with the picture name
    - **Large Icons**: shows a larger image of each picture along with the picture name

Filter: this section of the **Picture Manager** screen allows you to choose what is displayed according to the fields below:

1. **Ticket ID**: by clicking the **Select Ticket** button you can select to show pictures on all tickets or just one ticket.
2. **Client name**: filter pictures by a specific client name.
3. **Picture type**: you can choose from:
   - **All**: shows all pictures
   - **General**: shows generic pictures
   - **Before Picture**: shows before pictures
   - **After Picture**: shows after pictures
4. **Picture category**: you can choose from the following categories:
   - **All**: all pictures will be shown
   - **"___"**: choose from the categories you created
5. **Date range**: click the **Select** button if you wish to show only a certain date range.
6. Check the **Only show primary photos** box if desired.

Click the **Clear Filter** button if you want to reset the **Picture Manager** to show all pictures.

Appointment Book

making and keeping track of appointments

Appointment Book Overview

The Salon Iris **Appointment Book** allows you to maintain a visual setting of your scheduled services and previous service sales, as well as view your current business resources that require scheduling.

The **Appointment Book** screen is accessed by clicking the **Apt Book** button/icon or selecting **View Appointment Book** from the **Tickets** drop-down menu. The appointment book has the following features:

- View the schedule of any employee
- View ticket numbers, times, and services assigned to employees
- Assign new tickets to available employees in open time slots
- Add, edit, print, and delete tickets
- Color code services and employees
- Check-in clients and color code if they are late
- Block out times when employees and/or resources are not available

Appointment Book Views: Salon Iris allows you to select how much information that you would like to display on the appointment book. The appointment book display can be viewed in three different date formats. You can switch between the three formats by clicking on the corresponding buttons towards the top of the **Appointment Book** screen.

1. **Day**: view the appointments by day. Choose to view the daily schedule anywhere between viewing one day and five days, one week, or two weeks.
2. **Week**: view the appointments by week. Because there is less space, viewing the appointment book by week will provide less details than viewing on a day to day basis.
3. **Month**: View the appointments by month. This view will look similar to a calendar, and the appointment book will show very few details.

Time interval: change the interval that will display on the **Appointment Book** by selecting one of the following options from the drop-down list:

- **1 min.**
- **2 mins.**
- **5 mins.**
- **10 mins.**
- **15 mins.**
- **20 mins.**
- **30 mins.**
- **60 mins.**

Column Width: You can change the **Column width** to increase or decrease the column size. The **Column width** is optimized to fit as many columns as possible onto the screen. However, for businesses that have numerous employees and resources, they may want to display more information on the tickets and increase the width. The minimum width is 50 pixels, and the maximum width is 1500 pixels.

Appointment Book Calendar: you can use the **Calendar** button to bring up the calendar and quickly select which day(s) to view.

1. Click the **Calendar** button.
2. The calendar will appear.
3. Click on a date to immediately move to that date in the appointment book.
4. Continue to use the appointment book as you normally would.

Calendar Show Options: easily display certain categories of employees on the **Appointment Book** screen. You can quickly find an employee or resource on the appointment book, or a recently edited ticket.

1. Click the **Calendar** button.
2. Click the arrows next to **Show** to expand those options.
    - **All employees and resources**: view everything
    - **Only employees**: view only your employees
    - **Only resources**: view only your scheduled resources
3. Check the **Only show working employees and resources** box to display only those working that day.
4. Select a category from the drop-down list that you would like to display. The categories listed are the categories that you created when adding and editing employees.
5. If you wish to quickly find an employee or resource on the **Appointment Book** screen, click the arrows next to **Find Employee or Resource** to expand those options.
6. Select the employee name or resource from the drop-down list.
7. If you wish to quickly find a recently edited or added ticket on the **Appointment Book** screen, click the arrows next to **Recent** to expand those options.
8. Select the ticket from the drop-down list.

Adding or Editing an Appointment: adding an appointment on the **Appointment Book** screen is the same as adding a ticket. Appointments are a visual representation of your tickets that contain services requiring employee time. For more information about adding tickets, see the **Tickets Overview** section.

1. Click the **Options** button.
2. Double-click on the open time under the appropriate employee, single-click on the open time under the appropriate employee and click the **Add Appointment** button or right-click on the open time under the appropriate employee and select **Add Appointment** from the menu. If editing or viewing an appointment, double-click the appointment to edit or highlight the appointment and click **Edit Appointment**, and skip to **Step 5**.
3. The **Find Client** screen will appear.
4. Use the search options to find the client. If the client is new, click **Add New Client** to add the client to the database. If you do not wish to create a new client, simply click the **Walk In** button.
5. The **Ticket Information** screen will appear.
6. In the **Ticket Information** section, verify that the **Date Scheduled** is correct and change it if necessary.
7. In the **Employee** column, verify that the **Employee** is correct and change it if necessary.
8. In the **Start Time** column, verify that the **Start Time** is correct and change it if necessary.
9. Type in the **Service ID** of the service to be performed in the **ID** column. If you do not know the **Service ID**, double click in the **ID** column and the **Look Up** screen will appear. Select the service and click the **OK** button.
10. In the **Mins** column, the amount of time it takes to perform the service will appear. This amount of time is automatically populated from the added the service. Change the time if necessary.

11. The **Type** column will show an **S** for service setup time. If the service has a processing time, the processing time will be listed below the setup time and the type will show as **X**. If the service has a finishing time, the finishing time will be listed below the processing time and the type will show as **F**.
12. The **Price**, **Tax**, and **Backbar** columns will be automatically populated from the added service.
13. In the **Qty Prch** column, type in the quantity being purchased. This column will automatically default to the quantity defined when setting up the service.
14. In the **Qty Used** column, type in the quantity being used today. This column will automatically default to the quantity defined when setting up the service.
15. In the **Referral** field, if desired, select the type of referral from the drop-down list.
16. Click the **Schedule/Leave Open** button.
17. Your ticket is now scheduled in the Salon Iris appointment book database.

Deleting Future and Past Appointments: Salon Iris gives users the options of deleting future and past appointments. Because past appointments affect reporting, it is recommended to only delete them after sufficient time has passed.

1. **Delete a Single Appointment**: use this option to delete a single appointment from the appointment book.
    a. Click the **Options** button.
    b. Click to highlight the appointment to delete.
    c. Click **Delete Appointment**.
    d. The **Are You Sure?** screen will appear.
    e. Click **Yes** to remove the appointment.
2. **Delete Client Specific Appointments**: use this option to delete appointments directly from a client's purchase history.
    a. Click the **Client Info** button/icon or select **View Client Information** from the **Clients** drop-down menu.
    b. Select the client from the list.
    c. Click the **Purchase History** button.
    d. Click the appropriate tab for what should be deleted.
    e. Click on the tickets to delete. If you would like to delete more than one ticket at a time, hold down the **Shift** key and click the tickets to delete.
    f. Press the **Delete Tickets(s)** button.
    g. The **Are You Sure?** screen will appear.
    h. Click **Yes**.

Time Block: a time block blocks off the appointment book from regularly scheduled appointments. They are typically used for lunches or random appointments that come up. There are two options for adding a time block.

1. **Time Block** button: located on the **Appointment Book** screen under the **Other** section of the **Options**.
    a. Click the **Options** button.
    b. Click the **Time Block** button under the **Other** section.
    c. The **Employee Time Block** screen will appear.
    d. Select the **Date** to add the time block on.

   e. Select the **Employee** to add the time block to.
   f. Select the **Description** for what the time block is for.
   g. If you do not see an appropriate description, click the **Edit** button to add one.
   h. Select the appropriate **Time Range** that the time block is for, or select a start time and an **Interval** from the drop-down list.
   i. If this is a recurring time block, click the **Recurring** button near the top, and enter the appropriate recurring schedule. See the **Scheduling Overview** section for more information regarding recurring schedules.
2. **Right-Click on the Appointment Book Screen**: this will bring up a menu with numerous appointment book options.
   a. Right-click under the employee the time block is for.
   b. Select **Add Time Block** from the menu.
   c. The **Employee Time Block** screen will appear.
   d. Select the **Description** for what the time block is for.
   e. If you do not see an appropriate description, click the **Edit** button to add one.
   f. Select the appropriate **Time Range** that the time block is for, or select a start time and an **Interval** from the drop-down list.
   g. If this is a recurring time block, click the **Recurring** button near the top, and enter the appropriate recurring schedule.

Drag and Drop Appointments: you may easily move an appointment by using the drag and drop feature. Please note some important points about drag and drop:

- **Day** view must be selected. Drag and drop is always disabled in the **Week** and **Month** views
- Only one employee can be scheduled on the ticket. Drag and drop is disabled if you have more than one employee or resource selected on a ticket

1. Set the **Appointment Book** screen on the desired day.
2. Make sure that **Day** view is selected at the top of the **Appointment Book** screen.
3. With your mouse pointer positioned on the ticket you wish to move, click and hold down your left mouse button.
4. While continuing to hold down the left mouse button, drag the appointment into the column of the new employee or to the row of the new time.
5. Release the left mouse button to schedule the ticket at the new time or with the new employee.
6. The **Complete Drag and Drop?** screen will appear.
7. Click the **Yes** button to complete the drag and drop.

The drag and drop feature only works on the same day that the appointment was originally scheduled. To move an appointment between days, you will need to use the cut and paste tools.

Cut, Paste Appointments: easily move appointments using the **Cut Appointment**, and **Paste Appointment** tools. This can be used to easily move appointments between days on the **Appointment Book** screen.

1. Right-click on the appointment you could like to move on the **Appointment Book** screen.
2. Select **Cut Appointment** from the menu.
3. Browse the **Appointment Book** to the new day and/or time of the appointment.
4. Right-click on the **Appointment Book** where you would like the appointment to begin.

5. Select **Paste Appointment**.

Search for an Open Appointment: automatically search for the next available appointment. You can search for up to five services with five different employees.

1. Select **Search Availability** from the **Tickets** drop-down menu.
2. The **Search for Appointment Opening** screen will appear.
3. In the **Step 1: Select Type** section, select the type of search according to the following parameters:
    a. **Service(s)**: use this selection to find openings for a specific service length. Salon Iris will automatically account for service setup, processing, and finish times as well as the "employee performing the service" time exceptions.
        i. Enter up to five employees and services.
        ii. If you do not remember the **Service ID** of the service you would like to enter, click the **...** button to the right of the **Service ID** column to search for the service. If the service selected is linked to a resource, that resource will automatically populate when this appointment is scheduled.
        iii. Salon Iris will check availability for both the employee and the resource needed for this service to be scheduled.
    b. **Simple time opening**: use this selection to find a basic opening with a specific employee
        i. Select the **Employee** from the drop-down list.
        ii. Enter the length of time the appointment is for.
4. Select the **Start Date** for the search under the **Step 3** section.
5. Select the **Number of Days** that you would like to search after that date.
6. Click the **Search** button. You must have the employees' and resources' schedules entered to use the **Search** function. If no employee or resource schedules are entered, the software will assume the employee is not working and will show the time as unavailable.
7. A list of available appointment start time slots for the criteria you specified will appear.
8. For each employee and service combination in the **Select** column, check the box for the time slot that you wish to schedule the appointment for.
9. Click the **Create Ticket** button.
10. The **Find Client** screen will appear.
11. Select the client and create an open ticket as normal.

Checking a Client In: check in a client when he or she arrives for his or her appointment. You may check in a client by right-clicking on the appointment and selecting **Check Client In** from the menu.

1. Click **Options**.
2. Click to highlight the client's scheduled appointment.
3. Click the **Check Client In** button located under **Other** in the **Options** section.

Appointment Book Options Overview

Salon Iris allows you to select how much information that you would like to display on the appointment book.

1. Click the **Options** button.
2. Click the **Calendar View Options** button located under the **Scheduling** section.

3. The **Appointment Book Options** screen will appear.
4. The **Appointment Book Options** screen is divided into two tabs:
   a. **Calendar Options**: the **Calendar Options** tab is broken down into four sections:
      i. **Days and Times to Display**: select the start and end times, and which days to show on the appointment book.
      ii. **Information to Display**: choose which information to show on the appointment book, and its order of importance.
      iii. **Display Options**: select general appointment book display options.
      iv. **Other**: choose your general appointment book ticket display options and off time options.
   b. **Color Codes**: the **Color Codes** tab is broken down into three sections:
      i. **Appointment Color Codes**: set the color codes of standard tickets, and customize color codes based on service, referral, or confirmation type.
      ii. **Appointment Color Code Priority for Open Tickets**: change the priorities of how your color codes will work, i.e. if a service type color code is less important than the closed ticket color code, then the ticket will be color coded as the service until it is closed.
      iii. **Employee and Resource Color Codes and Appointment Book Order**: give your employees and resources specific colors and set the order in which employees appear on the **Appointment Book**.
5. The **Appointment Book** screen must refresh on the other network computers before the color coding will update on them. Click the **Refresh Calendar** button under the **Scheduling** options to do this manually, otherwise the screen will refresh based on your settings.

Appointment Book Options - Calendar Options Tab

The Calendar Options tab allows you to select how days, times, and other information is displayed in the appointment book.

1. Click the **Calendar Options** tab.
2. Edit the **Days and Times to Display** section:
   a. Checking the appropriate box(es) in the **Visible** column to select the days of the week that you would like to display on the appointment book. These should be the days that you are open and accepting appointments.
   b. In the **Start Time** and **End Time** columns, select the appropriate start and end times by clicking the mouse in the column and selecting the time from the drop-down list. The start times are typically when your business opens and the end times are typically when your business closes. The displayed time range for all days on the appointment book will be based off the earliest start and latest end time.
   c. Select the first day of the week that will appear on the visual calendar from the **First Day of Week** drop-down list.
3. Edit the **Information to Display** section.
   a. Check or uncheck the appropriate boxes of information that you would like displayed (on each appointment) in the appointment book:
      - **Client Name**
      - **Service Description**
      - **Client Home Phone Number**

- **Overdue**
- **Checked In**
- **Client Name - Service Description**
- **Created By**
- **Ticket Number**
- **Start Time of Appointment**
- **End Time of Appointment**
- **Client Work Phone Number**
- **Client Mobile Phone Number**
- **Client Address**
- **Confirmation**
- **Referral**
- **Comments**
- **Client Primary Phone Number**
- **Online Booking Tracking Number**: applicable if you use the **Online Booking** feature
- **E-mail Reminder**

b. Use the **Move Up** and **Move Down** buttons to change the order of the information displayed above. Moving information to the top of the list will prevent information near the lower end of the list from being displayed if the appointment is very short.

4. Edit the **Display Options** section.
   a. **Time slot label style**: reflect how often on the screen the time slot label is shown.
      i. **Hour Only**: the time slot label will be shown on the hour only.
      ii. **Every Time Slot**: the time slot label will be shown on every time slot, i.e. if your **Time Interval** is every 10 min. the **Appointment Book** screen may look a little busy if you select this option.
      iii. **Alternating Time Slots**: the time slot label will be shown on every other time interval.
   b. **Employee header style**: reflect how you would like the employee names to appear on the appointment book.
      i. **Employee within Date**: the day of the week will appear above the employee names as one long bar.
      ii. **Date within Employee**: the employees will be listed above the day of the week.
   c. **Side bar location**: change if you want the **Calendar** and **Options** to be on the **Left** or **Right** side of the appointment book.
5. Edit the **Other** section.
   a. Check or uncheck the appropriate box(es) to change the remaining display options:
      - **Display closed tickets**: if closed tickets will be shown on the appointment book
      - **Show closed tickets on the date they were closed**: will move tickets from the day they are scheduled to the day they are closed if it's different than the scheduled date
      - **Display the font of overdue tickets in RED**: the font of overdue tickets will change to red
      - **Show employee and resource schedules**: this will display the off times according to the entered schedule
      - **Show if employee or resource is not scheduled**: this will display if no schedule is entered for employees and resources

- **Display scheduling comments for "Off" Times**: this will display the **Comment** field for the "Off" day that was entered on the **Scheduling** screen, i.e. if the employee is scheduled as **Off: Other** the comment will display if you added one

b. Select one of the following options for how "Off" times are displayed on the appointment book:

- **Use default colors for employee and resource off times**: will use the default color for "Off" times
- **Use universal color for employee and resource off times**: will use the selected color for "Off" times

6. Click **OK** to save the changes and return to the **Appointment Book** screen.

Appointment Book Options - Color Codes Tab

The Color Codes tab allows you to select how tickets, services, and employees are color coded.

1. Click the **Color Codes** tab.
2. Edit the **Appointment Color Codes** section.
   a. There are two options for appointment color codes: **Standard Color Codes** and **Custom Color Codes**.
      i. **Standard Color Codes**: change the color codes for the six standard tickets: **Appointment Requests**, **Checked In**, **Closed Tickets**, **Open Tickets**, **Selected Appointment**, and **Time Block**.
         1. Select the ticket type to change and click the **Edit** button.
         2. The **Customize Color Code** screen will appear.
         3. Select the desired **Background color**.
         4. Check the **Use Gradient** box If you want the color to fade from one to another.
         5. Select the **Gradient color** if applicable.
         6. Select the **Gradient style** if applicable.
         7. Select the **Border color**.
         8. Select the **Font color**.
         9. Select the **Font name**.
         10. Select the **Font size**.
         11. Check the appropriate box(es) if you would like the font to appear **Bold** or in *Italic*.
         12. The **Preview** section will show you how your changes will look on the appointment book.
         13. Click **OK** when finished.
         14. Repeat **Steps 1-11** for the remaining **Standard Color Codes**.
      ii. **Custom Color Codes**: this feature allows you to customize the way certain appointments for individual services, service categories, referral types, or confirmation types appear on the appointment book. You must create service categories in order to create service category color codes. See the **Services Overview** section of this User's Guide for instructions on creating service categories.
         1. Click the **Add** button.
         2. Enter the name of the color code, i.e. Sample Service Category.

3. Click the **OK** button.
4. The **Customize Color Code** screen will appear.
5. Select the type of color code from the **Type** drop-down list: **Confirmation**, **Referral**, or **Service ID/Category**.
6. If it's a **Confirmation** select the **Confirmation type** from the drop-down list. This list is populated based on your confirmation settings.
7. If it's a **Referral** select the **Referral type** from the drop-down list. This list is populated based on your referral settings.
8. If it's a **Service ID/Category** click the **Select** button.
9. To add a single service, type in the **Service ID** or click **Search** and select the service from the list.
10. Click the **Add** button.
11. To add a **Service Category**, click on the service category and click **Add**.
12. Follow **Steps 3-13** from the **Standard Color Code** instructions.
13. Click **OK** when finished.
14. Repeat **Steps 1-13** for each **Custom Color Code**.

b. Color codes may overlap, i.e. open tickets, checked in, and a service category. The color will change on the **Appointment Book** screen based on priority.

3. Edit the **Appointment Color Code Priority for Open Tickets** section.
   a. The highest priority level will determine the color code for open tickets on the **Appointment Book** screen.
   b. Increase and decrease the priority of the following with the **Increase Priority** and **Decrease Priority** buttons:
      - **Confirmation Type**: gives priority to the type of appointment confirmation used on tickets
      - **Referral Type**: gives priority to the type of referral used on tickets
      - **Service ID/Category**: gives priority to the type of service ID or service category on the ticket
      - **Checked In**: gives priority to tickets that are checked in
      - **Open Tickets**: gives priority to open tickets
   c. If a ticket is lacking a higher priority, i.e. if a referral type was not used, then the color code for the next highest priority will be used.
4. Edit the **Employee and Resource Color Codes and Appointment Book Order** section.
   a. Highlight the employee to change.
   b. Click the **Edit** button.
   c. If this is the first time editing the employee, the **Edit Name** screen will appear.
   d. Enter a color code name and click **OK** to continue.
   e. The **Customize Employee Color Code** screen will appear. There are two tabs:
      - **General**
      - **Appearance and Colors**
   f. Select the **General** tab.
   g. If you would like to change the name of the color code, click the **Change Name** button.
   h. There are four options pertaining to the employee(s) that the color code can by applied to:
      - **Apply this color code to all employees/resources**: apply the color code to all

employees/resources on the appointment book
- **Apply this color code to only this employee/resource**: apply the color code to only the employee/resource selected
- **Apply this color code to only the following category of employee/resource**: apply the color code to a specific employee/resource category selected from the drop-down list
- **Apply this color code to only the following employees/resources**: apply the color code to employees/resources that are selected by the user

i. Select the **Appearance and Colors** tab.
j. Select from the following two options for color schemes:
   - **Use Default Base Color**: choose preset color options from a drop-down list
   - **Use Specific Base Color**: choose a specific color from three different drop-down lists: **Custom**, **Web**, and **System**
k. Select a **Font name** for the **Header** from the drop-down list. This list comes from the fonts available on your specific computer.
l. Select a **Font size** for the header. **6**pt is the smallest available size, and **24**pt is the largest available size.
m. Use the Move Up and Move Down buttons to change position of selected employee on the **Appointment Book**.
n. Click **OK** to return to the **Appointment Book Options** screen.

5. Click **OK** to save the changes and return to the **Appointment Book** screen.

Appointment Book Printing Overview

The appointment book can be printed in a variety of formats to fit business needs.

- **Standard Schedule**
- **Daily Schedule**
- **Weekly Schedule**
- **Monthly Schedule**
- **Calendar Summary**
- **Memo**
- **Tri-Fold**

Standard Schedule: selecting **Standard Schedule** prints employee and resource schedules in a grid showing the working hours, client, ticket ID, service ID, and service description.

1. Select the **Day**, **Week**, or **Month** view. If you selected **Day**, also select the number of days to display.
2. Click the **Options** button.
3. Click the **Print Appointment Book** button under the **Printing** section.
4. The **Select Printing Method** screen will appear.
5. Select **Standard Schedule** and click **OK**.
6. The **Print Appointment Book Options** screen will appear.
7. In the **Standard Schedule** section, select from the following choices:
   a. **Print employee and resource schedules**: print the full schedules including times that are open.
   b. **Print employee and resource schedules without openings**: print the employee and resource

schedules without openings to save space when printing.

c. **Exclude non-working days**: does not print employees on the days they have scheduled off.
d. **Start each day on new page**: each day starts on a new page.
e. **Start each employee or resource on a new page**: each resource and/or employee will be printed on a new page.
f. **Items to include in printout**: Client address, notes, e-mail, and primary phone number

8. Select from the following choices in the **Date Range** section:
   a. **Base date range on selected date range from appointment book**: the date range to print is based on what you have selected in **Step 1**.
   b. **Specify date range**: select a specific start and end date for the schedule to print.
9. In the **Employees and Resources to Print** section you can select which employees and resources to print by checking or unchecking the appropriate boxes.
10. The **Time Range** section is grayed out and not available for the **Standard Schedule** selection.
11. The **Color** section is grayed out and not available for the **Standard Schedule** selection.
12. Click the **Print** button.
13. The **Printing Options** screen will appear. You can click the **Print Preview** button to view what will be printed.
14. Select the printer and range of pages to print and click the **Print** button.

Daily Schedule: selecting **Daily Schedule** prints the employee and resource schedules according to a day at a time.

1. Select the **Day** view and select the number of days to display.
2. Click the **Options** button.
3. Click the **Print Appointment Book** button under the **Printing** section.
4. The **Select Printing Method** screen will appear.
5. Select **Daily Schedule** and click **OK**.
6. The **Print Appointment Book Options** screen will appear.
7. In the **Daily** section, you can select from the following choices:
   a. **Include blank notes area**: this will include an area for blank notes on the printout so the employee can hand write in notes.
   b. **Include lined notes area**: this will include an area for lined notes on the printout so the employee can hand write in notes.
   c. **Include date header area**: this will include a date header on the printout.
8. Select from the following choices In the **Date Range** section:
   a. **Base date range on the selected date range from appointment book**: the date range to print is based on what was selected in **Step 1**.
   b. **Specify date range**: choose a specific date range between the date ranges currently selected in **Step 1**.
9. Select from the following choices In the **Time Range** section:
   a. **Print entire day**: print the entire day's schedule.
   b. **Specify time range**: choose to print a specific time range from the day.
10. In the **Employees and Resources to Print** section you can select which employees and resources to print by checking or unchecking the appropriate boxes.

11. In the **Color** section, select if you would like to print the appointment book information in grayscale, color, or monochrome.
12. Click the **Print** button.
13. The **Printing Options** screen will appear. You can click the **Print Preview** button to view what will be printed.
14. Select the printer and range of pages to print and click the **Print** button.

Weekly Schedule: selecting **Weekly Schedule** prints the employee and resource schedules according to a week at a time.

1. Select the **Week** view.
2. Click the **Options** button.
3. Click the **Print Appointment Book** button under the **Printing** section.
4. The **Select Printing Method** screen will appear.
5. Select **Weekly Schedule** and click **OK**.
6. The **Print Appointment Book Options** screen will appear.
7. In the **Weekly** section, you can select from the following choices:
    a. **Pages per week**: select how many pages per week you would like the appointment book information printed on. Selecting **1 page** per week formats the information to fit on one printed page for each week.
    b. **Layout style**: select from the following choices:
        i. **Day view**: this displays the appointment book information as one day at a time.
        ii. **Week view**: this displays the appointment book information as a week at a time.
        iii. **Month view**: this displays the appointment book information as one month at a time.
    c. Check or uncheck the following boxes as desired:
        i. **Include blank notes area**: this will include an area for blank notes on the printout so the employee can hand write in notes.
        ii. **Include lined notes area**: this will include an area for lined notes on the printout so the employee can hand write in notes.
        iii. **Include date header area**: this will include a date header on the printout.
8. Select from the following choices in the **Date Range** section:
    a. **Base date range on the selected date range from appointment book**: print the date range based on what you selected in **Step 1**.
    b. **Specify date range**: select a specific date range between the dates selected in **Step 1**.
9. Select from the following choices in the **Time Range** section:
    a. **Print entire day**: print the entire day's schedule.
    b. **Specify time range**: choose to print a specific time range from the day.
10. In the **Employees and Resources to Print** section you can select which employees and resources to print by checking or unchecking the appropriate boxes.
11. In the **Color** section, select if you would like to print the appointment book information in grayscale, color, or monochrome.
12. Click the **Print** button.
13. The **Printing Options** screen will appear. You can click the **Print Preview** button to view what will be printed.

14. Select the printer and range of pages to print and click the **Print** button.

Monthly Schedule: selecting **Monthly Schedule** prints the employee and resource schedules according to a month at a time.

1. Select the **Month** view.
2. Click the **Options** button.
3. Click the **Print Appointment Book** button under the **Printing** section.
4. The **Select Printing Method** screen will appear.
5. Select **Monthly Schedule** and click **OK**.
6. The **Print Appointment Book Options** screen will appear.
7. In the **Monthly** section, you can select the following choices:
    a. **Pages per month**: select how many pages per month you would like the appointment book information printed on. Selecting **1 page** per month formats the information to fit on one printed page for each month.
    b. **Layout Style**: select from the following choices:
        i. **5 weeks per page**: this displays the appointment book information as five weeks per page.
        ii. **One month per page**: this displays the appointment book information as one month per page. It may or may not show the first few days of the following month depending on the formatting.
        iii. **One month per page exact**: this displays the appointment book information as one month per page exactly. It will not show the first few days of the next month.
    c. Check or uncheck the following boxes as desired:
        i. **Include blank notes area**: this will include an area for blank notes on the printout so the employee can hand write in notes.
        ii. **Include lined notes area**: this will include an area for lined notes on the printout so the employee can hand write in notes.
        iii. **Include date header area**: this will include a date header on the printout.
8. The **Date Range** and **Time Range** sections are grayed out and not available for the **Monthly Schedule** selection.
9. In the **Employees and Resources to Print** section you can select which employees and resources to print by checking or unchecking the appropriate boxes.
10. In the **Color** section, select if you would like to print the appointment book information in grayscale, color, or monochrome.
11. Click the **Print** button.
12. The **Printing Options** screen will appear. You can click the **Print Preview** button to view what will be printed.
13. Select the printer and range of pages to print and click the **Print** button.

Calendar Summary: selecting **Calendar Summary** prints a list of each employee's and resource's appointment times, ticket ID's, and description of services.

1. Select the **Day**, **Week** or **Month** view.
2. Click the **Options** button.
3. Click the **Print Appointment Book** button under the **Printing** section.
4. The **Select Printing Method** screen will appear.

5. Select **Calendar Summary** and click **OK**.
6. The **Print Appointment Book Options** screen will appear.
7. Under the **Calendar Summary** section, select one of the following choices from the **Page break mode** drop-down list:
    a. **None**: this selection adds no page breaks when printing the calendar summary.
    b. **Day**: this selection adds a page break after each day when printing the calendar summary.
    c. **Week**: this selection adds a page break after each week when printing the calendar summary.
    d. **Month**: this selection adds a page break after each month when printing the calendar summary.
    e. **Year**: this selection adds a page break after each year when printing the calendar summary.
8. Check or uncheck the following boxes as desired:
    a. **Include date header area**: this will include a date header on the printout.
    b. **Include employee and resource off times**: this will print employee and resource off times. Do not check to save printing space.
9. Select from the following choices in the **Date Range** section:
    a. **Base date range on the selected date range from appointment book**: print the date range based on what you selected in **Step 1**.
    b. **Specify date range**: select a specific date range between the date ranges selected in **Step 1**.
10. The **Time Range** section is grayed out and not available for the **Calendar Summary** selection.
11. In the **Employees and Resources to Print** section you can select which employees and resources to print by checking or unchecking the appropriate boxes.
12. In the **Color** section, select if you would like to print the appointment book information in grayscale, color, or monochrome.
13. Click the **Print** button.
14. The **Printing Options** screen will appear. You can click the **Print Preview** button to view what will be printed.
15. Select the printer and range of pages to print and click the **Print** button.

Memo: selecting **Memo** prints the employee and resource schedules in a format showing the ticket information, and the start and end times of the appointments.

1. Select the **Day**, **Week** or **Month** view.
2. Click the **Options** button.
3. Click the **Print Appointment Book** button under the **Printing** section.
4. The **Select Printing Method** screen will appear.
5. Select **Memo** and click **OK**.
6. The **Print Appointment Book Options** screen will appear.
7. Under the **Memo** section, select one of the following choices from the **Page break mode** drop-down menu:
    a. **No extra breaks**: this selection adds no page breaks when printing the memo.
    b. **Break after whole item**: this selection adds a page break after a whole item when printing the memo.
    c. **Break after each item**: this selection adds a page break after each item when printing the memo.
8. Check or uncheck the **Include employee and resource off times** as desired.

9. Select one of the following choices from the **Date Range** section:
    a. **Base date range on the selected date range from appointment book**: print the date range based on what you selected in **Step 1**.
    b. **Specify date range**: select a specific date range between the date ranges selected in **Step 1**.
10. The **Time Range** section is grayed out and not available for the **Memo** selection.
11. In the **Employees and Resources to Print** section you can select which employees and resources to print by checking or unchecking the appropriate boxes.
12. In the **Color** section, select if you would like to print the appointment book information in grayscale, color, or monochrome.
13. Click the **Print** button.
14. The **Printing Options** screen will appear. You can click the **Print Preview** button to view what will be printed.
15. Select the printer and range of pages to print and click the **Print** button.

Tri-Fold: selecting **Tri-Fold** prints the employee and resource schedules in a format that can show the day's schedule, the week's schedule, and the month's schedule all on the same page.

1. Select the **Day**, **Week** or **Month** view.
2. Click the **Options** button.
3. Click the **Print Appointment Book** button under the **Printing** section.
4. The **Select Printing Method** screen will appear.
5. Select **Tri-Fold** and click **OK**.
6. The **Print Appointment Book Options** screen will appear.
7. Under the **Tri-Fold** section, select one of the following choices from the **Layout style** drop-down list:
    a. **Page per employee**: this selection prints one page per employee and resource.
    b. **Page per date**: this selection prints one page per date.
8. The **Left section** will show the information to print on the left third of the page. The **Middle section** will show the information to print on the middle third of the page. The **Right section** will show the information to print on the right third of the page.
9. Select one of the following choices for the **Left section**, **Middle section**, and **Right section** from the drop-down list options:
    a. **Daily**: this selection will print the daily schedule on the appropriate third of the page.
    b. **Weekly**: this selection will print the weekly schedule on the appropriate third of the page.
    c. **Monthly**: this selection will print the monthly schedule on the appropriate third of the page.
    d. **Yearly**: this selection will print the yearly schedule on the appropriate third of the page.
    e. **Blank notes area**: this selection will print a blank notes area on the appropriate third of the page.
    f. **Lined notes area**: this selection will print a lined notes area on the appropriate third of the page.
10. Check the **Include date header area** box if desired.
11. Select from the following choices in the **Date Range** section:
    a. **Base date range on the selected date range from appointment book**: print the date range based on what you selected in **Step 1**.
    b. **Specify date range**: select a specific date range between the date ranges selected in **Step 1**.

12. Select from the following choices in the **Time Range** section:
    a. **Print entire day**: print the entire day's schedule.
    b. **Specify time range**: choose to print a specific time range from the day.
13. In the **Employees and Resources to Print** section you can select which employees and resources to print by checking or unchecking the appropriate boxes.
14. In the **Color** section, select if you would like to print the appointment book information in grayscale, color, or monochrome.
15. Click the **Print** button.
16. The **Printing Options** screen will appear. You can click the **Print Preview** button to view what will be printed.
17. Select the printer and range of pages to print and click the **Print** button.

Printing and Viewing Future Appointments: look up and print future appointments for a client. There are two ways to print or view a client's future appointments.

1. On the receipt. See the **Options - Hardware Setup Tab** section of the **Options Overview** for full receipt printer setup instruction.
    a. Click on the **Tools** drop-down menu.
    b. Select **Options**.
    c. Click the **Hardware Setup** tab.
    d. Click the **Configure Receipt Printer** button.
    e. Edit your **Text Settings** to include **Upcoming Appointments**.
    f. Click **OK** to save the changes.
2. When viewing client information.
    a. Click the **Client Info** button/icon or select **View Client Information** from the **Clients** drop-down menu.
    b. Select the client from the list.
    c. Click the **Purchase History** button.
    d. Click the **Upcoming Appointments** tab.
    e. Click **Print**.
    f. Click **Yes** or **No** to print entries with or without IDs and prices listed.
    g. Click **OK** when finished.

Printing and Viewing Past Appointments: Salon Iris stores old client purchase history for records and marketing purposes.

1. Click the **Client Info** button/icon or select **View Client Information** from the **Clients** drop-down menu.
2. Select the client from the list.
3. Click the **Purchase History** button.
4. Depending on the situation, select one of the following tabs:
    a. **Previous Products**: all previous products purchased.
    b. **Previous Services**: all previous services purchased.
    c. **Previous Other**: shows tickets containing other transactions like gift certificates, product returns, etc.
    d. **No Shows**: a list of no shows.

e. **Canceled**: client tickets that have been canceled.
f. **Voided**: client tickets that have been voided.

5. Click **Print**.
6. Click **Yes** or **No** to print entries with or without IDs and prices listed.
7. Click **OK** when finished.

Appointment Confirmations Overview

Creating an Appointment Call List: easily create a client upcoming appointment call list. This can be used to not only remind clients of their appointments, but to confirm that they will be coming in.

1. Click the **Tickets** button/icon or select **Edit Tickets** from the **Tickets** drop-down menu.
2. Make the appropriate search selections:
   - Set the **Status** as **Open**
   - Edit the appropriate **Date Range** selection
3. Click the **Customize View** button.
4. The **Customize View** screen will appear.
5. In the **Available** section, click on **Client Cell Phone** and click the **Add =>** button.
6. In the **Available** section, click on **Client Home Phone** and click **Add =>**.
7. In the **Available** section, click on the **Client Work Phone** and click **Add =>**.
8. Click **OK**.
9. The phone numbers will now appear on the **Tickets** screen. Your receptionist can now call each client, and then edit the ticket and record the confirmation type in the **General** section.

Appointment Confirmations: appointment confirmations let your employees know that the client has confirmed that they will be in. The **Confirmed** field identifies the person or method used to confirm the upcoming appointment. It's located on the **Ticket Information** screen on the lower-left corner.

1. Add or edit a ticket to bring up the **Ticket Information** screen.
2. Move to the **General** section.
3. Click on the down arrow in the **Confirmed** field.
4. A drop-down list is initially set with the following choices:
   - **Phone (Direct)**
   - **Phone (Answering Machine)**
   - **In person**
   - **E-mail**
5. Select how the appointment was confirmed.
6. The **Confirmed** list can be customized to include different or additional options by performing the following steps:
   a. Click the **Edit** button to the right of the **Confirmed** field.
   b. The **Confirmation Types** screen will appear.
   c. Click the **Add** button.
   d. Type in the new name of the confirmation type, i.e. Text Message.
   e. Click the **OK** button.

f. Repeat **Steps c-e** for each confirmation type that you would like to add.
g. You can click on a confirmation type and use the **Move Up** and **Move Down** buttons as needed to re-order the list. The top entry in the list of choices in the **Confirmation Types** screen will be the default entry on your **Ticket Information** screen. It's recommended that you use a **(blank)** entry as the top entry to keep the default blank until further notice.
h. Click **OK** when finished.

7. Continue editing your appointment ticket as needed and click **Schedule/Leave Open** to save the ticket.

Canceled Appointments: if a client is reminded of their appointment and cancels, or calls directly to cancel. Canceled appointments may be moved to another date if the client likes, or they can be canceled outright.

1. Open the client's appointment ticket.
2. Click the **Cancel** button.
3. The **Cancel Ticket** screen will appear.
4. Enter a comment if desired.
5. Click **OK**.

Tickets Overview

Tickets track all of the day-to-day sales and returns of your business. Tickets contain information on scheduled appointments and a complete history of previous appointment activity. All tickets in your database, open, closed, voided, etc., can be displayed in the center of the **Tickets** screen.

To access the **Tickets** screen, click the **Tickets** button/icon, or select **Edit Tickets** from the **Tickets** drop-down menu.

Tickets Screen: the tickets screen can display the following tickets:

1. **Open**: these are lists of appointments for services scheduled, but not yet performed. Open tickets may also contain products.
2. **Closed**: closed tickets are used when calculating reports, such as totals, commission, top spending clients, etc. A closed ticket is the record of the service rendered or product purchased.
3. **Canceled**: appointments that have been created and saved, and then later canceled.
4. **Voided**: appointments that have been created and saved, and then later voided.
5. **No Show**: appointments that have been created and saved, and then later marked as a **No Show**.
6. **All**: display all tickets. It is not recommended to display **All** tickets over **All dates**.
7. **Time Blocks**: because time blocks are saved as tickets, you can view scheduled time blocks on the **Tickets** screen. This can be helpful when deleting recurring time blocks.

The default ticket information displayed includes the following information:

- **Ticket ID**: a tracking number automatically assigned when a new ticket is added
- **Date Scheduled/Date Closed**: date of the scheduled appointment
- **Description**: description of the scheduled service
- **Price**: price of the scheduled service(s) and product(s) (open tickets only)
- **Start Time**: the scheduled start time of the appointment

- **Last Name**: the last name of the client
- **Employee Name**: the employee scheduled to perform the service
- **Total**: total of the closed ticket (closed tickets only)

Adding or Editing a Ticket

1. Click the **Add Ticket** button or select **Add New Ticket** from the **Tickets** drop-down menu to add a ticket, or highlight the ticket to edit and click the **Edit Ticket** button.
2. The **Find Client** screen will appear.
3. Select the client and click **OK**.
4. The **Ticket Information** screen will appear. It is divided into these key sections:
    a. **Ticket Information**: includes the date scheduled, date created, ticket ID, status, and comments.
    b. **Client Information**: includes the client name, picture, balance, and buttons that you can use to view previous purchases, notes, and other information about the client.
    c. **Appointment Details**: includes the employee performing the service, times, products, pricing, tax, backbar, quantity purchased, quantity used, and any discounts, including coupons.
    d. **General**: includes gift certificate, gift card, created by, confirmation, and referral information.
    e. **Totals**: includes applicable taxes, tips, and how much currency and change is due.
    f. **Tender**: where you enter the amount of currency received and the tender type. Salon Iris will calculate the amount of change due.
    g. Action buttons: **Schedule/Leave Open**, **Check Out/Close**, **No Show**, **Void**, etc. The **Special** button is also located here. The **Special** button brings up a menu that can be used for **Loyalty Points**, **Client Balance**, etc.
5. Enter the appropriate information into the fields.
6. Click **Schedule/Leave Open** to schedule the appointment ticket, or **Check Out/Close** to close the ticket.

Deleting a Ticket: a deleted ticket is permanently removed from the database. No deleted ticket information appears in payroll or totals reports. You can control whether or not tickets can be deleted. Select **Options** from the **Tools** drop-down menu and click the **Tickets** tab. Under the **Editing/Voiding/Deleting** section, check or uncheck the **Allow tickets to be deleted** box.

1. Click on the ticket to delete.
2. Click the **Delete Ticket** button.
3. The **Are You Sure?** screen will appear.
4. Click the **Yes** button to permanently delete the ticket from the database. Once you delete a ticket from the database it is gone forever. You cannot recover it. However, the ticket's history information could still remain in the database depending on your ticket settings.
5. Select **Options** from the **Tools** drop-down menu.
6. Click the **Tickets** tab.
7. Click the **More Options** button.
8. Click the **Remove History for Deleted Tickets Now** button.
9. All deleted tickets' histories will be permanently removed from the database.
10. You can also check or uncheck the **Keep ticket history after a ticket is deleted** box. If you uncheck this box, then from this point on **Steps 5-8** are not necessary after you delete a ticket, because the ticket history will not be kept in the database.

Searching for Tickets: you can search for tickets by **Date Range**, **Status**, **Client**, **Employee**, **Service** or **Product**, or by **Ticket ID**. You can also view **Recent Tickets** and choose the information to display on the **Tickets** screen.

1. **Date Range**: allows you to search for tickets based on the date range of your tickets.
    a. **Today's tickets**: view today's tickets.
    b. **Yesterday**: view yesterday's tickets.
    c. **Tomorrow's tickets**: view tomorrow's tickets.
    d. **Range**: view tickets between a specified date range.
    e. **Single Date**: view tickets from a single date.
    f. **All dates**: view tickets from all days. It's not recommended to choose **All dates** and **All** tickets.
2. **Status**: search by a ticket's status, i.e. open, closed, etc.
    a. **Open**: tickets that have unpaid products and services scheduled, and tickets featuring services in progress or not yet completed.
    b. **Closed**: tickets that have completed services and products purchased and paid for.
    c. **Canceled**: canceled tickets.
    d. **Voided**: voided, or no longer valid tickets.
    e. **No Show**: client no shows.
    f. **All**: all tickets, including open, closed, and all canceled, voided, and no show tickets.
    g. **Time Blocks**: times that employees are unavailable to take appointments.
3. **Client**: enter any part of the client's **First name** and/or **Last name** under the **Search** section.
4. **Employee**: select an employee from the drop-down list under the **Search** section.
5. **Service or Product**: enter part or all of the **Service** or **Product** name in the **Description** field under the **Search** section.
6. **Ticket ID**: if you know the ticket ID that you would like to look up, enter it in the **Find by ID** field.
7. **Recent Tickets**: select one of the recent tickets from the drop-down list.
8. **Display**: show the ticket information list as a **Detailed** or a **Summary** view.
    a. **Detailed**: shows the following information:
        - **Ticket ID**
        - **Date Scheduled**
        - **Description**
        - **Price**
        - **Start Time**
        - **Last Name**
        - **Employee Name**
        - **Comment**
    b. **Summary**: shows the following information:
        - **Ticket ID**
        - **Date Scheduled**
        - **First Name**
        - **Last Name**
        - **Client Home Phone**
        - **Client Work Phone**

- **Client Cell Phone**
- **Total**

c. You can select to show more information in the tickets **Detailed** or **Summary** table by performing the following steps:
    i. Choose either **Detailed** or **Summary**.
    ii. Click the **Customize View** button under the **General Options** section.
    iii. The **Customize View** screen will appear.
    iv. Use the **Add**, **Remove**, **Move Up**, and **Move Down** buttons to organize the desired fields of the **Selected** column.
    v. Click **OK** when finished.

9. **Quick Show**: allows you to view the following tickets:
    a. **Today's Open** tickets.
    b. **Today's Closed** tickets.

Printing Tickets: you may print recently viewed tickets from the **Tickets** screen by going to the **Find Ticket** section, selecting a ticket from the drop-down menu, and then clicking the **Print** button. You can also print a list of tickets, as well as individual traveler tickets for employees and customers. Traveler tickets will have client notes, past purchases, and other important information.

