Manual

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Starting Memento 6

1) <u>Entering a Float</u>

- ❖ A float must be entered into the system to use the Purchase Screen.
- ❖ You will be prompted with a number pad, enter the float amount and click OK.
- ❖ If you make a mistake click clear and re-enter the float amount.
- ❖ Click cancel if you don't want to enter a float, please note that you won't be able to use the purchase screen without entering a float.

2) <u>Passwords/PINs</u>

- ❖ If the Password/PIN is activated from the Manager section in the Access screen then you will be prompted with a number pad when you start Memento 6, enter your Password/PIN and click OK.
- ❖ If you make a mistake click clear and re-enter the Password/PIN.
- ❖ Click cancel if you don't want to enter a Password/PIN, please note that you won't be able to use the system without entering a Password/PIN if the security has been activated.

Navigating Memento 6

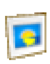
1) <u>Navigation buttons</u>

The following navigation buttons are found on the left hand side of the screen. They are used to enter the different sections of the system. You need to be on the main screen of the section of memento 6 you are working in; otherwise the navigation buttons will be disabled. If you're not on the main screen, finish your work and return to the main screen and then the navigation buttons will be enabled.

Appointment ~ Click to enter the Appointment Screen.

Clients ~ Click to enter the Client Screen.

Diary ~ Click to enter the Diary Screen.



Marketing ~ Click to enter the Marketing Screen.

Purchase ~ Click to enter the Purchase Screen.

Manager ~ Click to enter the Manager Screen.

Minimise ~ Click to Minimise the Memento 6 application.

Log Off ~ Click to log off the current user.

Shut Down ~ Click to shut down the Memento 6 application.

Purchase

There are two ways to make a purchase – you can click on an appointment in the appointment section and click pay or you can enter all the information directly in the Purchase screen. For the former you need to look at the Appointment section of the manual.

The 4 Steps to make a Purchase

1) <u>Choose a Client</u>

Go to the top of the Purchase screen

- **To choose an existing client**
  - ❖ Type in the first letter of the first name or last name or both and this will bring up all the clients starting with that letter – to select one of these you can click on the name with your finger or the mouse. The full name and mobile (if they have one) will now appear and the button on the right hand side of the name will read CARD.

- **To add a new client**
  - ❖ Type in the first, last name and mobile number into Client fields in step 1. If the name and number is not recognised then the button on the right hand side will turn orange and read ADD. If you click the ADD button this will add the client to your database and also create a client card. The ADD button will now read CARD.

- **To update the mobile number of a client**

  ❖ If you have selected a client as in a) above you can update their mobile number by deleting the number there and putting in a new one. Memento will recognise that you are putting in a new number for this client and the button on the right hand side will turn orange and read UPDATE. If you click this it will update that client's mobile number to the new one.

2) *Choose a Staff Member*

- **To choose one staff member**

  ❖ As soon as a client is entered, Step 2 Staff will be selected and the Staff Names will appear as buttons at the bottom section of the Purchase screen. (To add Staff names to the system you need to go to the Manager section of the manual.) You now click the name of the staff member who did the service or sold the product.

- **To choose more than one staff member for a purchase**

  ❖ If multiple staff members were involved in the purchase, you need to select the staff as in a) above – select the service or product in Step 3 below and then choose the second staff member and then go to Step 3 and select the product or service for the second staff member and so on for each staff member involved.

3) ***Choose an Item (Product, Service, Voucher, etc)***

- **To choose a Service**
  - ❖ As soon as a staff member is selected, you can click on the Services button in Step 3 Items. All your service categories will appear as buttons in the bottom section of the purchase screen. (To add services and service categories please go to the Manager section of the manual.) Once you click a Service category – all the services that belong to that category will appear as buttons in the bottom section of the Purchase screen. You will see a number in brackets beside/under the service name and this is the retail price of the service. Only 15 buttons appear at any one time so if you wish to choose more you can click the gold up and down arrows above the buttons.

- **To choose more Services**
  - ❖ Once you have selected a service, if you click on the Service Categories button above the services or on the Services button in Step 3 – Items you may select another category and add another Service to the receipt list to the right of Step 3 – Items.

- **To choose a Product by barcode**
  - ❖ Once a staff member is selected you may click on the Products button in Step 3 – Items and a barcode symbol will appear with an empty white field beside it in the bottom section of the Purchase screen. There will automatically be a cursor in this field. If you now scan the barcode of the product you wish to sell it will immediately appear in the receipt section of the purchase screen as long as this product and barcode are in Memento (To add a product and barcode go to the Stock, Manager section of the Manual). You may scan in as many products as you wish.

- **To choose a Product manually**
    - ❖ Once a staff member is selected you may click on the Products button in Step 3 – Items and a barcode symbol will appear with an empty white field beside it in the bottom section of the Purchase screen. Beside the barcode symbol and field there is a SELECT button – click this and the entire stock list will appear in the screen. You can search this section like the Stock section in manager by description, brand, or category. Just double click or select