1. **List of Tickets**
    a. Click the **Tickets** button/icon or select **Edit Tickets** from the **Tickets** drop-down menu.
    b. The **Tickets** screen will appear.
    c. Click **Customize View**.
    d. Use the **Add** and **Remove**, and the **Move Up** and **Move Down** buttons as needed to make the desired changes to the **Selected** section.
    e. Click the **OK** button to return to the **Tickets** screen.
    f. Select the appropriate settings in the **Search**, **Date Range**, **Display**, and **Status** sections to display the list of desired tickets.
    g. Click a column heading to organize the tickets as desired.
    h. Click the **Print** button.
    i. The **Print Format** screen will appear.
    j. Select **Multiple tickets per page** option.
    k. Click the **Print** button.
    l. The **Printing Options** screen will appear.
    m. Make the appropriate printer and page range selections and click the **Print** button. Whatever is displayed on the screen will be printed.
2. **List of Traveler Tickets**
    a. Select the appropriate settings in the **Search**, **Date Range**, **Display**, and **Status** sections to display the list of desired tickets.
    b. Click to highlight one ticket, or hold the left mouse button down and drag to select any number of tickets.
    c. Click the **Print** button.
    d. The **Print Format** screen will appear.
    e. Select **Traveler/single ticket per page**.

f. You have two options:
    i. **Print all pages**: this will print a traveler ticket for all the tickets on the screen.
    ii. **Print selected ticket(s)**: this will print a traveler ticket for the currently highlighted tickets.
g. Click the **Print** button.
h. The **Printing Options** screen will appear.
i. Make the appropriate printer and page range selections and click the **Print** button.

3. **Single Traveler Ticket**: can be printed from the appointment book, or directly from an open ticket.
    a. Find the appointment on the appointment book.
    b. Right-click on the appointment and select **Print Ticket** from the menu, or;
    c. Open a ticket to the **Ticket information** screen.
    d. Click the **Special** button and select **Print Ticket** from the menu.

Ticket History: each created ticket has a log that automatically records when the ticket was created, edited, and deleted. This log is referred to as the **Ticket History**. The ticket's history can be accessed by clicking the **History** button in the bottom left corner of the **Ticket Information** screen. The **Ticket History** can record which employees made the changes to the tickets if you use **Employee Passwords** with the option to **Remember what employee is logged in**. Ticket history of deleted tickets can be viewed if the **Keep ticket history after a ticket is deleted** option is selected. See the **Options Overview** section of the **Welcome** chapter for more information.

1. If you don't remember the deleted ticket ID, you can find it in the **Activity Log**.
2. Select **Activity Log** from the **Tools** drop-down menu.
3. Click the **Tickets** button/icon or select **Edit Tickets** from the **Tickets** drop-down menu.
4. Locate the **Find by ID** field under the **Find Ticket** section.
5. Enter the ticket ID in the **Find by ID** field.
6. Hit the **Enter** key on the keyboard.
7. The **Ticket Not Found. View History?** screen will appear.
8. Click **Yes** to view the ticket history.

Ticket Information Overview

The **Ticket Information** screen can be accessed by adding or editing a ticket. The **Ticket Information** screen holds all of the information about a client's appointment or a product being purchased. The **Ticket Information** screen serves several purposes:

- It contains the appointment scheduling information
- It details products and services associated with the specific appointment
- It tracks all personnel, costs, taxes, discounts, coupons, tips, gift certificates, etc. associated with the appointment
- It tracks payment information and calculates change
- The information will be printed as a customer receipt

Ticket Information: this section is located in the upper-left corner of the **Ticket Information** screen.

1. Enter the scheduled appointment date in the **Date Scheduled** field. The default date will typically be today. You can change the date in the following ways:

   a. Type the date directly in the information box.
   b. Use the down arrow to the right of the box to access a drop-down calendar for date selection.
2. If this appointment is going to be a recurring appointment, click the **Recurring Appointment** button.
   a. The **Recurring Dates** screen will appear.
   b. Click the **Add Multiple Dates** button.
   c. Enter the **Start date** in the **Start of Recurrence** section. You may enter your choice directly, or use the arrow to bring up a calendar to select the date.
   d. Select one of the following choices from the **End of Recurrence** section:
      - **End after |___| occurrences**: have the schedule end after a specific number of appointments
      - **End on or before**: end on a specific date
   e. Choose from the following in the **Recurrence** section:
      i. **Daily**: schedule the appointments in intervals over a specific number of days. This will cause the heading for the section to the right to change to **Daily** and produce the **Every** field for entry of the desired interval in days. Enter in how often the recurrence should be, i.e. entering **3** in the **Every** field will produce an interval of an appointment to recur every 3 days.
      ii. **Weekly**: schedule the appointments in intervals of a specific number of weeks. This will cause the heading for the section to the right to change to **Weekly**. Check the day(s) of the week that you would like to have this appointment recur on. Enter the number of weeks between appointments in the **Every** field, i.e. entering **2** in the **Every** field and checking **Tuesday** would schedule this appointment for every other Tuesday.
      iii. **Monthly**: schedule the appointments in intervals of a specific number of months. This will cause the heading for the field to the right to change to **Monthly**. There are two options for monthly recurrence:
         - **Day**: the appointment will be on a specific date of the month for a selected interval of months. Enter the date and monthly interval in the appropriate boxes, i.e. if you want to schedule for the 5th of every other month, you would enter 5 in the first box, and 2 in the second box
         - **The**: the appointment will be on a specific day of a specific week of the month for a selected interval of months. Use the drop-down entries to make the weekly and daily selections in the first two boxes, and then enter the monthly interval in the last box, i.e. selecting **Third** in the first box, **Friday** in the second box, and the number 2 in the last box would produce a schedule of appointments on the third Friday of every other month
   f. Use the **Test** button located in the lower, left to view the schedule you created.
   g. When you have completed the entries click the **OK** button to return to the **Recurring Dates** screen.
   h. Click **OK** again to return to the **Ticket Information** screen.
   i. A ticket with recurring appointments should be scheduled via the **Schedule/Leave Open** button. Do not click the **Check Out/Close button** to close a ticket when the ticket includes recurring appointments, or the appointments scheduled on recurring dates will be scheduled as closed tickets. Once the recurring schedule has been set, the ticket can be closed as normal.
3. Enter any comments in the **Comment** field.

4. When finished with entering the **Ticket Information**, move on to the remaining sections of the ticket or click the **Schedule/Leave Open** or **Check Out/Close** buttons.

Client Information: this section is located in the upper-right of the **Ticket Information** screen. It is useful in adding new tickets, as it allows you to look up previous appointment information to determine client history and preferences, i.e. you could press the **Purchases** button to determine what products the client normally purchases.

1. Click any of the buttons to view a client's information.
    a. **View Info**: view the client's information.
    b. **Edit Info**: edit the client's information, such as address or phone number.
    c. **Purchases**: view the client's previous purchases.
    d. **Formula History**: view the client's formula notes.
    e. **Pictures**: view/take/manage the client's pictures.
2. You can also click the **Change Client** button to select a different client for this appointment.
3. When finished with entering any **Client Information**, move on to the remaining sections of the ticket or click the **Schedule/Leave Open** or **Check Out/Close** buttons.

Appointment Details: this section is the large information grid located in the center area of the **Ticket Information** screen. It contains multiple columns for entering details and cost information on all products and services associated with the appointment.

1. Click on the **Employee** column. Use the drop-down employees list, and click on the employee that will be performing the service on the ticket. If the ticket was added from the **Appointment Book** screen, the default employee on the ticket will be the employee from the appointment book.
2. Move to the **Start** column and enter the desired service starting time. Salon Iris will have entered, as a default, the time the ticket was added assuming an immediate start. If the ticket was added from the **Appointment Book** screen, the default time will be the time from the appointment book.
3. Move to the **ID** column and enter the appropriate **Product ID** or **Service ID**. You can move to this and other points in the field by clicking on the desired cell with the mouse or by using the arrow keys (up, down, left, right) on your keyboard. If you are unsure of the correct **Product ID** or **Service ID**, double click in the **ID** column to reach the **Look Up** screen.
    a. In the **Display** section, located in the lower-left portion of the window, there are choices for displaying the following items:
        - **Products**
        - **Services**
        - **Products and services**
        - **All Products, services, and backbar products**
        - **Backbar products**
        - **Packages**
        - **Coupons**
    b. In the **Show Only** section you can select to display items by their product or service category or services that can be performed by particular employees.
    c. Select to sort the list in the **Sort List By** section
        - **Name**
        - **ID**

- **Price**

d. You may enter an **ID** or a partial product or service description in the **Search** section. Your search will be limited to the criteria you've already selected. Click the **Clear** button if there is a previous entry in this field, or if you do not want this search limitation.
e. With the above fields set, locate the appropriate product or service. Double-click that item to add it and return to the **Ticket Information** screen.
f. If the client is redeeming a **Pre-Paid service**, add the item to the ticket by **ID** or use the **Redeem Pre-Paid Service** button just below the appointment details section. Click the button and the **Select Pre-Paid Service To Redeem** window will be displayed. Once the service to be redeemed has been added to a ticket, the client's **pre-paid service** items will be adjusted to reflect the new item balance.

4. After entries in the **Employee**, **Start Time**, and **ID** columns, Salon Iris will have made automatic (default) entries in the remaining columns for that row. These entries are based on the information you entered for the specific product or service. You may change any entry item by moving to the appropriate box and entering the new information.
   a. **Mins**: the time, in "mins." that the selected employee normally takes to perform that service.
   b. **Type**: could be any of the following:
      - **P**: product
      - **S**: service or service setup time
      - **X**: service processing time
      - **F**: service finish time
      - **E**: resource linked to a service
      - **R**: product return (add to inventory)
      - **D**: product return (do not add to inventory)
      - **V**: service return
      - **G**: gift certificate purchase
      - **L**: loyalty points reward
      - **M**: multi-ticket checkout
      - **C**: client credited
      - **T**: amount due transferred to client's balance
      - **N**: note or comment
   c. **Description**: the product or service description.
   d. **Price**: the price of the product or service.
   e. **Tax**: the taxable status of the product or service (a checked box means the item is taxable).
   f. **Backbar**: the cost of products used in performing a service.
   g. **Qty Purch**: quantity purchased, or the number of products or services being purchased under that specific ID or description.
   h. **Qty Used**: quantity used, or the number of products or services being used during this visit.
   i. **Discount**: the percentage or dollar discount being offered for the product or service, i.e. you may be offering a special $2.00 or 10% off discount on some items. To enter a percentage discount use the percentage sign after the numerical value.
   j. **Total**: the total price for the product or service entered under that ID. This will reflect the normal price less any offered discounts.

   k. **Commission Based On**: the price that the employee's commission is based on. Enter a new value if the desired commission is different from that listed.
5. If there are additional products or services associated with this appointment, move to the second row of the **Appointment Details** grid and continue adding entries. If you are entering a product, or, if the same employee is to perform the service, you may start with the **ID** column. You may frequently have multiple employees listed, as one may perform Haircut and another Full Color.
6. When finished with entering the **Appointment Details**, move on to the remaining sections of the ticket or click the **Schedule/Leave Open** or **Check Out/Close** buttons.

General Information: this section is located in the lower-left corner of the **Ticket Information** screen.

1. **Created by**: identifies the person or method used to create the original ticket.
   a. Click on the down arrow next to **Created by**.
   b. This will produce a drop-down list that is initially set with the following choices:
      - **(blank)**
      - **Main Desk**
      - **Walkup**
      - **Phone In**
   c. Select your choice.
   d. The **Created by** list can be customized to include different or additional options.
      i. Click the **Edit** button to the right of the **Created by** field.
      ii. The **Created By Types** screen will appear.
      iii. Click the **Add** button.
      iv. Type in the new name of the created by type, i.e. an employee's name.
      v. Click the **OK** button.
      vi. Repeat **Steps iii-v** for each created by type that you would like to add.
      vii. You can click on a **Created by** type and use the **Move Up** and **Move Down** buttons as needed to re-order the list.
      viii. The top entry in the list of choices will be the default entry on the **Ticket Information** screen. For this reason, we recommend leaving the top entry as **(blank)**
      ix. Click **OK** when finished revising your list.
2. **Confirmed**: identifies the person or method used to remind a client and confirm an upcoming appointment.
   a. Click on the down arrow next to **Confirmed**.
   b. This will produce a drop-down list that is initially set with the following choices:
      - **(blank)**
      - **Phone (Direct)**
      - **Phone (Answering Machine)**
      - **In person**
      - **E-mail**
   c. Select your choice.
   d. The **Confirmed** list can be customized to include different or additional options.
      i. Click the **Edit** button to the right of the **Confirmed** field.
      ii. The **Confirmation Types** screen will appear.

   iii. Click the **Add** button.
   iv. Type in the new name of the confirmed type, i.e. Fax.
   v. Click the **OK** button.
   vi. Repeat **Steps iii-v** for each confirmation type that you would like to add.
   vii. You can click on a confirmation type and use the **Move Up** and **Move Down** buttons as needed to re-order the list.
   viii. The top entry on the list of choices will be the default entry on the **Ticket Information** screen. For this reason, we recommend leaving the top entry as **(blank)**.
   ix. Click **OK** when finished revising your list.

3. **Referral**: identifies how the customer heard about the business or why they came in.
   a. Click on the down arrow next to **Referral**.
   b. This will produce a drop-down list that is initially set with the following choices:
      - **(blank)**
      - **Request**
      - **Transient**
      - **New**
      - **New Request**
   c. Select your choice.
   d. The **Referral** list can be customized to include different or additional options.
      i. Click the **Edit** button to the right of the **Referral** field.
      ii. The **Referrals List** screen will appear.
      iii. Click the **Add** button.
      iv. Type in the new name of the referral type, i.e. Magazine Ad.
      v. Click the **OK** button.
      vi. Repeat **Steps iii-v** for each referral type that you would like to add.
      vii. You can click on a referral type and use the **Move Up** and **Move Down** buttons as needed to re-order the list.
      viii. The top entry on the list of choices will be the default entry on the **Ticket Information** screen. For this reason, we recommend leaving the top entry as **(blank)**.
      ix. Click **OK** when finished revising your list.
4. **Redeem**: redeem a gift card, gift certificate, or coupon.
   a. If you know the coupon ID, type that ID under the **ID** column.
   b. If you do not know the coupon ID, click the **Coupon** button next to **Redeem**.
   c. The **Look Up** screen will appear.
   d. Make sure the **Display** section is set to **Coupons**.
   e. Double-click the appropriate coupon.
   f. Repeat **Steps b-e** for as many coupons as you would like to redeem on this ticket.
   g. Click **Check Out/Close** or **Schedule/Leave Open** to save the ticket as needed.
5. **Purchase**: purchase a gift card or gift certificate.
   a. For more information on redeeming and purchasing gift cards and certificates, see the **Tender Tracking and Transactions** chapter.
6. When finished with entering the **General** information, move on to the remaining sections of the ticket or click the **Schedule/Leave Open** or **Check Out/Close** buttons.

Special Button: located in the lower-right side of the **Ticket Information** screen under the **Void** button, and to the right of the **No Show** button. The **Special** button brings up a separate menu that allows the user to perform a variety of ticket related tasks from clearing the entire ticket to checking it for errors.

1. Click the **Special** button.
2. A menu will appear with fifteen options:
    a. **Check Ticket**: checks the ticket for errors or problems.
    b. **Delete Ticket**: deletes the ticket from the database.
    c. **Add Ticket to Multi-Ticket Checkout**: adds the ticket to the current list of tickets for a multi-ticket checkout.
    d. **Cancel Ticket**: cancels the ticket.
    e. **Void Ticket**: voids the ticket.
    f. **No Show**: records the ticket as a no show for the client.
    g. **Gift Card**: brings up a sub-menu with the following options:
        i. **Redeem Gift Card**: redeem an already purchased gift card.
        ii. **Purchase Gift Card**: purchase a gift card.
        iii. **Add to Balance**: add money to an already purchased gift card.
        iv. **Look Up Balance and History**: look up a gift card's current balance and purchase history.
    h. **Client Balance**: brings up a sub-menu with the following options:
        i. **Use Available Credit**: use a positive credit to pay for services or products.
        ii. **Add Additional Credit/Pay Off Balance**: add to the current positive credit the client can spend, or pay off any negative balance that the client owes.
        iii. **Close Ticket And Add Amount Due to Client's Balance**: close the ticket and add the unpaid remainder to the client's negative balance.
        iv. **Show Client's Balance**: shows the current positive or negative balance that the client has with the business.
    i. **Loyalty Points**: brings up a sub-menu with the following options:
        i. **Redeem Loyalty Points**: redeem accrued loyalty points for a loyalty option.
        ii. **Add Loyalty Points**: add loyalty points to the current loyalty point balance. For more information on **Loyalty Points** see the **Marketing** chapter.
    j. **Reminders**: brings up a sub-menu with the following options:
        i. **Add Reminder for this Ticket**: add a reminder to the ticket. This is useful when originally scheduling the appointment, as you can leave notes for other employees.
        ii. **View Reminders for this Ticket**: view any reminders associated with the ticket.
    k. **Purchase Gift Certificate**: purchase a gift certificate.
    l. **Claim Tips**: claim any tips associated with the ticket.
    m. **Clear All Items**: clears all items from the appointment details.
    n. **Print Ticket**: print a copy of the ticket.
    o. **Print Tip Line Receipt**: print a copy of the receipt with the tip line added. This is typically used with credit card transactions.
3. When finished with using the **Special** button features, move on to the remaining sections of the ticket or click the **Schedule/Leave Open** or **Check Out/Close** buttons.

Closing Tickets Overview

Closing a Ticket: a ticket is closed after the product, service, coupon, gift certificate, gift card, and payment information has been completed. A closed ticket is a record of services rendered or products purchased. Closed tickets are used when reports, such as business totals, commission, top spending clients, etc., are calculated.

1. Open the **Ticket Information** screen from the appointment book, adding a ticket, or editing a ticket.
2. Verify that all the ticket information is correct, and make any necessary changes.
3. Add any tips if necessary.
4. Enter the tender **Type**.
5. Enter the **Tender**, or the amount that the client is paying. Click the **Tender = Due** button if they are paying the exact amount.
6. Click the **Check Out/Close** button to close the ticket and record the sales in your totals.

Closing a Ticket and Rebooking the Appointment: rebook the next appointment immediately after closing the previous service ticket.

1. Check the **Rebook after closing** box in the lower-right corner and close the ticket as normal, or simply click the **Check Out/Close & Rebook** button.
2. The current ticket that you have selected will be closed.
3. The **Rebook Client** screen will appear.
4. Use the **Quick rebook** option to select a date that's 1 to 8 weeks from the date of the original appointment.
5. Use **Manually select a date to rebook** to choose a specific date from the calendar.
6. You have the option of including the products and services from the previous ticket or removing them by checking or unchecking the **Copy products and services from previous ticket** box as desired.
7. Click the **Rebook** button.
8. Carefully read the following note on the screen: "The appointment book will now display the selected rebook date. To complete the rebooking process, simply right-click on the appointment slot where you would like to rebook the appointment, then select **Paste Appointment**."
9. Click **OK**.
10. As described in **Step 8**, simply right-click on the appointment slot where you would like to rebook the appointment, then select **Paste Appointment** from the menu to complete the rebook.

Voiding or Canceling a Ticket: a voided or canceled ticket will not appear in any business totals or payroll reports, but a record of it will be tracked. Occasionally a ticket will need to be voided or canceled completely, and the ticket will need to be removed from the appointment book. Voiding or canceling a ticket will close and remove the ticket while retaining a record for certain reporting purposes.

1. Edit an open ticket.
2. Click the **Void** or **Cancel** button.
3. The **Void/Cancel** screen will appear.
4. Enter in any comments and click **OK**.

Edit a Closed Ticket: you can control whether or not a closed ticket can be edited. Select **Options** from the **Tools** drop-down menu and click the **Tickets** tab. Under the **Editing/Voiding/Deleting** section, check or uncheck the **Allow closed tickets to be edited** box.

1. Click the **Tickets** button/icon or select **Edit Tickets** from the **Tickets** drop-down menu.
2. Click on the closed ticket to edit or do a search to find the closed ticket in question.
3. Click the **Edit Ticket** button.
4. The **Ticket Information** screen will appear.
5. Click the **Edit** button.
6. Make the appropriate changes and click the **Save Changes** button.

Multi-Ticket Checkout: it is possible to close multiple tickets on one ticket. This is useful if you have two or more clients coming in together and want to pay for all of their services on one ticket. If one or more booth renters is listed on the ticket, you can't do a multi-ticket checkout. This is because booth renters receive payments to their own accounts, and there can only be one account per transaction.

1. Click the first ticket that you would like to include on the multi-ticket checkout.
2. The ticket should be highlighted once it has been selected. This will be the primary ticket, or the ticket that will hold the combined totals from the secondary tickets. You can use the **Remove This Ticket as Primary Ticket** and **Set This Ticket as Primary Ticket** buttons as needed.
3. Click the **Special** button.
4. Select **Add Ticket to Multi-Checkout** option.
5. If the **Question** screen appears, click **Yes**.
6. Adding a secondary ticket to the multi-ticket checkout can be done in multiple ways:
    a. Click the **Add Another Ticket by ID** button under the **Secondary Ticket(s)** section. Type in the **Ticket ID** number and click **OK**.
    b. Click the **Add Another Ticket by Browsing** button. The **Browse for Open Tickets** screen will appear. Select the ticket and click **OK**.
    c. Select an open ticket and click the **Special** button. Then select **Add Ticket to Multi-Ticket Checkout**.
6. Repeat **Step 5** until all desired secondary tickets have been added.
7. If you make a mistake, use the **Remove Selected Ticket** button on the **Multi-Ticket Checkout** screen.
8. Click the **Finished** button.
9. Click **OK**.
10. The **Ticket Information** screen for the primary ticket you selected will appear. The balance(s) from the secondary ticket(s) you entered will be carried over to the balance from the primary ticket that you have selected.
11. Close out the ticket as you normally would.

If you delete the primary ticket of a multi-ticket checkout, the secondary ticket(s) that were added will still exist as closed tickets, and as such will reflect on your sales reporting. Be very careful when deleting tickets that were used in a multi-ticket checkout.

Taking Deposits on Tickets: some clients may prefer putting a down payment or a deposit on a procedure or service that your business offers. Some businesses require deposits on certain services to ensure the appointment is kept. Deposits can be made for the full or partial amount. Most businesses will not refund the deposit if the client does not show up for the scheduled appointment.

1. **Take the Deposit**: the customer can put down a partial or full deposit.

   a. Create a ticket.
   b. Select the service that the client is putting a deposit on.
   c. Set the **Qty Used** column to **0** for that service. The **Qty Prch** column should be the quantity of this service that the client is scheduling an appointment for, usually 1.
   d. In the **Tender** section, enter the amount of the deposit and the payment type.
   e. Click the **Check Out/Close** button.
   f. If the deposit is less than the full amount, the **Tender Less than Total** screen will appear.
   g. Click **Record Amount Due** to add the payment to the prepaid service with the remaining balance to the customer.
   h. Next reserve the date of the future appointment.
   i. Create a new ticket for the date and time that the client is coming in for the service.
   j. Add the service with the deposit to the ticket.
   k. The **Pre-Paid Available** screen should appear.
   l. Click **Yes** to use the pre-paid service.
   m. Click the **Schedule/Leave Open** button.
2. **Redeem the Deposit**: when the client comes in to have the appointment fulfilled and the service rendered, the remaining balance (if any) will need to be paid.
   a. Open the ticket for the previously scheduled appointment.
   b. Click the **Special** button.
   c. Select **Client Balance** then **Add Additional Credit/Pay Off Balance**.
   d. Enter the remaining amount of the client's balance in order to completely pay for the service.
   e. Click **OK**.
   f. Enter the tender type and amount.
   g. Click the **Check Out/Close** button.
3. **Lost Deposit**: most businesses will not refund a deposit for a service if the client does not show up for the appointment. It's easy to remove the client's credit for the deposit without losing the deposit from your totals.
   a. Edit the client and click the **Balance** tab.
   b. Click the **Set to Exact Value** button.
   c. Enter **0** and click **OK**.
   d. Enter that the client was a no show for the appointment in the **Comments** section.
   e. Click the **Pre-Paid Services** button.
   f. Select the pre-paid service to remove and click **Edit**.
   g. Click the **Current Quantity** tab.
   h. Change the **Quantity Available** field as desired. This will most likely be set to **0**.
   i. Click **OK**.
   j. Click **Save** to exit the client's file.
   k. Edit the scheduled appointment ticket and click the **No Show** button.

Wait List Overview

The **Wait List** feature allows you to create a list of clients who have no prior scheduled appointment and are waiting for the next available employee. On the wait list, you can select a specific employee or the first available employee, and the service that the client is waiting for. You can then move the employee from the wait list to an open ticket. To access the wait list feature, click the **Wait List** button/icon or select **Edit Wait List** from the **Clients** drop-down menu.

There are six options for viewing the clients on the wait list:

1. **Only show clients who are currently in the lobby**: show only the clients currently waiting at the business.
2. **Show clients who are available today**: show clients who are available to fill appointments today.
3. **Show clients who are available tomorrow**: show clients who are available to fill appointments tomorrow.
4. **Show clients who are available over a range of days**: show clients who are available to fill appointments between a set range of days.
5. **Show clients who are available on a specific day**: show clients who are available to fill appointments on a specific day.
6. **Show all wait listed clients**: show all clients waiting to fill an appointment.

Wait List Settings: determine when the software will automatically look for appointment openings.

1. Click **Wait List Settings** under the **General Options** section, or select **Wait List Settings** from the **Clients** drop-down menu.
2. The **Wait List Settings** screen will appear.
3. Under the **Automatic Appointment Opening Search Settings**, select when the software should automatically look for appointment openings:
   - **cancel/void/no show a ticket**
   - **delete a ticket**
   - **close a ticket**
   - **drag and drop a ticket**
   - **cut/paste a ticket**
4. Click **OK** to save the settings.

Adding or Editing a Wait List Entry

1. Click **Add Entry** or select the entry from the list and click **Edit Entry**.
2. The **Find Client** screen will appear if you are adding a new entry.
3. Select the client you want to add to the wait list and click **OK**.
4. The **Edit Wait List Entry** screen will appear.
5. If necessary, enter in a comment in the appropriate field.
6. Under the **Wait Dates** section, select if the client is waiting for an appointment today or at some point in the future.
   - **This client is waiting in the lobby for an appointment today**: the client is currently waiting for a seat
   - **This client would like to be booked on the following day**: the client is waiting for a specific available day, and optionally is available every day after the original date
   - **This client would like to be booked on one of the following days**: the client is waiting for an appointment on any of the specified days
7. Under the **Wait Times** section, select what times the client would like to come in for the appointment.

- **This client is available for this appointment at any time**: the client is always available
- **This client is available for this appointment only during specific times**: the client is only available during certain hours

8. Under the **Services this client is Waiting for** section, enter the ID of the service the client is waiting for or click on the **...** button next to the **Service ID** field to bring up the **Look Up** screen.
9. In the same row, if the client is waiting for a particular employee, select the employee in the **Employee/Resource** box.
10. Repeat **Step 8** and **Step 9** for each service the client would like to have performed.
11. You can delete a service from the **Edit Wait List Entry** screen by using the **Delete** button, and you can delete the employee the client is waiting for with the **Clear** button.
12. Click **OK** to save the entry to the wait list.

Deleting a Wait List Entry

1. Click to highlight the appropriate entry.
2. Click **Delete Entry**.
3. The **Are You Sure?** screen will appear.
4. Click **Yes** to permanently delete the wait list entry.

Moving a Client from the Wait List to an Open Ticket: once an appointment opening is available to service the client, the client can easily be moved to an open ticket.

1. Select the appropriate wait list entry.
2. Under the **General Options** section, click **Move to Ticket**.
3. The open ticket will appear.
4. If needed, select the name of employee who is going to perform the service.
5. Complete any remaining information for the ticket and click the **Schedule/Leave Open** button.
6. Close the ticket after the service is complete.

Printing the Wait List: it's occasionally helpful to print the wait list, especially if you would like to call clients that have been waiting for an extended period of time.

1. Click **Customize View**.
2. Use the **Add** and **Remove**, and the **Move Up** and **Move Down** buttons as needed to make the desired changes to the **Selected** section.
3. Click the **OK** button to return to the **Wait List** screen.
4. Select the appropriate option in **Client Booking Availability**.
5. Click a column heading to organize the wait list as needed.
6. Click **Print List**.
7. The **Printing Options** screen will appear.
8. Make the appropriate printer and page range selections and click **Print**.

Quotes and Invoices Overview

You can create, edit, e-mail, and delete quotes and invoices for clients. Both quotes and invoices can be accessed by clicking the **Quotes** button/icon, or by selecting **Edit Quotes and Invoices** from the **Accounting** drop-down menu.

The **Quotes and Invoices** screen can display quotes and/or invoices according to:

- **Type**: quote or invoice
- **Status**: open or closed
- **Date Range**: today, yesterday, a single specified date, a range of dates, or all dates
- **Client's Name**: search specifically by client name

Adding or Editing a Quote or Invoice

1. Click the **Add Quote/Invoice** button or select the quote/invoice to edit and click **Edit Quote/Invoice**.
2. The **Find Client** screen will appear if you are adding a new quote or invoice.
3. Select the client and click **OK**.
4. The **Quote/Invoice Information** screen will appear.
5. Select the **Type**:
    a. **Quote**: an estimate of cost for services to be performed or products purchased. A quote is not a bill to the customer.
    b. **Invoice**: an itemized bill given to the customer detailing the costs of products and services already rendered or to be rendered. Your business will expect to receive payment for an invoice.
6. Select the **Status**:
    a. **Open**: an open invoice is an invoice that the client needs to make payment on. An open quote is a quote that was sent to the client for review. An open quote can be changed to an invoice at any time.
    b. **Closed**: an invoice is closed when a client finishes making all payments on it. A quote is closed when a client has reviewed the quote, but has decided not to proceed with the purchase.
7. Select the **Employee** or leave as **none**.
8. In the **ID** column, type in the **Service ID** or **Product ID** or double-click to bring up the **Look Up** screen.
9. Repeat this for each product or service to add to the quote/invoice.
10. Adjust the **Start Time** column if desired.
11. Click **Save**.

Deleting a Quote or Invoice

1. Use the **Search** and **Date Range** options to display the appropriate quotes and/or invoices.
2. Click on the quote or invoice to delete.
3. Click the **Delete Quote/Invoice** button.
4. The **Are You Sure?** screen will appear.
5. Click **Yes** and your quote or invoice will be permanently deleted from the database.

Moving a Quote or Invoice to a Ticket: you may want to move a quote or invoice to a ticket when a customer is ready to pay for his or her quote or invoice and finalize the sales transaction.

1. Click on the quote or invoice you wish to move to a ticket.
2. Click the **Move to Ticket** button.
3. The **Ticket Information** screen will appear.
4. Select an employee if necessary.
5. Enter the tender amount and close out the ticket as you normally would, or click **Schedule/Leave Open** to schedule the appointment.

E-mailing a Quote or Invoice: e-mail the quote or invoice to a customer for review.

1. Click on the quote or invoice to e-mail.
2. Click the **E-mail Quote/Invoice** button.
3. The **E-mail** screen will appear.
4. The **E-mail To** information will be entered based on the client.
5. Enter a comment or your business information in the **E-mail From** section.
6. Click **Send** to send the quote or invoice via e-mail.
7. Click **OK** to complete the process.

Printing a Quote or Invoice: before printing quotes and invoices, the print format must be set up.

1. Click the **Print Setup** button.
2. The **Quote and Invoice Print Setup** screen will appear.
3. Modify the following information to suit your needs:
   - **From**: this field should contain your business information
   - **Comment**: any other comments you would like to include
   - **Graphic file**: if you would like to print a graphic on the purchase order, i.e. a company logo, click the **Select** button to choose the fill from your computer.
   - **Top**: graphic's distance from the top of the PO
   - **Left**: graphic's distance from the left side of the PO
   - **Height**: graphic's height
   - **Width**: graphic's width
4. Click **OK**.

There are two ways to print a quote or invoice.

1. **Individual Quote or Invoice**
   a. Click to highlight the quote or invoice.
   b. Click the **Print Single Item** button.
   c. The **Printing Options** screen will appear.
   d. Make the appropriate printer and page selections and click the **Print** button.
2. **Quote or Invoice List**
   a. Click the **Customize View** button.
   b. Use the **Add** and **Remove**, and the **Move Up** and **Move Down** buttons to organize the **Display** column.
   c. Click **OK** to return to the **Quotes and Invoices** screen.
   d. Click on a column heading to organize the list as desired.
   e. Click the **Print List** button.
   f. The **Printing Options** screen will appear.
   g. Make the appropriate printer and page selections and click the **Print** button.

Tender Tracking and Transactions

maintaining your cash drawer and performing transactions

Cash Drawer Balance Overview

Salon Iris will control most cash drawers that interface with the serial port or USB port on your computer. The cash drawer controls can be password protected. See the **Password Protection** chapter of this User's Guide for more information. Please visit our website at http://www.SalonIris.com//software/add-ons/salon-pos-system/ for our current recommendation of cash drawer types. See the **Options - Hardware Setup Tab** in the **Options Overview** section for detailed instructions on setting up your cash drawer.

Cash Drawer Balance and Startup: track and balance all currency in the cash drawer. The actual amount of money, checks, credit cards, and other currencies in the cash drawer may be recorded and compared to the amount of currency taken in on closed tickets. Each cash drawer balance for each employee can be recorded and tracked. Cash drawer balances can be reached by selecting **View Cash Drawer Balances** from the **Cash** drop-down menu.

You do not need to do a cash drawer balance first thing in the morning or at the beginning of a shift, but it is recommended. The starting balance will be used when counting down the drawer for closing, or counting down the drawer at the end of a shift. Most businesses use a set amount for each day's starting balance, i.e. $200.

1. Click **Open the Day** which is located under the **General Options**.
2. The **Open the Day** screen will appear.
3. Enter the starting balance of your cash drawer. Most businesses prefer to have a set amount of money that they start the day with. This is usually done so businesses can make change at the start of the day, and to have a set balance that drawers can be counted down to. This balance will be the same from day to day.
4. Check the box next to **When running a new cash drawer balance, automatically set the starting balance to the counted cash value of the last cash drawer balance ran** if your business carries over the previous night's sales to the morning balance. The starting amount in the drawer will be set to the last amount recorded from the previous cash balance. This is typically used when there aren't replacement drawers used between shifts, or when businesses hold all money in the drawer until a deposit can be made to the bank.
5. Click **OK** to save the changes.

Adding Cash Drawer Balance Entries: adding cash drawer balance entries is similar to closing out the drawer at the end of the day. Cash drawer balance entries can be made periodically throughout the day, or when changing cashiers. The cash drawer balance entries record the cash amount at specific times of the day.

1. Click the **Add Balance** button.
2. If password protection is enabled, the cash drawer balance will be recorded for the employee that is logged in. The **Select Date and Time** screen will appear.
3. Select the appropriate date and time parameters and click the **OK** button.
4. If you have booth renters, a pop-up screen will appear asking if you would like to include them.
5. Select **Yes** or **No** as desired.
6. Select the computer(s) that you would like to record the new cash drawer balance for and click the **OK** button.

7. The **Cash Drawer Balance** screen will appear.
8. In the **Counted Cash** section, enter the number of each type of currency in the cash drawer.
9. The **Starting Balance** field should already be set to your declared starting balance. If you have not set a starting balance, enter the amount that the cash drawer started the day with.
10. The amount of dropped cash will automatically appear.
11. The amount of petty cash and settled tips will automatically appear.
12. Salon Iris will calculate the reported amount of cash in the drawer and compare it to the counted cash in the drawer.
13. The **Non-Cash** section shows the total amount of checks, credit cards, and other non-cash amounts from closed tickets.
14. For a perfect drawer balance, there should be no difference in counted currency and reported currency.
15. Click **Save** when finished.

Record a New Cash Drawer Balance and Close Out: Salon Iris enables you to easily balance your cash drawer and close out for the day. You can do a cash drawer balance and close out according to date and/or time.

1. Select **Close Out & Cash Drawer Balance** from the **Cash** drop-down menu.
2. Follow **Steps 2-15** under **Adding Cash Drawer Balance Entries**.
3. After closing the drawer, most businesses fill out a deposit slip and take the day's cash and checks to the bank, or they keep them in a safe until they are taken to a bank or a can be picked up by a bank service.

The cash drawer **Reported Balance** should be equal to the **Counted Cash** in the drawer. The **Reported Balance** is equal to the **starting balance** plus **calculated total of cash from closed tickets** minus **dropped cash** minus **petty cash** minus **settled tips**. The **Counted Cash** is the amount of cash physically in the drawer. **Status** shows if the drawer is balanced, over, or under.

Viewing Cash Drawer Balance Entries and Close Outs: Salon Iris does not allow you to edit an existing cash drawer balance entry. This screen may be used by the business owner or manager to view, delete, and add cash drawer balance entries. We recommend that this screen be password protected.

1. Select the appropriate **Date Range** as desired:
    - **Today**: balances recorded today
    - **Yesterday**: balances recorded yesterday
    - **Range**: balances recorded within a user defined range of days
    - **Single Date**: balances recorded on a single date
    - **All dates**: balances recorded for all days
2. Click on the cash drawer balance entry that you would like to view.
3. Click the **View Balance** button.
4. Click **OK** when finished.

Deleting Cash Drawer Balance Entries: if you happen to accidentally run a cash drawer balance for the incorrect day or time, it is easy to recalculate, but it does need to be rerun.

1. Select the appropriate **Date Range** as desired.
2. Click on the cash drawer entry to delete.
3. Click the **Delete Balance** button.

4. The **Are You Sure?** screen will appear.
5. Select **Yes** to permanently delete the cash drawer entry from the database.
6. If necessary, you may now rerun the cash drawer balance.

Petty Cash Overview

Petty cash transactions are money taken out of the cash drawer, i.e. if you buy coffee for your employees, and money put back in the drawer, i.e. change from the coffee purchase. Petty cash transactions do not appear in store sales' totals, but they do appear in the overall cash balance. This feature allows you to track miscellaneous money taken out of and put back in the cash drawer. Petty cash transactions can be reached by selecting **View Petty Cash Transactions** from the **Cash** drop-down menu.

Adding Petty Cash Transactions: you may record a new petty cash transaction in either of two ways:

1. **New Petty Cash Transaction**: from the **Cash** drop-down menu.
   a. Select **New Petty Cash Transaction** from the **Cash** drop-down menu. If password protection is enabled, the petty cash transaction will be recorded for the employee that is logged in.
   b. The **Add Petty Cash** screen will appear.
   c. Select the employee from the drop-down list.
   d. Select a category from the drop-down list. There are two default choices:
      - **Misc. Supplies**
      - **Found Currency**
   e. Click the **Edit** button to add more categories, i.e. a category called "Coffee."
   f. Add a description of the petty cash transaction.
   g. Enter the **Type**: is cash going into the drawer or coming out.
   h. Enter the amount of the petty cash transaction.
   i. Click **OK**.
2. **Add Petty Cash**: from the **Petty Cash Tracking** screen.
   a. Click the **Add Petty Cash** button.
   b. The **Add Petty Cash** screen will appear.
   c. Perform **Steps c-h** listed above.
   d. Click **OK**.

Viewing or Editing Petty Cash Transactions: after petty cash transactions are entered, you may wish to view or edit them as needed. This option will typically be used by the business owner or manager to review incoming and outgoing petty cash transactions.

1. Click on the petty cash transaction to view or edit.
2. Click the **Edit Petty Cash** button.
3. Make the appropriate changes, or just view the transaction.
4. Click **OK** when finished.

Deleting Petty Cash Transactions

1. Select the petty cash transaction to delete.
2. Click the **Delete Petty Cash** button.

3. The **Are You Sure?** screen will appear.
4. Confirm your selection and click the **Yes** button to permanently delete this entry from the database.

Cash Drop Overview

Salon Iris allows you to record and track cash and check drops. A cash drop is an amount of cash removed from the cash drawer and placed in the safe or sent to the bank for deposit. There is no limit on the number and cash amount of drops you can take. Typically, cash drops are performed to remove excess money from the drawer to be placed in the safe until the balance can be reconciled. Cash drops can be viewed by selecting **View Cash Drops** from the **Cash** drop-down menu.

Adding a Cash Drop: you may record a new cash drop in either of two ways:

1. **New Cash Drop**: from the **Cash** drop-down menu.
   a. Select **New Cash Drop** from the **Cash** drop-down menu.
   b. The **Add Cash Drop** screen will appear.
   c. Enter the amount in cash being dropped.
   d. Enter the amount in checks being dropped.
   e. Select the employee from the drop-down list. If password protection is enabled for this feature, the employee logged in will be recorded automatically.
   f. Click **OK**.
2. **Add Cash Drop**: from the **Cash Drop Tracking** screen.
   a. Click the **Add Cash Drop** button.
   b. The **Add Cash Drop** screen will appear.
   c. Perform **Steps c-e** listed above.
   d. Click **OK**.

Viewing Cash Drop Entries: Salon Iris does not allow you to edit an existing cash drop entry. The **Cash Drop Tracking** screen will typically be used by the business owner or manager to view, delete, and add cash drop entries. It is highly recommended that this screen be password protected.

1. Select **View Cash Drops** from the **Cash** drop-down menu.
2. All cash drop entries will appear in a table.
3. You can narrow or adjust the results by selecting the appropriate option from the **Date Range** section:
   - **Today**
   - **Yesterday**
   - **Range**
   - **Single Date**
   - **All Dates**

Deleting Cash Drop Entries

1. Click on the entry that you would like to delete.
2. Click the **Delete Cash Drop** button.
3. The **Are You Sure?** screen will appear.
4. Confirm your selection and click the **Yes** button to permanently delete the entry from the database.

Checking Out Overview

When a ticket is created it can be saved on the appointment book or closed to record the transaction. Closing out a ticket records all sales information, purchase history, tender, and balances. Open tickets can be viewed on the **Appointment Book** or on the **Tickets** screen.

Closing an Open Ticket

1. Open a scheduled ticket or create a new one.
2. Make sure that all ticket information is correct before closing out.
3. Add a tip if necessary with the **Edit Tip** button.
4. Select the **Type** of tender from the drop-down list. There are six default tender types.
   - **Cash**
   - **Check**
   - **Visa**
   - **MasterCard**
   - **American Express**
   - **Discover**
5. Enter the amount the client is paying in the **Tender** field. If the client is paying the exact amount, click **Tender = Due**.
6. Salon Iris will calculate the change.
7. Click the **Check Out/Close** button.
8. If you are processing a credit card with integrated processing through Salon Iris use the **Process Credit Card** button instead of the **Check Out/Close** button.

Split Tenders: customers have the option of splitting their payments between different tender types, i.e. a customer may want to pay part by cash and part by credit card. To split tenders use the **Split** button in the upper-left portion of the **Tender** section.

1. Click the **Split** button on the open ticket.
2. The section name will change to **Tender (Split Payment)** and there will be two sets of tender entry fields. The **Split** button name will change to **Single**, use this to return back to single tender payment.
3. Make the appropriate **Type 1** and **Type 2** tender entries, i.e. if the total was $50, and the customer wants to pay $20 cash and a check for $30:
   a. Enter **Cash** for the **Type 1** field and $20 for the **Tender 1** field.
   b. Enter **Check** for the **Type 2** field and $30 for the **Tender 2** field.
4. Close the ticket as you normally would.

Tender Types: tender types can be added or modified as needed to suit the needs of the business.

1. Select **Edit Lists** from the **Tickets** drop-down menu.
2. Select **Payment**.
3. The **Payment Types** screen will appear.
4. Click the **Add** button.
5. Enter the payment type.
6. Click **OK**.

7. Repeat **Steps 4-6** for each payment type that you would like to add.
8. Use the **Edit**, **Delete**, **Add Blank**, **Move Up**, and **Move Down** buttons as necessary to organize the tender types.
9. Click **OK** when finished.

Change: Salon Iris automatically calculates the change for all transactions after the tender amount is entered. There are five default change settings:

- **Cash**
- **Visa**
- **MasterCard**
- **American Express**
- **Discover**

Change Types: users can edit and add change types depending on business needs, i.e. using return gift cards or store credit for returns without receipts or excessively late returns.

1. Select **Edit Lists** from the **Tickets** drop-down menu.
2. Select **Change**.
3. The **Change Types** screen will appear.
4. Click the **Add** button.
5. Enter the change type.
6. Click **OK**.
7. Repeat **Steps 4-6** for each change type that you would like to add.
8. Use the **Edit**, **Delete**, **Add Blank**, **Move Up**, and **Move Down** buttons as necessary to organize the change types.
9. Click **OK** when finished.

Tips Overview

Employees may claim tips on an open ticket. Two types of tips exist:

1. **Direct Tip**: a tip given directly to the employee. The tip amount does not appear on the client's receipt. The tip amount is reported in payroll for reference, but is not included in the payroll total. However, payroll taxes for the tip amount are calculated and applied to payroll.
2. **Withheld Tip**: the tip is withheld until the tip is settled. A withheld tip may be settled at the end of the employee's shift by giving them cash from the drawer, or they can be held and settled by running payroll. Withheld tips appear on the client's receipt and in your totals reports. Withheld tips and settled tips should be equal by the time payroll is calculated. Payroll taxes are applied to withheld tips.

Adding Tips: an employee may claim a direct or withheld tip on an open ticket.

1. Add or edit a ticket.
2. The **Ticket Information** screen will appear.
3. Click the **Edit Tip** button located in the **Totals** section of the **Ticket Information** screen, or click the **Special** button and select **Claim Tips**.

4. The **Claim Tip** screen will appear.
5. In the **Claim** section, enter the amount of the tip in the **Amount** field.
6. Select the appropriate tip type in the **Withholding Type** section.
    - **Direct**: cash is given directly to the employee
    - **Withheld**: tip payment is made with some tender other than cash, and the employee receives no direct tip from the client
7. Click **OK**.
8. The **Tips Claimed** screen will appear with a list of all employees shown on the ticket with the corresponding tips.
9. If more than one employee performed services on the ticket, click the **Add** button to add tips for additional employee(s).
10. Select the employee and click **OK**.
11. Repeat **Steps 5-7** to add the tip for the other employee.
12. Repeat **Step 8** for each employee that you wish to add a tip for.
13. Click the **OK** button to return to the **Ticket Information** screen.
14. Close the ticket as normal to record the sale.

Settling Tips: if a tip is withheld, it is not given to the employee until the tip is settled. Settling tips on a daily basis will subtract from the amount of cash expected in your cash drawer when you run a close out/cash drawer balance at the end of the day. If you take money out of the cash drawer for an employee's tip, be sure to settle the tip or at the end of the day, or your drawer will be shown as being under. All tips can be viewed by clicking the **Tips** button/icon, or by selecting **Edit Tips** from the **Employees** drop-down menu.

1. **From an Open Ticket**: from a ticket being edited.
    a. From the open ticket or ticket to be edited, click the **Edit Tip** button.
    b. The **Tips Claimed** screen will appear.
    c. Highlight the tip to edit.
    d. Click the **Edit** button.
    e. The **Claim Tip** screen will appear.
    f. Make sure that the tip type is **Withheld**.
    g. Click the **Settle This Tip Now** button.
    h. Give the employee the appropriate amount of cash.
    i. The settled tip will appear in the payroll calculations for reference. It will not be added to the employee's income, but payroll tax deductions will still be calculated and subtracted.
2. **Single Tip**: settled from the **Tips** screen.
    a. Select **Details** in the **Display** section.
    b. Double-click on the tip to be settled.
    c. Click the **Settle This Tip Now** button.
    d. Give the employee the appropriate amount of cash.
    e. The settled tip will appear in the payroll calculations for reference. It will not be added to the employee's income, but payroll tax deductions will still be calculated and subtracted from the employee's income.
3. **Multiple Tips**: from the **Tips** screen.

   a. Select **Settlement** in the **View** section.
   b. A sum of all unsettled tips for each employee will be displayed.
   c. Click on the employee for whom you wish to settle all tips.
   d. Click the **Settle Tips** button.
   e. Give the employee the appropriate amount of cash.
   f. The settled tips will appear in the payroll calculations for reference. It will not be added to the employee's income, but payroll tax deductions will still be calculated and subtracted from the employee's income.
   g. Repeat **Step c-e** for each employee as appropriate.
4. **Running Payroll**: withheld tips can be settled automatically by running payroll. The amount in tips that are owed to the employee along with the payroll tax deductions are calculated at the same time. The employee's pay is adjusted accordingly to include the tips that haven't been settled. This is an excellent way to monitor tips for tax purposes. See the **Payroll** chapter in this User's Guide for more information on running payroll.

Unsettling Tips: you can easily unsettle tips if you make a mistake, such as forgetting to settle tips and running payroll. Since the tips settle automatically when payroll is run and are added onto employee's checks, this would be an issue if you meant to give your employees cash. Therefore, you can unsettle the tips, and resettle the tips manually to indicate that the employees received cash tips. Payroll would need to be recalculated in this instance to reflect the change.

1. Select **Edit Tips** from the **Employees** drop-down menu.
2. The **Tips** screen will appear.
3. Select **Withheld: Settled Only** in the **Display** section. This may make it easier to find the settled tip that you wish to unsettle.
4. Double-click the tip that you wish to unsettle.
5. The **Claim Tip** screen will appear.
6. Click the **Unsettle This Tip Now** button.
7. Click the **Yes** button.
8. Click **OK**.
9. Repeat **Steps 4-8** for each individual tip that you wish to unsettle.

Editing a Tip: a tip can be edited in two ways:

1. **From an Open Ticket**: from a ticket being edited.
   a. Edit the desired ticket. If the ticket has been closed, you must edit the ticket to edit the tip. If a credit card was used to pay for a ticket that you would like to edit the tip on, the amount charged to the card will not be changed to reflect the tip change. The change will have to be made through the credit card processing company. To remain PCI compliant, most processing companies will not allow transactions if the card is not present.
      i. Locate the closed ticket and double-click on it.
      ii. Click the **Edit** button.
      iii. The ticket is now able to have the tip edited.
   b. Click the **Edit Tip** button.
   c. The **Tips Claimed** screen will appear.
   d. Highlight the tip to edit.

e. Click the **Edit** button to make the appropriate changes.
f. Click the **OK** button to return to the **Ticket Information** screen.
g. Click the **Check Out/Close** button or the **Save Changes** button.

2. **Tips Screen**
   a. Select **Edit Tips** from the **Employees** drop-down menu.
   b. The **Tips** screen will appear.
   c. Highlight the tip to edit and click the **Edit Tip** button.
   d. The **Claim Tip** screen will appear.
   e. Make the appropriate changes. Changes to tip amounts can only be made to open tickets.
   f. Click the **OK** button.

Deleting a Tip: tips can be deleted in two ways:

1. **From an Open Ticket**: from a ticket being edited.
   a. Edit the ticket. If the ticket has been closed, you must edit the ticket to delete the tip. If a credit card was used to pay for a ticket that you would like to delete the tip on, the amount charged to the card will not be changed to reflect the tip deletion. The change will have to be made through the credit card processing company. To remain PCI compliant, most processing companies will not allow transactions if the card is not present.
      i. Locate the closed ticket and double-click on it to edit it.
      ii. Click the **Edit** button.
      iii. The ticket is now able to have the tip deleted.
   b. Click the **Edit Tip** button.
   c. The **Tips Claimed** screen will appear.
   d. Highlight the tip to delete.
   e. Click the **Delete** button.
   f. Click the **OK** button to return to the **Ticket Information** screen.
   g. Click the **Check Out/Close** button or the **Save Changes** button.
2. **Tips Screen**
   a. Select **Edit Tips** from the **Employees** drop-down menu.
   b. The **Tips** screen will appear.
   c. Highlight the tip to delete.
   d. Click the **Delete Tip** button.
   e. The **Are You Sure?** screen will appear.
   f. Verify your selection and click the **Yes** button.

Processing Returns Overview

Salon Iris can accommodate product and service returns. Product returns may be added back to stock during the transaction, and defective items can simply be returned without being added. Service returns are typically used if a client is unhappy with the service that was provided. Service returns, like product returns, will reduce the commission for the employee included on the return ticket.

Only one booth renter can be selected on a ticket for all products and services being returned. In other words, multiple booth renters cannot be selected on the same ticket. This is due to how information is held in the database, reporting is done, and the ability to deposit credit card transaction amounts directly in each booth renter's bank account. If you do not have booth renters but only direct employees, then multiple employees can be selected on a return ticket.

Product Return: process a product return and give the client cash back. See the **Credit Card Processing Overview** section for more details on processing credit card product returns.

1. Create a new ticket.
2. The **Ticket Information** screen will appear.
3. In the **Employee** column, select an employee. If employees get product commission, the employee you select will lose commission for the item being returned. If you do not wish any employee to lose commission, select the **(none)** employee.
4. Enter the **ID** of the product that is being returned.
5. Under the **Type** column, change the type from **P** to **R - Product Return (Add to inventory)** if the product will be returned to inventory.
6. Under the **Type** column, change the type from **P** to **D - Product Return (Do NOT add to inventory)** if the product will not be returned to inventory.
7. Repeat **Steps 3-6** for each additional item being returned.
8. Make sure the tender amount is **$0**.
9. Make sure the refund type is listed as **Cash**.
10. Click the **Check Out/Close** button and give the client his or her cash back.

Service Return: process a service return and give the client cash back. See the **Credit Card Processing Overview** section for more details on processing credit card service returns.

1. Create a new ticket.
2. The **Ticket Information** screen will appear.
3. Select an employee in the **Employee** column. If employees get service commission, the employee you select will lose commission for the service being returned. If you do not wish any employee to lose commission, select the **(none)** employee.
4. Enter the **ID** of the service that is being returned.
5. Change the type from **S** to **V - Service Return** in the **Type** column.
6. Repeat **Steps 3-5** for each additional service being returned.
7. Make sure the tender amount is **$0**.
8. Make sure the refund type is listed as **Cash**.
9. Click the **Check Out/Close** button and give the client his or her cash back.

Credit Card Processing Setup Overview

Salon Iris works with X-Charge, a credit card processing service through OpenEdge. This allows you to process credit cards directly through Salon Iris. To use this feature, we recommend you have the following:

1. **Merchant Account**: before you can process your first integrated credit card transaction, you need to have a merchant account. Ownership of a merchant account is required to process credit cards and also provides a way for the credit card funds to be routed to your bank account. Please contact us at (800) 423-8100 for more information on how to obtain a merchant account. Businesses can have

multiple merchant accounts to facilitate each booth renter employed.

2. **Credit Card Reader**: a credit card reader is a device that attaches to your computer and allows you to quickly obtain the information needed for a credit card transaction by swiping the credit card through the reader. If you use a credit card reader, you will not need to manually type in the credit card information. Some credit card readers are a little larger than a candy bar and plug directly into the USB port on your computer. You can also purchase a keyboard with a built-in credit card reader.
3. **Printer**: a receipt printer is used to print receipts. One receipt is kept by the customer and the other receipt is signed by the customer and returned to you. Salon Iris officially supports Epson brand receipt printers. You can also use a regular full size (8.5" x 11" sheets of paper) Windows printer to print receipts.
4. **Internet Connection**: a phone line modem is used by your computer to connect to your merchant account provider and process the charge. If you are going to use a modem and not high speed Internet, we recommend using a US Robotics modem. A phone line is also required when using the US Robotics modem. For higher processing speeds, we recommend a cable modem or DSL line to process the credit card transactions.

Single Merchant Account Setup: a single merchant account means that all credit card transaction amounts will be deposited into one account. Most businesses use high speed Internet to process their credit card transactions, but a phone line modem will also work. XCharge allows processing Visa and MasterCard credit cards. See **Accepting Discover and American Express** for instructions on accepting Discover and American Express.

1. Obtain the hardware and connect it to your computer(s).
2. Obtain your business' merchant account. A merchant account is a requirement to process credit cards. To obtain a merchant account:
   a. If you have not already done so, call (800) 423-8100 and we can send you the merchant worksheet and provide instructions on the process.
   b. Fill out and return, by fax, the merchant worksheet that was faxed, e-mailed, or postal mailed to you.
   c. After a few days, you will receive a formal application. Your information will already be filled out on this application. Simply sign the application and return it using the enclosed return-envelope.
   d. After the signed application is received, OpenEdge will apply for a merchant account for you. This takes 2-3 working days. Once CAM Commerce receives approval, they will send you the merchant approval sheet. This sheet will contain your merchant ID and bank number.
3. On all computers on the network, be sure Windows file sharing is enabled and that it allows other users to modify files. Make sure your Windows file sharing is NOT set as read only. Also, be sure that Salon Iris is installed on all computers on the network.
4. Have your bank ID number and terminal ID number ready. If you are unsure about any of these, call OpenEdge credit card processing support at (800) 338-6614, and they can give you this information or tell you the status of your bank and terminal IDs.
5. Start Salon Iris.
6. Select **Options** from the **Tools** drop-down menu.
7. Click the **Credit Card Processing** tab.
8. Check the **Enable credit card processing** box.
9. Check the **Show a pop-up message confirming the transaction was approved** box.

10. Select the appropriate option in the **Processing Method** drop-down.
11. If you use the **XCharge** type, click the **Test Connection** button to make sure that the software is able to communicate.
12. Click **OK**.
13. If you use the **EdgeLink Cloud** type, enter your **X-Web ID**, **Terminal ID**, and **Auth Key**.
14. If you accept EMV credit card payments, check the **Enable EMV credit card payments** box.
15. Click the **Verify Settings** buttons to ensure your account credentials are entered correctly. If you receive an error and are unsure of your account settings, contact OpenEdge at (800) 338-6614.
16. Click **OK**.
17. Choose from the following options in the **Tips** section:
    - **Include a tip line only if one or more services are listed on the ticket**
    - **Always include a tip line**
    - **Never include a tip line**
    - **Treat tips for booth renters as direct tips for credit card transactions**
14. Click the **OK** button to return to the **Options** screen.
15. Click **OK** again to return to Salon Iris.
16. Repeat **Steps 6-15** for each computer on the network.

You should now test your integrated credit card processing. To do so, add or edit a ticket. Add a service and mark it to a dollar. Click the **Tender = Due** button and click the **Process Credit Card** button. Swipe the credit card and Salon Iris will process the card and approve or decline it. If the card is approved, the ticket will automatically close. Perform a return for the service to return the money to your card. If your credit card did not process, call XCharge credit card processing technical support at (800) 338-6614.

Multiple Merchant Accounts Setup: Salon Iris allows you to set up multiple merchant accounts. Each booth renter can have his or her own merchant ID number and the credit card transaction amounts from a ticket for a specific booth renter can be deposited directly into his or her account. Most businesses use high speed Internet to process their credit card transactions, but a phone line modem will also work. XCharge allows processing Visa and MasterCard credit cards. See **Accepting Discover and American Express** for instructions on accepting Discover and American Express.

1. Obtain the hardware and connect it to your computer(s).
2. Obtain merchant accounts for each booth renter who wishes to have credit card transaction amounts deposited into his or her account. The merchant account is a requirement to process credit cards. To obtain merchant accounts:
    a. If you already have not done so, call (800) 423-8100 and we can send you the merchant worksheet and provide instructions on the process.
    b. Fill out and return, by fax, the merchant worksheet that was faxed, e-mailed, or postal mailed to you.
    c. After a few days, you will receive a formal application. Your information is already filled out on this application. Simply sign the application and return it using the enclosed, return-envelope.
    d. After the signed application is received, OpenEdge will apply for a merchant account for you. This takes 2-3 working days. Once OpenEdge receives approval, they will send you the merchant approval sheet. This sheet will contain your merchant ID and bank number.
3. On all computers on the network, be sure Windows file sharing is enabled and that it allows other

users to modify files. Make sure your Windows file sharing is NOT set at read only. Also, be sure that Salon Iris is installed on all computers on the network.

4. Make sure that each booth renter has his or her bank ID number and terminal ID number. If you are unsure about any of these, call OpenEdge credit card processing support at (800) 338-6614, and they can give you this information or tell you the status.
5. Call OpenEdge credit card processing support at (800) 338-6614, and they will walk you through the proper configuration and setup on the computer containing the Internet connection.
6. Start Salon Iris.
7. Select **Options** from the **Tools** drop-down menu.
8. Click the **Credit Card Processing** tab.
9. Check the **Enable credit card processing** box.
10. Check the **Show a pop-up message confirming the transaction was approved** box.
11. Select the appropriate option in the **Processing Method** drop-down.
12. If you use the **OpenEdge** type, click the **Test Connection** button to make sure that the software is able to communicate.
13. Click **OK**.
14. If you use the **EdgeLink Cloud** type, enter your **X-Web ID**, **Terminal ID**, and **Auth Key**.
15. If you accept EMV credit card payments, check the **Enable EMV credit card payments** box.
16. Click the **Verify Settings** buttons to ensure your account credentials are entered correctly. If you receive an error and are unsure of your account settings, contact OpenEdge at (800) 338-6614.
17. Choose from the following options in the **Tips** section:
    - **Include a tip line only if one or more services are listed on the ticket**
    - **Always include a tip line**
    - **Never include a tip line**
    - **Treat tips for booth renters as direct tips for credit card transactions**
14. Click the **OK** button to return to the **Options** screen.
15. Click **OK** again to return to Salon Iris.
16. Select **Edit Employees** from the **Employees** drop-down menu.
17. Double-click on the employee who is a booth renter.
18. Click the **Booth Renter** tab.
19. Check the box that says **This person is a booth renter**.
20. In the **X-Web ID**, **Terminal ID**, and **Auth Key** that was provided to this booth renter. The merchant ID should have been obtained when he or she applied for the merchant account in **Step 2**.
21. Note that EMV credit card processing is not available for booth renters. Transactions should be processed using a standard card reader obtained from OpenEdge.
22. Click the **OK** button.
23. Repeat **Steps 17-21** for each employee that is a booth renter.

You should now test your integrated credit card processing. To do so, add or edit a ticket. Add a service and mark it to a dollar. In the **Employees** column, select one booth renter with merchant processing. Multiple booth renters cannot be selected on the same ticket. This is due to how information is held in the database, reporting is done, and how the credit card transaction amounts are deposited into the booth renter's bank account. Click the **Tender = Due** button and click the **Process Credit Card** button. Swipe the credit card and Salon Iris will process the card and approve or decline it. If the card is approved the ticket will automatically close. Perform a return for the service to return the money to the card. If your credit card did not process, call XCharge credit card processing technical support at (800) 338-6614.

Accepting Discover and American Express: if you followed the instructions in the sections above, you will be automatically set up to accept Visa and MasterCard. If you already have a merchant account for Discover and/or American Express, call Global at (800) 338-6614 and give them your merchant account number(s). They can set up your account with the ability to accept Discover and American Express.

1. **Discover**: if you do not have a merchant account with Discover yet, call OpenEdge at (800) 338-6614 and they will add the ability for you to accept Discover.
2. **American Express**: if you do not have an American Express merchant account set up, call (800) 528-5200 and request a merchant account. When you receive your American Express merchant account, call OpenEdge at (800) 338-6614 and give them your American Express merchant account. They will add the ability for you to accept American Express.

Receipt Tip Line: if you are using the integrated credit card processing feature, and have not done so yet, you can print a receipt with a tip line while processing a credit card transaction.

1. Select **Options** from the **Tools** drop-down menu.
2. Click the **Credit Card Processing** tab.
3. Choose from the following options in the **Tips** section:
    - **Include a tip line only if one or more services are listed on the ticket**
    - **Always include a tip line**
    - **Never include a tip line**
    - **Treat tips for booth renters as direct tips for credit card transactions**
4. Click the **OK** button.
5. Click **OK** again.

Depending on your chosen settings, a tip line will now be printed on the receipt before finalizing the credit card transaction. The tip line system has the following advantages:

- Seamless integration with the existing tip tracking system.
- Support for up to two different credit cards with different tip amounts on a single ticket.
- Support for unlimited employees receiving tips on a single ticket.

Processing Credit Card Sales

Credit cards may be used as tender for all service and product sales. There are two ways to process credit card sales:

1. **Integrated Processing**: the credit card transaction is processed directly through Salon Iris.
    a. Create or edit a ticket.
    b. The **Ticket Information** screen appears.
    c. Make sure the ticket is filled out completely.
    d. Enter the amount, not including tip, to charge to the card in the **Tender** field of the the **Tender** section.
    e. Click the **Process Credit Card** button.

f. The **Credit Card** screen will appear.
g. If you have a credit card reader attached to the computer, slide the credit card through the reader. If you do not have a credit card reader or the reader is unable to read the card, type in all the required information on the credit card screen and click the **Process** button.
h. If you have the option selected to include a tip line on the receipt, the receipt will print with a tip line on it.
i. Present the receipt to the customer for his or her signature and for him or her write the tip amount in.
j. In Salon Iris, the **Add Tip** screen will appear.
k. Enter the tip amount in the **Tip Amount** column.
l. Click the **OK** button.
m. If the transaction was approved, the ticket will close. If the card was declined, you will receive a pop-up notification and you should ask the customer if he or she has another form of payment.

2. **External Processing**: the credit card is processed through an external terminal, and the tender needs to be recorded appropriately to match. Although Salon Iris does not approve the credit card transaction directly, by following the steps, you will manually record the credit card transaction. When totals and other reports are run, Salon Iris will be able to show results for each type of credit card.
   a. Create or edit a ticket from within Salon Iris.
   b. The **Ticket Information** screen will appear.
   c. Make sure the ticket is filled out completely.
   d. Click the **Edit Tip** button and enter the tip amount to be given to each employee on the ticket.
   e. Click **OK** after entering the tip.
   f. This will add the tip amount to the amount due.
   g. Take the amount due from within Salon Iris and run the credit card separately through your credit card processor's terminal, software, and/or reader. This step will approve or decline the credit card transaction.
   h. Have your client sign the credit card receipt as you normally would. If you wish to print a tip line on the credit card receipt, you must ask your credit card merchant for instructions on how to do this.
   i. From within Salon Iris, enter the amount that you processed on the credit card in the **Tender** field.
   j. From within Salon Iris, select the credit card type from the **Type** field.
   k. Click **Check Out/Close**.

Processing Credit Card Returns

Product Returns: there are two ways to process credit card product returns.

1. **Integrated Processing**: the credit card return transaction is processed directly through Salon Iris.
   a. Create a new ticket.
   b. The **Ticket Information** screen will appear.
   c. Select an employee in the **Employee** column. If employees get product commission, the employee you select will lose commission for the item being returned. If you do not wish any employee to lose commission, select the **(none)** employee.

   d. Enter the **ID** of the product being returned.
   e. Under the **Type** column, change the type from **P** to **R - Product Return (Add to inventory)** if the product will be returned to inventory.
   f. Under the **Type** column, change the type from **P** to **D - Product Return (Do NOT add to inventory)** if the product will not be returned to inventory.
   g. Repeat **Steps c-f** for each additional item being returned.
   h. Make sure the tender amount is **$0**.
   i. Click the **Card** button located underneath the **Refund Type** field. You cannot use the **Process Credit Card** button located in the **Tender** section to process a credit card return.
   j. Swipe the client's card in the usual matter to process the refund.
2. **External Processing**: the credit card return is processed through an external terminal, and the tender needs to be recorded appropriately to match.
   a. Create a new ticket.
   b. The **Ticket Information** screen will appear.
   c. Select an employee in the **Employee** column. If employees get product commission, the employee you select will lose commission for the item being returned. If you do not wish any employee to lose commission, select the **(none)** employee.
   d. Enter the **ID** of the product being returned.
   e. Under the **Type** column, change the type from **P** to **R - Product Return (Add to inventory)** if the product will be returned to inventory.
   f. Under the **Type** column, change the type from **P** to **D - Product Return (Do NOT add to inventory)** if the product will not be returned to inventory.
   g. Repeat **Steps c-f** for each additional item being returned.
   h. Make sure the tender amount is **$0**.
   i. Take the amount refunded from within Salon Iris and run the credit card refund separately through your credit card processor's terminal, software, and/or reader. This step will approve or decline the credit card transaction.
   j. In the **Refund Type** field, select the credit card type that the amount was refunded to, i.e. Visa, MasterCard, etc.
   k. Click the **Check Out/Close** button and your transaction will be recorded in Salon Iris. Your credit card processing company will actually be the one crediting the client.

Processing Credit Card Service Returns: there are two ways to process credit card service returns.

1. **Integrated Processing**: the credit card return transaction is processed directly through Salon Iris.
   a. Create a new ticket.
   b. The **Ticket Information** screen will appear.
   c. Select an employee in the **Employee** column. If employees get service commission, the employee you select will lose commission for the service being returned. If you do not wish any employee to lose commission, select the **(none)** employee.
   d. Enter the **ID** of the service that is being returned.
   e. Change the type from **S** to **V - Service Return** in the **Type** column.
   f. Repeat **Steps c-e** for each additional service being returned.
   g. Make sure the tender amount is **$0**.

   h. Click the **Return to Credit Card** button located underneath the **Refund Type** field. You cannot use the **Process Credit Card** button located in the **Tender** section to process a credit card return.
   i. Swipe the client's card in the usual matter to process the refund.
2. **External Processing**: the credit card return is processed through an external terminal, and the tender needs to be recorded appropriately to match.
   a. Create a new ticket.
   b. The **Ticket Information** screen will appear.
   c. Select an employee in the **Employee** column. If employees get service commission, the employee you select will lose commission for the service being returned. If you do not wish any employee to lose commission, select the **(none)** employee.
   d. Enter the **ID** of the service that is being returned.
   e. Change the type from **S** to **V - Service Return** in the **Type** column.
   f. Repeat **Steps c-e** for each additional service being returned.
   g. Make sure the tender amount is **$0**.
   h. Take the amount refunded from within Salon Iris and run the credit card refund separately through your credit card processor's terminal, software, and/or reader. This step will approve or decline the credit card transaction.
   i. In the **Refund Type** field, select the credit card type that the amount was refunded to, i.e. Visa, MasterCard, etc.
   j. Click the **Check Out/Close** button and your transaction will be recorded in Salon Iris. Your credit card processing company will actually be the one crediting the client.

Gift Cards vs. Gift Certificates

Gift cards and gift certificates both provide ways for your clients to pre-pay for a specific amount and then give that amount to another person. If you will only be tracking cash, it is recommended to use gift cards. Gift cards are much simpler to use than gift certificates, and can only have a designated amount of money associated with them.

If you will be tracking both cash and specific products and/or services, then it is recommended to use gift certificates. Gift certificates provide greater flexibility than gift cards, and can be used to redeem a specific product or service on top of having a straight cash value.

The following chart summarizes the differences between gift cards and gift certificates:

	Gift Card	**Gift Certificate**
Size	Roughly the size of a credit card	Any size. Common sizes are 8 1/2" by 11" and paycheck size
Material	Plastic	Paper
Comes with Pre-printed Value Amount?	Yes - if purchased from Salon Iris Software No - if purchased from another company or printed yourself	Yes, gift certificates are only created by the user
Tracks Current Balance?	Yes	Yes
Tracks Balance History?	Yes	Yes

Can Have Services or Products Attached?	No	Yes
Reusable?	Yes	No

Gift Card Overview

Gift cards provide a quick and efficient way for your clients to purchase a specific amount to give as gift. After a gift card is purchased, it can be used on returning visits to pay for purchases. Selling and redeeming gift cards is simple. Our gift cards work with a barcode scanner, gift card/credit card reader, or both depending on the style you choose. You can also track gift cards using a gift card ID number and do not have to have a barcode or magnetic stripe. Gift cards are made of plastic and are the size of a credit card. They may contain the following information:

- Full color or logo
- Full color photo
- Your business name
- Your business address
- Your business phone number
- Your business website address
- Optional message
- Optional value of card

There are two types of gift cards:

1. **Predefined Cards**: these are cards that have the currency value, i.e. $50, printed directly on the card and encoded in the gift card value.
2. **Undefined Cards**: these cards do not have a value assigned to them. When these cards are purchased, Salon Iris will ask what value should be assigned to the card.

Obtaining Gift Cards: there are two ways to obtain gift cards for use with Salon Iris.

1. **Directly from Salon Iris Software**
   a. This is the recommended method. Cards printed by Salon Iris Software can have either a predefined or undefined value. Depending on your design, you can track the gift cards using a four digit number, a credit card reader, and/or a barcode scanner.
   b. To purchase cards through Salon Iris Software, call (800) 423-8100, or select **Order Gift Cards** from the **Gift Cards** drop-down menu in Salon Iris.
2. **Print Your Own**
   a. The other option is to print your own gift cards or order them through another company.
   b. Cards printed this way cannot have a predefined value and may not work with a credit card reader or barcode scanner. Instead, the **Gift Card ID** number and amount must be manually typed into Salon Iris. In other words, if you print your own cards or order through another company, they are considered to be undefined gift cards.

Selling Gift Cards

1. Create a new ticket or edit an existing ticket.

2. Click the **Gift Card** button next to **Purchase** and type in the **Gift Card ID** number, or scan/swipe the gift card.
3. If the card is predefined, i.e. already has the card value printed on it, Salon Iris will automatically put the value of the card on the ticket. If the card is undefined, Salon Iris will prompt you to enter the value of the card.
4. Close the ticket.
5. After the ticket is closed, Salon Iris will record the total on the gift card.

Redeeming Gift Cards: when a customer returns to your business and wishes to use a gift card, the gift card needs to be redeemed.

1. Create a new ticket or edit an existing ticket.
2. Add all the products and services to the ticket that the customer is purchasing.
3. Click the **Gift Card** button next to **Redeem** and type in the **Gift Card ID** number, or scan/swipe the gift card.
4. Salon Iris will suggest the amount to use, or you can type in the amount that the customer wishes to redeem.
5. Confirm the amount is correct, then click the **OK** button.
6. If applicable, enter in any tender still owed after the card is redeemed.
7. Close the ticket.

Viewing a Gift Card Balance and Activity: gift cards will keep track of the current balance and the amount spent each time the gift card is used. All gift cards can be viewed by selecting **Edit Gift Cards** from the **Gift Cards** drop-down menu. Double-clicking on a card will bring up the **Gift Card Information** screen. There are two other ways to check a gift card's balance and activity.

1. **Look Up Gift Card Status**: from the **Gift Cards** drop-down menu.
   a. Select **Look Up Gift Card Status** from the **Gift Cards** drop-down menu.
   b. The **Enter Gift Card ID** screen will appear.
   c. Scan the gift card or enter the gift card ID manually and click **OK**.
   d. The **Gift Card Information** screen will appear.
   e. Review the information and click **OK**.
2. **From an Open Ticket**: gift card balances can also be looked up while editing or creating a ticket.
   a. Create or edit a ticket.
   b. Click the **Special** button.
   c. Select **Gift Card** then **Look Up Balance and History**.
   d. Scan the gift card or enter the gift card ID manually and click **OK**.
   e. The **Gift Card Information** screen will appear.
   f. Review the information and click **OK**.

Edit a Gift Card Balance: you can manually edit a gift card balance if there is a dispute or discrepancy.

1. Double-click on a gift card or highlight the gift card and click the **Edit Gift Card** button.
2. The **Gift Card Information** screen will appear.
3. Click the **Change Balance** button.
4. Enter the new balance and click **OK**.
5. Click **OK** to exit.

Delete Gift Card: you can manually delete gift cards in the instance that predefined cards are stolen, or some other reason would necessitate.

1. Highlight the gift card in question.
2. Click the **Delete Gift Card** button.
3. The **Are You Sure?** screen will appear.
4. Click **Yes** to permanently delete the gift card from the database.

Reusing Gift Cards: Salon Iris gives you the flexibility to reuse gift cards. In other words, after a gift card is sold and the client redeems it to a remaining balance of zero, the gift card may be sold again.

1. Select **Gift Card Options** from the **Gift Cards** drop-down menu.
2. The **Gift Card Options** screen will appear.
3. Check the box that says **Allow gift cards to be re-sold to a different client after the balance reaches zero.**
4. Click **OK**.
5. Sell the already used gift card the same as a regular gift card.

Promotional Gift Cards: you can define a set of gift cards as sold without manually having to create a separate ticket for each card. This is useful when you want to give away a group of cards for a special sale or promotion. Cards selected when using this feature will not appear as income in the **Totals** report.

1. Select **Gift Card Options** from the **Gift Cards** drop-down menu.
2. The **Gift Card Options** screen will appear.
3. Click the **Batch Pre-Sale** button.
4. Enter the starting **ID** of the gift card batch, i.e. 1000, and click **OK**.
5. Enter the ending **ID** of the gift card batch, i.e. 1100, and click **OK**.
6. Enter the amount of money to assign to each gift card, i.e. $5, and click **OK**.
7. Click the **Yes** button.
8. Click **OK** when done.

Printing a List of Gift Cards: you may want to print out a list of gift cards for records purposes.

1. Click the **Customize View** button on the left to add or remove columns as desired.
2. You can use the **Add**, **Remove**, and **Move Up** and **Move Down** buttons to customize the information to view.
3. Click **OK** to return to the **Gift Card** screen.
4. You may click a column heading, such as **Amount**, to sort by that column.
5. Click the **Print List** button.
6. The **Printing Options** window will appear.
7. Make your printer and page selections and click **Print**.
8. The information that is displayed on the screen will print.

Gift Certificate Overview

Salon Iris allows you to sell and track gift certificates. Note the following about gift certificates:

- Salon Iris maintains a record of the issuance and usage of gift certificates. Salon Iris does not physically write the certificate document the business gives to the buyer, but you can easily purchase pre-made gift certificates at your local office supply store or print them yourself using a word processor program.

- Gift certificates have a currency value that may be used the same as cash for purchasing business products and/or services.
- The purchase prices of gift certificates may be different from their currency values. For example, the business might have a surcharge on certificates when purchased.
- Gift certificates may offer products and/or services savings or may be for specific products and/or services. For example, there may be currency or percentage discounts on items purchased on a gift certificate.
- Gift certificates may be for a combination of both currency and/or products and/or services.

Selling Gift Certificates: Gift Certificates must be purchased from the tickets screen. This creates a ticket associated with the gift certificate that allows you to track how the gift certificate was paid for

1. Add or edit a ticket.
2. The **Ticket Information** screen will appear.
3. Click the **Gift Cert** button located to the right of **Purchase**.
4. The **Add Gift Certificate** screen will appear with an **ID** that is automatically assigned.
5. You can change the **ID** by clicking the **Change ID** button.
6. Enter the following information of the **General** section:
    a. **Purchase cost**: if there is no surcharge or discount applied to the gift certificate, check the **Make equal to currency value** box before entering the purchase price; clicking this box first will cause the currency value to update to equal the purchase price.
    b. **Status**: as **Open** or **Closed**. The status will default to **Open** since this is a new gift certificate. The status becomes **Closed** when there are no more currency, products, or services left to redeem.
    c. **Currency Value (Useable as Cash)**: the currency value of the gift certificate is a strict cash value and is separate from any cash value inherent in products and services. The purchase cost of the gift certificate may be different than its currency value depending on whether the gift certificate also includes redeemable products and/or services.
7. Complete the **To** and **From** sections. The **To** and **From** sections are identical in setup and may be completed in two ways:
    a. Enter the first and last names of the gift certificate recipient and giver in the appropriate fields.
    b. Click the **Select** button in each field and select the client from the **Find Client** window.
8. If the purchaser desires the certificate to be used for specific products and services, move to the **Item Savings** section. This section maintains a list of the specified goods and services and enables the business to offer special currency or percent discounts on items purchased on gift certificates. If no products or services are to be added on the gift certificate, then skip to **Step 11**.
9. Click the **Add** button.
10. The **Add Gift Certificate Item** screen will appear.
    a. Enter the ID or click the **Search** button to locate the product and/or service.
    b. Enter the quantity.
    c. Check the **Apply taxes to this item** box if applicable.
    d. In the **Discount Type and Amount (Per Item)** section, enter applicable discounts as a percent

and/or currency.

e. Click **OK** to return to the **Add Gift Certificate** screen.
f. If desired, click the **Add** button to add additional products and/or services to the **Product and Services Savings** section and repeat **Steps a-e**.

11. Complete the expiration date, created date, and comments information in the **Miscellaneous** section.
12. Click **OK** to return to the **Ticket Information** screen.
13. The **Ticket Information** screen will show the gift certificate as an entry on the ticket.
14. Close the ticket as you normally would. Taxes for products and services will be applied to the gift certificate at the time it is redeemed.

Redeeming a Gift Certificate: if you do not know the gift certificate number, you can look at a complete list of your business' gift certificates by selecting **Edit Gift Certificates** from the **Tickets** drop-down menu.

1. On the open ticket, enter all products and services that the customer is purchasing.
2. Click the **Gift Cert** button to the right of **Redeem**.
3. The **Gift Certificate** screen will appear.
4. Enter in the gift certificate number and click **OK**.
5. The **Redeem Gift Certificate** screen will appear.
6. If you are only redeeming products and/or services skip to **Step 10**. If you are redeeming a currency (cash) value, click the **Redeem Currency** button.
7. The **Enter Currency to Redeem** screen will appear.
8. Enter the currency to redeem and click **OK**.
9. If you are not redeeming products and/or services, skip to **Step 15**.
10. If you are redeeming products and/or services, all available products and services to use on this gift certificate will be listed in the **Available Items** section. Double-click on the item you wish to redeem.
11. The **Enter Quantity to Redeem** screen will appear.
12. Enter the quantity to redeem and click **OK**. That item will now appear in the **Selected Items** section. You can use the **Remove Item** button if necessary.
13. Repeat **Steps 10-12** for all products and/or services that you wish to redeem.
14. If the gift certificate number is wrong, or if the client decides not to use the gift certificate, use the **Remove this gift certificate from this ticket** button.
15. Click **OK** after all currency, products and/or services to redeem are selected, and you will be returned to the **Ticket Information** screen.
16. Close the ticket as you normally would.

Viewing a Gift Certificate Balance and Activity: Salon Iris lists the details of all gift certificates, open and closed, in a table on the **Gift Certificates** screen. To access this screen, select **Edit Gift Certificates** from the **Tickets** drop-down menu. The gift certificate table will display all of the gift certificates and their current status. They can be organized by clicking any of the column headings. Gift certificates will keep track of the current balance and the amount spent each time the certificate is used.

1. Click the **Gift Certs** button/icon or select **Edit Gift Certificates** from the **Tickets** drop-down menu.
2. The **Gift Certificates** screen will appear.
3. Double-click on the appropriate gift certificate.
4. The **Edit Gift Certificate** screen will appear.
5. Click the **Usage History** tab.

6. Review the information and click **OK** to exit.

Edit a Gift Certificate Balance: you cannot manually edit a gift certificate balance if there is a dispute or discrepancy. Balances can only be changed by closing tickets to accurately reflect the true balance of the gift certificate.

Delete a Gift Certificate: you can manually delete gift certificates in the instance that they are stolen, or some other reason would necessitate.

1. Click to highlight the certificate to be deleted.
2. Click the **Delete Gift Certificate** button.
3. The **Are You Sure?** window will appear.
4. Click the **Yes** button to permanently delete the gift certificate.

Printing a List of Gift Certificates: you cannot print out individual gift certificates within Salon Iris. If you want to make gift certificates, you can do so using a word processing program. You can also purchase pre-made gift certificates at an office supply store and hand write them as you sell them. Salon Iris does allow you to track gift certificates and print out a list of gift certificates that you have sold.

1. Click the **Customize View** button on the left to add or remove columns as desired.
2. You can use the **Add**, **Remove**, and **Move Up** and **Move Down** buttons to customize the information to view.
3. Click **OK** to return to the **Gift Certificate** screen.
4. You may click a column heading, such as **Amount**, to sort by that column.
5. Click the **Print List** button.
6. The **Printing Options** window will appear.
7. Make your printer and page selections and click **Print**.
8. The information that is displayed on the screen will print.

Marketing

marketing your brand and customer loyalty

Marketing Campaigns Overview

Salon Iris has the ability to create and track your business' marketing campaigns. Salon Iris is able to help you start different types of marketing campaigns: e-mail, postal mail, as well as campaigns through other mediums, such as newspapers, magazines, and television. Marketing campaigns can be reached by clicking the **Marketing** button/icon, or by selecting **Edit Marketing Campaigns** from the **Marketing** drop-down menu.

Salon Iris will only directly send e-mail and text messages to clientele. Salon Iris can print out a list of labels for postal mail marketing as well. Salon Iris does not contact radio, television, or periodicals to run ads; it will only record the rate of success that those ads have bringing in customers.

1. **E-mail**: send the clientele a promotional e-mail directly through Salon Iris.
2. **Postal Mail**: send the clientele a promotional letter through postal mail. With this option selected, you can optionally link a file to record what the client is being sent. When this type of campaign is initiated, Salon Iris can print off mailing labels that you can apply to envelopes to send to your clients.
3. **Other**: record and analyze a marketing campaign initiated through some other form of media. Each option allows for a file to be saved and associated with the campaign. Choose from the four following options:
   a. **Radio**
   b. **Television**
   c. **Magazine**
   d. **Newspaper**

Adding a Marketing Campaign

1. Select **Edit Marketing Campaigns** from the **Messaging & Marketing** drop-down menu.
2. Click **Add Campaign**.
3. Enter the campaign's name in the **Campaign Name** field.
4. Enter the campaign's description in the **Detailed Description** field.
5. Choose the date the e-mail blast should be sent using the calendar tool.
6. Optionally, select the **Automatically send this e-mail on a recurring basis** bubble and set frequency of recurrence using the **Starting on** calendar tool.
7. Optionally, select the end date from the **Stopping on** calendar tool.
8. Select the frequency of the campaign to send every **| __ |** day(s), week(s), month(s), or year(s).
9. Select the appropriate bubble for clients to include:
   - **Send to all active clients**: includes every active client in the database with an e-mail address.
   - **Send to a targeted list of clients**: click the **Select Fileter Criteria** button to launch the tool used to target specific clients based on customized criteria. (See the **Client Report** section of this chapter for more detail on this tool.)
10. Once clientele have been selected, a blue link will be available to check list of targeted clients.
11. Select the information to be sent in this campaign. Use an existing marketing template with the **Select Existing E-mail** button or create a completely new template with the **Create a New E-mail** button. (See the **E-mail Templates Overview** section of this chapter for more details on this feature.)
12. Once you are ready to initiate the campaign, click the **Turn on Campaign** button to initiate. If you're

not finished and want to save your work and come back to it later, choose the **Save as Draft** button.

Editing a Marketing Campaign: there may be the need to reopen a campaign to edit settings or run a previously run campaign over again.

1. Select the campaign you would like to edit and click the **Edit Campaign** button.
2. Make the adjustments to the campaign as necessary.
3. Click **Save** to save the changes.
4. If you are initiating a previously saved campaign, click the appropriate button under the **Initiate Marketing Campaign** section.

Copying a Marketing Campaign: there may be times when you want to create a campaign very similar to an existing campaign. Salon Iris helps you with this by providing the ability to copy a previous campaign using the **Copy Campaign** option.

1. Select the campaign you would like to clone, and click the **Copy Campaign** button in the **General Options** section on the left side of the screen.
2. A prompt window will appear.
3. Click **Yes** and a new campaign will be created based on the original.
4. A new window will appear asking if you would like to view the campaign.
5. Click the **Yes** or **No** button depending on whether you would like to do this at this time.

Deleting a Marketing Campaign: occasionally a marketing campaign will need to be deleted.

1. Select the campaign you would like to delete.
2. Click the **Delete Campaign** button.
3. The **Are You Sure?** window will appear.
4. Click **Yes** to permanently delete the campaign.
5. If a referral type was created specifically for that campaign, the referral type will not be deleted.
6. To delete a referral type, select **Edit Lists** from the **Tickets** drop-down menu.
7. Select **Referrals**.
8. Delete the appropriate referral from the list.

E-mail Templates Overview

Salon Iris comes with and has the ability to store e-mail templates to be used for contacting clients and marketing promotions. E-mail templates can be accessed by selecting **Edit E-mail and Text Message Templates** from the **Messaging & Marketing** drop-down menu. There are five main uses for e-mail templates:

1. **General**: e-mails meant to be sent to a single client.
2. **Appointment Notification**: what clients receive as appointment correspondence.
3. **Appointment Reminder**: what clients receive as a reminder for an upcoming appointment.
4. **Appointment Receipt**: what clients receive as a receipt by e-mail when a ticket is closed.
5. **Marketing**: templates that can be used for marketing campaigns, newsletters, etc.

Because the message may need to change depending on who is receiving the e-mail or text message, special fields to personalize messages can be added to the templates that automatically tailors the message for the receiving client. For instance, fields that get replaced automatically with the following information are:

- **Client First Name**: the client's first name
- **Client Last Name**: the client's last name
- **Client Number**: the client's Client ID in your database
- **Client Balance**: the amount the client owes or is owed by your business
- **Client Pre-Paid Services Balance**: list of pre-paid services the client has available to redeem
- **Loyalty Points**: the amount of loyalty points the client currently has available to rdeem
- **Client Address**: the client's address.
- **Client City**: the client's city
- **Client State**: the client's state
- **Client Postal Code**: the client's postal/ZIP code
- **Next Appointment**: displays the client's next upcoming appointment
- **Next 2 Appointments**: displays the client's next 2 upcoming appointments
- **Next 3 Appointments**: displays the client's next 3 upcoming appointments
- **Next 4 Appointments**: displays the client's next 4 upcoming appointments
- **Next 5 Appointments**: displays the client's next 5 upcoming appointments
- **All Upcoming Appointments**: displays all the client's upcoming appointments
- **Company Name**: your business' name
- **Company Address**: your business' address
- **Company City**: your business' city
- **Company State**: your business' state
- **Company Postal Code**: your business' postal/ZIP code
- **Company Phone**: your business' phone number
- **Company E-mail**: your business' e-mail address
- **Employee First Name**: the scheduled employee's first name
- **Employee Last Name**: the scheduled employee's last name
- **Appointment Date**: the appointment's scheduled date
- **Appointment Time**: the appointment's scheduled time
- **Add to Google Calendar**: allows the client to click to add appointment to their Google Calendar
- **Service Details List**: displays list of scheduled services
- **Ticket ID**: the Ticket ID number in your database
- **Appointment Closed Date**: the date the ticket was closed
- **Appointment Closed Time**: the time the ticket was closed
- **Ticket Details Table**: the service, totals, and tender information on the ticket
- **Delivered by Address**: identifies DaySmart Software, Inc. as the message sender
- **Company Address Mailing Line**: displays your business' full mailing address
- **Unsubscribe**: allows the client to click and opt out of receiving e-mail from your business

Adding these items to a template is easy.

1. Open a template.
2. Select the item you want to appear in the e-mail from the **Insert placeholder text into message** drop-

down menu. Not all items listed above can be inserted into every template type.

3. Click in the message body to place your cursor where you would like this information to appear.
4. Click the **Insert** button.
5. The item's name will be entered and surrounded by greater-than and less-than signs e.g. <First Name>.
6. When this e-mail is sent, Salon Iris will automatically replace this field with whatever it symbolizes to customize notifications for each client/employee.

Adding E-mail Templates

1. Select **Edit E-mail and Text Message Templates** from the **Messaging & Marketing** drop-down menu.
2. The **Manage Message Templates** screen will appear. Choose the medium of delivery for this template in the **Message Format** drop-down.
3. Click the **Create New Template** button.
4. Choose the type of message (described at the beginning of this section) to create and your preference to start with a blank message or a pre-designed e-mail template and click **Continue**.
5. Give the template a name in the **Name** field.
6. Optionally, use the **Import from Existing E-mail** to copy an existing template already in the software into this template.
7. When finished editing the template, click the **Save E-mail Message** button. You will now be able to select this template when sending e-mails based on the message type you chose in **Step 4**.
8. If you need to edit or delete a template in the future, simply select **Edit E-mail and Text Message Templates** from the **Messaging & Marketing** drop-down menu again, highlight the desired template, and use the appropriate button in the right side of the **Manage Message Templates** screen.

If creating a marketing template, it is recommended that the **<Company Mailing Address Line> If you no longer want to receive these advertisements, please click <Unsubscribe>** text remain intact. Without the placeholder items included in this text in the template, you will not be able to save the template.

The options for editing and creating e-mail templates in the **E-mail Content** section of the template editor are similar to those found in most word processing programs. E-mail templates can be written completely in HTML. Editing options from left to right on the toolbar include:

- **Font**: choose Arial, Courier New, Georgia, Impact, Lucida Console, Tahoma, Times New Roma, Trebuchet MS, or Verdana
- **Font Size**: choose any size between 5-74 pt.
- **Font Color**: choose any color that Windows can create
- **Bold**: make selected text bold
- **Italic**: make selected text italic
- **Underline**: make selecedt text underlined
- **Left Align**: align selected text/item(s) left
- **Center Align**: align selected text/item(s) center
- **Right Align**: align selected text/item(s) right
- **Bullet List**: create bullet list of text
- **Numeric List**: create numberic list of text
- **Picture Insert**: add images from file path or URL

- **Hyperlink**: create URL links
- **Table Insert**: create tables of text
- **Copy text from MS Word**: copy edited text and preserve formatting from Microsoft Word
- **Design View**: create/edit template in Design View
- **HTML Edit Mode**: create/edit template in HTML View

Salon Iris also comes with a variety of professionally designed e-mail templates that can be customized to suit the needs of your business for all types of e-mail messages. To view these templates, select **Edit E-mail and Text Message Templates** from the **Messaging & Marketing** drop-down menu and then the **Professionally designed templates** radio bubble. Double-click or highlight and select the **Create E-mail Using Selected Design** to begin customizing this template.

Adding Text Message Templates

1. Select **Edit E-mail and Text Message Templates** from the **Messaging & Marketing** drop-down menu.
2. The **Manage Message Templates** screen will appear. Choose the medium of delivery for this template in the **Message Format** drop-down.
3. Click the **Create New Template** button.
4. Choose the type of message (described at the beginning of this section) to create and click **Continue**.
5. Give the template a name in the **Template Name** field.
6. It is recommended that you keep text message templates below 160 characters to ensure that clients' cellular providers do not split a sent text message into multiple segments.
7. When finished editing the template, click the **Save Text Message** button. You will now be able to select this template when sending e-mails based on the message type you chose in **Step 4**.
8. If you need to edit or delete a template in the future, simply select **Edit E-mail and Text Message Templates** from the **Messaging & Marketing** drop-down menu again, highlight the desired template, and use the appropriate button in the right side of the **Manage Message Templates** screen.

Client Report Overview

The **Client Report** feature allows you to create a client mailing list that you may print directly to gum mailing labels, save as a file, or view. The mailing list can be highly customized by sort criteria, i.e. you might create a list of clients with a preferred employee if the employee leaves the business, or you may want to create a list of female clients that have birthdays in May.

1. Click the **Client Report** button/icon or select **Client Report** from the **Messaging & Marketing** drop-down menu.
2. The **Client Report** screen will appear.
3. You can choose one of the quick filter options here by selecting the **Use a quick filter to find clients based on popular criteria**.
4. Select the clients to include by choosing the appropriate radio bubble:
   - **Has a birthday within the next __ days/weeks/months/years**
   - **First visit was within the past __ days/weeks/months/years**
   - **Last visit was within the past __ days/weeks/months/years**
   - **Hasn't had any appointments in __ days/weeks/months/years**
5. You can also filter your client selection with dozens more criteria by selecting the **Find clients based**

on customized criteria using purchase history, personal information, and visit history.

6. Choose **Next** after selecting desired filter option.
7. If you chose the quick filter option, the results screen will appear.
8. If you chose the option to filter based on customized criteria, the next screen will have an accordion menu with search and sort filters.
    - **Visit History**: set parameters and find clients based on their visit history
    - **Purchased Services and Products**: set parameters and find clients based on items they have purchased
    - **Client Information**: set parameters and find clients based on demographics
    - **Birthday**: set parameters and find clients based on birthdates
    - **Client Options**: set parameters and find clients based on other information contained in your database
9. Leave all the boxes blank to include all clients.
10. Click Next when finished and the results screen will appear.
11. Select the way the list should appear by choosing the appropriate bubble in the **Order Results By** section:
    - **Client's last name**
    - **Client's birthday**
    - **Last employee to service client**
12. Choose how you'd like to view the list in the **Result Options** section:
    - **View list or copy e-mail addresses to the Windows clipboard**: view, save, print, copy, or export the displayed information to Excel in this window.
    - **Save to a file**: choose the **Select File** button, name the document that will be created, and choose **Save**.
    - **Print list to guml label sheets**:
        - Select the appropriate label to use for printing with the **Select Label** button. Make any desired changes to the label with the **Edit label** button.
        - Select the font size to be printed on the label.
        - Optionally, check the box to print the text bold
        - Optionally, check the box to print the text italic.
        - Optionally, select additional items to be included: client's birthday, last employee, numbr of months since last visit, and title in front of name.
13. Click **Finish** to execute your chosen option and complete the report.

Client Referrals Overview

Salon Iris contains the ability to track which clients are referred by an existing client. You can view reports that contain this information and/or use the mailing report to print mailing labels so a "thank you" letter or coupon can be mailed to the client that referred the new client. You can also track which marketing tools, i.e. radio ad, newspaper, etc., referred the client. Tracking client referrals is a good way to not only understand where your clients are hearing about you, but it helps narrow down the best possible options for marketing.

When a new client enters the business, ask him or her how he or she heard about the business. If an existing client referred him or her, you can record the referral.

1. Add or edit the new client.
2. Click the **Marketing** tab.
3. Click the **Select** button in the **Client Referral** section to select the client that referred him or her.
4. The **Find Client** screen will appear.
5. Use the search options to find the client.
6. Check the **The above client has received credit for referring this client** box if you have already given the desired credit to this client.
7. Click the **Save** button when finished editing the client.

Credit Clients Who Deserve Referral Credit: some businesses offer a perk, such as a $5 off coupon, for clients who refer another client. After recording who referred the new client, the referring client should receive a referral credit if they already haven't.

1. Select **More Reports** from the the **Reports** drop-down menu.
2. Click **Clients**.
3. Select **Client's Referrals - Not Credited**, Report #58.
4. Select **Print** from the **File** drop-down menu to print the list.
5. The **Printing Options** screen will appear.
6. Make your printer and page selections and click **Print**.
7. Use the printed list to manually give the clients the appropriate referral perk. Some examples of referral perks are as follows: mailing out $5 off coupons, giving clients credit to use towards purchases, giving the clients loyalty points, etc.
8. After the credit has been given to the clients, select **Credit Clients for Referrals** from the **Marketing** drop-down menu.
9. All clients that have not been credited will be marked as receiving credit for their referral.

Client Referral Report: Salon Iris can generate a report that will show all referrals by all clients. This can be helpful in finding out who refers the most business.

1. **Clients Referrals - All**
   a. Select **More Reports** from the **Reports** drop-down menu.
   b. Select **Clients**.
   c. Select **Clients Referrals - All**, Report #57.
   d. The **Clients Referrals - All** screen will appear.
   e. Click **OK** when finished viewing.
2. **Clients Referrals with Totals - All**
   a. Select **More Reports** from the **Reports** drop-down menu.
   b. Select **Clients**.
   c. Select **Clients Referrals with Totals - All**, Report #100.
   d. The **Options** screen will appear.
   e. Make the date selection and click **OK**.
   f. The **Clients Referrals With Totals - All** screen will appear.
   g. Click **OK** when finished viewing.

Marketing Tools Referring a New Client: when a new client enters the business, ask him or her how they heard about the business. If a newspaper, radio ad, etc. referred them, you can record the referral.

1. Add or edit the new client.
2. Clicking the **Marketing** tab.
3. You can select how your client heard about your business under the **Marketing Referral** section.
4. Click the **Edit** button to add new referral types.
5. The **Marketing Referral Types** screen will appear.
6. You can customize your list by clicking the **Add** button for each type of marketing referral that you would like to appear.
7. Click **OK** when finished to return to the **Marketing** tab.
8. Click the **Save** button when finished editing the client.

Marketing Referral Report

1. Select **More Reports** from the **Reports** drop-down menu.
2. Select **Clients**.
3. Select **Marketing Referral Type for New Clients vs. Last Employee**, Report #29.
4. The **Options** screen will appear.
5. Make the date selection and click **OK**.
6. The **Marketing Referral Type for New Clients vs. Last Employee** screen will appear.
7. Click **OK** when finished viewing.

Loyalty Points Overview

The **Loyalty Points System** allows you to establish and customize a rewards system for your clients. Conveniently and easily issue rewards to clients who demonstrate consistency towards your business. After loyalty points are defined for individual services and products, clients will receive points for purchasing these services and/or products. Clients can then redeem the loyalty points for rewards.

Loyalty points rewards are considered an expense to your business. When a loyalty points reward is redeemed, its dollar value is subtracted from your totals for the day. For instance, if a dollar amount of $50.00 is redeemed, then $50.00 will be subtracted from your totals for the day. If a free service or product is redeemed, for instance Haircut, then that service or product's retail price will be subtracted from your totals for the day.

Setting up the Loyalty Points Rewards Table: the **Loyalty Points System** is based on the **Loyalty Points Rewards Setup**, which can be found under the **Messaging & Marketing** drop-down menu. The **Loyalty Points Rewards Table** can be customized to issue three types of awards:

- Dollar Amount
- Free Service
- Free Product

The point value defined must be reached in order for the client to be eligible for the reward type. If a client has points in excess of what is shown in the table, he or she will have access to multiple awards.

1. Select **Loyalty Points Reward Setup** from the **Messaging & Marketing** drop-down menu.
2. The **Loyalty Points Rewards Setup** screen will appear.

3. The **Rewards Table** is customizable and may be configured to award strictly a dollar amount, a free service, a free product, or any combination of the three.
4. Click on the **Add** button to add a new reward.
5. The **Loyalty Point Reward** screen will appear.
6. Enter the number of **Points** required to obtain the reward.
7. Enter the **Reward** type. This can be a designated currency amount, or one free product or service.
8. Click **Save**.
9. Repeat **Steps 4-8** until your **Loyalty Points Reward Table** setup is complete.
10. Under the **Options** section, select from the following options:
    a. **Use the loyalty points defined for each product or service when calculating the loyalty points earned on a ticket**: loyalty points are awarded to clients for the purchase of specific services or products. The Individual services and products that will award loyalty points must be assigned a loyalty point amount.
        i. Go to the **Products** or **Services** screen.
        ii. Edit any product or service that will add loyalty points.
        iii. The **Edit Product** or **Edit Service** screen will appear.
        iv. Click on the **Loyalty Points** tab.
        v. Enter a value in the **Loyalty Points** field. This value is the amount that will be added to a client's loyalty points balance upon purchasing this product or service.
        vi. Click **Save**.
        vii. Repeat **Steps ii-vi** for every other product or service that you wish to incorporate into the loyalty point system.
    b. **Base the loyalty points earned on a ticket on the subtotal of the ticket**: loyalty points will be calculated using a set spending ratio, i.e. one loyalty point for every two dollars spent. This will be applied to the subtotal of the ticket, regardless of what items make up the subtotal. You will not be able to make exceptions on a per product/service basis.
        i. Enter an **earn** value. This is how many points per specified dollar amount the client will earn.
        ii. Enter a **spent** amount. This is how much clients have to spend before they earn the above point value. Dollar amounts are rounded to the nearest numerical value you select. If you are giving one loyalty point for every dollar spent and the subtotal is $24.39, then $24 will be used to calculate loyalty points. If you are giving one loyalty point for every $2.25 spent and the subtotal is $22.41, then $22.50 will be used to calculate loyalty points.
        iii. Click **OK**.
11. Check the **I would like Salon Iris to notify me of the rewards a client is eligible for when creating tickets** box if desired.
12. Click **OK** when finished.

Recording and Adjusting Loyalty Points: when a ticket is closed, loyalty points are automatically added or subtracted on the client's record. A pop-up window will appear displaying the amount of points added to the client's balance and the total number of points available for redemption. Every loyalty point transaction is recorded in the client's **Loyalty Point History**.

1. Go to the **Clients** screen.
2. Edit the client.

3. The **Edit Client** screen will appear.
4. Click on the **Balance and Loyalty Points** tab.
5. The **View Loyalty Point History** button displays a history of all loyalty point transactions.
6. Click **OK** when finished viewing it.
7. The **Set To Exact Value** button allows you to set the client's loyalty points to an exact value.
8. The **Increase Points** button allows you to increase a client's existing loyalty points by a certain amount.
   a. A positive number will increase the client's points.
   b. A negative number will decrease the client's points.
9. The **Decrease Points** button allows you to decrease a client's loyalty points by a certain amount.
   a. A positive number will decrease the client's points.
   b. A negative number will increase the client's points.
10. When you are finished editing or viewing the client's loyalty points, click **Save** to exit.

Redeeming Loyalty Points: if the product or service being redeemed is not already on the ticket, Salon Iris will add the product or service to the ticket and a line to remove the price, and then account for the point deduction. If the product or service is already on the ticket, Salon Iris will only remove the price and subtract the loyalty points to be used.

1. Open a ticket and add a service or product.
2. On the Ticket Information screen, click the **Special** button.
3. Select **Loyalty Points**.
4. Then select **Redeem Loyalty Points**.
5. The **Loyalty Point Rewards** screen will appear.
6. Double-click on one of the available rewards to redeem. When redeeming loyalty points, the price and any sales tax is included in the loyalty points usage.
7. The reward will be shown on the ticket and the ticket will be adjusted accordingly.
8. Close the ticket.
9. A pop-up screen will appear showing the client's loyalty points adjustment and remainder.

Coupons Overview

The **Coupons** screen allows viewing, adding, editing, and deletion of coupons issued by your business. It also facilitates evaluation of the statistical effectiveness of each coupon type by displaying redemption history. This aids in determination of the most and least popular coupons. Coupons can be set to take a percentage off the total sale, a specific amount off the total sale, or give discounts to specific services or products. Click the **Coupons** button/icon or select **Edit Coupons** from the **Messaging & Marketing** drop-down menu to access the **Coupons** screen.

Adding or Editing a Coupon

1. Click the **Add Coupon** button, or highlight the coupon to edit and click the **Edit Coupon** button.
2. The **Add Coupon/Edit Coupon** screen will appear.
3. Enter the following information In the **General** section:
   a. **ID**: a unique number, word, or code that you assign to track coupon usage.

   b. **Description**: a sentence or two explaining what the coupon is for.
   c. **Expiration date**: if necessary.
   d. **Notes**: if necessary, leave any miscellaneous details or terms and conditions.
   e. **This coupon is inactive**: mark to remove item from coupon and ticket item search screens.
5. There are three options for the **Coupon Savings Details** section:
   a. **Percent**: takes the percentage off of the total purchase.
   b. **Currency**: takes the currency amount off the total purchase.
   c. Leave both numbers as zero if the coupon is only for specific product or service discounts.
6. If the coupon is to be used for specific product or service savings, select the corresponding option and add an item to be discounted or redeemed with the coupon.
   a. Click the **Add** button.
   b. The **Add Coupon Item** screen will appear.
   c. Type in the product or service ID or click the **Search** button.
   d. Select the quantity that needs to be purchased to receive the discount, i.e. buy two get one free, or buy 1 get one half off.
   e. Enter the discount percent or currency to be applied to this item when the coupon is redeemed.
   f. Click the **Save** button to add the coupon to the database.

Deleting a Coupon: If a coupon is deleted, Salon Iris will not be able to evaluate coupon statistics and will not be able to determine how many coupons were redeemed.

1. Click to highlight a coupon.
2. Click the **Delete Coupon** button.
3. The **Are You Sure?** screen will appear.
4. Click the **Yes** button to permanently delete the coupon from the database.

Redeeming a Coupon

1. Add or edit a ticket.
2. Make sure that all products and services are added and correct.
3. Add a coupon through either of the two methods:
   a. Click the **Coupon** button to the right of **Redeem** in the **General** section of the ticket.
   b. Manually add the coupon ID to the **ID** column.
      i. Type the coupon ID in the **ID** column, or double-click in the **ID** column to bring up the **Look Up** screen.
      ii. Select **Coupons** in the **Display** section.
      iii. Double-click on the coupon to use.
4. Repeat **Step 3** to add multiple coupons.
5. Close the ticket as you normally would.

Viewing Coupon History and Usage: evaluating the effectiveness of each coupon type can help determine how many of each coupon type was returned. Use this to determine the best way to create coupons for future marketing campaigns.

1. Click to highlight a coupon.
2. Click the **Edit Coupon** button.
3. The **Edit Coupon** screen will appear.

4. From here you can add or subtract to the number of coupons that have been issued.
   a. Click the **Modify Number Issued** button.
   b. The **Enter Number of Coupons Issued** screen will appear.
   c. Enter the number of coupons that were issued.
      - A positive number adds to the total coupons available
      - A negative number subtracts from the total coupons available
   d. Click **OK**.
   e. A notification screen will tell you how the coupons were adjusted.
   f. Click **OK** to return.
   g. Click **View Issue History** to view the history of how many coupons were added/subtracted, and on what date it happened.
6. The number of redeemed coupons, and the last date of use will be displayed under the **Usage History** section.
7. Click the **OK** button when finished.

Printing the Coupon List: some business prefer to keep a list of all current coupons at the POS to keep track of current sales.

1. Click the **Customize View** button on the left to add or remove columns as desired.
2. You can use the **Add**, **Remove**, and **Move Up** and **Move Down** buttons to customize the information to view.
3. Click **OK** to return to the **Coupon** screen.
4. Sort to the desired display by clicking a column heading, such as **Coupon ID**.
5. Click the **Print List** button.
6. The **Printing Options** window will appear.
7. Select the printer and page range options and click **Print**.
8. Only the list of coupons will print and not individual coupons. If you would like to print individual coupons to send to clients, you can make coupons using a word processor program or purchase pre-made coupons from an office supply store.

Messaging

communicating with clients and suppliers

Messaging System Overview

Salon Iris has a **Messaging System** in place that can send electronic business correspondence to clients, employees, and suppliers. Types of messages that can be sent include:

- Appointment reminders, changes, and cancellations by e-mail and SMS (Short Message Service) text message
- Marketing campaigns by e-mail
- Individual e-mails and SMS text messages
- Purchase orders e-mailed to Suppliers

All messages are sent by Salon Iris and require a **Messaging Service** subscription with DaySmart Software. Appointment correspondence is automated and requires only a first time setup. Marketing campaigns can be sent manually or set to run automatically on selected scheduled frequency. In order for Salon Iris to send any messages from the **Messaging System**, the program must be open on the server computer and requires an Internet connection.

To create a new **Messaging Service** account:

1. Select **Messaging System Setup** from the **Messaging & Marketing** drop-down menu.
2. Click the **Sign up for Messaging** button. A web browser will open to the DaySmart account management webpage. Click the **Continue to Messaging Setup** button. If you have not created a **DaySmart account** yet, choose the **Create Account** button and follow the setup instructions.
3. Choose the credit card details to use by electing to use the card information already on file or entering new credit card information and choosing **Continue Using this Payment Info**.
4. Enter all your business information and click **Create Account**. WHen the account creation is complete, close the web browser and return to Salon Iris.
5. Click the **I'm Done Signing Up Online** button in the **Messaging System Setup** window to complete account creation. Click **OK** to manage your account and sending preferences.

Salon Iris can also be used to send single e-mails and text messages to clients. To send an e-mail or text message:

1. Access the **Messaging** screen by clicking the **Messaging** button or choosing **View E-mail and Text messages** from the **Messaging & Marketing** drop-down menu.
   - Alternatively, any time the **Edit Client** screen is open, both an **E-mail Client** and a **Text Client** button will be available to quickly send correspondence to a client. Messages sent and saved as drafts from this screen will appear on the **Messaging Screen**.
2. For an E-mail, click **New E-mail** button in the upper left, enter recipient's name or e-mail address, edit the Subject line and Text Body, and then click **Send**.
3. For a Text Message, click the **New Text** button in the upper left, enter the recipient's name or SMS text number, edit the Subject Line and Text Body, and then click **Send**.

Any e-mail or text message that is started can be saved as a **Draft** to be finished and sent at a later time. When editing either type of message, click the **Save Draft** button and the message will be saved in **Draft Status**. Each message status can be viewed by using the **Advanced Search**. Simply select the desired message status from the **Status** drop-down menu. Messages in **Draft Status** can be sent by highlighting the item and clicking **Send Messages** from the **Messaging Options** on the left of the **Messaging** screen or by opening the draft and clicking **Send**.

If the **Purchase Orders** function is utilized by your business, then e-mailing orders with your **Messaging Service** account is a great way to handle all product ordering in one place. See the **Ordering Overview** in the **Products and Inventory** chapter to learn how to create purchase orders using Salon Iris. Once a PO has been created, sending it by e-mail with a **Messaging Service** account is performed by highlighting any open PO and clicking the **E-mail PO** button on the left of the **Purchase Orders** screen.

An overview of **Templates** for both **Appointment Reminders** and **Marketing Campaigns** is available in the **Marketing** Chapter.

Managing Notifications

1. Select **Set Up Appointment Notifications** from the **Messaging & Marketing** drop-down menu.
2. The **Edit Appointment Notification Settings** window will appear.
3. The window is divided into four tabs which are based on the four types of notifications that Salon Iris can send:
   - **Appointment Reminders**: what clients receive as a reminder for appointments
   - **Client Notifications**: what cleints receive when scheduling, changing, or canceling appointments
   - **Employee Notifications**: what employees receive when appointments are scheduled, changed, or canceled
   - **Receipts**: what your clients receive as receipts from closed tickets

Appointment Reminders: this tab contains all the controls that determine the how, when, and what appointment reminders are sent.

1. Check or uncheck the **Send appointment reminders to clients by e-mail** to turn on or off e-mailed appointment reminders.
2. Check or uncheck the **Send appointment reminders to clients by text message** box to turn on or off text message appointment reminders.
3. Optionally, check or uncheck the **and allow clients to respond to a text reminder to confirm the appointment** box to receive confirmations automatically. Salon Iris will proces this feedback periodically (about once an hour) and change the **Confirmed** drop-down on the client's ticket to **Text Message**. (See the **Appointment Book** chapter if you would like to learn about color coding based on confirmation.)
4. Select the timeframe for reminders with the **Send reminders |__| day(s) before a scheduled appointment** drop-down.
5. Optionally, check or uncheck the **Send a follow-up reminder |__| day(s) before a scheuled appointment** box.
6. Optionally, check or uncheck the **Make sure a client only gets one e-mail and text message reminder per day** box. This is useful if you have clients with multiple bookings.
7. Optionally, check or uncheck the **Don't send any reminders the same day of a scheduled appointment** box. This is useful if Salon Iris is shut down during a time reminders should be sending.
8. Select and/or edit the template for **Email Reminders**, **Text Reminders**, and **Text Confirmation Reply** in the lowest section. This is the template that clients will receive based on the message type.

Clicking the **Edit Message** button will show a preview and options to edit or create new templates. (See the **Templates Overview** section of the **Marketing** chapter for more on editing templates.)

Client Notifications: to make sure the line of communication is always open with clients, Salon Iris can send messages to keep them aware when anything chages with their appointments. Each message type can be sent by both e-mail and/or text message.

- Check or uncheck the box for each type to turn its notification on or off.
- Make changes to e-mail templates for each message type with the **Edit E-mail** button.
- See a preview or what clients will receive the with the **Preview** button for each message type.

Employee Notifications: in the same way as it can for clients, Salon Iris can send messages to employees to keep them aware when anything chages with their appointments. Each message type can be sent by both e-mail and/or text message.

- Check or uncheck the box for each type to turn its notification on or off.
- Make changes to e-mail templates for each message type with the **Edit E-mail** button.
- See a preview or what employees will receive the with the **Preview** button for each message type.

Receipts: unlike all the other notification types, receipts can only be sent by e-mail. Text message receipts would like be split into multiple segments because of character count and be confusing to clients.

1. Check or uncheck the **Send receipt when ticket is closed** box to turn on or off the sending of receipts when tickets are closed.
2. Optionally, check or uncheck the **and prompt me each time before it sends** to choose whether or not to send a receipt by e-mail.
3. Click the **Edit E-mail** button to make changes to the template clients receive as receipts.
4. Clieck the **Preview** button to see what the message looks like.
5. Optionally, check or uncheck the **Include employee names for each line item when including the ticket item details** box to show which employee performed each service or sold each product on the ticket.
6. Optionally, check or uncheck the **and also include employees' last names** box to include last names.

Payroll Settings

time clock and payroll maintenance

Time Clock Overview

You can have complete time clock capabilities for businesses with employees working on an hourly basis. Each time an employee "logs in" and "logs out" the hours worked are calculated for payroll use.

1. The time clock feature may be protected with an individual password for each employee.
2. The time clock feature is optional. You can also pay your employees according to salary and/or commission if you do not wish to use the time clock.

Utilize the time clock by clicking the **Log In** or **Log Out** button/icons, or by selecting **Log In** or **Log Out** from the **Time Clock** drop-down menu.

Logging In: Salon Iris will record the hours worked until the employee logs out.

1. Click the **Log In** button/icon or select **Log In** from the **Time Clock** drop-down menu.
2. The **Time Clock Log In** screen will appear.
3. Select the employee from the drop-down list.
4. Click the **Log In** button.
5. If the employee's time clock entry is password protected, a password entry box will appear.
6. Enter the employee's password and click the **Log In** button.

Logging Out: Salon Iris will record the hours the employee worked since logging in and use them in payroll calculations.

1. Click the **Log Out** button/icon or select **Log Out** from the **Time Clock** drop-down menu.
2. The **Time Clock Log Out** screen will appear.
3. Select the employee from the drop-down list.
4. Click the **Log Out** button.
5. If the employee's time clock entry is password protected, a password entry box will appear.
6. Enter the employee's password and click the **Log Out** button.

Time Clock Record Management: the **Time Clock** screen allows the business owner or other designated employees to access time clock records. The information displayed on the **Time Clock** screen is what your payroll is based on if your business operates on hourly wages. For this reason we highly recommend password protecting the **Time Clock** screen and only giving access to managers and owners.

1. Select **Edit Time Clock Entries** from the **Time Clock** drop-down menu.
2. The **Time Clock** screen will appear.
3. Select the appropriate date range from the **Date Range** section.
4. Click the **Advanced Search** button to display the **Search by Employee** drop-down list to view specific employee entries, or select **All** to view all employees' time records.

Manually Adding or Editing a Time Clock Entry: adding and editing time clock entries is useful for adding missed punches, or making adjustments in situations where a customer comes in and requests a service from an employee that has already logged out.

1. Click the **Add Entry** button, or highlight the entry to edit and click the **Edit Entry** button.
2. The **Add Time Clock Entry/Edit Time Clock Entry** screen will appear.

3. Select the employee from the **Employee** drop-down list.
4. Set the appropriate **Date**.
5. Enter the **Time In**.
6. Enter the **Time Out**.
7. Add or subtract time with the **Adjustment** feature, i.e. 1 hour spent on lunch.
8. Add any **Comment** if necessary.
9. Click the **OK** button to save the entry.

Manually Deleting a Time Clock Entry: deleting a time clock entry is helpful if an employee accidentally logs in as another employee.

1. Click to highlight the time clock entry to be deleted.
2. Click the **Delete Entry** button.
3. The **Are You Sure?** screen will appear.
4. Verify your selection and click the **Yes** button to permanently delete the time clock entry from the database.

Printing Time Clock Entries: printing time clock entries is important for records keeping. Some businesses require employees to sign off on their hours before collecting their paychecks.

1. Select the appropriate date range.
2. Select the appropriate employee sort options.
3. Click the **Customize View** button on the left to add or remove columns as desired.
4. You can use the **Add**, **Remove**, and **Move Up** and **Move Down** buttons to customize the information to view.
5. Click **OK** to return to the **Time Clock** screen.
6. Sort to the desired display by clicking a column heading, such as **Employee ID**.
7. Click the **Print List** button.
8. The **Print Options** screen will appear.
9. Select the printer and page range options and click **Print**.

Time Clock Password Overview

Salon Iris can be set up so that logging in and logging out requires an employee password. This is helpful in reducing accidental logins. Salon Iris can also be set up so that an employee can change his or her password for the time clock from the **Log In** or **Log Out** screen.

The business owner can also password protect the access to the entries in the **Time Clock** screen. Because these entries are typically how payroll is calculated, we highly recommend that only managers and the business owner have access to the **Time Clock** screen, and that employees sign off on their hours to ensure that employees are being paid for hours worked.

Setting Employee Log In/Log Out Passwords

1. Select **Password Setup** from the **Tools** drop-down menu.
2. The **Password Controls** screen will appear.
3. Click the **Enable employee password protection on this computer** box.

4. Click the **Edit Passwords** button.
5. The **Employee Passwords** screen will appear.
6. Check the **Allow employees to change their own passwords on the Time Clock Log In and Log Out screens** box if you would like employees to be able to change their own passwords.
7. Check the **Hide passwords** box if you want passwords to be hidden.
8. Double-click on the employee for whom you wish to set the password for.
9. Enter the password. It must be between 3 and 20 characters long.
10. Click **OK**.
11. Enter the new password for a second time. This verifies the password.
12. Click **OK**.
13. Repeat **Steps 8-12** for each employee password.
14. Click **OK** to return to the **Password Controls** screen.
15. Click **OK** to save the changes.
16. When the employee tries to log in or log out of the time clock, he or she will be automatically prompted for his or her password.

Password Protecting the Time Clock Screen: because the **Time Clock** screen has payroll sensitive information, we recommend that only the owner and/or manager(s) have access to it.

1. Select **Password Setup** from the **Tools** drop-down menu.
2. The **Password Controls** screen will appear.
3. Click the **Enable employee password protection on this computer** box.
4. Click the **Edit Access** button.
5. The **Employee Passwords** screen will appear.
6. You will see an item called **Time Clock: Time Clock Screen** in the **Item** column.
7. In the same row as the **Time Clock: Time Clock Screen** item, click the box in the **Require Password** column.
8. Underneath each employee's name and in the same row as the **Time Clock: Time Clock Screen** item, check the boxes underneath the names of the employees that you want to have access to the **Time Clock** screen.
9. Repeat **Steps 7-8** for **Time Clock: Delete Time Clock Entries** and **Time Clock: Add/Edit Time Clock Entries** if desired.
10. Click **OK** to return to the **Password Controls** screen.
11. Click **OK** to save the changes.

Payroll Overview

Salon Iris can calculate your business' employee payroll, and if desired, print payroll checks. Payroll calculations are made based on information taken from the following items:

1. Employee payroll settings for income and deductions, including tables for income and deductions.
2. Product and service sales commission recorded in closed tickets.
3. Time clock information if applicable.

The **Payroll Configuration** screen can be reached by selecting **Payroll Configuration** from the **Accounting** drop-down menu.

First Time Setup: to increase or decrease the size of the **Payroll Configuration** screen, position your pointer over the edge of the border until a double-headed arrow appears. Once the arrow appears, click and hold the left mouse button and drag to resize.

1. Select **Payroll Configuration** from the **Accounting** drop-down menu.
2. The **Select Country** screen will appear.
3. Select your country and click **OK**. Federal tax tables may be installed or updated.
4. The **Payroll Configuration** screen will appear.
5. There are three types of information for payroll configuration:
    a. **Setting**: basic inclusion and hours worked settings.
    b. **Income**: set how the money is earned.
    c. **Deduction**: set any number of deductions to be taken out.
6. The **Commission System** has two settings:
    a. **Use single commission system**: if employees earn commission for the entirety of the sale and use of services and products.
    b. **Use dual commission system**: if different commissions are earned on the original sale and when/if the service is used.
7. Click **OK** when finished.

Copy Profiles: you can copy the same payroll configuration from an already existing employee. When you have multiple employees to enter, this option will make entering payroll information more convenient.

1. In the lower-left portion of the screen, click the **Copy Profile(s)** button.
2. The **Copy Profile** screen will appear.
3. On the right side of the screen, select the employee that has the same payroll configuration that you want to copy from the **The same as** drop-down list.
4. On the left side of the screen, in the box next to the employee's name(s), check the appropriate employees that you want to copy the payroll configuration to.
5. Click **OK** to return to the **Payroll Configuration** screen.

Payroll Settings Overview

1. Double-click the box directly underneath the desired employee that is horizontally in-line with the **Include** field.
2. The **Include** screen will appear.
3. Select whether or not to include this employee in payroll calculations.
4. Click **OK** to return to the **Payroll Configuration** screen.
5. Double-click the box underneath the desired employee that is horizontally in-line with the **Hours Worked** field.
6. The **Hours Worked** screen will appear.
7. Select from the following choices:
    - **Hours based on time clock entries**: use time clock entries to calculate hours worked
    - **Prompt me for the number of hours worked for this employee each time I run payroll**: set

hours based on a prompt before payroll is calculated
- **Use |___| hours**: set a specific amount of hours to be used for each payroll

8. Click **OK** to return to the **Payroll Configuration** screen.
9. Click **OK** to save the settings.

Hourly vs. Commission: since many businesses have a system where the employees are paid based on which is greater between hourly pay and commission pay, the payroll system in Salon Iris is able to calculate this for you automatically.

1. Set up the **Service Commission** and **Product Commission** for the desired employee. See the **Single Commission Income Overview** section.
2. Double-click on the **Hourly** field for the same employee.
3. Select **Rate of |___| per hour** and enter the employee's wage. Or select **Based on hourly table** depending on hourly pay rate.
4. Check the **Use product and service commission amount, if greater** box.
5. Click **OK**.

Payroll for this employee will be calculated from either commission or hourly wages, not both. When payroll is run, if the employee's total commission pay (service commission + product commission) is greater than the hourly pay over that time period, the employee's hourly pay will be set to zero for this pay period and just the commission pay will be given. Otherwise, if the hourly pay is greater than the total commission, the two commission amounts will be set to zero and the hourly pay will be given instead.

Single Commission Income Overview

The recommended configuration for payroll is the **Single Commission System**. This means that the employees' commission is based on the amount shown in the **Commission Based On** column on the **Ticket Information** screen for all tickets for the selected time period.

1. Click **Use single commission system** under the **Commission System** section.
2. Double-click the box directly underneath the desired employee that is horizontally in-line with the **Salary** field.
3. The **Salary** screen will appear.
4. You can select to pay the employee in the following ways:
    - **No salary**: this employee does not receive salary pay
    - **Use |___| (currency amount)**: enter the salary amount that will be paid
5. Click **OK** to return to the **Payroll Configuration** screen.
6. Double-click the box directly underneath the desired employee that is horizontally in-line with the **Hourly** field.
7. The **Hourly** screen will appear.
8. You can select to pay the employee in the following ways:
    - **No hourly pay**: this employee does not receive hourly pay
    - **Rate of |___| per hour**: enter the rate of pay per hour worked, i.e. $9 for $9/hour
    - **Based on hourly table**: the rate of hourly pay fluctuates based on the settings of an established table

9. Click **OK** to return to the **Payroll Configuration** screen.
10. Double-click the box directly underneath the desired employee that is horizontally in-line with the **Adjustment** field.
11. The **Adjustment** screen will appear.
12. You can select to pay the employee in the following ways:
    - **No adjustment**: this employee does not receive a pay adjustment
    - **Use |___| (currency amount)**: enter an adjustment to the employee's normal pay. Adjustments will remain through payroll periods, so if the adjustment is a one time bonus, it must be removed before the next payroll period is calculated
13. Click **OK** to return to the **Payroll Configuration** screen.
14. Double-click the box directly underneath the desired employee that is horizontally in-line with the **Tips Claimed** field.
15. The **Tips Claimed** screen will appear.
16. You may select to claim tips in the following ways:
    - **Don't claim tips**: this employee does not receive tips
    - **Prompt me for this employee's tips each time I run payroll**: set claimed tips based on a prompt before payroll is calculated. Some business prefer to have their employees record daily tips on a sheet that is then added during payroll calculations
    - **Based on amounts claimed on tickets**: claimed tips are calculated based on closed tickets over the specified pay period
    - **Fixed percentage of services sold**: claimed tips are based on a set fixed percentage from the services provided on closed tickets over the specified pay period
    - **Fixed amount**: claimed tips are based on the same fixed amount every pay period
17. Click **OK** to return to the **Payroll Configuration** screen.
18. Employee commission for products and services may be calculated in three common ways:
    a. **Fixed**: there is one commission rate that is applicable to all total sales, minus backbar, regardless of the currency amount, i.e. if the employee's total sales minus backbar is $2300, and the commission rate for that employee is set to 10%, then the commission amount received will be 10% of $2300, or $230.
    b. **Stepped**: a specific commission rate will be determined by set intervals of the employee's total sales, i.e. if the employee's total sales minus backbar is $2300, and the commission intervals are set up so that if the employee's sales total is between $0.00 - $999.99 he or she will receive 10% commission, if the sales total is between $1000-1999.99 he or she will receive 12% commission, and if the sales total is between $2000-2999.99 he or she will receive 14%, then the employee would receive 14% of $2300, or $322.
    c. **Incremental Stepped**: adjusts the percentage rates at intervals of total sales, but pays at the interval rates, i.e. if the employee's total sales minus backbar is $2300, and the commission rates are set up so that if the employee's sales total is between $0.00 - 999.99 the employee receives 10%, for $1000-1999.99 the employee receives 12%, and for $2000-2999.99 the employee receives 14%, then by using an incremental stepped scale, the employee will now receive 10% for the first $1000 out of $2300, plus 12% of the second $1000 out of $2300, plus 14% of the $300 out of $2300. This would be (0.10 x $1000) + (0.12 x $1000) + (0.14 x $300) = $100 + $120 + $42 = $262.
19. Double-click the box directly underneath the desired employee that is horizontally in-line with the

Product Commission field.

20. The **Product Commission** screen will appear.
21. You can select to pay the employee in the following ways:
    - **No commission**: this employee does not receive product commission
    - **For all product sales amounts that are not bonuses or exceptions, use the following percentage**: the employee earns a straight percentage on all products sold excluding products with specific bonuses and exceptions
    - **For all product sales amounts that are not bonuses or exceptions, use the following table**: if the employee will receive commission based on a stepped or incremental stepped scale, select the appropriate commission table from the drop-down list
22. Click **OK** to return to the **Payroll Configuration** screen.
23. Double-click the box directly underneath the desired employee that is horizontally in-line with the **Service Commission** field.
24. The **Service Commission** screen will appear.
25. You can select to pay the employee in the following ways:
    - **No commission**: this employee does not receive service commission
    - **For all service sales amounts that are not bonuses or exceptions, use the following percentage**: the employee earns a straight percentage on all services rendered excluding services with specific bonuses and exceptions
    - **For all service sales amounts that are not bonuses or exceptions, use the following table**: if the employee will receive commission based on a stepped or incremental stepped scale, select the appropriate commission table from the drop-down list
26. Click **OK** to return to the **Payroll Configuration** screen.
27. To configure overtime settings and tables, please see the **Payroll Tables Overview** section for more information.

Single Commission System Examples: the examples below are for services given, no product examples will be discussed. When using the **Single Commission System**, there are four configurable entities for each service.

1. **Price**: a standard price can be defined, and exceptions created as needed per employee. If you change the service price, this new price will apply to all future tickets created after the point in time in which you changed the service price. The change is not retroactive.
2. **Backbar**: a standard backbar amount can be defined, and exceptions created as needed per employee. This backbar amount is subtracted from the **Commission Based On** amount when determining employee commission. The total backbar on a ticket is calculated as: **Backbar** times **Qty Used**.
3. **Bonus**: a standard bonus can be defined, and exceptions created as needed per employee. A bonus is a lump sum awarded to an employee for the selling of a service. It is independent of commission. The total bonus for a ticket is calculated as: **Bonus** times **Qty Prch**.
4. **Commission**: a commission percentage or lump sum can be awarded to an employee for performing a service. This number is usually determined from the **Payroll Configuration** screen, but exceptions can be created as needed per employee. If you change the commission amount, it **will** apply to all tickets. The change is retroactive. You can make commission exceptions for each employee based on the **Commission** tab within a service. If you make a commission exception, the settings under the **Commission** tab within the service are used instead of the settings on the **Payroll Configuration**

screen.

There are four configurable entities, each of them having either a **Standard** or **Exception** value. Therefore, there are sixteen possible configurations for any employee using the **Single Commission System** for each service.

Configurable Item	Price	Backbar	Bonus	Commission
Employee A	Standard/Exception	Standard/Exception	Standard/Exception	Payroll Settings/Exception

Figure 1: Different configurations using the ***Single Commission System***

Example 1:

1. Let us configure Susan Smith to have a commission percentage of 20% from the **Payroll Configuration** screen, Figure 2.

Type	Item	Susan Smith
Setting	Include	Yes
	Hours Worked	Time Clock
Income	Salary	None
	Hourly	None
	Adjustment	None
	Tips Claimed	Don't claim
	Product Commission	10%
	Service Commission	20%
Deduction	Federal Tax	None
	State Tax	None
	Local Tax	None
	Social Security	None
	Booth Renter	None
	Medicare	None
	Health Care	None
	SEP	None

Figure 2: ***Payroll Configuration*** *screen with a 20%* ***Service Commission***

2. We will be looking at a generic service, SERVICE A, configured for Susan Smith. Here are its characteristics:
   - Price: $60.00, no exceptions for Susan
   - Backbar: $15.00, no exceptions for Susan
   - Bonus: $10.00, no exceptions for Susan
   - Commission: 20%, based on **Payroll Configuration**
3. Susan performs SERVICE A and Ticket #1027 is closed.
4. When payroll is run the **Commission Details** screen will be displayed, see Figure 3.
5. Susan’s commission total taken from Ticket #1027 is calculated below:
   - Commission Total = ($60.00 – ($15.00 * 1))*20% + $10.00 = $19.00
   - Ticket #1027's information:

- Commission Based On: $60.00
- Backbar: $15.00
- Commission: 20%
- Bonus: $10.00

6. As can be seen below, this total is correct.

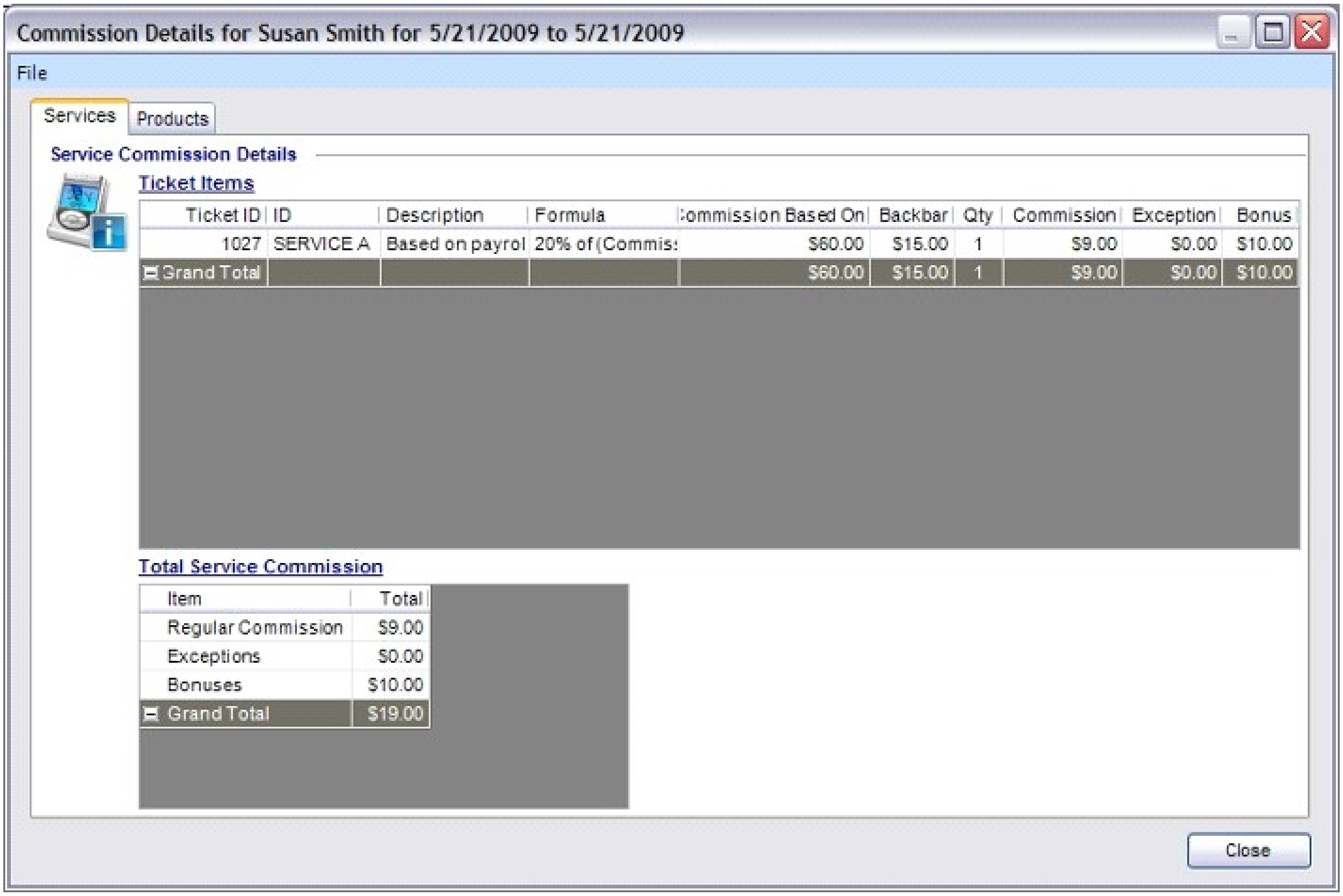


Figure 3: Commission Details screen for Example 1

Example 2:

1. Susan Smith's **Payroll Configuration** commission percentage will remain at 20%.
2. We will again be looking at SERVICE A as configured for Susan Smith. Here are its characteristics:
   - Price: $60.00, no exceptions for Susan
   - Backbar: $15.00, exception of $20.00 for Susan. This $20.00 exception will apply to Ticket #1029 and later. In other words, all tickets created after the point in time the exception was created will have a backbar exception of $20.00 for Susan
   - Bonus: $10.00, exception of $15.00 for Susan. This $15.00 bonus exception will apply to Ticket #1029 and later. In other words, all tickets created after the point in time the exception was created will have a bonus exception of $15.00 for Susan

- Commission: 20%, based on **Payroll Configuration**

3. Susan performs SERVICE A and Ticket #1029 is closed.
4. When payroll is run the **Commission Details** screen is displayed, see Figure 4. This payroll assumes that Ticket #1027 was already closed.
5. Susan’s commission total taken from Ticket #’s 1027, from **Example 1**, and 1029 is calculated below:

   Commission Total = ($60.00 - ($15.00*1) + $60.00 – ($20.00*1))*20% + ($10.00 + $15.00) = $42.00

   Or,

$$\text{Commission Total} = (\underbrace{\$60.00 - (\$15.00*1)}_{\text{Ticket\#1027}} + \underbrace{\$60.00 - (\$20.00*1)}_{\text{Ticket\#1029}})*20\% + \underbrace{(\$10.00 + \$15.00)}_{\text{Bonuses}} = \$42.00$$

   - Ticket #1027's information is below:
     - Commission Based On: $60.00
     - Backbar: $15.00
     - Commission: 20%
     - Bonus: $10.00
   - Ticket #1029's information is below:
     - Commission Based On: $60.00
     - Backbar: $20.00
     - Commission: 20%
     - Bonus: $15.00
6. As can be seen below, this total is again correct.

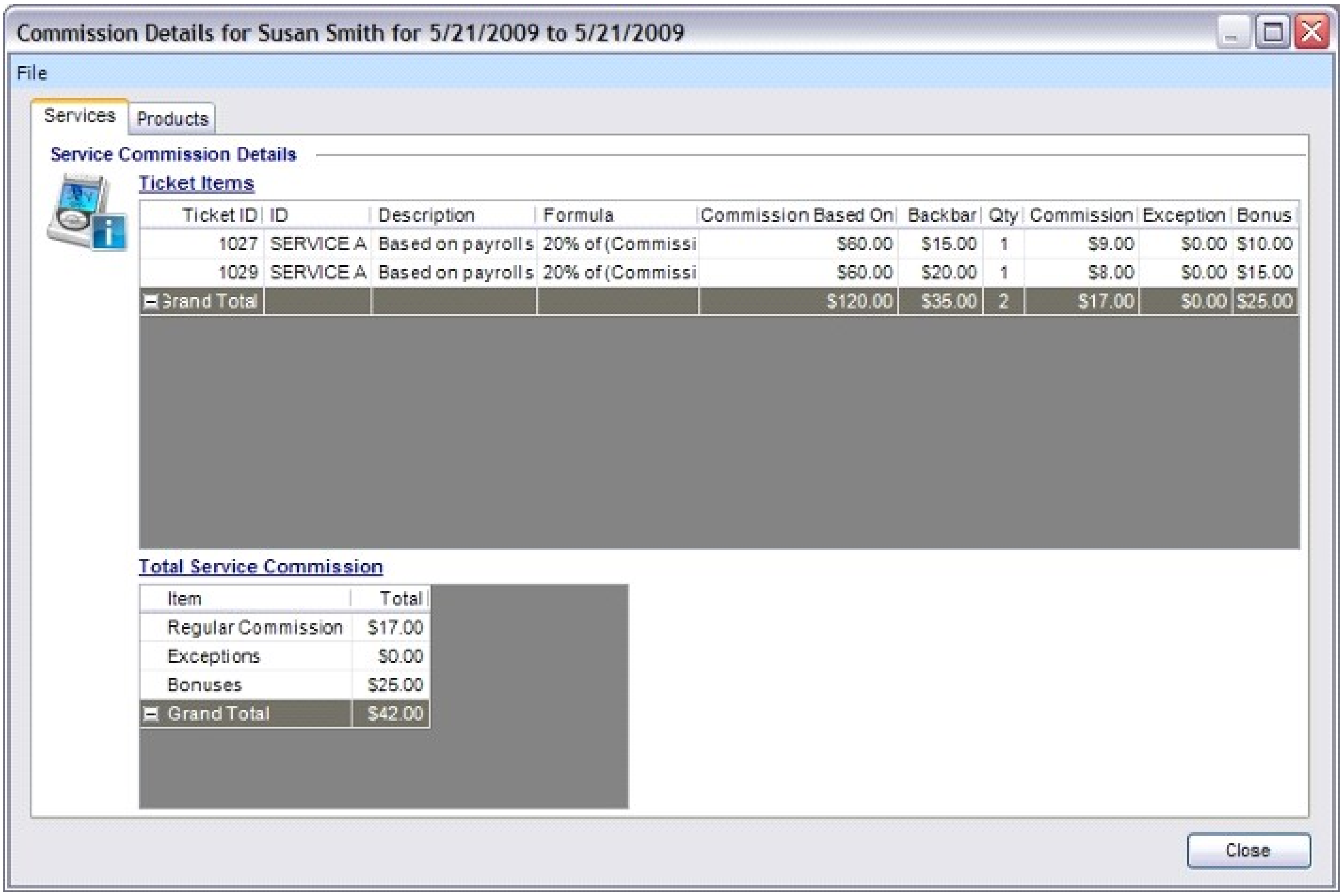


Figure 4: Commission Details screen for Example 2

Example 3:

1. Susan Smith's **Payroll Configuration** commission percentage will remain at 20%.
2. We will again be looking at SERVICE A configured for Susan Smith. Here are its characteristics:
    - Price: $60.00, exception of $80.00 for Susan. This $80.00 exception will apply to Ticket #1030 and later. In other words, all tickets created after the point in time the exception was created will have a price exception of $80.00 for Susan
    - Backbar: $15.00, exception of $20.00 for Susan. This $20.00 exception will apply to Ticket #1029 from **Example 2** and later
    - Bonus: $10.00, exception of $15.00 for Susan. This $15.00 exception will apply to Ticket #1029 from **Example 2** and later
    - Commission: exception of 50% for Susan. This 50% exception will apply to all tickets created and is retroactive
3. Susan performs SERVICE A and Ticket #1030 is closed.
4. When payroll is run, the **Commission Details** screen is displayed, see Figure 5. This payroll assumes that Ticket #'s 1027, 1029, and 1030 have already been closed.
5. Susan's commission total taken from Ticket #'s 1027 from **Example 1**, and 1029 from **Example 2**, and

1030 should be:

Commission Total = ($60.00 - ($15.00*1) + $60.00 - ($20.00*1) + $80.00 - ($20.00 * 1))*50% + ($10.00 + $15.00 + $15.00) = $112.50

Or,

$$\text{Commission Total} = \underbrace{(\$60.00 - (\$15.00*1)}_{\text{Ticket\#1027}} + \underbrace{\$60.00 - (20.00 * 1)}_{\text{Ticket \#1029}} + \underbrace{\$80.00 - (\$20.00 * 1))}_{\text{Ticket\#1030}} * 50\% + \underbrace{(10.00 + \$15.00 + \$15.00)}_{\text{Bonuses}} = \$112.50$$

- Ticket #1027's information is below:
    - Commission Based On: $60.00
    - Backbar: $15.00
    - Commission: 50%
    - Bonus: $10.00
- Ticket #1029's information is below:
    - Commission Based On: $60.00
    - Backbar: $20.00
    - Commission: 50%
    - Bonus: $15.00
- Ticket #1030's information is below:
    - Commission Based On: $80.00
    - Backbar: $20.00
    - Commission: 50%
    - Bonus: $15.00

6. The total is again correct. The exception of 50% is applied to all tickets in the payroll with SERVICE A.

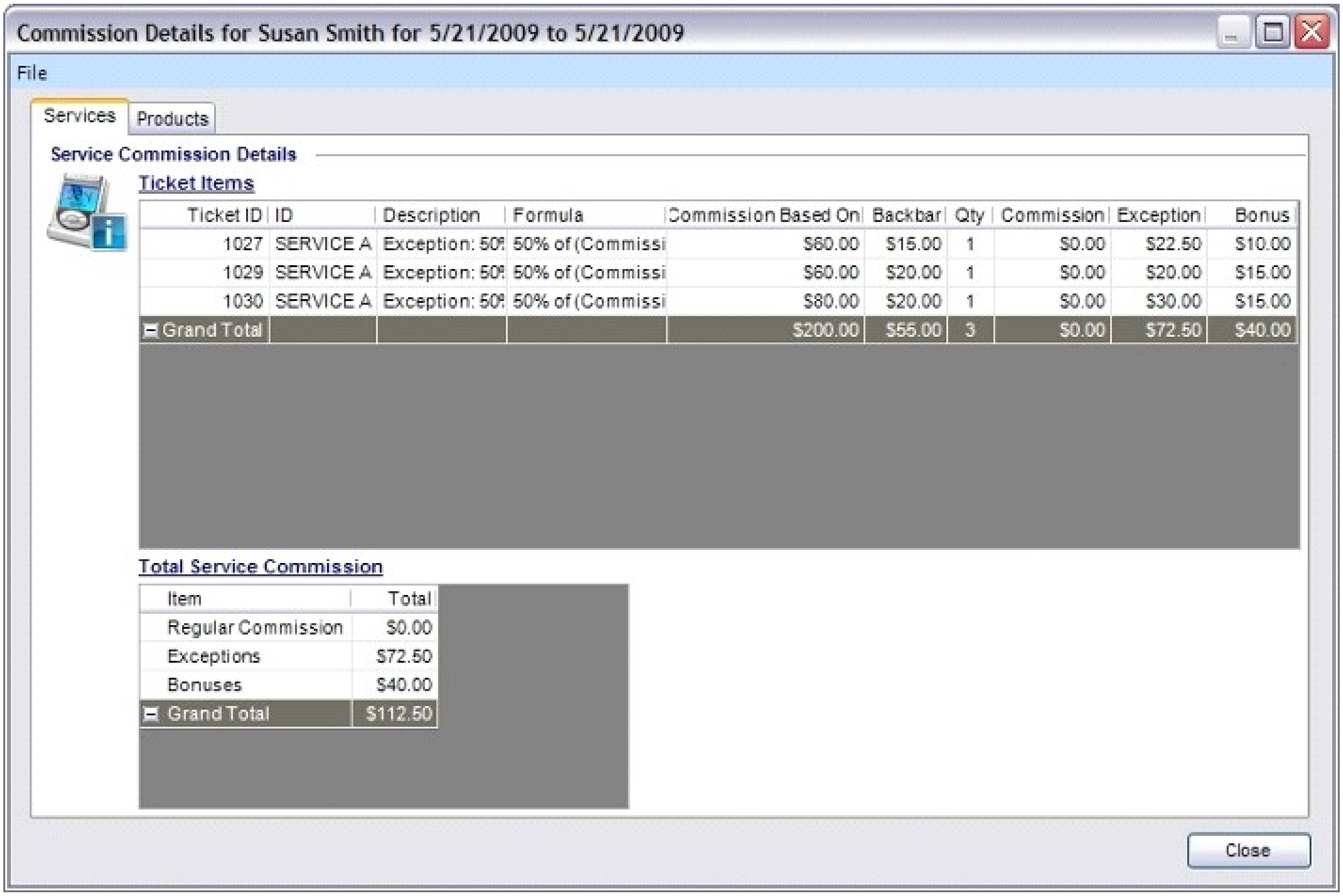


Figure 5: Commission Details screen for Example 3

Example 4:

This time, instead of using Susan's **Payroll Configuration** of 20%, we will be using Susan’s **Commission Table**, see Figure 6.

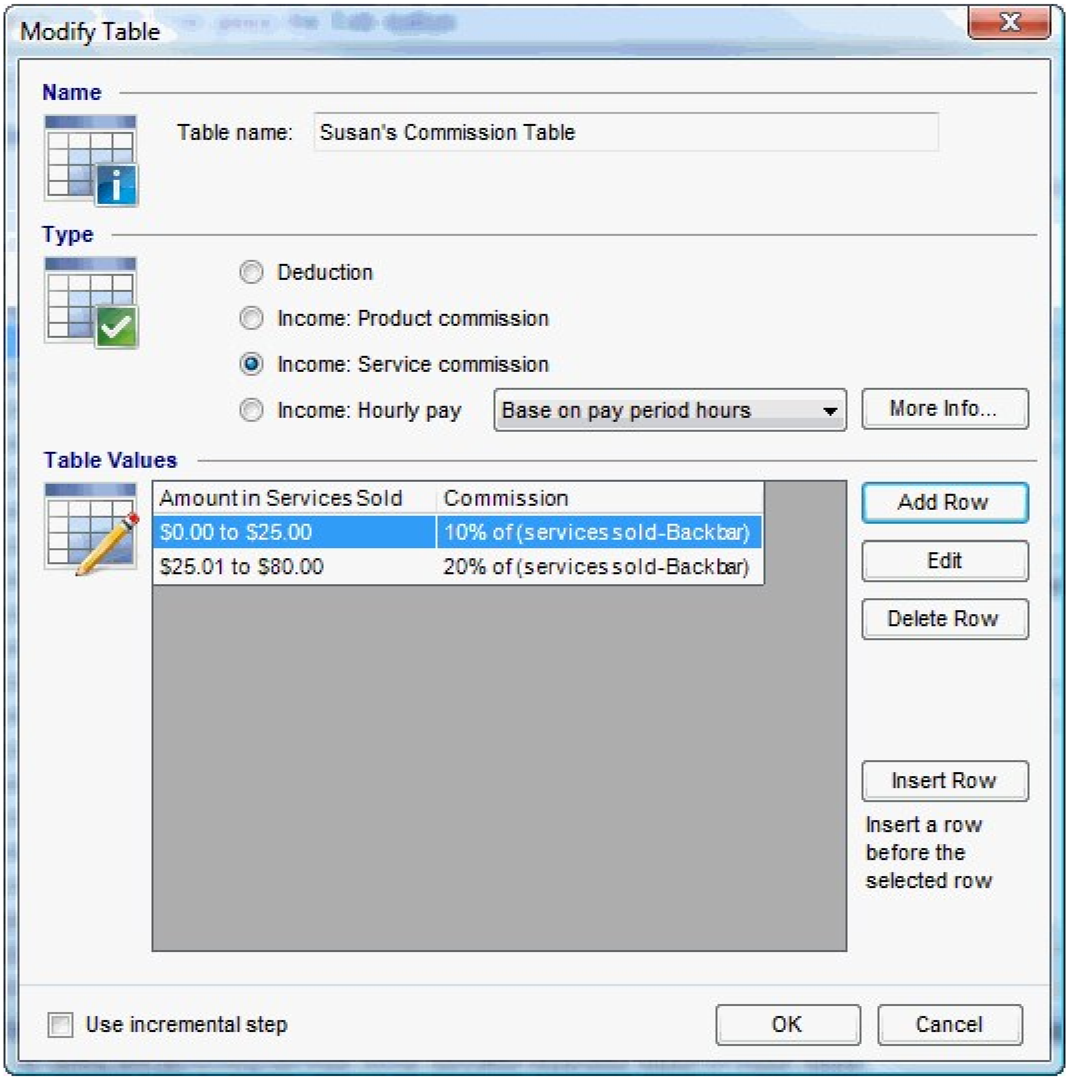


Figure 6: Commission Table Example

1. We will again be looking at SERVICE A configured for Susan Smith. Here are its characteristics:
   - Price: $60.00, exception of $80.00 for Susan. This $80.00 exception will apply to Ticket #1030 from **Example 3** and later
   - Backbar: $15.00, exception of $20.00 for Susan. This $20.00 exception will apply to Ticket #1029 from **Example 2** and later
   - Bonus: $10.00, exception of $15.00 for Susan. This $15.00 exception will apply to Ticket #1029 from **Example 2** and later
   - Commission: exception of 50% for Susan. This 50% exception will apply to all tickets created and is retroactive
2. A second service, SERVICE B will be configured for Susan Smith as shown below:
   - Price: $25.00, exception of $20.00 for Susan
   - Backbar: $10.00, no exceptions for Susan
   - Bonus: none

- Commission: Based on **Payroll Configuration** screen, Susan's **Commission Table**

3. Susan performs SERVICE B and Ticket #1031 is closed.
4. When the payroll is run, the **Commission Details** screen is displayed, see Figure 7. This payroll assumes Ticket #'s 1027, 1029, and 1030 have already been closed.
5. Susan's commission total taken from Ticket #'s 1027 from **Example 1**, 1029 from **Example 2**, 1030 from **Example 3**, and 1031 should be:

   Commission Total = (\$60.00 - (\$15.00*1) + \$60.00 - (\$20.00*1) + \$80.00 - (\$20.00 * 1))*50% + (\$20.00 - \$10.00)*20% + (\$10.00 + \$15.00 + \$15.00) = \$114.50

   Or,

$$\text{Commission Total} = (\underbrace{\$60.00 - (\$15.00*1)}_{\text{Ticket \#1027}} + \underbrace{\$60.00-(\$20.00*1)}_{\text{Ticket \#1029}} + \underbrace{\$80.00-(\$20.00*1)}_{\text{Ticket \#1030}})*50\% + \underbrace{(\$20.00-(\$10.00*1))*20\%}_{\text{Ticket \#1031}} + \underbrace{(\$10.00 + \$15.00 + \$1}_{\text{Bonuses}}$$

- Ticket #1027's information is below:
  - Commission Based On: \$60.00
  - Backbar: \$15.00
  - Commission: 50% exception for SERVICE A
  - Bonus: \$10.00
- Ticket #1029's information is below:
  - Commission Based On: \$60.00
  - Backbar: \$20.00
  - Commission: 50% exception for SERVICE A
  - Bonus: \$15.00
- Ticket #1030's information is below:
  - Commission Based On: \$80.00
  - Backbar: \$20.00
  - Commission: 50% exception for SERVICE A
  - Bonus: \$15.00
- Ticket #1031's information is below:
  - Commission Based On: \$20.00
  - Backbar: \$10.00
  - Commission: 20% from Susan's **Commission Table**
  - Bonus: \$0.00

6. This total is again correct.

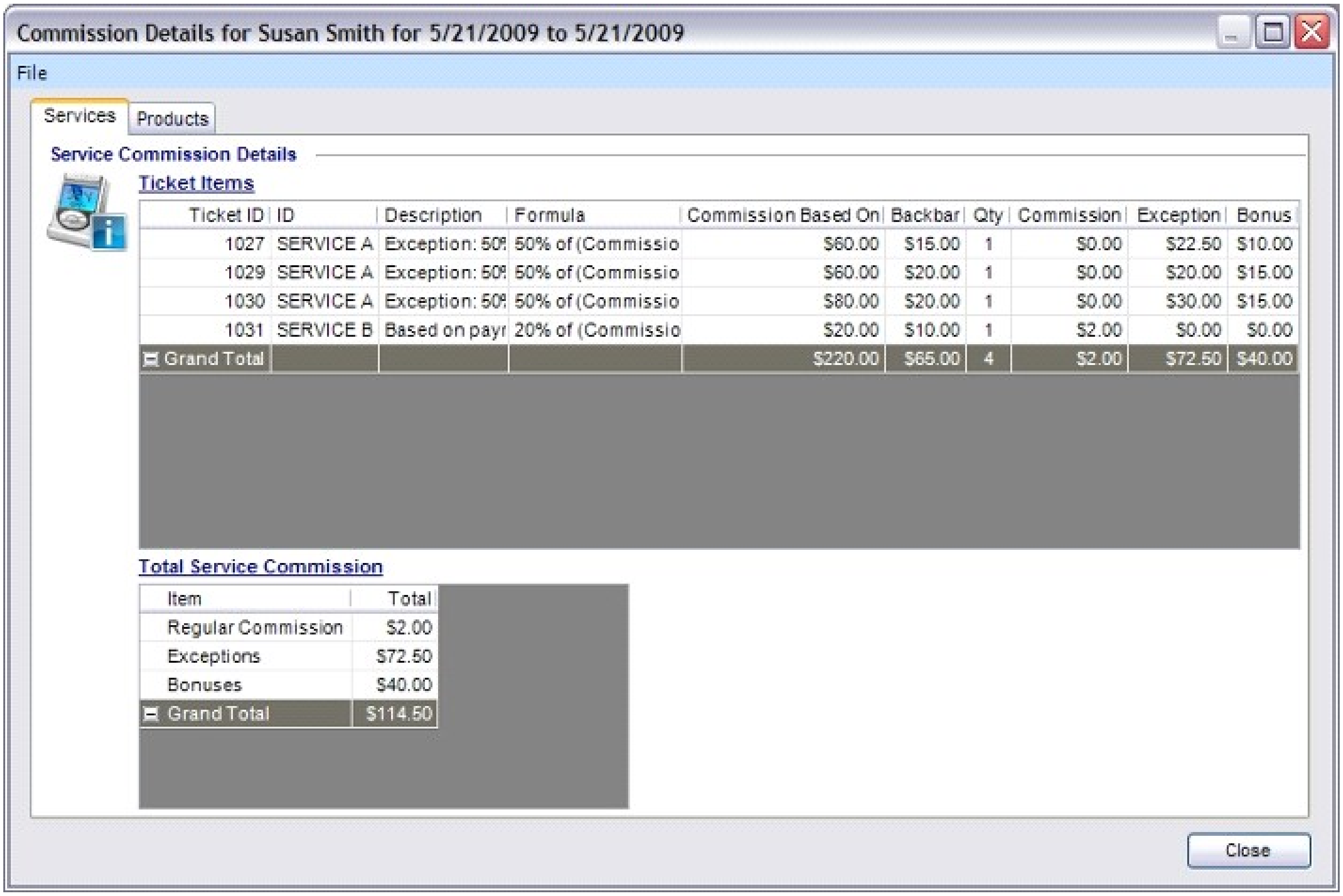


Figure 7: Commission Details screen for Example 4

Summary

1. There are sixteen possible configurations for each employee for each service when using the **Single Commission System**. The configurable entities are: price, backbar, bonus, and commission.
2. Changing the service price for an employee **IS NOT** a retroactive change.
3. Changing the commission for an employee **IS** a retroactive change.
4. A retroactive change will change the amounts of an entity for all tickets included in a payroll period.
5. A non-retroactive change will not change the amounts of an entity for all tickets included in a payroll period.
6. If an employee's commission is defined as an exception percentage, then the exception is calculated as:

   Exception = (Commission Based On – (Backbar*Quantity Used))*Exception%

7. If an employee's commission is defined as an exception lump sum, then the exception is calculated as:

   Exception = (Lump Sum - Backbar)*Quantity Used

Dual Commission Income Overview

The Dual Commission System is able to give different commission amounts when a service is used and when a service is purchased. When using the Dual Commission System a **Commission Used Based On** column and a **Commission Purchased Based On** column will appear on tickets. **Dual Commission** payroll income can be set almost identically to **Single Commission** payroll income, except for a few minor differences.

1. Click **Use dual commission system** under the **Commission System** section.
2. See the **Single Commission Income Overview** section above for instructions on employee income setup.
3. For each service you will need to set up the **Service Commission When Used** and **Service Commission When Purchased**.
4. Click **OK** to exit out of the **Payroll Configuration** screen.
5. Go to the **Service** screen.
6. Edit the service and click the **Commission** tab.
7. Click the **Commission When Purchased** tab and choose one of the following:
    - **None**: no commission is given to the employee when the service is purchased
    - **Fixed currency amount of**: the commission issued to the employee selling the service is in the form of a lump sum. The value used in **Payroll Configuration** is ignored. This exception will apply to any employee selling the service
    - **Fixed percentage amount of**: the commission issued to the employee selling the service is a percent of the **Commission Purchased Based On** column. The value used in **Payroll Configuration** is ignored. This exception will apply to any employee selling the service
    - **Based on Payroll Configuration screen**: the commission issued to the employee selling the service is based on the percent amount found in **Payroll Configuration**, either a straight percentage or based on a commission table. To make exceptions to the **Payroll Configuration**, click the **Exceptions** button and add any employees exempt from the normal routine. If you do an exception, the commission issued to the employee selling the service is based on an exception value, either a lump sum or a percentage amount. If an exception is chosen, the value found in **Payroll Configuration** is ignored. Different employees can have different exception values for the same service
8. Click the **Commission When Used** tab and choose one of the following:
    - **None**: no commission is given to the employee when the service is performed
    - **Fixed currency amount**: the commission issued to the employee performing the service is in the form of a lump sum minus the backbar amount. The value used in **Payroll Configuration** is ignored. This exception will apply to any employee performing the service
    - **Fixed percentage amount**: the commission issued to the employee performing the service is a percent of the **Commission Used Based On** column minus the backbar amount. The value used in **Payroll Configuration** is ignored. This exception will apply to any employee performing the service
    - **Based on Payroll Configuration screen**: the commission issued to the employee performing the service is based on the percent amount found in **Payroll Configuration**, either a straight percentage or based on a commission table. To make exceptions to the **Payroll Configuration**, click the **Exceptions** button and add any employees exempt from the normal routine. If you do an

exception, the commission issued to the employee performing the service is based on an exception value, either a lump sum or a percentage amount minus the backbar amount. If an exception is chosen, the value found in **Payroll Configuration** is ignored. With this option selected, different employees can have different exception values for the same service

9. You may choose to make exceptions to the amount of backbar for each employee. A standard backbar amount can be defined and exceptions created as needed per employee. This backbar amount is subtracted from the **Commission Used Based On** amount when determining employee commission. This backbar amount is subtracted only when a service is used and not when purchased. The total backbar for a ticket can be calculated as: **Backbar** times **Qty Used**.
10. You may choose to make exceptions to the bonus paid for a service for each employee. A standard bonus can be defined and exceptions created as needed per employee. A bonus is a lump sum awarded to an employee for the selling of a service. It is independent of commission. There is no bonus for the performing of the service. The total bonus for a ticket can be calculated as: **Bonus** times **Qty Prch**.
11. Click **Save** to exit.

Dual Commission System Examples: when using the **Dual Commission System**, there are five configurable entities for each service.

1. **Price**: a standard price can be defined and exceptions created as needed per employee. If you change the service price, this new price will apply to all future tickets created after the point in time in which you changed the service price. The change is not retroactive.
2. **Backbar**: a standard backbar amount can be defined and exceptions created as needed per employee. This backbar amount is subtracted from the **Commission When Used** amount when determining employee commission. This backbar amount is subtracted only when a service is used and not when purchased. The total backbar for a service on a ticket is calculated as: **Backbar** times **Qty Used**.
3. **Bonus**: a standard bonus can be defined and exceptions created as needed per employee. A bonus is a lump sum awarded to an employee for the selling of a service. It is independent of commission. There is no bonus for performing a service. The total bonus for a ticket is calculated as: **Bonus** times **Qty Prch**.
4. **Commission When Purchased (CWP)**: this commission is issued when a service is sold by an employee. If you change the commission amount, it will apply to all tickets and is retroactive.
5. **Commission When Used (CWU)**: this commission is issued when a service is performed by an employee. If you change the commission amount, it will apply to all tickets and is retroactive.

There are five configurable entities. Three entities have either a **Standard** or **Exception** value. Two entities can either have a **None** value, some type of exception value, or be based on the **Payroll Configuration** screen. There are seventy-two possible configurations for any employee using the **Dual Commission System** for each service.

Configurable Item	Price	Backbar	Bonus	Commission When Purchased	Commission When Used
Employee A	Standard/Exception	Standard/Exception	Standard/Exception	None/Exception/Payroll Configuration	None/Exception/Payroll Configuration

*Figure 8: Different configurations using the **Dual Commission System***

Example 1:

1. Susan Smith’s commission percentage will be 20%.
2. We will be looking at SERVICE A configured for Susan Smith. Here are its characteristics:
    - Price: $60.00, no exceptions for Susan
    - Backbar: $15.00, exception of $20.00 for Susan
    - Bonus: $10.00, exception of $15.00 for Susan
    - Commission When Purchased (CWP): None
    - Commission When Used (CWU): 20%, based on **Payroll Configuration**
3. Susan performs and sells SERVICE A and closes Ticket #1027.
4. When payroll is run the **Commission Details** screen is displayed, see Figure 9.
5. Susan’s commission total taken from Ticket #1027 should be:

    CWP = ($60.00)*0% + $15.00 = $15.00
    CWU = ($60.00 – ($20.00 * 1))*20% = $8.00
    Commission Total = CWU + CWP = $23.00

    - Ticket #1027's information is as follows:
        - Commission When Used Based On: $60.00
        - Commission When Purchased Based On: $60.00
        - Backbar: $20.00
        - Bonus: $15.00
        - CWP: 0%
        - CWU: 20%, from **Payroll Configuration**
6. As can be seen below, this total is correct. The bonus amount of $15.00 is applied when SERVICE A is purchased and not used. The backbar amount of $20.00 is applied when SERVICE A is used and not purchased.

    The first row of Figure 9 details the commission results for **Commission When Purchased** from Ticket #1027. Since None was selected for SERVICE A, this row is accurate.

    The second row of Figure 9 details the commission results for **Commission When Used** from Ticket #1027. Since Based on Payroll Configuration screen was selected for SERVICE A, this row is accurate as well.

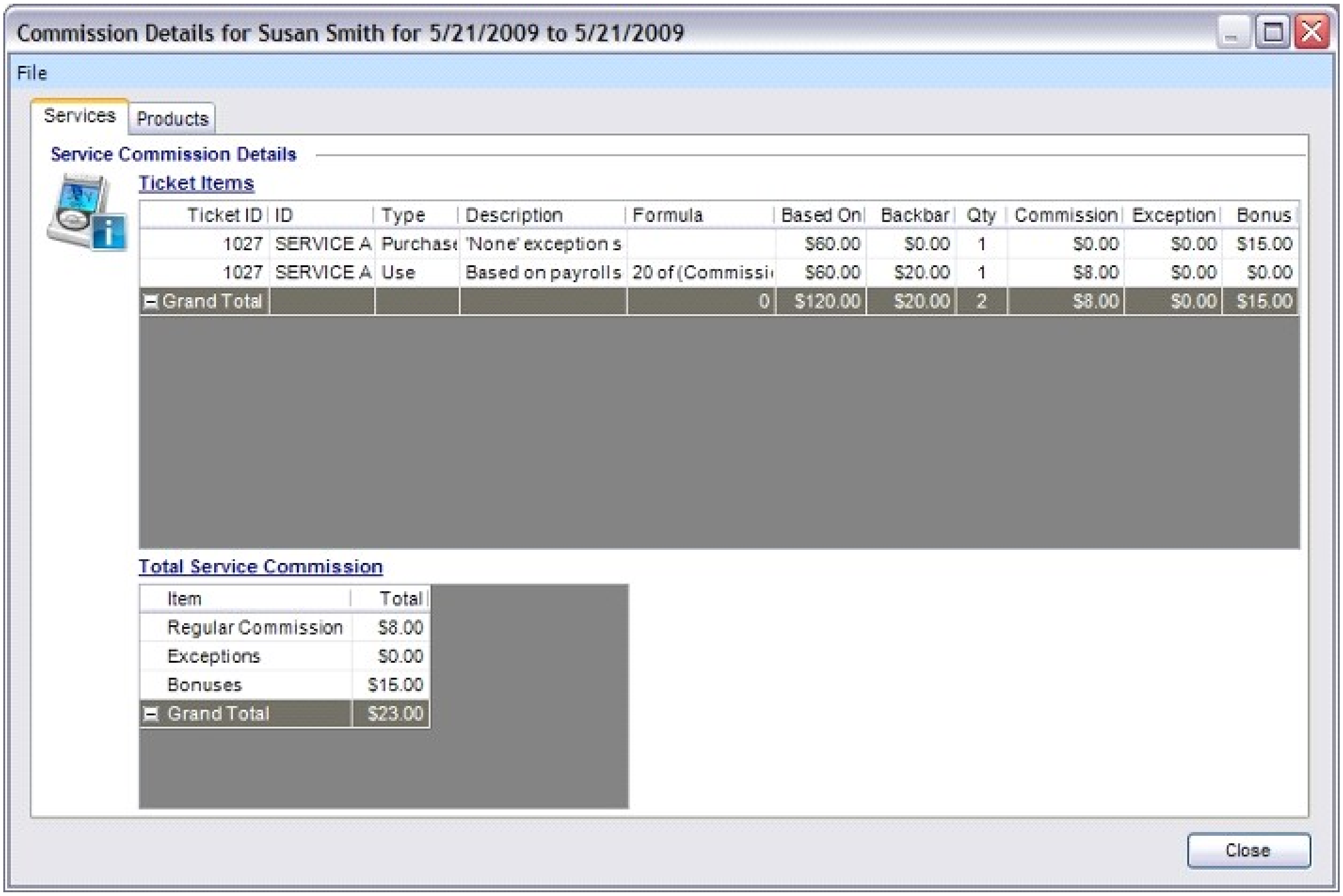


Figure 9: Commission Details screen for Example 1

Example 2:

1. Susan Smith's commission percentage will remain at 20%.
2. We will again be looking at SERVICE A configured for Susan Smith. Here are its characteristics:
   - Price: $60.00, no exceptions for Susan
   - Backbar: $15.00, exception of $20.00 for Susan
   - Bonus: $10.00, exception of $15.00 for Susan
   - Commission When Purchased: a generic exception of 10% applied to any employee selling the service. This 10% exception will apply to all tickets created and is retroactive
   - Commission When Used: 20%, based on **Payroll Configuration**
3. Susan sells and performs SERVICE A and Ticket #1032 is closed.
4. When payroll is run the **Commission Details** screen is displayed, see Figure 10. This payroll assumes Ticket #1027 has already been closed.
5. Susan's commission total taken from Ticket #'s 1027 from **Example 1**, and 1032 is calculated below:

   CWP = ($60.00 + $60.00)*10% + ($15.00 + $15.00) = $42.00
   CWU = ($60.00 – ($20.00*1) + $60.00 – ($20.00*1))*20% = $16.00

Commission Total = CWP + CWU = $58.00

Or,

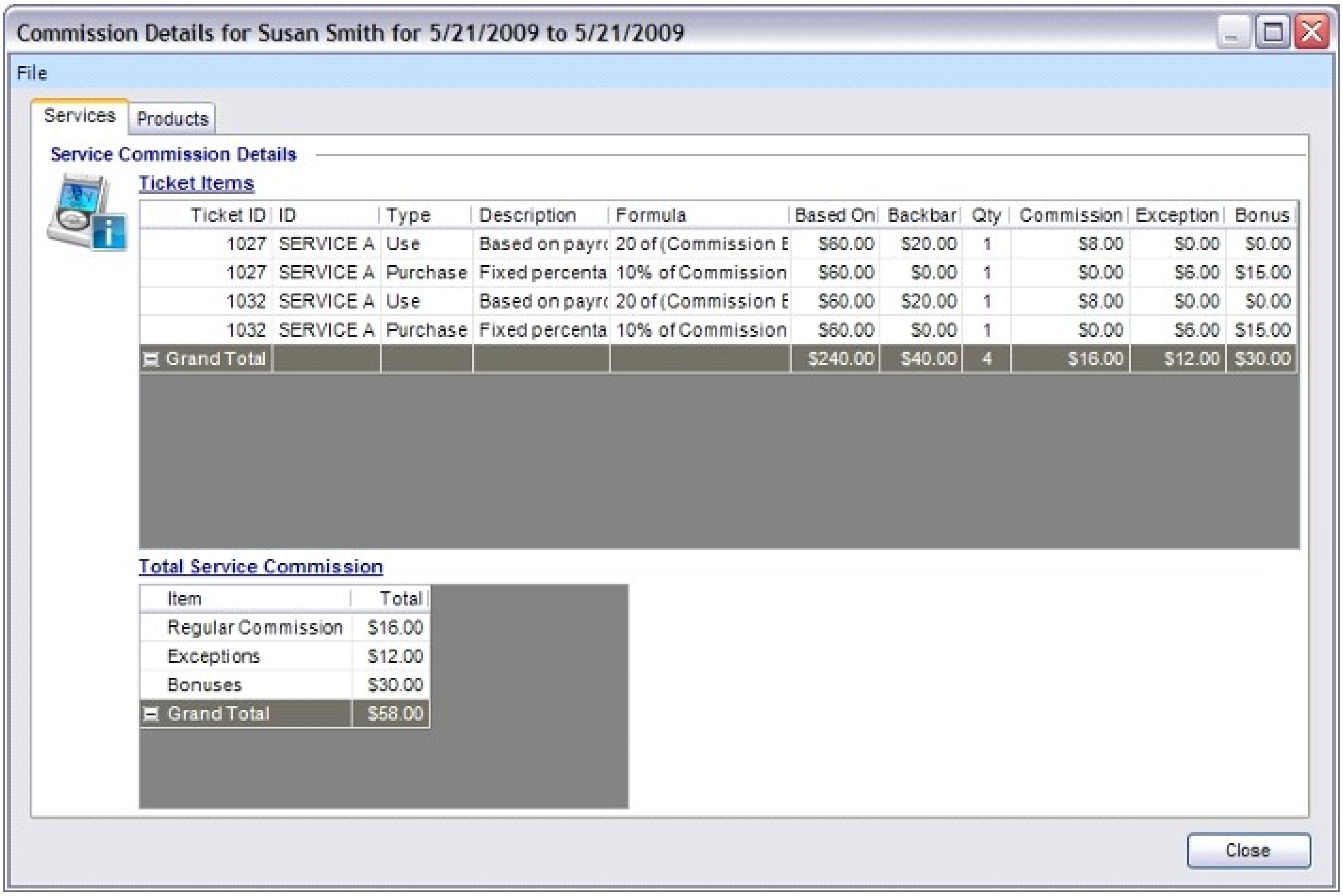
$$\text{CWP} = (\underbrace{\$60.00 + \$60.00}_{\text{Tickets 1027 \& 1032}}) * 10\% + (\underbrace{\$15.00 + \$15.00}_{\text{Bonuses}}) = \$42.00$$

$$\text{CWU} = (\underbrace{\$60.00 - (\$20.00*1)}_{\text{Ticket \#1027}} + \underbrace{\$60.00 - (\$20.00*1)}_{\text{Ticket \#1032}}) * 20\% = \$16.00$$

$$\text{Commission Total} = \text{CWP} + \text{CWU} = \$58.00$$

- Ticket #1027's information is below:
  - Commission When Used Based On: $60.00
  - Commission When Purchased Based On: $60.00
  - Backbar: $20.00
  - Bonus: $15.00
  - CWP: 10%, exception for SERVICE A purchase
  - CWU: 20%, from **Payroll Configuration**
- Ticket #1032's information is below:
  - Commission When Used Based On: $60.00
  - Commission When Purchased Based On: $60.00
  - Backbar: $20.00
  - Bonus: $15.00
  - CWP: 10%, exception for SERVICE A purchase
  - CWU: 20%, from **Payroll Configuration**

6. As can be seen below, this total is correct. The second and fourth rows of Figure 10 detail the commission results for **Commission When Purchased** for Ticket #'s 1027 and 1032. Since an Exception of 10% was selected for SERVICE A, these rows are accurate. This exception is applied to all SERVICE A services purchased for this payroll period. The first and third rows of Figure 10 detail the commission results for **Commission When Used** for Ticket #'s 1027 and 1032. Since Based on **Payroll Configuration**, or 20%, was selected for SERVICE A, these rows are accurate as well.



Commission Details for Susan Smith for 5/21/2009 to 5/21/2009

File

Services | Products

Service Commission Details

Ticket Items

Ticket ID	ID	Type	Description	Formula	Based On	Backbar	Qty	Commission	Exception	Bonus
1027	SERVICE A	Use	Based on payr	20 of (Commission E	$60.00	$20.00	1	$8.00	$0.00	$0.00
1027	SERVICE A	Purchase	Fixed percenta	10% of Commission	$60.00	$0.00	1	$0.00	$6.00	$15.00
1032	SERVICE A	Use	Based on payr	20 of (Commission E	$60.00	$20.00	1	$8.00	$0.00	$0.00
1032	SERVICE A	Purchase	Fixed percenta	10% of Commission	$60.00	$0.00	1	$0.00	$6.00	$15.00
Grand Total					$240.00	$40.00	4	$16.00	$12.00	$30.00

Total Service Commission

Item	Total
Regular Commission	$16.00
Exceptions	$12.00
Bonuses	$30.00
Grand Total	$58.00

Close

Figure 10: Commission Details screen for Example 2

Example 3:

1. Susan Smith's commission percentage will remain at 20%.
2. We will again be looking at SERVICE A configured for Susan Smith. Here are its characteristics:
   - Price: $60.00, exception of $80.00 for Susan. This $80.00 exception will apply to all tickets created after and including Ticket #1033 and is not retroactive. In other words, all tickets created after the point in time the exception was created will have a SERVICE A price exception of $80.00 for Susan
   - Backbar: $15.00, exception of $20.00 for Susan
   - Bonus: $10.00, exception of $15.00 for Susan
   - Commission When Purchased: a generic exception of 10% applied to any employee selling the service. This 10% exception will apply to all tickets created and is retroactive
   - Commission When Used: a specific exception of 50% applied only when Susan performs the service. This 50% exception will apply to all tickets created and is retroactive
3. Susan sells and performs SERVICE A and Ticket #1033 is closed.
4. Payroll is run and the **Commission Details** screen is displayed, see Figure 11. This payroll assumes that Ticket #'s 1027 and 1032 have already been closed.

5. Susan’s commission total taken from Ticket #’s 1027 from **Example 1**, 1032 from **Example 2**, and 1033 is calculated below:

   CWP = ($60.00 + $60.00 + $80.00)*10% + ($15.00 + $15.00 + $15.00) = $65.00
   CWU = ($60.00 – ($20.00*1) + $60.00 – ($20.00*1) + $80.00 – ($20.00*1))*50% = $70.00
   Commission Total = CWP + CWU = $135.00

   Or,

$$\text{CWP} = \underbrace{(\$60.00 + \$60.00 + \$80.00)}_{\text{Tickets 1027, 1032 \& 1033}}\text{*}10\% + \underbrace{(\$15.00 + \$15.00 + \$15.00)}_{\text{Bonuses}} = \$65.00$$

$$\text{CWU} = (\underbrace{\$60.00 - (\$20.00\text{*}1)}_{\text{Ticket \#1027}} + \underbrace{\$60.00 - (\$20.00\text{*}1)}_{\text{Ticket \#1032}} + \underbrace{\$80.00 - (\$20.00\text{*}1)}_{\text{Ticket \#1033}})\text{ * }50\% = \$70.00$$

$$\text{Commission Total} = \text{CWP} + \text{CWU} = \$135.00$$

- Ticket #1027's information is below:
  - Commission When Used Based On: $60.00
  - Commission When Purchased Based On: $60.00
  - Backbar: $20.00
  - Bonus: $15.00
  - CWP: 10%, exception for SERVICE A purchase
  - CWU: 50%, exception for SERVICE A use
- Ticket #1032's information is below:
  - Commission When Used Based On: $60.00
  - Commission When Purchased Based On: $60.00
  - Backbar: $20.00
  - Bonus: $15.00
  - CWP: 10%, exception for SERVICE A purchase
  - CWU: 50%, exception for SERVICE A use
- Ticket #1033's information is below:
  - Commission When Used Based On: $80.00
  - Commission When Purchased Based On: $80.00
  - Backbar: $20.00
  - Bonus: $15.00
  - CWP: 10%, exception for SERVICE A purchase
  - CWU: 50%, exception for SERVICE A use

6. As can be seen below, this total is correct. The first, third, and fifth rows of Figure 11 detail the commission results for **Commission When Purchased** for Ticket #’s 1027, 1032 and 1033. Since an Exception of 10% was selected for SERVICE A, these rows are accurate. The second, fourth, and sixth rows of Figure 11 detail the commission results for **Commission When Used** for Ticket #’s 1027, 1032,

and 1033. Since an Exception of 50% was selected for SERVICE A, these rows are accurate as well. These exceptions are applied to all SERVICE A services purchased for this payroll period. The price for each individual SERVICE A is based on when the exceptions for price were added: $60.00 and $80.00.

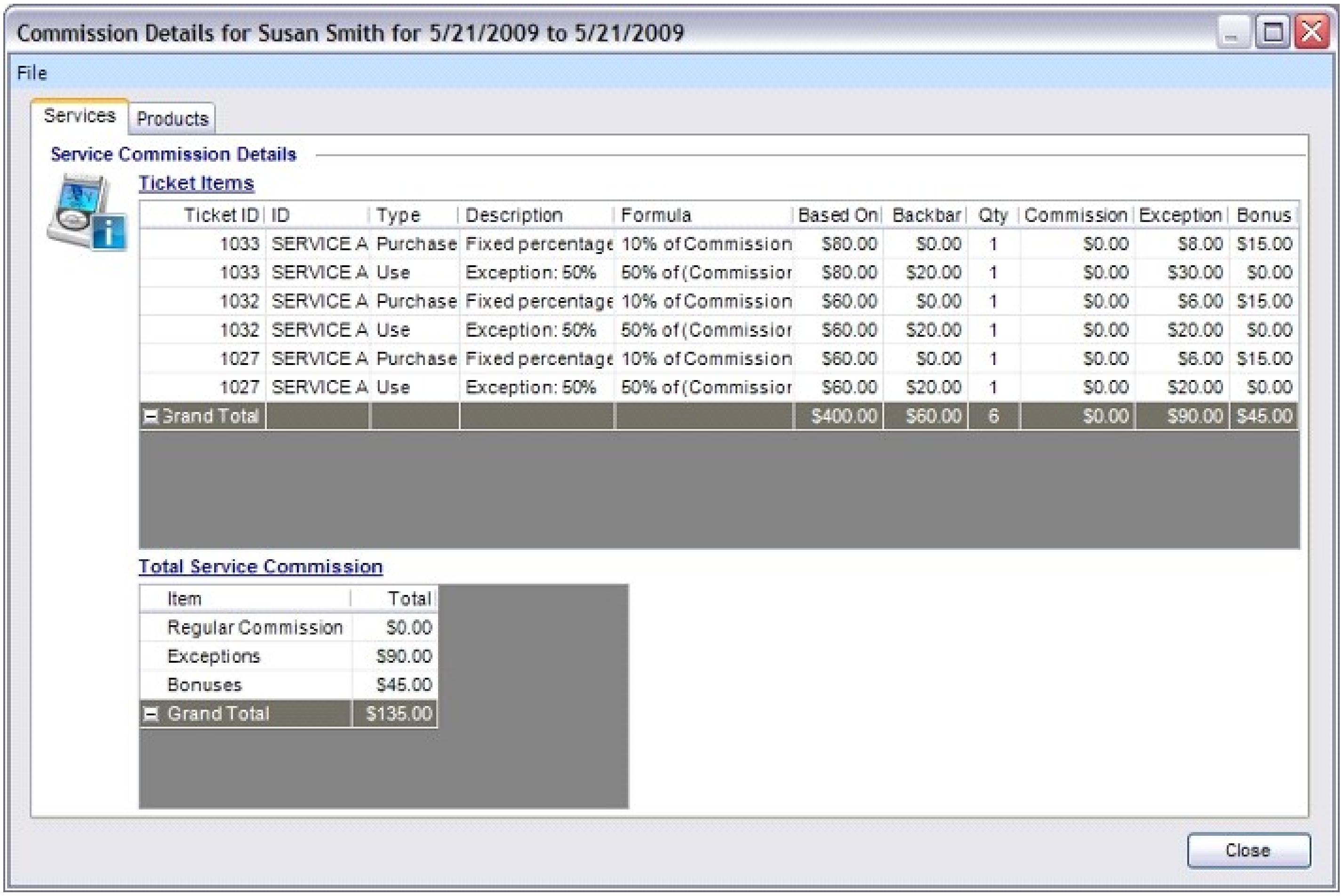


Figure 11: Commission Details screen for Example 3

Example 4:

1. Susan Smith's commission percentage will remain at 20%.
2. We will again be looking at SERVICE A configured for Susan Smith. Here are its characteristics:
   - Price: $60.00, exception of $80.00 for Susan. This $80.00 exception will apply to all tickets created after and including Ticket #1033 from **Example 3**. This change is not retroactive.
   - Backbar: $15.00, exception of $20.00 for Susan
   - Bonus: $10.00, exception of $15.00 for Susan
   - Commission When Purchased: a generic exception of 10% applied to any employee selling the service
   - Commission When Used: a specific exception of 50% applied only when Susan performs the service
3. A client purchases (5) of SERVICE A and uses (1) for the day. This type of procedure is typically called

a pre-paid service.

4. Susan sells (5) of SERVICE A and performs (1) of SERVICE A and closes Ticket #1034.
5. When payroll is run the **Commission Details** screen is displayed, see Figure 12. This payroll assumes that Ticket #’s 1027, 1033 and 1034 have already been closed.
6. Susan’s commission total taken from Ticket #’s 1027 from **Example 1**, 1032 from **Example 2**, 1033 from **Example 3**, and 1034 is calculated below:

   CWP = ($60.00 + $60.00 + $80.00 + (5*$80.00))*10% + ($15.00 + $15.00 + $15.00 + (5*$15.00)) = $180.00
   CWU = ($60.00 – ($20.00 * 1) + $60.00 – ($20.00 * 1) + $80.00 – ($20.00 * 1) + $80.00 – ($20.00 * 1)) *50% = $100.00
   Commission Total = CWP + CWU = $280.00

   Or,

$$\text{CWP} = \underbrace{(\$60.00 + \$60.00 + \$80.00 + (5 * \$80.00))}_{\text{Tickets 1027, 1032, 1033 \& 1034}} * 10\% + \underbrace{(\$15.00 + \$15.00 + \$15.00 + (5 * \$15.00))}_{\text{Bonuses}} = \$180.00$$

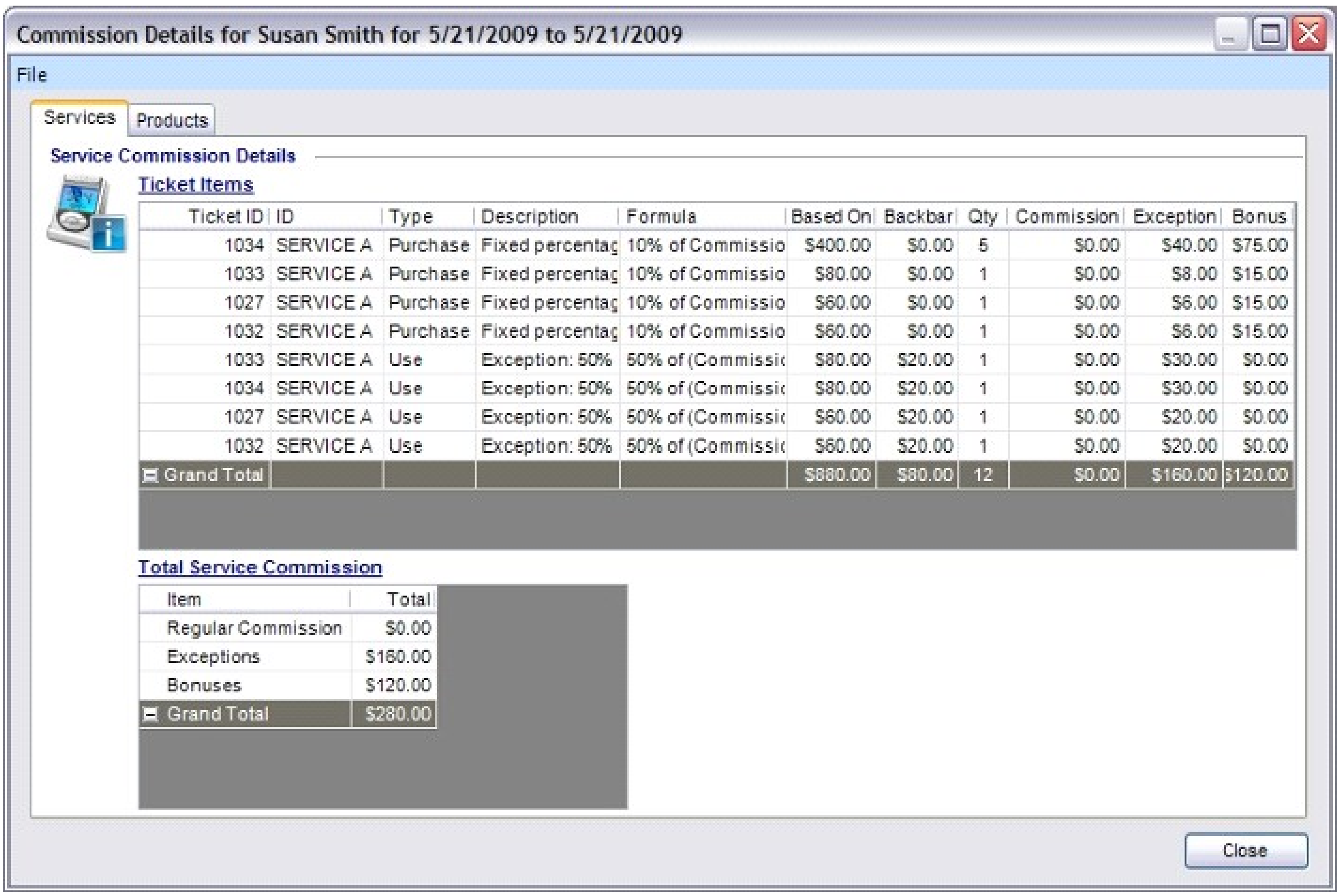
$$\text{CWU} = (\underbrace{\$60.00 - (\$20.00*1)}_{\text{Ticket \#1027}} + \underbrace{\$60.00 - (\$20.00*1)}_{\text{Ticket \#1032}} + \underbrace{\$80.00 - (\$20.00*1)}_{\text{Ticket \#1033}} + \underbrace{\$80.00 - (\$20.00*1)}_{\text{Ticket \#1034}}) * 50\% = \$100.00$$

$$\text{Commission Total} = \text{CWP} + \text{CWU} = \$280.00$$

- Ticket #1027's information is below:
  - Commission When Used Based On: $60.00
  - Commission When Purchased Based On: $60.00
  - Backbar: $20.00
  - Bonus: $15.00
  - CWP: 10%, exception for SERVICE A purchase
  - CWU: 50%, exception for SERVICE A use
- Ticket #1032's information is below:
  - Commission When Used Based On: $60.00
  - Commission When Purchased Based On: $60.00
  - Backbar: $20.00
  - Bonus: $15.00
  - CWP: 10%, exception for SERVICE A purchase
  - CWU: 50%, exception for SERVICE A use
- Ticket #1033's information is below:
  - Commission When Used Based On: $80.00
  - Commission When Purchased Based On: $80.00
  - Backbar: $20.00
  - Bonus: $15.00

  - CWS: 10%, exception for SERVICE A purchase
  - CWU: 50%, exception for SEVICE A use
- Ticket #1034's information is below:
  - Commission When Used Based On: $80.00
  - Commission When Purchased Based On: $400.00
  - Backbar: $20.00
  - Bonus: $75.00
  - CWP: 10%, exception for SERVICE A purchase
  - CWU: 50%, exception for SERVICE A use

7. As can be seen below, this total is correct. On this payroll, Susan has sold a total of (8) SERVICE A's and performed a total of (4) SERVICE A's. For Ticket #1034 containing the pre-paid services, Susan's **Commission When Purchased** is based on the number of SERVICE A's sold, or (5). Her **Commission When Used** is based on the number of SERVICE A's performed (1).



Ticket ID	ID	Type	Description	Formula	Based On	Backbar	Qty	Commission	Exception	Bonus
1034	SERVICE A	Purchase	Fixed percentag	10% of Commissio	$400.00	$0.00	5	$0.00	$40.00	$75.00
1033	SERVICE A	Purchase	Fixed percentag	10% of Commissio	$80.00	$0.00	1	$0.00	$8.00	$15.00
1027	SERVICE A	Purchase	Fixed percentag	10% of Commissio	$60.00	$0.00	1	$0.00	$6.00	$15.00
1032	SERVICE A	Purchase	Fixed percentag	10% of Commissio	$60.00	$0.00	1	$0.00	$6.00	$15.00
1033	SERVICE A	Use	Exception: 50%	50% of (Commissi	$80.00	$20.00	1	$0.00	$30.00	$0.00
1034	SERVICE A	Use	Exception: 50%	50% of (Commissi	$80.00	$20.00	1	$0.00	$30.00	$0.00
1027	SERVICE A	Use	Exception: 50%	50% of (Commissi	$60.00	$20.00	1	$0.00	$20.00	$0.00
1032	SERVICE A	Use	Exception: 50%	50% of (Commissi	$60.00	$20.00	1	$0.00	$20.00	$0.00
Grand Total					$880.00	$80.00	12	$0.00	$160.00	$120.00

Item	Total
Regular Commission	$0.00
Exceptions	$160.00
Bonuses	$120.00
Grand Total	$280.00

Figure 12: Commission Details screen for Example 4

Summary:

1. There are seventy-two possible configurations for each employee for each service when using the

Dual Commission System. The configurable entities are: price, backbar, bonus, commission when purchased, and commission when used.

2. A generic exception will apply to any employee selling or performing the service.
3. A specific exception will apply only to the employee selling or performing the service for which the exception was defined.
4. Changing the service price for an employee **IS NOT** a retroactive change.
5. Changing the commission when purchased for an employee **IS** a retroactive change.
6. Changing the commission when used for an employee **IS** a retroactive change.
7. A retroactive change will affect the amounts of an entity for all tickets included in a payroll period.
8. A non-retroactive change will not affect the amounts of an entity for all tickets included in a payroll period.
9. A bonus is awarded only when a service is sold.
10. A backbar amount is subtracted from the service price only when a service is performed.

Payroll Deductions Overview

1. The taxes and deductions listed on this page are set to a generic United States format, i.e. **Federal Tax**, **State Tax**, **Local Tax**, **Social Security**, **Booth Renter**, **Medicare**, **Health Care**, and **SEP** or Simplified Employee Pension. They can be easily renamed to match your specific needs.
   a. Click the **Deductions** button.
   b. Select the deductions that aren't needed and delete them by clicking the **Delete** button.
   c. Click the **Add** button to add the new deductions.
   d. Type in the new name of the deduction. When entering employee payroll taxes, the names of the payroll tax deduction will be the same for all employees, so it is imperative that the names and fields be consistent and appropriate for all cases.
   e. Click **OK**.
   f. Repeat **Steps c-e** for each deduction that you would like to add.
   g. Click **OK** to return to the **Payroll Configuration** screen.
2. Once you have your deduction names entered, you are ready to configure each employee's payroll deductions.
3. Double-click the box directly underneath the desired employee that is horizontally in-line with the appropriate deduction field, such as **Federal Tax**.
4. The **Deduction** screen will appear.
5. You may configure the deduction in the following ways:
   - **No deduction**: no money is deducted
   - **Fixed amount**: a fixed amount of money is deducted
   - **Percentage**: a fixed percentage of the total income is deducted
   - **Based on deduction table**: select the appropriate deduction table. You can choose to base the deduction value on some percentage of the table value. The default percentage is 100%
6. You can also base this deduction on either:
   - **Taxable gross pay**: bases the deduction on total gross pay minus pre-tax deductions
   - **Gross pay**: bases the deduction on the amount of salaries or wages being paid by an employer before any deductions have been taken out.

7. You can also select if this deduction is a pre-tax item. Marking a deduction as a pre-tax item will adjust the employee's taxable gross when running payroll, i.e. an employee has a salary of $10,000 and contributes 10% of her gross salary to her 401k plan. In Salon Iris you would set up your deduction as shown in **Figure 13** below. When Salon Iris calculates this deduction it will take (Gross Pay) X (Percentage Amount). In this example it would be ($10,000) X (0.10) = $1,000. Thus, the employee's gross income is $10,000, but her taxable gross income now becomes $10,000 - $1,000 = $9,000. Subsequent deductions, such as State, Federal, Local, Social Security, etc., will be calculated using the employee's taxable gross which, as stated earlier in this example, would be $9,000. A pre-tax item **MUST** be based on gross pay and cannot have a pre-deduction amount associated with it.

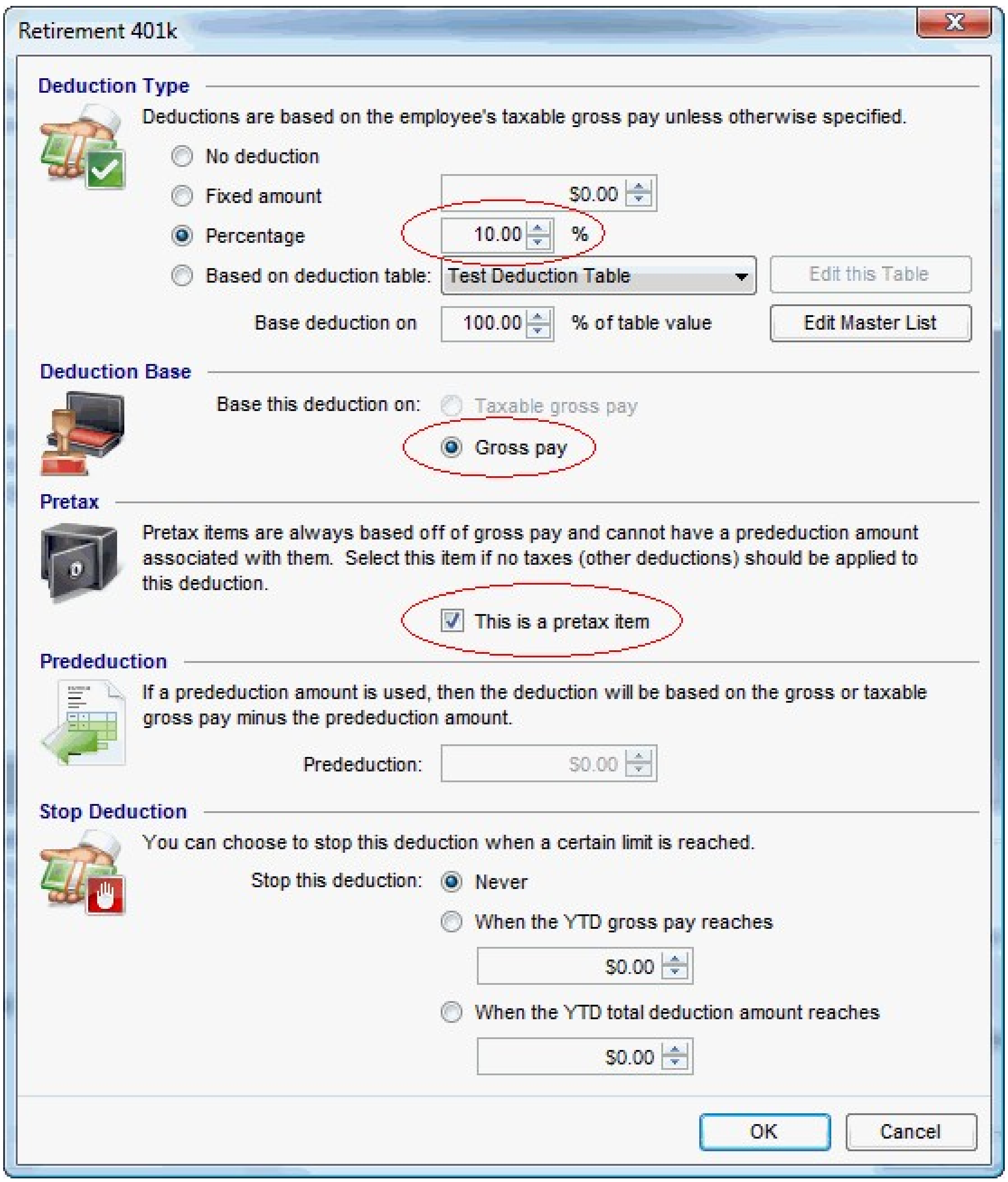


Figure 13: Pre-tax Example Setup

8. You can also select the pre-deduction amount. If a pre-deduction amount is used, then the percentage or table deduction will be based on the taxable gross/gross pay minus the pre-deduction amount, i.e. the employee has a salary of $10,000 and has a deduction as illustrated in **Figure 14**. When Salon Iris calculates this deduction it will take ((Gross Pay) – (Pre-deduction Amount)) X (Percentage Amount). So, that would be ($10,000.00 - $5,000.00) X 0.10 = $500.00.

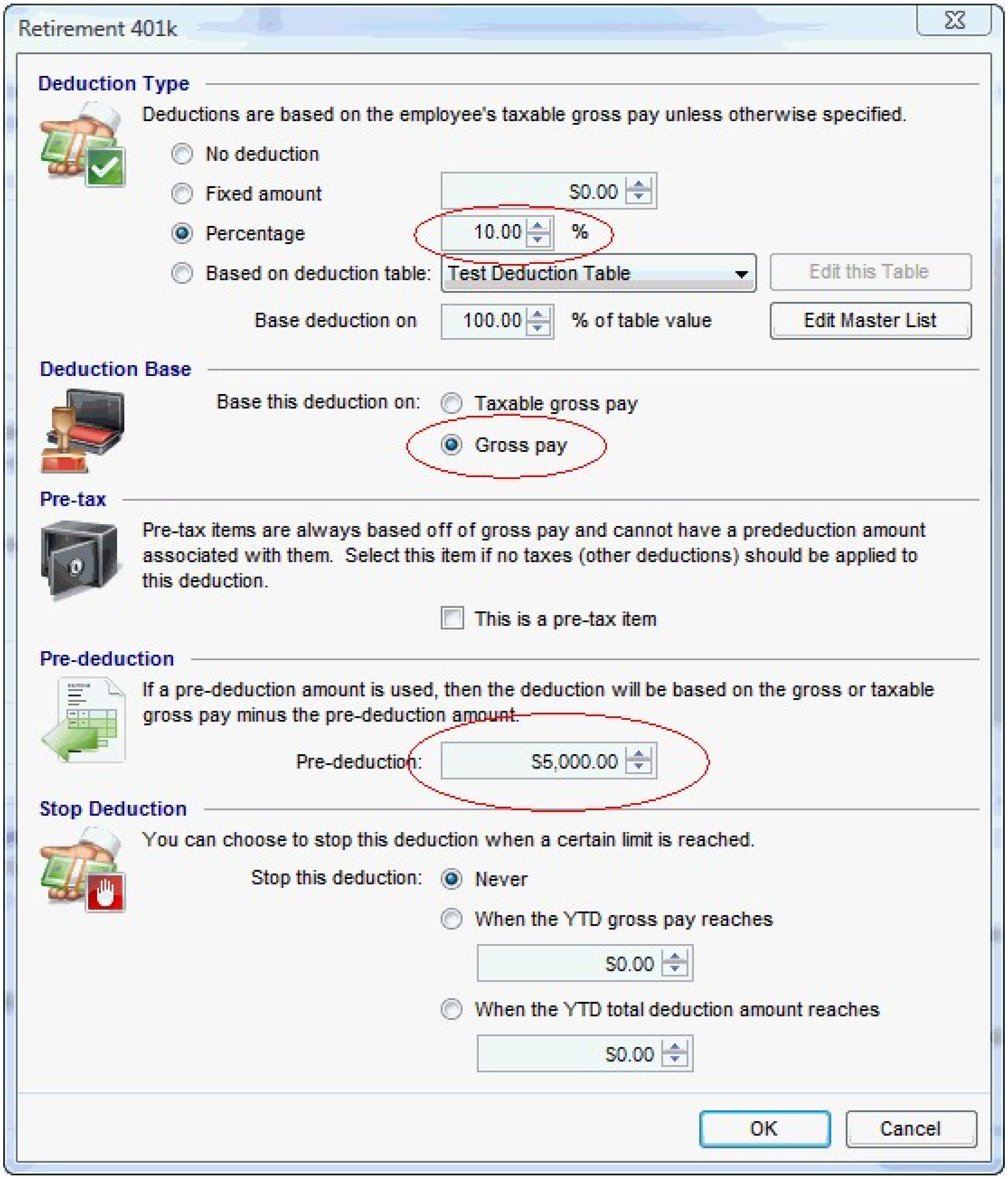


Figure 14: Pre-deduction Example Setup

9. You can optionally choose when to stop a deduction.
    - **Never**: the deduction will happen every pay period
    - **When the YTD gross pay reaches**: the deduction will stop when the YTD gross pay reaches the set amount
    - **When the YTD total deduction amount reaches**: the deduction will stop when the deduction total reaches the set amount
10. Repeat **Steps 3-9** for each employee and deduction.
11. Click the **OK** button when the payroll configuration is complete.

If you do not have any pre-tax deductions set up in the software, gross income and taxable gross income will always be identical. Examples of pre-tax deductions are 401k contributions, pension contributions, and certain health care insurance contributions. Contact your CPA to determine if particular deductions are considered pre-tax items.

Payroll Tables Overview

Payroll tables may be used to customize commissions, pay, and deductions. Tables involve any payroll option that doesn't work based on a straight percentage, i.e. a deduction that gets incrementally larger with a higher gross pay, or hourly pay that increases with the amount of hours worked in a week (overtime). Payroll tables can be reached by selecting **Edit Payroll Tables** from the **Accounting** drop-down menu.

Adding or Editing a Payroll Table

1. Click the **Add** button, or select the table to edit and click the **Edit** button.
2. The **Modify Table** screen will appear.
3. Type in the appropriate name of the table, i.e. **Products Commission Table**.
4. On the **Modify Table** screen, check the **Use incremental step** box if needed. Incremental steps are when the amount received or deducted is cumulative for each row in the table, i.e. if a commission amount from $0 to $100 is $10 and commission from $101 to $200 is $20, then when an employee sells $150, the incremental step commission amount would be $10 plus $20, which equals $30. If a straight table amount was used, the employee would only receive $20 in commission.
5. Select the table **Type** from the following table options:
    - **Deduction**: this can be a tax deduction, employee retirement deduction, or a custom deduction. Because Salon Iris makes payroll calculations based on federal tax payroll deduction information, it is extremely important that your tax tables be correct and up-to-date. Verify that these tables are correct and applicable to your business. This information may be edited or added should tax laws change
    - **Income: Product commission**: this can be an employee's amount of commission based on products sold
    - **Income: Service commission**: this can be an employee's amount of commission based on services sold
    - **Income: Hourly pay**: this can be an employee's hourly pay based on a table of hours worked vs. income. A table may be used to enter in overtime amounts for hourly pay
6. On the **Modify Table** screen, use the **Edit**, **Add Row**, **Insert Row**, and **Delete Row** buttons to manipulate the rows within the table.

7. Click the **Add Row** button.
8. The **Edit Row** screen will appear.
9. Enter the appropriate amounts in the **Range start** and **Range end** fields.
10. Select if the amount of income or deduction is one of the following parameters:
    - **Exact currency amount**: is the deduction or income a straight numerical amount
    - **% of gross pay**: deduction percentage of gross income
    - **% of products sold**: income percentage based on total value of products sold
    - **% of services sold - Backbar**: income percentage based on total value of services sold
11. Click **Save and Add Another**.
12. Repeat **Steps 6-11** until all the table entries are complete.
13. Click **Save** to return to the **Modify Table** screen.
14. After the payroll table is complete, click **OK** to return to the **Payroll Tables** screen.
15. Use the **Test** button to enter an amount and have the table return the value. Always test new tables to ensure that they deliver the desired results.
16. Repeat **Steps 1-15** for each table that you would like to add.
17. Click the **Close** button when finished.

Deleting a Payroll Table

1. Select the table to delete.
2. Click the **Delete** button.
3. The **Are You Sure?** screen will appear.
4. Verify your selection and click **Yes** to permanently delete the table from the database.
5. Click the **Close** button to exit.

Configuring an Overtime Pay Table: Salon Iris allows you to set up an incremental hourly pay table configured to the amount of hours an employee works, i.e. calculate overtime for hours worked over 40 in a week. This example assumes that the employee is paid overtime wages based on weekly hours worked. If you pay your employees overtime based on their daily hours worked or pay period hours worked, you would set up the table accordingly. Also, if employees earn double-time for hours worked over 80, an extra row would have to be added to accommodate that.

1. Make sure that the hours the employee works is based on time clock settings.
2. Select **Payroll Configuration** from the **Accounting** drop-down menu.
3. Double-click in the box underneath the desired employee and in the same row as **Hours Worked**.
4. The **Hours Worked** screen will appear.
5. Select **Hours based on time clock entries**.
6. Click **OK**.
7. Click **OK** to return to the main screen.
8. Select **Edit Payroll Tables** from the **Accounting** drop-down menu.
9. The **Payroll Tables** screen will appear.
10. Click the **Add** button.
11. The **Modify Table** screen will appear.
12. Enter the appropriate name of the table, i.e. **Income: Hourly Pay (Including Overtime)**.
13. Select **Income: Hourly pay** in the **Type** section.

14. Select which type of hourly pay table this is from the drop down list:
    a. **Base on pay period hours**: the total number of hours worked in the pay period will be used to obtain the table value.
    b. **Base on weekly hours**: the total number of hours per week (7 days) will be used to obtain the table value. If more than one week is included in the payroll time range, the time range will be broken into week (7 day) segments.
    c. **Base on daily hours**: the total number of hours worked per day will be used to obtain the table value. If more than one day is included in the payroll time range, the time range will be broken into day segments.
15. Click the **Add Row** button.
16. The **Edit Row** screen will appear.
17. Enter the appropriate pay for the appropriate number of hours, i.e. for 0 to 40 hours of work, enter in $10.
18. Click **Save and Add Another**.
19. Enter the appropriate overtime pay for the appropriate number of hours, i.e. for 41 to 80 hours of work, enter $15 if they receive time-and-a-half.
20. Click **Save**.
21. Click the **Use incremental step** box at the bottom left corner. When payroll is run, your employee will be paid $10 for every hour worked during the first 40 hours and then $15 for every hour worked over 40.
22. Click **OK** to return to the **Payroll Tables** screen.
23. Click **Close** to exit.

Importing Payroll Tables: you can import your own payroll deduction tables in several ways. The information you are importing needs to be in a text file (.txt) or a database deduction file (.ddf) format. A .ddf file can be generated using the **Export Payroll Table** function. Text files can be either comma or tab separated variable files. These files should contain two columns. The first column should be the **To** value (or the end range), and the second column should be the **Amount**.

Sample Text File 1:

```
100,5
500,7.5
1000,11
2000,14.5
```

Would result in the following deduction table:

From	To	Amount
$0.00	$100.00	$5.00
$100.01	$500.00	$7.50
$500.01	$1000.00	$11.00
$1000.01	$2000.00	$14.50

You can also import amounts based off of percentages rather than dollar amounts. To do this, simply include percent signs at the end of each amount in the text file.

Sample Text File 2:

```
100,5%
500,7.5%
1000,11%
2000,14.5%
```

Would result in the following deduction table:

From	To	Amount
$0.00	$100.00	5.0%
$100.01	$500.00	7.5%
$500.01	$1000.00	11.0%
$1000.01	$2000.00	14.5%

1. Click the **Import** button.
2. Click **OK**.
3. Select the type of file(s) you wish to import from the following options:
   - **Import a single table from a text file.**: import one text file from a location on your computer
   - **Import multiple tables from an entire directory of text files.**: import multiple tables from a file directory on your computer
4. Click **OK**.
5. Select the file(s) from your hard drive or another location.
6. Click **Open**.
7. The file(s) will be imported into Salon Iris and be shown on the **Payroll Tables** screen under its original file name.
8. Select the table you just imported and click the **Edit** button to view or modify the information. By default, tables will import as deductions.

You can click on the table you just imported and click the **Edit** button to view the information, or you can click **Test** and then enter a sample gross pay amount to see how the calculations from the table will work.

Updating Federal Tax Tables: if you have Internet access, you can update the federal tax tables for the United States and Canada directly. Federal table updates typically come out around February of each year.

1. Select **Update/Install/Remove Tax Tables** from the **Accounting** drop-down menu.
2. The **Tax Table Installation and Update** screen will appear.
3. Click on the **Check for Updates** button and follow the instructions.
4. Click on the appropriate tax table and click **Install**.
5. Click **Close** when finished.

If you do not have Internet access, you can request a CD with the updates by e-mailing us at Support@Salon Iris.com.

Payroll Calculation Overview

Payroll calculations are made based on criteria from payroll configuration information, closed tickets, and product and service commission.

Calculating Payroll

1. Select **Calculate New Payroll** from the **Accounting** drop-down menu.
2. If the **Payroll** screen is password protected, the **Password Required** window will appear.
3. The **Run Payroll** screen will appear.
4. Select from the following options to run payroll:
   - **Run payroll and save results**: run a new payroll and save the results for future reference. This new payroll will be used in year-to-date totals
   - **Recalculate a previous payroll and save results**: replace a previously run payroll with a new calculation. The new payroll will be used in the year-to-date totals. This option can be used to correct a payroll that was previously run
   - **Practice: Run test payroll and do not save results**: run a practice payroll to test configuration settings. The results are not saved and will not affect any year-to-date totals or any previous payrolls
5. If applicable, select the **Pay Date**.
6. Make the appropriate pay period **Date Range** selection.
7. Click **OK**.
8. The **Payroll** screen will appear with the calculated payroll for all of the business' employees that have been set to be included in the payroll report.

The following is a summary of the items and their descriptions used in the payroll calculations and shown on the **Payroll** screen.

Item	Description
Employee ID	Employee identification number
Product Sales (Total Sales)	Total of all products sold for selected date range, not including tax
Service Sales (Total Sales)	Total of all services sold for selected date range, not including tax
Backbar	Total of all backbar on services for selected date range
Hours Worked	From payroll configuration (fixed, prompt, or based on time clock)
Hourly Pay (Hours*Rate)	Hours worked times hourly rate from payroll configuration
Salary	Salary rate from payroll configuration
Product Commission	From payroll configuration based on product sales
Service Commission	From payroll configuration based on service sales
Adjustment	From payroll configuration
Tips Claimed	From payroll configuration based on tips claimed

Unsettled Tips	Sum of all unsettled withheld tips. If you are recalculating this payroll, this amount will also include withheld tips in a previously ran payroll
Gross Pay	Sum of all income (hourly pay, salary, commission, adjustment, unsettled tips)
Taxable Gross Pay	Gross pay minus pre-tax deductions
Deductions	All deductions removed from the paycheck
Net Pay	Gross pay minus deductions minus direct tips (withheld tips are included)

The following items are the Salon Iris default deductions. Deductions can be added, edited, or deleted to suit business needs. They can be selected as a pre-tax deduction, or as a deduction to the **Taxable Gross Pay**.

Federal Tax	From payroll configuration
State Tax	From payroll configuration
Local Tax	From payroll configuration
Social Security	From payroll configuration
Booth Renter	From payroll configuration
Medicare	From payroll configuration
Health Care	From payroll configuration
SEP	From payroll configuration

Recalculating an Incorrect Payroll Report: if payroll has been calculated incorrectly, i.e. an incorrect date range or an incorrect commission amount setting was used, you should delete all payroll calculations since the incorrect payroll and recalculated them with the correct information.

1. Select **Payroll Reports** from the **Accounting** drop-down menu.
2. Select **View/Delete Previous Payrolls**.
3. The **Previous Payrolls** screen will appear.
4. Select the **Delete Last** button.
5. Verify your selection and click the **Yes** button to delete the last payroll you ran.
6. Repeat **Steps 4-5** until all payrolls calculated after the incorrect payroll are deleted as well as the incorrect payroll, i.e. you may notice you need to delete a payroll from 3 pay periods ago.
7. Recalculate the payroll with the correct information by selecting **Calculate New Payroll** from the **Accounting** drop-down menu.
8. Follow the steps described in **Calculating Payroll**.
9. Repeat **Step 7-8** until you are back to your current pay period.

Running Payroll Reports: there are four payroll reports that Salon Iris can generate.

1. Select **Payroll Reports** from the **Accounting** drop-down menu.
2. Select the appropriate payroll report to run.
    - **View/Delete Previous Payrolls**: a list will appear of previously calculated payrolls. Select which payroll calculation(s) to view or delete from this list
    - **View Year-to-Date Payroll Totals**: a comprehensive report is based on previously calculated payrolls

- **View Payroll History by Employee**: select an employee to view his or her payroll history
- **W2/1099 Report**: you can print the information required for W2 and 1099 reports. This information can be entered into a program that prints actual W2 and 1099 forms, or exported for sending to a CPA

3. Follow the screen prompts for the specific report.
4. Click **OK** when finished.

Printing Payroll Information: there are three options to print after running a payroll calculation.

1. **Print Checks**: use to print out payroll checks.
   a. Calculate your payroll by selecting **Calculate New Payroll** from the **Accounting** drop-down menu.
   b. The **Payroll** screen will appear.
   c. Click the **Print Checks** button.
   d. The **Print Checks** screen will appear.
   e. Select the starting check number in the **Payroll Check Options** section.
   f. Check or uncheck the following boxes as appropriate:
      i. **Add entries to General Ledger after printing**: select the appropriate ledger account and the appropriate ledger category from the drop-down lists.
      ii. **Do not print service and product totals on check stub**: keep individual totals off the check stub and only print the pay information.
   g. Select who you would like to print the checks for in the **Print** column.
   h. Click the **Next** button.
   i. The **Printing Options** screen will appear.
   j. Click the **Print** button.
   k. Only checks for a value greater than zero will be printed.
2. **Print Single Page**: use to print all payroll info onto a single page.
   a. Calculate your payroll by selecting **Calculate New Payroll** from the **Accounting** drop-down menu.
   b. The **Payroll** screen will appear.
   c. Click the **Print Single Page** button.
   d. The **Printing Options** screen will appear.
   e. Click the **Print** button.
   f. A summary of the payroll information will print on a single page.
3. **Print Separate Pages**: use to print each employee's payroll information on a different page.
   a. Calculate your payroll by selecting **Calculate New Payroll** from the **Accounting** drop-down menu.
   b. The **Payroll** screen will appear.
   c. Click the **Print Separate Pages** button.
   d. The **Printing Options** screen will appear.
   e. Click the **Print** button.
   f. A summary of each employee's payroll information will print on a separate page.

Quick Print Employee Checks: the **Quick Print Employee Checks** feature is a way to print payroll checks that do not include wage or deduction details on the stub. These checks can be added directly to the

General Ledger.

1. Select **Quick Print Employee Checks** from the **Accounting** drop-down menu.
2. The **Print Checks** screen will appear.
3. Select the starting check number in the **Payroll Check Options** section.
4. Check or uncheck the following boxes as appropriate:
    a. **Add entries to General Ledger after printing**: select the appropriate ledger account and the appropriate ledger category from the drop-down lists.
    b. **Do not print service and product totals on check stub**: keep individual totals off the check stub and only print the pay information.
5. Select who you would like to print the checks for in the **Print** column.
6. Click the **Next** button.
7. The **Printing Options** screen will appear.
8. Click the **Print** button.
9. Only checks for a value greater than zero will be printed.

Payroll FAQ: these are some common, frequently asked questions regarding payroll.

Q1: What does it mean when you claim a tip on a ticket?
A1: Claiming a tip means that the employee is reporting and recording the tip as income. Employees may claim a tip on an open ticket. Two types of tips exist:

1. **Direct tip**: this is a tip that is given directly to the employee. The tip amount does not appear on the client's receipt. The tip amount is reported in payroll (for reference), but is not included in the payroll total. Payroll taxes for the tip amount are calculated and applied to payroll.
2. **Withheld tip**: the tip is withheld (not given to the employee) until the tip is settled. A withheld tip may be settled by using the **Settling** feature, i.e. settle the tip at the end of the employee's shift, or the tip can be settled by calculating payroll. The withheld tip appears on the client's receipt. A withheld tip may be used when the client is paying by check or credit card. Payroll taxes are applied to the withheld tip.

Q2: What does it mean when you settle a tip?
A2: To settle a tip means that if your business took the tip money from the client, put it in the cash drawer, and then at a later time you give the employee the money for the tip, i.e. a customer may pay by check or credit card, and include the employee's tip on the check or credit card. Your business settles the tip when your business gives the employee the money for the tip.

Q3: What impact does backbar have?
A3: Backbar is the amount in products used to support a service, i.e. if Haircut costs $50, but $10 of Conditioner is used to while performing the service, the backbar is $10.

1. **Single Commission Payroll System**: a standard backbar amount can be defined and exceptions created as needed per employee. This backbar amount is subtracted from the service price when determining employee commission.
2. **Dual Commission Payroll System**: a standard backbar amount can be defined and exceptions created as needed per employee. This backbar amount is subtracted from the service price when determining employee commission. This backbar amount is subtracted only when a service is used and not when purchased.

Q4: Where can I get my State tax tables?
A4: Federal tax tables are built into the software, but state tax tables are not. Some states have a percentage tax and some states have a tax table. You need to check with an accountant for your state tax information and to get a copy of the state tax table. You can also search the Internet for a copy of your state tax table. See the **Payroll Tables Overview** section for more instructions on creating tax tables.

Q5: How do I know how much to configure for Social Security, Medicare, City, Local or other deductions or taxes?
A5: You should check with an accountant and then configure payroll accordingly.

Q6: What is a booth renter deduction?
A6: Some businesses only have booth renters and no employees. Each month, the booth renters pay the business rent for using space inside the business.

Q7: What if I calculate the incorrect payroll date? How do I fix it?
A7: If payroll has been run for an incorrect date range, the payroll calculations after and including the incorrect payroll need to be recalculated. See the **Calculating Payroll** and **Recalculating an Incorrect Payroll Report** portions of the **Payroll Calculation Overview** for the proper steps.

Q8: What is a payroll adjustment?
A8: A payroll adjustment is any currency amount that you wish to give or take away from an employee. A positive amount indicates that you are giving funds to the employee. A negative amount, which will appear in parenthesis, indicates funds being subtracted from the employee's payroll. This feature is useful if, for example, an employee unexpectedly worked some extra hours over the weekend during the last pay period, but after payroll was run. You can pay the employee the difference during the next pay period with a payroll adjustment.

Q9: Why don't all of my employees appear when I run a payroll report?
A9: Your employees may not appear for either of the following reasons:

1. You have no closed tickets for the range of dates that you selected to run payroll for. Some important payroll calculations are taken from closed tickets.
2. You have **No** selected under the **Include** field on the **Payroll Configuration** screen.

Q10: How can I test my payroll configuration and settings?
A10: Select **Calculate New Payroll** from the **Accounting** drop-down menu. Click the button next to **Practice: Run test payroll and do not save results**.

Q11: I added an employee bonus for a product and/or a service. Why are the bonuses not showing on my payroll calculations?
A11: in order for a bonus to be given to the employee, the employee must be set up to receive commission. For a product to have a bonus, the employee should have product commission enabled, and likewise for services. If the employee should receive a bonus only for some products/services, but will receive either no bonuses, different bonuses, and/or no commission for other products/services, then the product/service commission should be enabled and set at a straight percentage of 0%. This will keep the commission enabled, but not give anything to employees unless a bonus amount is entered for individual products/services.

Q12: On what amounts does the commission get based off?
A12: Commission amounts are calculated by taking information from closed tickets and applying the settings

you have chosen to the total sales amounts for each employee. These amounts will be obtained differently depending on the commission system being used:

1. **Single Commission System**: commission is given to employees when services are performed or products are sold. From individual closed tickets, the commission amount is based off of the price of the service, subtracting out any discounts and backbar, and multiplied by the number showing in the **Quantity Used** column.
2. **Dual Commission System**: commission is given to employees when services are purchased, and separately when services are performed. From individual closed tickets, the commission when purchased amount (CWP) is based off of the price of the service, subtracting out any discounts, and multiplied by the number showing in the **Quantity Purchased** column. The commission when used amount (CWU) is based off of the price of the service, subtracting out any discounts and backbar, and multiplied by the number showing in the **Quantity Used** column.

Accounting

monitoring payments in your general ledger

General Ledger Overview

The **General Ledger** feature allows you to track the financial transactions of your business. These transactions can be rent payments, utility payments, supplier shipments, written checks, and most every other financial transaction that can occur within your business. The **General Ledger** works very much like an interactive bank account statement. Salon Iris can even calculate the current balance of your account based on what checks have cleared. To reach the **General Ledger** click the **Ledger** button/icon, or select **Edit General Ledger** from the **Accounting** drop-down menu.

The **General Ledger** feature also allows you to track multiple accounts. This is useful for business owners who have more than one business or would like to track personal and business accounts in one software package. Some of the benefits of using the **General Ledger**:

- Each entry can be categorized into an unlimited number of customized categories
- Check printing with automatic check numbering
- Automatic stock count update if products are received from a supplier
- Automatic retail price changing. If wholesale prices change, a new retail price is suggested based on the previous wholesale/retail ratio
- Split entry payments where a single entry can be sub-divided into multiple entries, i.e. a single invoice from a supplier can contain multiple items. This invoice can be entered as a single **General Ledger** entry using the split feature

Each **General Ledger** entry contains the following information:

- **Account**: assign this entry to a particular account
- **Date entered**: the date the payment or deposit was entered
- **Check number**: the check number for the payment or deposit
- **Date cleared**: the date the deposit or payment has been cleared through the bank
- **Date voided**: the date the transaction has been voided. Voided transactions do not affect the balance
- **Supplier**: supplier of the product
- **Supplier invoice number**: the invoice number associated with this entry
- **Description/To**: person or company that is receiving payment
- **Comment**: comment about the payment
- **Authorization code**: if relevant, the credit card authorization code
- **PO #**: the purchase order ID number associated with this entry
- **Category**: type of payment or deposit
- **Type**: payment or a deposit
- **Split**: allows two types of payments in one transaction, i.e. one half for non-product items: shipping, credit charges or supplier discounts, and the other half for products
- **Payment Amount**: transaction amount

The **General Ledger** screen also displays the following information:

- **Balance (Cleared)**: total figure after deposits and payments go through
- **Balance (All)**: total figure including all pending and cleared deposits and payments

Adding Ledger Accounts

1. Click the **Accounts** button.
2. The **Accounts** screen will appear.
3. Click the **Add Account** button.
4. Enter the account name and click **OK**.
5. Click the mouse in the **Starting Balance** column and enter the starting balance.
6. Click the **OK** button.
7. Repeat **Steps 1-6** for each account you would like to add.

Renaming a Ledger Account

1. Click the **Accounts** button.
2. The **Accounts** screen will appear.
3. Click on the account to change and click the **Rename Account** button.
4. Enter the new name and click **OK**
5. Click **OK** to return to the ledger.

Deleting a Ledger Account: deleting an account will not delete the transactions associated with that account in the general ledger, but it will clear the **Account** field from those transactions.

1. Click the **Accounts** button.
2. The **Accounts** screen will appear.
3. Click on the account to delete and click the **Delete Account** button.
4. The **Delete General Ledger Account?** screen will appear.
5. Click **Yes** to delete the account.
6. Click **OK** to return to the ledger.

Entering an Account Balance: you can enter your business' initial account balance. The balance is sometimes referred to as the "carry-over" balance. This is the account balance at the time when the first ledger entry is made.

1. Click the **Accounts** button.
2. The **Accounts** screen will appear.
3. Click the mouse in the **Starting Balance** column of the appropriate account.
4. Enter the starting balance.
5. Click **OK** to return to the ledger.

Ledger Entry Overview

Adding or Editing a General Ledger Entry: Salon Iris allows you to enter transactions into the **General Ledger**. You can enter payments or deposits to keep track of your business' finances and better track profit and loss. You can search for **General Ledger** entries using the **Date Range** and **Search** sections located at the bottom of the **General Ledger** screen.

1. Click the **Add Entry** button, or click the entry to edit and click the **Edit Entry** button.
2. The **Add Ledger Entry/Edit Ledger Entry** screen will appear.

3. The **Add Ledger Entry/Edit Ledger Entry** screen has two tabs:
   - **General**: this tab contains all the general information about the ledger entry
   - **Check**: this tab lets you print checks directly from the ledger
4. Once the information is filled out, click **Save** or **Save and Add Another** to continue.

Ledger - General Tab: enter the ledger entry information.

1. Click the **General** tab.
2. Select the appropriate **Account**.
3. Enter the correct date. The day the entry was added will be the default.
4. Enter the check number or click the **Next Check Number** button and Salon Iris will automatically insert the next unused check number into the **Check number** field. If you are making a payment or receiving a deposit by another means besides check, such as automatic withdrawal, leave the **Check number** field blank.
5. Select the appropriate supplier from the drop-down list. If it is a new supplier, click the **Add New Supplier** button and enter in the appropriate information. If it is an existing supplier that requires updating, click on the **Edit Supplier** button and enter the appropriate information.
6. Enter the supplier invoice number if applicable.
7. Enter the description for whom the check is made payable if applicable.
8. The **Comment** field is available to note other information that is relevant to the transaction.
9. Select the **Category** from the drop-down list. The **Category** is the type of transaction, payroll, utilities, expenses, etc. Click the **Edit** button to modify the category information if desired.
10. Select if the transaction is a **Payment** or a **Deposit** from the **Type** field.
11. Enter in the appropriate transaction amount. If you would like to split how a transaction is tracked, click the **Split** button.
12. The **Split Details** section will appear. The **Split Details** section is divided into two areas:
    a. **General**: all non-product items, shipping charges, etc.
    b. **Products**: all product items received.
       i. Click the **Add Row** button next to the **General** section.
       ii. Select the **Category**.
       iii. Enter a **Description** and **Amount**.
       iv. Click the **Add Row** button next to the **Products** section.
       v. Select the **Category**.
       vi. Enter the **Product ID**.
       vii. If the **Product ID** is already in Salon Iris's database, the **Description**, **Unit Price**, and **Amount** will automatically appear. If the wholesale price has changed, type in the appropriate amount in the **Unit Price** field. If the **Product ID** is not in the database, Salon Iris will prompt you to enter it.
       viii. Enter the quantity received.
       ix. Salon Iris will automatically compare the amount entered in the **Split Details** section to the amount of the transaction. The difference will appear in the **Difference from Payment/Deposit Amount listed above** field.
       x. Click the **Fix** button.
       xi. You will be prompted to **Change Payment Amount** or **Add Adjustment** to account for the

discrepancy.

xii. Click **OK** after making your selection.

xiii. If you check the **Update pricing and stock after saving** box, Salon Iris will automatically perform a pricing check and a stock count update.

xiv. The **Pricing and Stock Count Update** screen will appear.

xv. Your current and new, or suggested wholesale, retail, quantity on order, and stock count will be displayed. When Salon Iris "suggests" the new pricing, the ratio of wholesale to retail price for the current prices are used.

xvi. Select **Update** or **Don't Update** as appropriate. If you follow the **General Ledger** instructions, there should be no need to update products on the **Ordering** screen.

13. Click the **Save** or **Save and Add Another** button to save the information.

Ledger - Check Tab: print a check for a ledger entry.

1. Click the **Check** tab.
2. If this is your first time printing checks, click the **Check Setup** button. If not, skip to **Step 3**.
   a. The **Edit Check Format** screen will appear.
   b. You can adjust the format, spacing, and alignment of how each check is printed. It is recommended that while you are adjusting the settings, you use a blank sheet of paper in the printer to practice on. After you print your first test check, you can hold the paper next to the check and adjust the settings accordingly.
   c. Click the **OK** button after your check settings are correct.
3. Click **Print This Check Now**.
4. The **Printing Options** screen will appear.
5. Make your selections and click **Print**.

Deleting a General Ledger Entry

1. Click to highlight the entry to be deleted.
2. Click the **Delete Entry** button.
3. The **Are You Sure?** screen will appear.
4. Confirm your selection and click the **Yes** button to permanently delete the ledger entry.

General Ledger Category Search and Replace: you can easily do a general ledger category search and replace, i.e. this would allow you to replace all categories called, "Utilities" with a category called, "Utilities: Location One". The ledger category must be added before it can be used to replace a previous entry.

1. Select **Ledger Category Replace** from the **Accounting** drop-down menu.
2. The **Category Search and Replace** screen will appear.
3. Select the category that you wish to replace from the **Search for category called** field.
4. Select the category that you wish to have the item in **Step 3** replaced with from the **Replace with** field.
5. Click the **Replace** button.
6. All ledger entries will be searched and replaced according to your specifications.

Move General Ledger Entries: Salon Iris gives users the ability to move ledger entries between accounts quickly and easily.

1. Click to highlight the entry or entries to be moved.
2. Click **Move Entries**.
3. The **Move Entries to Different Account** window will appear.
4. Select the account from the drop-down list that you would like to move the entry or entries to. The account needs to already be created within Salon Iris.
5. Click **OK**.

Printing the General Ledger Entry: the information that is displayed on the screen is the information that will print.

1. Click the **Customize View** button on the left to add or remove columns as desired.
2. You can use the **Add**, **Remove**, and **Move Up** and **Move Down** buttons to customize the information to view.
3. Click **OK** to return to the **General Ledger** screen.
4. Make the appropriate selections in the **Date Range** and **Search** sections to display what you would like printed from the **General Ledger** screen.
5. Sort to the desired display by clicking a column heading, such as **Account**.
6. Click the **Print List** button.
7. The **Printing Options** screen will appear.
8. Select the printer and page range options and click **Print**.

Check Printing Overview

You can print checks using a full-size Windows printer. To do this, you need to obtain blank checks from your local bank or from Salon Iris Software. Please contact us at (800) 423-8100 or visit our website at http://www.SalonIris.com. There are five different ways to print a check. Each way is designed for all payment kinds:

1. **Payroll**: calculate payroll and then click the **Print Checks** button. The check stubs will include wages and deduction details. The option is provided to add or not add the entries to the general ledger after printing.
2. **Quick Print Employee Checks**: select **Quick Print Employee Checks** from the **Accounting** drop-down menu. These are checks that do not include payroll wages or deduction details.
3. **Miscellaneous General Checks**: select **Quick Print Any Check** from the **Accounting** drop-down menu. This is a non-payroll check and it includes no payroll calculations.
4. **Individual General Ledger Check**: when editing a **General Ledger** entry, select the **Check** tab. Click the **Print This Check Now** button.
5. **Multiple General Ledger Checks**: click the **Print Checks** button while on the **General Ledger screen**. All the checks on the ledger that have been flagged to print will be printed. These checks will be included on the **General Ledger**.

Before checks can be printed, they need to be formatted. Select **Check Setup** from the **Accounting** drop-down menu to customize how your checks are printed. Make the appropriate selections and click **OK**. You only need to configure the check setup once. It is recommended that you use blank paper while adjusting the settings. Hold the paper next to a check and adjust the settings accordingly.

Printing General Ledger Checks: printing checks from the **General Ledger** screen is quick and easy. You can use these checks to pay employees, utilities, or other business expenses. You can print checks from the **General Ledger** screen in two ways:

1. **While Adding or Editing a Ledger Entry**
    a. Select **Edit General Ledger** from the **Accounting** drop-down menu.
    b. The **General Ledger** screen will appear.
    c. Add or edit a general ledger entry.
    d. Click the **Check** tab.
    e. Click the **Print This Check Now** button.
    f. The **Printing Options** screen will appear.
    g. Make the appropriate printer selection and click the **Print** button.
2. **From the General Ledger Screen**
    a. Select **Edit General Ledger** from the **Accounting** drop-down menu.
    b. The **General Ledger** screen will appear.
    c. Click the **Print Checks** button.
    d. The **Print Checks** screen will appear.
    e. In the **Print** column, a checkmark means the check will be printed. Make sure the appropriate boxes are checked in the **Print** column.
    f. If you need to change any information such as the check #, click on the **Check #** column and type in the appropriate changes.
    g. Click the **Next** button.
    h. The **Printing Options** screen will appear.
    i. Make the appropriate printer selection and click the **Print** button.

Quick Print Any Check: you can quick print non-payroll checks, such as a check going to a supplier. The process is identical to quick printing payroll checks, except no payroll calculations are made. You may edit the name of the payee, and must enter the check amount.

1. Select **Quick Print Any Check** from the **Accounting** drop-down menu.
2. The **Quick Print Check** screen will appear.
3. The **Date** default to today's date. Change it if desired.
4. Manually enter in the check number in the **Check number** field, or click the **Next Check Number** button to have the next check number inserted.
5. Enter who the check is being issued to in the **Description/To** field.
6. Enter text in the **Comment field** if desired.
7. Enter the amount in the **Amount** field.
8. Check or un-check the **Add this check to General Ledger after printing** box.
9. Select the ledger **Account** if necessary.
10. Select the **Category** of the check from the drop-down list in the **Category** field.
11. If you wish to edit the category, click the **Edit Categories** button and make the appropriate revisions.
12. Click the **Print This Check Now** button.
13. The **Printing Options** screen will appear.
14. Select the appropriate options and click **Print**.

QuickBooks Integration Overview

Salon Iris is fully compatible with QuickBooks. This means that you can setup Salon Iris to sync your most important information with QuickBooks automatically.

What can you sync with QuickBooks?

- **Clients**
- **Tickets**
- **Employees**
- **Products**
- **Services**
- **Suppliers**
- **Gift Cards**
- **Gift Certificates**
- **General Ledger**

Syncing with QuickBooks - Desktop Edition

To get started with syncing your Salon Iris information with QuickBooks, please take the following steps:

1. Select **QuickBooks**, located in the **Accounting** drop-down menu.
2. When the **QuickBooks Setup Wizard** window appears, click **Next**.
3. Select **I am using a QuickBooks Desktop Edition**, and click **Next**.
4. In order to sync Salon Iris with QuickBooks, we will need to install the **QuickBooks Foundation** support file. To do this, click the **Install QuickBooks Foundation** button. Once the installation wizard has finished installing the **QuickBooks Foundation**, click **Next**.
5. In most cases, selecting the **Use default company file** option should be fine. However, if you have a specific company file that you would like to use that is not your default company file, you may select **Use specific company file**, and click the **Select** button to locate the desired company file.
6. Once you have selected the correct company file, click **Next**.
7. If QuickBooks is not already open, open QuickBooks now. QuickBooks must be running alongside Salon Iris in order for Salon Iris and QuickBooks to communicate.
8. Click **Next**.
9. QuickBooks may prompt you to accept a connection from Salon Iris. Allow this connection. It is also recommended that you select the option to "Allow access even if QuickBooks is not running."
10. Once Salon Iris connects, a message will display stating that a connection has been successfully established with QuickBooks. Click **Next**
11. On the Account Mapping screen, you will see the items that you can map to QuickBooks. Click on the item in the QB Account column to select which account you would like to map an item to. Once you click next, Salon Iris will create the accounts listed under the "Chart of Accounts" section of QuickBooks.

QuickBooks Settings Screen

QuickBooks Connection Info: This section displays information relating to the status of Salon Iris's connection to QuickBooks.

- **Connecting To:** this will display the QuickBooks connection type.
- **Connection Status:** Displays Salon Iris's connection status. This will give a brief description of any errors connecting to Quickbooks.
- **Change Connection**: If you would like to sync your information to a different company file, this will launch the QuickBooks connection setup wizard and guide you through the process of connecting to QuickBooks. Please the the previous **Syncing with QuickBooks** section for more details on setting up a connection.
- **Disconnect:** This will remove any connection to any QuickBooks Company file account. Once you disconnect, you will no longer be able to sync your information with QuickBooks until you run the QuickBooks Setup Wizard to establish a new connection.

Account Mapping: Account Mapping is needed to make sure Salon Iris is correctly syncing your information with QuickBooks.

When you click on the **Account Mapping** button, you will be brought to the **Account Mapping** screen. Here you can designate what items in [Product Name] will be exported to QuickBooks, as well as what QuickBooks Account will be associated with the item. For example, If you make a Gift Card sale, a sales receipt is created, adding to your "Gift Card Liability" account.

Manual Sync: Click the Manual Sync button here to begin syncing your information with QuickBooks. All information will be sent to the accounts that were configured in the previous **Account Mapping** section.

QuickBooks Questions and Answers

Q1: Do I have to use QuickBooks with Salon Iris?

A1: No, you do not need QuickBooks to use Salon Iris. Salon Iris will track your entire payroll, expenses, profit and loss, and supplier payments. It will print out all information for W2 and 1099 forms that you can give to your accountant. Salon Iris is an all-in-one business management program. Some accountants like to have all end of year financial information in the QuickBooks format.

Q2: Can I run payroll in Salon Iris and export the payroll information to QuickBooks?

A2: Salon Iris can export all payroll information to a .txt file, but QuickBooks does not have an option to import payroll data from another program. The payroll system in Salon Iris is very complete, simple to use, and contains all the major features in the QuickBooks payroll system, including the following items:

- Check printing
- Support for salary, hourly, commission, and product/service bonus pay
- Generates information for W2 and 1099 reporting
- Year-to-date totals
- SEP, Medicare, and 401k deduction
- Ability to create custom deductions

AutoSync: AutoSync can automatically keep your information between Salon Iris and QuickBooks current and up-to-date. You must be using a desktop edition of QuickBooks to use **AutoSync**.

Reporting

pulling your business information together

Reports Overview

Salon Iris comes with numerous built-in reports and even gives users the option to write their own. See the **Custom Reports Overview** section for more information. The reports are categorized and listed on the **Reports** drop-down menu. You can run a report in any of the following ways:

- Select the report from the **Reports** drop-down menu
- Select **Search for Reports** from the **Reports** drop-down menu. Choose the **Browse All Reports** Option. You will be presented with a complete list of all reports. Double-click on the report you wish to run
- Select **Search for Reports** from the **Reports** drop-down menu. Choose the **Run by ID Number** option. Enter the **ID** of the report you wish to run
- Select **Search for Reports** from the **Reports** drop-down menu. Choose the **Search by Keywords** option. Search for the report with the appropriate keywords

To make finding a report easier, each report has its own **ID Number**. This number is a simple and easy way to remember and reference a report. To see the latest list of available reports, select **Search for Reports** from the **Reports** drop-down menu. Choose the **Browse All Reports** option. A list of all the available reports will be shown. The report **ID**s are in the left-most column. If desired, click **Print** to print this list for future reference.

Customizing the Appearance of a Report: sometimes it is useful to customize the columns of a report. This can be used to make the report more concise or to limit the horizontal length of the report so everything can be printed on one page.

1. Run the desired report.
2. Click the **Customize View** button on to add or remove columns as desired.
3. You can use the **Add**, **Remove**, and **Move Up** and **Move Down** buttons to customize the information to view.
4. Click **OK** to save the settings.
5. The report will then be updated to reflect these changes.

Additionally, the option of customizing the Header and Footer displayed on a report is available by selecting **Report Header and Footer** from the **Reports** drop-down menu. These fields can be used to display business name and details on each report generated using Salon Iris.

Graphing and Charts: for most reports, you can easily create graphs and charts of the information contained in the report. After running a report, simply click the **Graph** button if it is available. You can create the following types of graphs and charts:

- **Area**: typically used for graphing cumulated totals
- **Bar**: good for comparing specific items
- **Pie**: good for showcasing percentages or totals
- **Step**: like an area chart, good for showing growth or trends in totals
- **XY Plot**: typically used for statistical analysis and measuring variance

1. Run the desired report.
2. The results of the report will be displayed.

3. Click the **Graph** button. If there is not **Graph** button on the report, the graphing feature is not available.
4. The graph or chart will be displayed.
5. If the graph is not displayed in the desired style, it can be easily changed to fit your needs.

Editing the Graph or Chart Appearance

1. Run the desired report.
2. The results of the report will be displayed.
3. Click the **Graph** button.
4. The graph or chart will be displayed.
5. Click the **Edit Graph Properties** button.
6. The **Graph Options** screen will appear.
7. Select the graph type from the drop-down list:
   - Area
   - Bar
   - Pie
   - Step
   - XY Plot
8. Enter the **Title**.
9. Select the item that you wish to graph from the **Horizontal axis** drop-down list.
10. Enter the **Horizontal axis label**.
11. Enter the **Vertical axis label**.
12. Select the items to graph by checking the appropriate box(es).
13. Optionally, check **Use 3D Effects** or **Invert Vertical Axis** if desired.
14. Click **OK**.

Printing a Graph or Chart

1. Run the desired report.
2. The results of the report will be displayed.
3. Click the **Graph** button.
4. The graph or chart will be displayed.
5. Edit the graph or chart to fit your needs.
6. Click the **Print** button.
7. The **Print Options** screen will appear.
8. Verify the settings and click **Print**.

Most Used Reports: there over hundreds of reports available in Salon Iris, but there are certain reports that get used more often. These are nine of the most commonly used reports:

1. **Sales Totals and Sales Tax Report (Report #1)**: shows calculated business totals and taxes for any selected date and time period, and for specific employees and booth renters.
2. **Business Performance Report (Report #147)**: provides various metrics to measure the business' performance. The report provides the ability to set goals, and reports whether or not those goals are being met over different time ranges.
3. **Business Growth Report (Report #152)**: provides a comparison of the business' performance

between two different time ranges, i.e. the report can be used to compare the total sales of the most recent month to the same month a year prior.

4. **Client Retention Report (Report #4)**: review the percent of new clients that return to your business for repeat services. Return rates are listed for each employee and the average return rate represents the overall return rate for the business.
5. **Employee Performance Report (Report #146)**: provides performance information regarding a specific employee.
6. **Profit and Loss Report (Report #80)**: provides comprehensive tools for analyzing income, expense, and net profit for your business.
7. **Product Sales Statistics (Report #5)**: analyze your product sales and profit statistics to determine relative product profitability.
8. **Service Sales Statistics (Report #6)**: analyze your service sales and the net profit for each service to determine which services are the most and least profitable for your business.
9. **Top Spending Clients (Report #2)**: review your highest spending clients. The top clients are listed vertically in descending order for purchase totals, and listed in categories for overall business and employee sales.

Sales Totals and Sales Tax Report

The **Sales Totals and Taxes** screen shows calculated business totals for any selected date and time period.

1. Click the **Totals** button/icon or select **Sales Totals and Sales Tax Report** from the **Reports** drop-down menu.
2. The **Sales Totals and Taxes** screen will appear.
3. Make the appropriate date selections in the **Date Range** section.
4. If you are viewing totals for a single day then you can enter the time of day for calculations in the **Time Range** section, i.e. you can view totals for a single day from 9:00 AM to 1:00 PM, and then perform another calculation for 1:00 PM to 5:00 PM.
5. In the **Individuals** section, you can select who you would like included in the **Totals** report from the following choices:
   - **Employees: All (grouped by employee name)**: include all employees
   - **Employees: Only employees listed on the Employees screen (group by employee ID)**: include only current employees. Check or uncheck the appropriate boxes:
     - **Do not list employees with a zero total**: will not include employees with no recorded sales
     - **Include all booth renters**: include all booth renters in the totals
   - **Only this employee**: select the employee from the drop-down list
   - **Only this booth renter**: select the booth renter from the drop-down list
6. If you are networking, you can select to show totals for **All Computers** or for a specific compluter by clicking the **Select** button in the **Computers** section. This is useful for businesses that have multiple computers on the business network.
7. Click the **OK** button.
8. The **Totals** screen will appear.
9. The **Totals** screen is divided into five sections:

a. **Other**: backbar and gift certificate totals.
    i. **Backbar**: the amount of backbar from closed tickets.
    ii. **Services - backbar**: the amount of services minus backbar from closed tickets.
    iii. **Gift Cert. Purchased**: for reference, the gift certificate purchase cost entries on the **Gift Certificates** screen are shown. Note that the preferred method of adding a gift certificate is to add it to a ticket and not add it directly using the **Gift Certificates** screen.
b. **Summary**: summary of financial totals and returns.
    i. **Products**: amount of products sold.
    ii. **Services**: amount of services sold.
    iii. **Total Tax**: total sales tax collected. Some states, cities, and countries have multiple sales taxes. You can enter up to three different taxes for products and three different taxes for services.
    iv. **Product Returns**: amount of product refunds.
    v. **Service Returns**: amount of service refunds.
    vi. **Withheld Tips**: amount of withheld tips collected.
    vii. **Settled Tips**: amount of settled tips given to employees.
    viii. **Credit Added**: if a client was credited, the amount of credit will appear in this field.
    ix. **Credit Used**: this is credit that a client used on a ticket. The amount of credit given will appear in this field.
    x. **Gift Certs Purchased**: amount in gift certificates purchased (from tickets).
    xi. **Gift Certs Redeemed**: amount in gift certificates redeemed (from tickets).
    xii. **Petty Cash In**: amount of petty cash put in the drawer.
    xiii. **Petty Cash Out**: amount of petty cash taken out.
    xiv. **Loyalty Points Rewards**: amount of loyalty points rewards given.
    xv. **Coupons Redeemed**: total amount of coupon discounts redeemed.
    xvi. **Total**: grand total of all sales and returns for the date range selected.
c. **Payment and Change**: summary of payments received and change given.
    i. **Name**: Type of tender used on the transaction, i.e. Cash, Check, Visa, etc.
    ii. **In**: the total amount of the tender type taken in as a payment.
    iii. **Out**: the total amount of the tender type given out as change.
    iv. **Net**: net profit from each tender type. Net is equal to **Amount In** minus **Amount Out**.
d. **Tax(es)**: amount of sales tax charged.
    i. All applicable sales tax(es) on products and services are displayed in the **Tax(es)** section. Products and services can have up to three separate taxes applied to each. Each tax will be listed individually with the amount that was taken.
e. **Employee(s) and/or booth renter(s)**: totals by employee(s) and/or booth renter(s).
    i. **ID**: the employee or booth renter ID.
    ii. **Name**: the employee or booth renter name.
    iii. **Products**: amount of products sold by the employee or booth renter.
    iv. **Services**: amount of services sold by the employee or booth renter.
    v. **Returns**: amount of returns performed by the employee or booth renter.
    vi. **Backbar**: amount of backbar used by the employee or booth renter.
    vii. **Total**: amount of services sold plus products sold minus the returns and backbar.

viii. **# of Tickets**: number of tickets closed by the employee or booth renter.

10. Click or double-click on most every entry in the **Totals** display to view the information associated with that calculation.

Changing the Date Selection: you can change the date easily from the **Sales Total and Sales Tax Report** screen.

1. Click the **Change Date** button.
2. The **Sales Totals and Taxes** screen will appear.
3. Make the appropriate date(s) selection.
4. Click **OK**.
5. The **Totals and Sales Tax** screen will appear with the new date or date range.

Copy Employee Information: you can copy employee and booth renter totals quickly. This copy can be easily pasted into a word processor or spreadsheet program.

1. Click the **Copy Employee Info** button.
2. The **Copy Completed** notification will appear stating: "The information has been copied to the clipboard."
3. Click **OK** to proceed.
4. Paste the employee information to a word processor or a spreadsheet program by hitting **Ctrl+V** on your keyboard.

Printing the Sales Total and Sales Tax Report: there are four options for printing the report.

1. **Print All Information**: prints the entire report will all details.
   a. Click the **Print All Information** button on the **Totals** screen.
   b. The **Printing Options** screen will appear.
   c. Verify the settings and click **Print**.
2. **Print to Receipt Printer**: print the totals formatted to standard receipt paper size.
   a. Click the **Print to Receipt Printer** button.
   b. The **Printing Options** screen will appear.
   c. Verify the settings and click **Print**.
3. **Print Employee Table**: only print the details from the **Employee(s) and/or Booth Renter(s)** table as it appears.
   a. Click the **Print Employee Table** button.
   b. The **Printing Options** screen will appear.
   c. Verify the settings and click **Print**.
4. **Print Summary Stubs**: print the **Employee(s) and/or Booth Renter(s)** table broken up by each individual employee.
   a. Click the **Print Summary Stubs** button.
   b. Select how many employees to print per page.
   c. The **Printing Options** screen will appear.
   d. Verify the settings and click **Print**.

Business Performance Report

The **Business Performance Report** provides various metrics measured against goals to show a business' performance.

1. Select **Business Performance Report** from the **Reports** drop-down menu.
2. The **Select Date** screen will appear.
3. Select the desired date.
4. Click **OK**.
5. The **Business Performance Report** will appear.
6. Business goals can be set from this report to measure the business performance.
7. Click **Edit Goals**.
8. The **Modify Business Performance Goals** screen will appear.
9. Enter each performance goal for your business.
10. Click **Save** to return to the **Business Performance Report**.

Business Growth Report

The **Business Growth Report** provides a comparison of the business' performance between two different time ranges to measure how well the business is growing, i.e. this past January to the January from the year before. This report will only make sense if the two date ranges are of the same length. When comparing month-to-month, a 31-day month will tend to appear "better" than a 30-day month simply because there is an extra day. However, when one January is compared to another January, the months will show clear differences. However, holidays and the days that they fall during the week and inclement weather will not be accounted for in totals.

1. Select **Business Growth Report** from the **Reports** drop-down menu.
2. The **Busines Growth Report** screen will appear.
3. Enter the following information:
    - **First date range**: the older of the two date ranges to compare
    - **Second date range**: the more recent of the two date ranges to compare
    - **Employees**: the employees to include in the report
        - **Employees: All (grouped by employee name)**: include all employees
        - **Employees: Only employees listed on the Employees screen (group by employee ID)**: include only current employees
        - **Only this employee**: select the employee from the drop-down list
        - **Only this booth renter**: select the booth renter from the drop-down list
4. Click **OK**.
5. The **Business Growth Report** will appear.

Client Retention Report

The **Percent Retained** report allows you to review the percent of new clients that return to your business for repeat services. Return rates are listed for each employee; the average return rate represents your business' overall return rate.

1. Select **Client Retention Report** from the **Reports** drop-down menu.
2. The **Find Percent Retained** screen will appear.
3. Select the appropriate **Date Range**.
4. Click **Next**.
5. Select how many times the client must have returned to qualify as retained, i.e. 2 times.
6. Click **Next**.
7. Select the past number of days the client has to have returned to qualify as retained, i.e. 90 days. This includes the number of times that a client has returned, i.e. the client would be considered a returning customer if they have returned 2 times in the past 90 days since the initial visit.
8. Click **Finish**.
9. The **Percent Retained Report** will appear.

Employee Performance Report

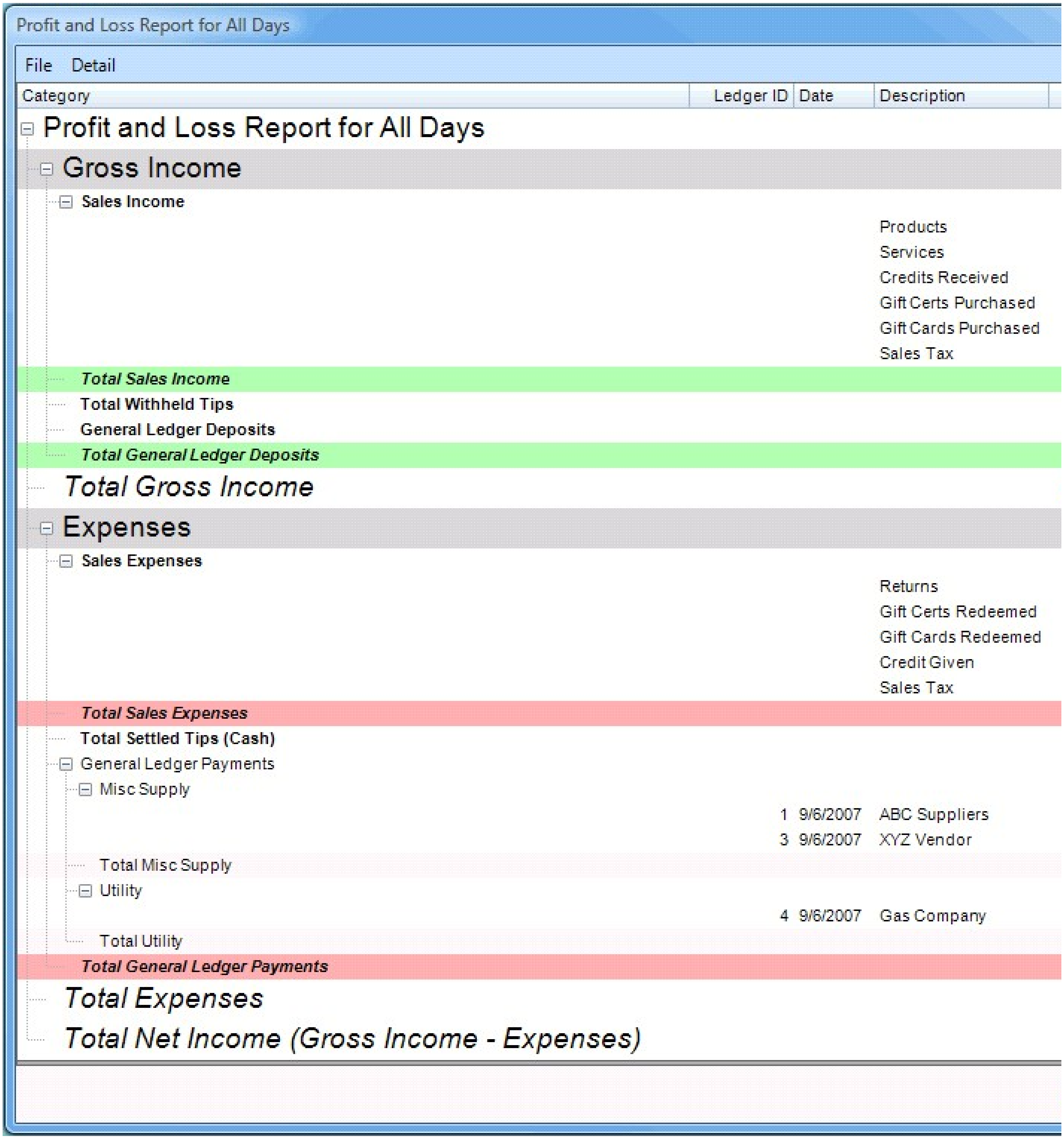
The **Employee Performance Report** provides performance information regarding a specified employee.

1. Select **Employee Performance Report** from the **Reports** drop-down menu.
2. The **Options** screen will appear.
3. Select the **Range of Dates** that you would like for the report.
4. Select the **Employee** from the drop-down list.
5. Click **OK**.
6. The **Employee Performance Summary** will appear.

Profit and Loss Report

The **Profit and Loss Report** provides the comprehensive tools for analyzing the income, expense, and net profit of your business.

1. Select **Profit and Loss Report** from the **Reports** drop-down menu.
2. The **Profit and Loss** screen will appear.
3. Select the **Date Range**.
4. As desired, check or uncheck the **Include sales transactions** box. This box should be checked if you do not record sales deposits in the **General Ledger**. If you do record sales deposits in the **General Ledger**, then these ledger entries will represent your business' income.
5. Select how payroll will be included:
   - **General Ledger entries**: if you utilize a payroll account in your general ledger
   - **Saved payroll calculations**: if you only use payroll calculations and don't include payroll in your general ledger
   - **Don't include payroll**: if you do not want to include payroll in your **Profit and Loss Report**
6. In the **General Ledger** section, use the **Include** column to check or uncheck the general ledger entries that you would like to include. Usually **General Ledger** entries include utility payments and other business expenses, so we recommend including these.
7. Click **OK**.
8. The **Profit and Loss Report** will appear.



Sample Profit and Loss Report

Backbar is accounted for in your **General Ledger** when you order products. Products contained on tickets with **Backbar** are not an additional expense because the wholesale cost of these products should already have been accounted for.

The amount of detail shown on the report can be changed automatically or manually depending on needs. To manually change the amount of detail displayed under each heading, click the **+** or **-** symbols next to each heading name. To automatically change the amount of detail displayed, select one of the four levels from the **Detail** drop-down menu. Level 4 has the greatest amount of detail and Level 1 has the least.

You can print, copy, or save the **Profit and Loss Report**. If you select to copy the report by selecting **Copy** from the **File** drop-down menu, the information is copied to the clipboard. Next, you can open a spreadsheet and paste the information by hitting **Ctrl+V** on the keyboard. If you selected **Save As**, you can save the information as a .txt file that can be opened in a spreadsheet.

Product Sales Statistics Report

The **Product Sales Statistics Report** will help you to analyze your product sales and profit statistics, and it will help to determine relative product profitability.

1. Select **Product Sales Statistics** from the **Reports** drop-down menu.
2. The **Options** screen will appear.
3. Select the **Range of Dates** to calculate statistics for.
4. Click **OK**.
5. The **Product Sales Statistics** will appear.

Service Sales Statistics Report

The **Service Sales Statistics Report** will calculate your business' service statistics to show the quantity of services sold and the net profit for each service. This allows you to see which services are the most and least profitable for your business.

1. Select **Services Sales Statistics** from the **Reports** drop-down menu.
2. The **Options** screen will appear.
3. Select the **Range of Dates** to calculate statistics for.
4. Click **OK**.
5. The **Service Sales Statistics** will appear.

Top Spending Clients Report

The **Top Spending Clients Report** allows you to review your business' highest spending clients. The top clients are listed vertically in the **Top Clients** table in descending order for purchase totals and listed in categories for overall business and employee sales.

1. Select **More Reports** from the **Reports** drop-down menu.
2. Select **Top Spending Clients** from the **Clients** menu.
3. The **Top Clients** screen will appear.
4. Select the appropriate dates to run the report for.

5. Select the number of clients to view on the report, i.e. the top 10 spending clients, etc.
6. Select which employees you would like to see on the report. The entire business is the first item on the employee list. Keeping this entry checked will show the top clients for your entire business overall.
7. Click **OK**.
8. The **Top Spending Clients Report** will appear.

Custom Reports Overview

Salon Iris allows you to create your own custom reports. There is no limit to the number of reports you can create. Each time you create a new report, you have the option of having it added to the **Reports** drop-down menu. You can even create your custom reports by basing them on the built-in reports that come with Salon Iris. Creating a custom report is not difficult. However, you need to be familiar with the following two topics:

1. The Salon Iris database format. The database is where Salon Iris holds all your information. It contains a list of all your clients, products, services, sales, etc. These items are grouped together in separate lists known as tables. The tables are further subdivided into smaller categories called fields, i.e. the **Clients** table has a field called, **FirstName**, which is a list of all the clients' first names. You can see a complete list of the database format by opening the file called, Database Schema.xls, located on the Salon Iris CD.
2. Structured Query Language. The Structured Query Language, or SQL, is a series of commands you use to specify what information you want in your report. The format consists of abbreviations and words similar to English.

Creating Custom Reports

1. Select **Manage Custom Reports** from the **Reports** drop-down menu.
2. The **Custom Reports** screen will appear.
3. Click the **Add** button.
4. Enter the title and description of the report.
5. Add the **SQL statement**. See the examples in the **Structured Query Language Information** section for assistance on writing the SQL statement.
6. If desired, select from the following options:
    - **Show results after running report**: check this if the report is generating information that you need displayed, i.e. generating a report of all clients that came in on a specific date. If the report is being used to make changes to a specific field, then this option can be unchecked, i.e. setting all client discounts to 0
    - **Fix first column**: select this option if you do not want to be able to click the column headings to sort the data
    - **Show subtotals row for each change in first column**: check this option if the report needs to feature subtotals under each row
    - **Show totals row at end of report**: check this option if you are generating a report that is to show a total amount
7. Click the **Run** button to view your report.
8. Click the **OK** button to save it.

Creating Custom Reports Based on Built-In Salon Iris Reports: you can view the SQL statements for approximately 90% of the built-in reports in Salon Iris. Importing the built-in Salon Iris reports is a great way to see how the reports were written so you can model your own reports after them.

1. Select **Manage Custom Reports** from the **Reports** drop-down menu.
2. The **Custom Reports** screen will appear.
3. Click the **Add** button.
4. The **Modify Custom Report** screen will appear.
5. Click the **Import** button.
6. The **Available Reports** screen will appear.
7. Select the report you wish to import the SQL statements for and click **OK**.
8. Make the desired changes to the **SQL statement**, **Title**, and **Description**.
9. Click **OK** to return to the **Custom Reports** screen.

Structured Query Language Introduction

Below is a basic introduction to the SQL language. This introduction will allow you to write basic reports. SQL statements can range from very simple to extremely complex. Because SQL is one of the most popular database languages, hundreds of books have been written on it. We highly recommend purchasing a book on SQL if you would like to become more familiar with the language. After you have a firm understanding of SQL, you will be able to write your own very sophisticated reports.

The basic format of a SQL statement is as follows:

```
SELECT <field> FROM <table>
```

Where:

- <field> are a list of the items, or fields, that you want to view, or * if you would like to view all fields
- <table> is the name of the table containing the items

Example 1: List of All Clients: as mentioned, there is a table in the database called **Clients** that contains a field called **FirstName**. A SQL statement to obtain a list of all the first names of all your clients would be:

```
SELECT fldFirstName FROM tblClients
```

Notice that all fields are preceded by **fld** and all tables are preceded by **tbl**. The is true for all fields and tables in Salon Iris.

You could also obtain a list of all the information on each client with the following statement:

```
SELECT * FROM tblClients
```

Now let's create a custom report that shows a list of all the clients.

1. Select **Manage Custom Reports** from the **Reports** drop-down menu.
2. The **Custom Reports** screen will appear.
3. Click the **Add** button.
4. The **Modify Custom Report** screen will appear.
5. Enter the following information:

Title:	List of All My Clients
Description:	This is my first custom report!
SQL Statement:	SELECT * FROM tblClients

6. Click the **Run** button.
7. You should see a list of all your clients and all their information. Each field name (heading of each column) is preceded by fld. We will show you how to clean this up in the next example.
8. Click **OK**.
9. Click **Close** to finish.

Example 2: Better List of All Clients: **Example 1** showed you how to get a basic list of all clients and all their information. The result was a list that was very complete, but also very hard to read as the column headings were all preceded with **fld**. You can indicate your own column heading names by using the AS command. You can also specify what fields you want displayed. In the example below, you can type anything you want in the brackets: [Type anything you want in the brackets]. Whatever is between the brackets is your new column heading.

TItle:	First and Last Name of All My Clients
Description:	This report is easier to read.
SQL Statement:	SELECT fldFirstName AS [First Name], fldLastName AS [Last Name] FROM tblClients

Example 3: Show Only Certain Clients: now let's make a more useful report. We will create a report that contains a list of all clients who have a first name of Chris and have spent more than $100. We will use the WHERE command to do this. The WHERE command is placed after the name of the table and is used to select only entries matching a specific criteria.

Title:	All Chris's That Spent More Than $100
Description:	These clients have a first name of Chris and spent more than $100
SQL Statement:	SELECT fldFirstName AS [First Name], fldLastName AS [Last Name] FROM tblClients WHERE fldFirstName='Chris' AND fldTotal>100

The above examples are only an introduction to SQL. The language is very sophisticated and supports dozens of other keywords. Over 90% of the reports in Salon Iris were written using pure SQL. You can view all the SQL statements by using the **Import** button when editing a report, then selecting the built-in report that contains the SQL statement you wish to view.

Built-In User Prompts: there will be times when you want to ask the user for information when you are writing a report. In addition to all SQL commands, Salon Iris allows you to imbed additional commands in your SQL statements. They are as follows:

- `GetUserInput(<prompt>)`
  - `<prompt>` is the question you want to display to the user.
  - When this keyword is embedded in an SQL statement, the user will be prompted to enter a value. The value is inserted into the original SQL statement in place of the `GetUserInput`

keyword

- GetUserDate(<type>,<field name>,<prompt>)
    - <type> is WHERE or AND
    - <field name> is the name of the field you want to compare the selected to date to
    - <prompt> is the question you want to display to the user
    - When this keyword is embedded in the SQL statement, the user will be prompted to enter a range of dates. The range of dates selected by the user is transformed into another SQL statement using the <field name> that is passed. The result is inserted into the original SQL statement in place of the GetUserDate keyword
- GetUserEmployees(<type>,<field name>,<prompt>)
    - <type> is WHERE or AND
    - <field name> is the name of the field you want to compare the selected Employee ID to
    - <prompt> is the question you want to display to the user
    - When this keyword is embedded in the SQL statement, the user will be prompted to select employees this report applies to. The employee list selected by the user is transformed into another SQL statement using the <field name> that is passed. The result is inserted into the original SQL statement in place of the GetUserEmployees keyword

Example Using GetUserInput(<prompt>)

```
SELECT * FROM tblClients WHERE fldFirstName='GetUserInput('Enter the
client's first name.')'
```

When this report is run, the user will be prompted with a pop-up window asking to 'Enter the client's first name.' If the user enters 'Bill', the final SQL statement would be:

```
SELECT * FROM tblClients WHERE fldFirstName='Bill'
```

Example 1 Using GetUserDate(<type>,<field name>,<prompt>)

```
SELECT * FROM tblClients GetUserDate('WHERE','fldLastVisit','Enter
last visit date range')
```

When this report is run, the user will be prompted with a pop-up window and asked to enter a date or range of dates. In this example, to select a date range from Jan 1, 2010 to Jan 1, 2012, the final SQL statement would be:

```
SELECT * FROM tblClients WHERE fldLastVisit >= DateSerial(2010,1,1)
AND fldLastVisit <= DateSerial(2012,1,1)
```

Example 2 Using GetUserDate(<type>,<field name>,<prompt>)

If we wanted to specify additional search criteria, we would place it in prior to the GetUserDate keyword and then use the AND type in the GetUserDate keyword.

```
SELECT * FROM tblClients WHERE fldFirstName='Chris' GetUserDate
('AND','fldLastVisit','Enter last visit date range')
```

When this report is run, the user will be prompted with a pop-up window and asked to enter a date or range of dates. In this example, to select a date range from Jan 1, 2010 to Jan 1, 2012, the final SQL statement would be:

```
SELECT * FROM tblClients WHERE fldFirstName='Chris' AND fldLastVisit
>= DateSerial(2010,1,1) AND fldLastVisit <= DateSerial(2012,1,1)
```

Example Using GetUserEmployees(<type>,<field name>,<prompt>)

```
SELECT fldFirstName, fldLastName, fldHomePhone FROM tblEmployees
GetUserEmployees('WHERE','fldEmployeeID','Select the employees to
list')
```

When this report is run, the user will be prompted with a pop-up window and asked to select which employees to run the report for. In this example, to select employees only with IDs 1000, 1001, and 1002, the final SQL statement would be:

```
SELECT fldFirstName, fldLastName, fldHomePhone FROM tblEmployees WHERE
fldEmployeeID IN (1000, 1001, 1002, 0)
```

Networking

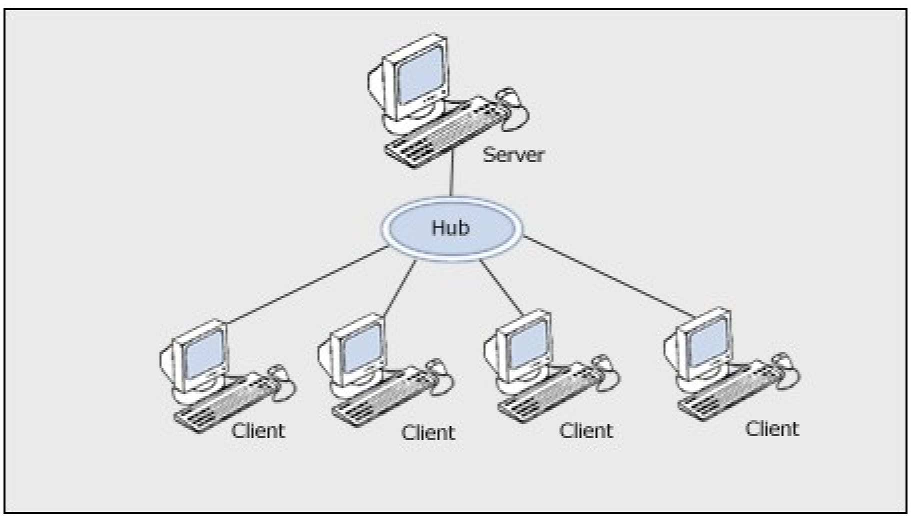
local and wide area networking

Networking Overview

Salon Iris is designed to operate on a network. This allows you to connect several computers and use Salon Iris on all of them simultaneously. The networking ability is only available in the Multi-Computer and Multi-Location editions of Salon Iris. Networking is not available in the free trial. The information in your database, i.e. clients, appointments, products, services, etc. will be available on each of the computers. Additionally, the **Appointment Book** screen and the **Tickets** screen will automatically update to show changes that have been made on any of the other networked computers. Screens can be updated manually by clicking the **Refresh** button located towards the left side of each major screen.

The proper operation of the network can be critical to the operation of your business. Because of this, we recommend that the network be set up and maintained by an experienced network administrator.

Networking Basics: a local area network, or LAN, consists of two or more computers that are physically connected together, usually within the same building, and can share information. Salon Iris can be set to work in a LAN environment. One computer in your LAN will contain the Salon Iris database. This computer is referred to as the "server" because it "serves" information to the other computers. All the other computers are called "clients" because they get their information from, and send their information to the server. The cables that connect the computers together are attached to a "hub" that controls the flow of information. Below is a diagram that shows a typical LAN setup:



The server computer does the following:

- Contains a copy of the database
- Performs database backups and restores databases
- Runs a copy of Salon Iris which allows you to view and edit all your information
- Runs a copy of Microsoft SQL Server 2012 Express, the free version of SQL Server and can be downloaded from the Salon Iris website

Because the server contains the database, it is required to be running any time a client computer is connected to it. It is recommended that you leave the server running all the times. The client(s) run a copy of

Salon Iris, which allows you to view and edit all of your database information that is located on the server computer. Keep in mind that you can use any computer on your network to edit the database, book appointments, enter clients, sell products, etc., but only the server can be used to backup and restore the database.

Network Requirements: Salon Iris uses Microsoft's SQL Server for the database engine. SQL Server 2012 Express is the free version of SQL Server and it can be downloaded from the Salon Iris website. SQL Server 2012 Express only allows a maximum of 10 users at a time. If you want to network more than 10 computers, you will need to purchase Microsoft's SQL Server Standard version. Your software and computers must meet the following requirements to use Salon Iris in a network environment.

1. **Salon Iris**: you must have a Multi-Computer Edition of Salon Iris. The Multi-Computer Edition includes a license for two computers (one server plus one client). If you wish to use more than two computers, you must purchase additional client access licenses (CALs).
2. **Network Hardware**: make sure each computer has an Ethernet connection. If it does not, purchase and install the appropriate hardware. If you are networking more than two computers, then you should also purchase a network hub. All computers that are going to be networked should be connected to this hub. Follow the instructions included with the hardware you purchase(d). The networking kit should contain specific information on how to install and configure the network hardware. We recommend that you have an experienced network technician help you network your computers.
3. **Other Requirements**: please use the chart below to determine system requirements:

Computers (Server + Clients)	**2 to 9**	**10 or More**
Server Requirements	• Windows Server 2008, 2008RT, 2011 (all editions), and 2012, Windows 7 (all editions), Windows 8 (all editions), or Windows 10 (all editions) • SQL Server 2008 R2 Express or 2012 Express (comes free with your Salon Iris purchase) • 1.6 GHz Intel Core i5 or better processor • 4 GB RAM • 1 GB or more free hard drive space	• Windows Server 2008, 2008RT, 2011 (all editions) and 2012, Windows 7 (all editions), Windows 8 (all editions), or Windows 10 (all editions) • Full copy of Microsoft SQL Server (Standard or higher) • 2.66 GHz Intel Core i5 or better processor • 6 GB RAM • 2 GB or more free hard drive space
Client Requirements	• Windows Server 2008, 2008RT, 2011 (all editions) and 2012, Windows 7 (all editions), Windows 8 (all editions), or Windows 10 (all editions) • 1.5 GHz processor • 2 GB RAM • 1 GB or more free hard drive space	• Windows Server 2008, 2008RT, 2011 (all editions) and 2012, Windows 7 (all editions), Windows 8 (all editions), or Windows 10 (all editions) • 2.0 GHz processor • 2 GB RAM • 1 GB or more free hard drive space

Network Setup Overview

If you have purchased the Multi-Computer or Multi-Location Edition of Salon Iris and will be using Salon Iris in a network environment, it is the responsibility of the user to set up and troubleshoot the Windows network. Please see the Windows Help file for complete information on how to set up your Windows network or contact a network administrator. Once the Windows network has been established, follow the steps below to set up your Salon Iris network. We recommend that the network be set up and maintained by an experienced network administrator.

There are two major steps in setting up your Salon Iris network:

1. Set up the server computer.
2. Set up the client computer(s).

After setting the server computer up, the client(s) can be connected to the server. If you experience difficulties, call (800) 604-2040, or e-mail Support@DaySmart.com.

Set up the Server Computer: the server is the computer that contains the actual Salon Iris database. Generally the faster or most heavily used computer should be the server. The server computer must be on for the client computers to run the software. The server is also the only computer that will be able to backup the database, so it is recommended that this computer contain a CD/DVD writer, or access for a USB memory stick.

1. Install Salon Iris on the server computer. See the **Getting Started** section for more information.
2. Open Salon Iris.
3. Select **Database Controls** from the **File** drop-down menu.
4. The **Database Controls** screen will appear.
5. Click the **Select Server** button.
6. The **Select Server** screen will appear.
7. Select **This computer is the server**.
8. Click the **Auto Setup** button.
9. In most cases, Salon Iris will automatically connect to the instance of SQL Server found. If more than one instance of SQL Server is found on your computer, you will be prompted to select which instance to use. From the list of available instances, select which instance you would like to connect to and click **OK**.
10. If Salon Iris does not connect to an instance of SQL Server, click the **Auto Setup** button again. If you still have an issue, restart your computer. When you open Salon Iris, you may be prompted with the **No Database Open** screen. Click the **Select Server** button and repeat **Steps 7-10**. If you still have an issue, see the **Networking Troubleshooting** section of this User's Guide for further assistance.
11. Select which type of database that you would like to start with. You can select either of the following choices:
    - **Sample Database**: select this choice if you would like to start using Salon Iris with some sample clients, products, and appointments
    - **Blank Database**: select this choice if you would like to start using Salon Iris with a totally blank database
12. Click **OK** on the next two screens.
13. After the database has been created, the **Set Database Password** screen will appear. Salon Iris will ask for a database password every time it is opened or when you restore a database from a backup.
14. Enter your database password and then retype it. Be sure to take careful note of your database password spelling in UPPER and lower case. Passwords are CaSe sensitive. Keep the password in a safe place as Salon Iris Software does not replace database passwords.

15. Click the **OK** button.
16. Salon Iris will let you know that your database password was successfully set.
17. Click **OK** to continue.
18. You are now ready to set up your client computers.

Set up the Client Computer(s): each client computer needs to be connected to the server.

1. Install Salon Iris on the server computer. See the **Getting Started** section for more information.
2. Open Salon Iris.
3. Select **Database Controls** from the **File** drop-down menu.
4. The **Database Controls** screen will appear.
5. Click the **Select Server** button.
6. The **Select Server** screen will appear.
7. Select **This computer is a client**.
8. Click the **Auto Setup** button.
9. Salon Iris will now generate a list of computers on your network that have instances of Microsoft SQL Server running on them.
10. Select the computer that you set up as the server computer from the list and click **OK**. If no instances of SQL Server are detected, click the **Auto Setup** button again. If this does not fix the issue, restart your computer. If the **No Database Open** screen appears when you reopen Salon Iris, click the **Select Server** button and repeat **Steps 7-10**. If you are still having an issue, see the **Networking Troubleshooting** section of this User's Guide for further assistance.
11. The client computer will now connect to the database located on the server computer and prompt you for the database password. This is the same password that you entered when setting up the server computer.
12. Click **OK** after entering in the password.
13. You are now ready to use Salon Iris on a network.

Important Networking Notes

1. The proper operation of the network can be critical to the operation of your business. We recommend that the network be set up and maintained by an experienced network administrator.
2. The automatic backup feature only works on the server while Salon Iris is running. Therefore, we highly recommend that Salon Iris always runs on the server.
3. The server must be turned on before any client computers can be used.
4. The server is the only computer that can backup, restore, or create a new database.
5. To select how often the network computers will check for changes from the other computers, such as new appointments, select **Options** from the **Tools** drop-down menu, and click the **Scheduling** tab. In the **Appointment Book Auto Refresh Rate** section, select how often to update the computers.

Multi-Location Overview

The Multi-Location Edition has all the features of the Multi-Computer Edition and allows one location to remotely connect to other location(s) to perform functions such as appointment booking and reporting. In other words, multiple buildings anywhere in the world can share information. Typically these locations are connected through a wide area network, or a WAN. While a WAN operates similarly to a LAN, a full time

Internet connection is required at each location, as well as a Virtual Private Network, or VPN, that will connect each location to the overall network because the computers are not connected on a single, local network.

The Multi-Location Edition differentiates each location with a unique store name selected by the user. The hardware and software requirements for the Multi-Location Edition are the same as the Multi-Computer Edition.

Multi-Location Reporting: standard reports are the set of reports that exist in the other Editions of the software. Standard reports display information of a single location by including only information of the database from that location. Standard reports can be run for any location that Salon Iris is currently connected to.

For example, if you are currently at Location A, and wish to run a standard report for Location B, connect to Location B by selecting **Wide Area Network Settings** from the **Tools** drop-down menu. Select **Location B** from the menu next to the **Remote Location** option. Run the reports as you normally would if you were on the Location A database. When you are finished, you can connect to another location to run reports or connect back to your current location, Location A, by going back to the **Wide Area Network Settings** option from the **Tools** drop-down menu and selecting the appropriate option.

Cross reports encompass information from all locations on a single report. Cross reports start with report ID #500 and are located on the **Reports** drop-down menu under **More Reports** and **Wide Area Network**. The cross reports available are:

- **Totals for All Locations (Report #500)**: view combined totals from all locations
- **Number of Open Tickets (Report #501)**: view the open tickets at all locations
- **Product Stock Count (Report #502)**: check stock at all locations

What the Multi-Location Edition CAN Do

1. Everything that the Multi-Computer Edition can do.
2. Everything is done in real time.
3. Connect to other locations and perform all functions that a Multi-Computer Edition client copy can perform, including the following functions:
   - View the appointment book
   - Make appointments
   - View/edit inventory
   - View/edit clients
   - Run 100% of the reports
   - Look up the balance of a gift card or gift certificate
   - Payroll for each location (must log into each location separately and run payroll)
   - Inventory (must log into each location separately to view inventory)
4. Run the "Cross Reports."

What the Multi-Location Edition CAN'T Do

1. Centralized payroll.
2. Centralized mailing report.
3. Search all locations and find an open time slot; you must connect to each location separately to view

an open time slot.
4. Automatic inventory transfer from one location to another.
5. Backup or restore a database at a remote location.
6. Communicate with other locations that are running different versions of the software.
7. You cannot "log in" and "log out" using a remote location's time clock.

Multi-Location Edition Setup

1. Make sure your VPN is set up at each location.
2. At the first location, install Salon Iris on the server computer.
3. At the first location, add each additional computer that you want included in your Salon Iris network as client computers.
4. At the second, third, fourth, etc. business locations, repeat **Steps 1-3**. A unique serial number for each location needs to be entered on all computers at each location, i.e. all computers at location 1 will have serial number "XYZ" and all computers at location 2 will have a serial number "ABC".
5. Register and activate Salon Iris at each location. If you are on a payment plan, you are not required to activate until you complete the payment plan. If you are leasing the software, you are not required to activate the software.
6. After the serial number of a Multi-Location Edition is entered, a new item on the **Tools** drop-down menu will be available. The setting is called **Wide Area Network Settings**.
7. Select **Wide Area Network Settings** from the **Tools** drop-down menu.
8. The **Wide Area Network Configuration** screen will appear. The **Wide Area Network Configuration** screen shows where the names of the other locations are entered.
9. Click the **Add** button on the right side of the screen to add each location.
10. When it asks for the password for the location being added, you should enter the database password that has been set at the selected location. If no password was set up at the location, you can leave this field blank.
11. To "reconnect" to one of these locations, select the name of the location from the drop-down list, which is located in the **Active Server** section, i.e. to connect to the store named **Northville**, select **Northville** from the drop-down list.
12. After selecting the location, click **OK**.
13. The title bar on the top of the software now lists the name of the location you are connected to. From now on, all operations in the software perform as if you were at the **Northville** location.
14. To return back to your local location, go back to the **Wide Area Network Settings** screen and change the **Active Server** to **This location**.

Switching Client and Server Computers

When a business upgrades a client computer it sometimes ends up as the best computer at that location. As a result, it would better function as the server instead of a client. Switching client and server computers is easy.

1. Make a backup of your database on the current server computer, and then save that database backup to an external device, such as a USB flash drive, or an external hard drive.
   a. From Salon Iris, select **Backup and Restore** from the **File** drop-down menu.

   b. Select **Backup Database**.
   c. Click **Next**.
   d. Select the location where you would like to make the backup.
   e. Click **Save**.
2. Safely remove the external device and take it to the computer that you would like to make the new server. Older computers may require you to stop the device before removing it.
3. If Salon Iris is not already installed on the new computer, install it.
4. Register Salon Iris with your serial number.
5. Open Salon Iris and set your new computer as the server.
   a. Select **Database Controls** from the **File** drop-down menu.
   b. The **Database Controls** screen will appear.
   c. Click the **Select Server** button.
   d. The **Select Server** screen will appear.
   e. Choose the option that says **This computer is the server**.
   f. Take note of the name of your new computer which is listed on the **Select Server** screen. You will need this to set up the rest of your client computers properly.
   g. You may be prompted to create a new or blank database at this point; create a blank database - this will be replaced shortly with your backup.
6. Restore your database backup to the new server computer.
   a. Connect the USB flash drive or external hard drive to the new server computer.
   b. In Salon Iris, select **Database Controls** from the **File** drop-down menu.
   c. The **Database Controls** screen will appear.
   d. Click the **Restore Database from Backup** button.
   e. Click **Yes** on the warning to override the current database.
   f. The **Restore Database** screen will appear.
   g. Select **I would like to restore my database from a database backup file**.
   h. Select **Restore a database from a specific location**.
   i. Click **Next**.
   j. Select the backup file from its location and click **Open**.
   k. You will be prompted to enter the password for the backup database. This is the same as the database password from the old computer and might not necessarily match the new password set on this computer if you changed it.
7. Go to each of your client computers and set them to connect to the new server computer. This may include the computer that used to be the server computer if it will now be working as a client computer.
   a. On each client select **Database Controls** from the **File** drop-down menu.
   b. The **Database Controls** screen will appear.
   c. Click the **Select Server** button.
   d. The **Select Server** screen will appear.
   e. Choose the option that says **This computer is a client**.
   f. Click **Auto Setup**.
   g. Select the computer that was just made the new server from the list.
   h. Click **OK**.

8. Repeat **Step 7 a-h** for each client computer on the network.

Networking Troubleshooting

If you are having trouble with your network setup, below are some helpful troubleshooting tips to try. Please consider the items below prior to calling customer support.

1. **Restart the computer**: sometimes simply restarting the computer will re-establish the network connection.
2. **Check the network connections**: makes sure that your network is working, and that computers can communicate.
   a. Make sure that the computers on your network can see each other.
      i. If you have Windows 7, click on the **Start** menu in Windows, then select **Network**.
      ii. Click on **View Workgroup Computers**.
      iii. If you have Windows 8, from the desktop, hold the **Windows** key on our keyboard, and press "**R**". This will bring up the **Run** window. Type "**\\(Computer Name)**" Where (Computer Name) is the name given to your computer.
      iv. You should be able to see a list of the other computers and files that are shared through the network.
   b. If you do not see any other computers or shared folders, are unable to access this screen due to a Windows error message, or can see the files and/or computers, but cannot access the information by double-clicking an item, your network is not functioning properly.
      i. Verify that your network cables are properly connected.
      ii. If you are using a wireless network that receives a signal from a router, verify that your hub, router, or switches are all powered and properly configured.
      iii. You may also have to re-establish your network settings if everything appears to be connected and functioning, but you still cannot see the other computers on your network or access network folders.
3. **Configure Windows Firewall**: the Windows Firewall has to be turned off or has to be specially configured so that it can remain on, but not block client computers from accessing the Microsoft SQL Server on your server computer. If your Windows Firewall is on, you may turn it off and test the connection. If your clients can connect to the server with the Firewall off, an exception needs to be created to allow client computers to connect to the server with the Windows Firewall on.

If using Windows 7:

a. On your Windows desktop, click the **Start** menu.
b. Select **All Programs**.
c. Select **Microsoft SQL Server 2012**.
d. Select **Configuration Tools**.
e. Select **SQL Server Configuration Manager**. The SQL Server Configuration manager screen will appear.
f. Continue to step g below.

If using Windows 8:

a. From the **Start** screen, right click on a blank area of the screen
b. Click on **All Apps.**
c. Scroll to the right of the apps screen, until you find **Microsoft SQL Server 2012**.
d. Click on **SQL Server Configuration Manager**.
e. The SQL Server Configuration Manager will appear.
f. Continue to step g below.

g. Click **SQL Server Network Configuration**
h. Double-click **Protocols for DSI**.
i. Right-click on **TCP/IP** and select **Properties** from the menu.
j. The **TCP/IP Properties** window will appear.
k. Click on the **IP Addresses** tab.
    i. In every section, delete the information in the field labeled **TCP Dynamic Ports** so that the field is completely blank.
    ii. In every section, change the information in the field labeled **TCP Port** to **1433**.
    iii. If you have Windows 7, do not change any of the **Enabled** fields.
l. Click **Apply** once all the changes have been made.
m. Click **OK** on the warning message.
n. Close out the **TCP/IP Properties** window.
o. Click on **SQL Server Services**.
p. Right-click on **SQL Server (CMJ)** and select **Restart** from the menu.
q. Right-click on **SQL Server Browser** and select **Restart** from the menu.
r. Select **Exit** from the **File** drop-down menu in the **SQL Server Configuration Manager**.

If using Windows 7:

s. From your computer's desktop, click on **Start** menu.
t. Select **Control Panel**.
u. Continue to step **i** below.

If using Windows 8:

s. From your computers desktop, hover the mouse cursor to the top right corner or top left corner of your screen. The windows **Sidebar** will appear.
t. Click **Settings**.
u. Click **Control Panel**.
    i. Select **Windows Firewall**.
    ii. Click **Advanced settings**.
    iii. The **Windows Firewall with Advanced Security** window will appear.
    iv. Click **Inbound Rules**.
    v. Click **New Rule**.
    vi. The **New Inbound Rule Wizard** window will appear.
    vii. Select **Port**.
    viii. Click **Next**.
    ix. Select **TCP**.
    x. Select **Specific local ports** and enter **1433** in the field.

xi. Click **Next**.
xii. Select **Allow the connection**.
xiii. Click **Next** and then **Next**.
xiv. Enter a **Name** and a **Description**.
xv. Click **Finish**.

v. You should now be able to have the Windows Firewall enabled while using the Multi-Computer or Multi-Location Editions of Salon Iris.

4. **Check Other Firewall Software**: make sure all other firewall software, such as Norton Personal Firewall, McAfee Internet Suite, or McAfee Personal Firewall, is either disabled or allows access for port **1433**.
5. **Perform Network Diagnostics**: done through Salon Iris.
   a. In Salon Iris select **Database Controls** from the **File** drop-down menu.
   b. The **Database Controls** screen will appear.
   c. Click the **Select Server** button.
   d. The **Select Server** screen will appear.
   e. Select the role of this computer **Server** or **Client**.
   f. Check the **Show Details** box.
   g. Click **Auto Setup**.
   h. The software will now perform a series of diagnostics to determine the status of your Windows network and the status of the SQL Server.

SQL Server Troubleshooting

There are certain issues that may arise when downloading and installing Microsoft SQL Server 2012 Express. Some issues involve certain Microsoft Service Pack files while other problems occur from incorrect settings following installation.

1. **Restart the computer**: sometimes simply restarting the computer will fix the SQL issue.
2. **Enable the TCP/IP communication**.

If using Windows 7:

a. On your Windows desktop, click the **Start** menu.
b. Select **All Programs**.
c. Select **Microsoft SQL Server 2012**.
d. Select **Configuration Tools**.
e. Select **SQL Server Configuration Manager**.
f. The **SQL Server Configuration Manager** window will appear.

If using Windows 8:

a. From the **Start** screen, right click on a blank area of the screen
b. Click on **All Apps.**
c. Scroll to the right of the apps screen, until you find **Microsoft SQL Server 2012**.
d. Click on **SQL Server Configuration Manager**.
e. The **SQL Server Configuration Manager** will appear.

a. Click **SQL Server Network Configuration**.
b. Double-click on **Protocols for DSI**.
c. The various configuration protocols will be listed in the right window pane. Make sure the protocol named **TCP/IP** is enabled.
d. If it is not, right-click on **TCP/IP** and select **Enable** from the menu.
e. Click on **SQL Server Services**.
f. Right-click on **SQL Server (DSI)** service and select **Restart** from the menu.

If using Windows 7:

a. On your Windows desktop, click the **Start** menu.
b. Select **Control Panel**.
c. Double-click on **Add/Remove Programs**.
d. Continue to step **e** below.

If using Windows 8:

a. From your computers desktop, hover the mouse cursor to the top right corner or top left corner of your screen. The windows **Sidebar** will appear.
b. Click **Settings**.
c. Click **Control Panel**.
d. Click on **Uninstall a Program**.
e. Scroll down to check for **MSXML6 (Service Pack 2)**.
f. If it is there, it can only be removed with the **Windows Installer Cleanup** program. This is a free download available from http://downloads.daysmart.com/Misc/WindowsCleanup.exe.
g. Download **Windows Installer Cleanup** and install it.
h. Open **Windows Installer Cleanup** and locate **MSXML6 (Service Pack 2)** from the list.
i. Click **Remove**.
j. Reinstall Salon Iris to reinstall Microsoft SQL Server 2012 Express and a compatible version of **MSXML6 (Service Pack 2)**.

4. **Change the log on account for SQL Server**: the software installs SQL Server using the **Local System** account. This can cause problems on some computers. Sometimes changing this to a different account will allow SQL Server to start.
   a. On your Windows desktop, click the **Start** menu.
   b. Select **All Programs**.
   c. Select **Microsoft SQL Server 2012**.
   d. Select **Configuration Tools**.
   e. Select **SQL Server Configuration Manager**.
   f. The **SQL Server Configuration Manager** window will appear.
   g. Click **SQL Server Services**.
   h. Right-click on the instance of SQL Server that is having problems and select **Properties** from the menu.
   i. The **SQL Server Properties** window will appear.
   j. Make sure the **Log on as** option is set to **Built-in account** on the **Log On** tab.
   k. Change the account type to **Network Service**.

l. Click the **Apply** button.
m. Click the **OK** button to exit.
n. Right-click the instance of SQL Server that is not running and select **Start** from the menu. If the SQL Server starts and is running properly, then you should be able to open Salon Iris without any problem.

Web Features

web-based options to grow your business

DaySmart Account

A **DaySmart Account** is an online account management tool designed to provide access to information about business and account details. From a single login, accounts with administrative access can manage the following:

- Payments made to DaySmart Software, Inc.
- Services and subscriptions associated with Salon Iris
- User account access for other, non-administrative employees

In addition to accounts for employees, non-employed individuals, i.e. web designers, can also have **DaySmart Accounts** that will grant access to editing and managing an **Online Booking** website. See the **Online Appointment Booking** section of this chapter for more details.

Creating a DaySmart Account

Perform the following steps to create a **DaySmart Account**:

1. Click **Online Services** and select **Go to my Salon Iris Account**
2. Your computer will open a web browser to http://account.Salon Iris.com/. Click **Create an Account**.
3. Enter your Salon Iris Serial Number and click **Check my serial number**.
4. Type all your desired account credentials and click **Create Account**.

Navigating the DaySmart Account Website

Once an account has been created and you've logged in, navigation buttons along the top of the website display the various account options that can be managed. The main features include:

- **Overview**: details next bill date, estimated amount due (varies based on number of **Remote Access** users and **Messaging Service** usage), and service subscription details.
- **Billing**: manage credit card on file to be billed and view payment summary of charges for account subscriptions and services.
- **Users**: lists employees in Salon Iris database, non-employee accounts, and access/activation status for **Administrator privilege**, **Remote Access**, and **Online Booking**.
- **My Info**: displays account overview, account owner information, and business information for [Online Booking and the **Messaging Service**.
- **Update**: shows current licensing information and information about available updates/upgrades
- **Help**: displays DaySmart Software, Inc. contact information for account support.
- **Log Out**: log out of your **DaySmart Account**.

Online Appointment Booking Overview

Why Use Online Booking?: the Salon Iris **Online Booking** feature is easy-to-use and has many benefits that will help your business grow and become more profitable.

The Salon Iris **Online Booking** feature is easy-to-use and has many benefits that will help your business grow and become more profitable:

- **Take appointments 24/7**: our online booking system runs 24 hours a day, 7 days a week, 365 days a year so your customers can book appointments anytime, even when your business is closed. You control the appointment options. Clients can book their own appointments and have them auto-approved or you can manually accept or reject their requests.
- **Your own website is included**: your business will have its own, unique website. Your website address will be YourAccountName.MySalonOnline.com. Or for an extra fee, select your own domain, www.YourAccountName.com
- **Advertise on the Internet**: customize all the website content, announce sales, promote services, and talk about the benefits of your business vs. the competition
- **Easy to use**: when a customer books an appointment on your website, Salon Iris will notify you. Depending on the settings you choose, you can "Accept" and "Reject" requests manually or have clients book their own appointments. Salon Iris will automatically e-mail the customer with your response
- **Automatic updating**: your computer will automatically connect to your website and update it with the times employees can take appointments
- **Safe and secure**: there is no need to worry about any security issues because none of your client information, sales information, product pricing, or appointment details is on the website. Your database is never transferred outside of your business
- **Save time and money**: let your customers spend their time looking up and booking their appointments so your employees are free to do other things
- **Quick and easy setup**: you can have your entire website set up and ready to allow your customers to book online appointments in under 10 minutes

Online appointment booking works with your business' Salon Iris database. Salon Iris syncs your business' list of services, times when employees are busy, i.e. when an open ticket is scheduled, and employee schedules over the Internet to your website. Your clients can view offered services, contact information, specials, and request an appointment. Your website will then communicate to Salon Iris and update the Salon Iris database that you have running in your business.

Online information can be accessed by selecting **Online Booking** from the **Online Services** drop-down menu. In this window you can view and **Online Booking Summary** in the upper section and take actions with your website in the lower section including:

- **Edit Your Website**: opens a web browser to website Dashboard
- **Manage Your Billing**: opens a web browser to the DaySmart Account login webpage
- **View Appointment Requests**: navigate to **Tickets** screen and view requests
- **Manually Sync Website**: opens a web browser to manually sync employee, service, and coupon information to your website
- **View Sync History**: opens a window in Salon Iris to view recent website sync information

First Time Setup: You have the option of creating either a blank site with no styling or a site that's built with one of Salon Iris's premade themes. Once your account is created all the content on your site is managed from the **Dashboard**, which is accessible from the left side of your web browser window when you're logged into your website.

Website Setup Overview

After your website is created, it can be accessed for editing in any of the following ways:

- Open a web browser and navigate to your website at **http://YourAccountName.MySalonOnline.com/** or **http://www.YOURACCOUNTNAME.com**, depending on which account you signed up for. Click on the **Manage Site** link at the bottom of the page to log in.
- Select **Online Booking** from the **Online Services** drop-down in Salon Iris and click on **Edit Website** in the lower section.

Once logged in, the landing page for **Online Booking** is the **Dashboard**, which contains navigation buttons to each function of the website. The main sections of the **Dashboard** are:

1. **Change Your Website Appearance**:
   a. Website Themes: select the theme for your website. There are several premade themes that can be chosen and activated, or for total customization, a blank theme is available. Changing themes will not affect added content (Like text and images). It will only affect the styling of the page. There is no limit on the number of themes that can be created, but only one can be activated and displayed at a time. Each theme has action links for editing:
      i. **Activate**: makes a theme the active, displayed theme for your site.
      ii. **Preview**: opens a new web page displaying the preview of the selected theme.
      iii. **Copy**: quickly copies the theme. Enter a name for the new theme.
      iv. **Edit**: opens the theme in a new web page for editing.
      v. **Delete**: delete the theme. The changes are permanent if a theme is deleted.
   b. Pages and Navigation: add new pages and select the ones that will be displayed to the public.
      i. **Pages**: move the slider from 'Yes' to 'No' for desired display option, click **Add New Page** to create new pages to show, and click **Save Changes** when finished.
      ii. **Menu Items**: Arrange the order of the navigation links displayed for each website page. Optionally, click the pencil to edit the name for each Menu Item and choose how it opens in the web browser. Click **Save Changes** when finished.
2. **Manage Business Information**:
   a. Business Details: modify business contact information displayed on the site, business hours, types of services and amenities offered, enter a Google Analytics Tracking ID, and add buttons with links to your business' social media profiles.
   b. Service Listing: choose the services that will be displayed on your site. Use the **Edit** button to enter an optional detailed description and check or uncheck boxes in the **Show on Website** column to add or remove services from the **Services** page. Use the **Reorder Service List** button to change the services list order.
   c. Employee Profiles: choose the employees that will be displayed on your site. Click the **Edit** button to add detailed information about employees including a photo, description, schedule, contact phone number and E-mail address, and social media accounts. Check or uncheck boxes

in the **Show on Website** column to add or remove employees from the **Employees** page. Use the **Reorder Employee List** button to change the employee display order.

   d. Coupons and Specials: choose coupons from the business database to display on the website. Click the **Edit** button to add an image and/or detailed description of the promotion and check or uncheck boxes in the **Show on Website** column to add or remove coupons from the **Specials** page. Use the **Reorder Specials List** button to change the specials display order.
   e. Appointment Request Log: view all appointment requests that have come to your software. You can sort by Online requests and Offline requests over any date range you choose. You can also mark your Offline requests as reviewed here.

3. **Set Your Preferences**:
   a. Booking Preferences: customize all booking settings and preferences. Choose how appointments get approved or rejected, how far in advance appointments can be requested, allow or force clients to provide additional contact details, edit client notifications related to appointment requests, and set up employee notifications and recipients. After each desired option is selected, click **Save Changes** to finish and save settings.
   b. Booking Plugin Setup: if you have an existing business website, a plugin can be designed to fit the layout, look, and feel of that existing site. Click the **Design Booking Plugin** button to customize what clients will see when booking. Once finished, click the **Check mark** in the editor on the left and click **Generate Plugin Code** and copy the link into the code for the existing site to link it directly to your **Book Now** page.
   c. Facebook Integration: if you have a Facebook business profile, clients can book directly through that page with a specially designed plugin. Click the **Design Facebook Plugin** button to customize what clients will see when booking. Once finished, click the **Check mark** in the editor on the left and click **Login with Facebook** button to allow your **Online Booking** page to access your Facebook profile. Click **Connect a Facebook Page** and choose your business page from the drop-down menu. **Online Booking** will now be available in the **Apps** section of your Facebook business page.
4. **Manage Account Settings**
   a. Account Overview: click to be directed to the landing page for your **DaySmart Account**.
   b. Manage User Access: click to be directed to the **Users** page of your **DaySmart Account**.
   c. Add Custom Domain: if your business is currently utilizing the provided website address of YourAccountName.MySalonOnline.com and you would like the option of using your own selected domain, www.YourAccountName.com, then click to add that account option.
   d. Manual Sync: this will manually sync employees, services, and coupons from your database if the information displayed on your website does not match the information entered in your database. Click **Sync Now** and the information will be updated.

Booking Appointments Online Overview

1. Go to your business' website. The address will be in the format as follows: **http://www.MySalonOnline.com/ACCOUNTNAME** or **http://www.YOURACCOUNTNAME.com**, depending on which account you signed up for.
2. Click the **Book Now** link located on the top of the screen.
3. The **Book an Appointment Online** screen page 1 of 4 will appear.
4. The client should enter the appropriate information: first and last name, phone number, e-mail, and

address if you require one.

5. Click the **Select Day & Time** button.
6. The **Book an Appointment Online** screen page 2 of 4 will appear.
7. Select the date or date range the client would like to book from the appropriate fields.
8. Select a time range.
9. Click the **Choose Service** button.
10. The **Book an Appointment Online** screen 3 of 4 will appear.
11. The available appointment start times will appear in the **Select Start Time** section.
12. Select the service to be booked and sort by category to narrow down list.
13. Choose the employee the client would like to book with or choose First Available if no preference.
14. Add additional services if desired.
15. Click the **Find an Appointment** button.
16. The **Book an Appointment Online** screen page 4 of 4 will appear.
17. Select a desired time slot to schedule and click **Book**.
18. Click **Book Now** to submit the request.
19. The **Book an Appointment Request Confirmation** screen will appear.
20. At this time your client will receive an appointment request tracking ID number. The client will also receive a message stating that your business will call or e-mail him or her to confirm the appointment.

Check for New Online Appointment Requests: requests will be sent to your software as they are made. Depending on your booking notifications settings, you and/or the employee will also receive E-mail notifications that a request has been submitted for approval or rejection.

View New Online Appointment Requests: you can manually view the list of existing appointment requests that are currently awaiting rejection or acceptance.

1. Navigate to the **Tickets** screen.
2. Use the filter option for Online Booking and select **View Appointment Requests**.
3. Double-click on request to view the requested appointment details.

Accepting Appointment Requests

Perform the following steps to accept an online appointment request:

1. Navigate to the tickets screen.
2. Select the **Appointment Requests** filter option from the **Online Booking** section.
3. Double-click to open an appointment request and details.
4. Click **Accept Request**.
5. Once accepted, the request is added to the database as an open ticket. The request is also held on file in the **Accepted Requests** filter of the **Online Booking** section of the **Tickets** screen.

Rejecting Appointment Requests

Perform the following steps to reject an appointment request:

1. Navigate to the tickets screen.

2. Select the **Appointment Requests** filter option from the **Online Booking** section.
3. Double-click to open an appointment request and details.
4. Click **Reject Request**.
5. Once rejected, the request is held on file in the **Rejected Requests** filter of the **Online Booking** section of the **Tickets** screen.

Cancel Online Booking Account

Perform the following steps to cancel your account:

1. Select **Online Booking** from the **Online Services** drop-down menu.
2. Click **Manage Billing Information**.
3. A web browser will open to your **DaySmart Account** page.
4. Choose the **Manage** button under **Online Booking** in the **Services** section.
5. Click **Cancel Service** and **Confirm Cancellation**.

Keeping Online Booking in Sync

The online appointment booking system is a robust and stable system that has been designed to minimize problems. However, due to the nature of the public Internet, Internet service providers, and that the Salon Iris database is separate from your website, some issues may occur. Salon Iris periodically contacts your website and synchronizes information. Most issues occur while a client is accessing the website when something changes in the Salon Iris database before the website is updated, such as employees' schedules.

Some common issues that you may experience:

1. The Internet and reliability.
    - The Internet is a service provided by various Internet Service Providers, and therefore is not maintained by DaySmart Software, Inc. Occasionally, portions of the Internet will temporarily stop working. Because of this, DaySmart Software, Inc. cannot guarantee the reliability of the online appointment booking system. Although these outages are rare and usually brief, this may affect the ability for your clients to book online appointments or the ability of Salon Iris to check for online appointments or update your website.
2. Restoring database backups.
    - If you restore a database backup that does not contain accurate services, employees, or coupons lists, it's possible that you may need to perform a manual sync to get all the information in your database to match what is displayed on your website. The next automatic sync will also update all the displayed information, but during the interim it may be possible to add appointment requests that do not match availability of employee or service times.
3. The client is not found.
    - When Salon Iris receives an appointment request, it will attempt to locate the client in the database first by searching by the client's name, then by searching by the client's e-mail address. If no matching clients are found, then Salon Iris will create a new client in the database. This can lead to multiple clients under the same name if there are misspellings in either the client name or e-mail address. See the **Merging Clients** overview in the **Clients** chapter for

instructions on how to create a single record for clients with more than one entry in your database.

Remote Access Overview

Remote Access is a powerful tool that allows the employees of your business to view and modify their appointments remotely from their mobile devices or any computer with an internet connection. In order to function, **Remote Access** requires Internet access on the business computer running Salon Iris and the device with which the employee is making a remote connection.

Before you are able to use the **Remote Access** system, you must first create a **Remote Access** account.

Once the account is created, you can log in to **Remote Access** by going to https://Online.SalonIris.com or from the Salon Iris website at http://www.SalonIris.com, clicking log in and then entering your e-mail address and password. As long as your main business computer is turned on and connected to the Internet, you can see your appointments from your phone or home computer's web browser.

You can also use **Remote Access** via apps that are available for your Android phone, Android tablet, iPhone, or iPad. To find the app for an Android device, all you have to do is search the Google Play Store for Salon Iris, and for an iPhone or iPad, you can search for Salon Iris in the App Store. Once you have downloaded and installed the app, you will be able to run the app and log in with the same e-mail address and password that you use to log in to the **Remote Access** web page.

Creating a Remote Access Account

Before you can connect to your database from the **Remote Access** website or from a mobile application, the owner of the business must first create a **Remote Access** account. Perform the following steps to create a **Remote Access** account:

1. Click **Online Services** and then **Remote Access Setup**.
2. Click **Create Remote Access Account**.
3. Your web browser will open a web page. Select the employee that is to be the account administrator. This is typically the owner of the business, or a general manager.
4. Enter the e-mail address that you would like to associate with your remote access account. This must be a valid e-mail address, and will be used to log in to the **Remote Access** web site and app.
5. Enter your desired password, and click **Continue**.
6. On the next screen, enter your business address and your payment information. If you have received a promotional code, enter it into the **Promotional Code:** field and click **Check**.
7. Agree to the **terms and conditions**, and click **Create Account**. You should be directed to the **Remote Access** web page, and can now perform all functions of **Remote Access**.

Creating an account for a new employee

In order for another employee to be able to view the appointment book via **Remote Access**, each employee must have his or her own **Remote Access** account. To add additional employees to **Remote Access**, please perform the following steps:

NOTE: In order to create an account for a new employee, your account must have administrative privileges, and have the proper permissions to add an employee to the database.

NOTE: To create an account for a new employee, you must first create an employee. You can do this from the **Employees** screen within **Remote Access**, or you can also create the employee from within the software installed on your computer. For more information on adding Employees, please see the **Employees and Scheduling** section of the user's guide.

1. Go to [Web Access Site] and log in using the proper credentials. You can also log in by going to http://www.SalonIris.com
2. Click on the **Employees** tab.
3. You should see the new employee on this screen. Double-click on the employee to bring up the **Edit Employee** screen.
4. Click on the **New Remote User Account** tab.
5. Click **Create New User Account**.
6. Enter the employees e-mail address. In order to complete this process, this must be a valid e-mail address.
7. The new employee will receive an e-mail, which will contain a link to activate his or her **Remote Access** account, and to create a password.
8. Once this process is completed, the new employee will have access to the **Remote Access** web page, and can also download and install the mobile **Remote Access** app to any Android phone, Android tablet, iPhone, or iPad.

Once the employee has an active account, you do have the option to set that employee as an administrator. An administrator has the ability to create new employee accounts and modify existing user accounts. Administrators also have access to the account setup screen where billing preferences and company information can be modified.

More than one administrator is allowed at each business so that multiple managers can have access to these functions.

To set an employee as an administrator, locate the employee on the **employees** screen. Double-click on the employee to bring up the **Edit Employee** screen. Go to the **Remote User Account** tab, and click **Make Administrator**.

Editing Employee Access Permissions

Remote Access allows you to fine-tune how your employees interact with various parts of the **Remote Access** website. These settings are enforced automatically once set up, and can be changed at any time. These settings also apply to what employees are able to access when using **Remote Access** on a mobile device.

If you have already set up employee access permissions within Salon Iris on your business computer, those settings will carry over for any employees who also use **Remote Access**. For Example, if an employee is unable to delete a client on within Salon Iris on the business computer, that same employee will already be unable to delete a client through **Remote Access** once his or her account has been created.

Please perform the following steps if you would like to edit the access permissions for your employees:

NOTE: In order to edit employee access, you must have the proper employee access permissions.

1. Go to [Web Access Site] and log in using the proper credentials. You can also log in by going to http://www.SalonIris.com
2. Click on the **Options** button.
3. Choose **Management** and then **Employee Access**, located on the left side of the options screen.
4. Click **Set Up Employee Access**.
5. Click on the tab that relates to the setting or screen for which you would like to modify permissions (e.g., click on the **Reports** tab if you would like to change which reports an employee has access to).
6. Underneath each employee's name, uncheck the box if that employee is not allowed access to this screen or feature. If the employee should be allowed access to this screen or feature, the box under that employee's name should be green with a check mark. We recommend having all the important financial screens password protected.

Using Remote Access

The main features of the **Remote Access** website include the following items:

1. **Tickets**: track all of your day-to-day transactions, check-in clients, process credit cards, e-mail a receipt to your client, void a ticket, check out a client, and record employee tips
2. **Appointment Book**: view your appointment book, schedule appointments, close tickets, add/edit/delete time blocks and create recurring time blocks.
3. **Client List**: view/edit/delete client information, view clients purchase history, add new clients and search your existing client list
4. **Product List**: view/edit/delete all product information, update product inventory, add new products and deleting products
5. **Service List**: view/edit/delete all service details and add new services
6. **Employee List**: view/edit/delete employee information, add new employees and create a **Remote Access** account for existing employees, view tip details and settle tips claimed, and also setup individual merchant accounts for booth renters
7. **Scheduling**: view/edit/delete employees' schedules. Note that this information can only be viewd/modified using the website interface and NOT the mobile apps
8. **Reports**: run various reports to track how your business is doing
9. **Options**: customize and adjust how you manage your business with Salon Iris

Appendix

Shortcuts and Legal Information

Shortcuts

The following keys and key combinations can be used on any of the major screens in Salon Iris to quickly access specific functions and features. Printing this page is helpful as a quick reference guide for Salon Iris shortcuts.

Use the **Function Keys**, or **F1** through **F12**, to access numerous features in Salon Iris.

- **F1**: open the **Help** window
- **F2**: go to the **Products** screen
- **F3**: search for an appointment opening
- **F4**: open the cash drawer
- **F5**: add a new ticket
- **F6**: go to the **Tickets** screen
- **F7**: go to the **Clients** screen
- **F8**: lookup a client
- **F9**: go to the **Appointment book** screen
- **F11**: run the **Sales Totals and Taxes** report
- **F12**: search for a product or service

Holding the **Control** key, or **Ctrl** on your keyboard, and hitting the certain letter keys will also perform specific functions.

- **Ctrl+B**: backup database your database
- **Ctrl+D**: enter a new declared cash
- **Ctrl+E**: go to the **Employees** screen
- **Ctrl+F**: go to the **Schedule** screen
- **Ctrl+G**: go to the **Gift Certificates** screen
- **Ctrl+I**: go to the **Product Ordering** screen
- **Ctrl+L**: open the **Print Labels** screen
- **Ctrl+M**: open the **Merge Clients** screen
- **Ctrl+O**: open the **Options** screen
- **Ctrl+P**: open the **Password Setup** screen
- **Ctrl+R**: run report by specific **Report ID**
- **Ctrl+S**: go to the **Services** screen
- **Ctrl+T**: go to the **Employee Tips** screen
- **Ctrl+U**: open the **User's Guide**
- **Ctrl+W**: run report by browsing, browse all available reports
- **Ctrl+X**: password logout for currently logged in employee
- **Ctrl+Z**: open the Salon Iris **About** screen

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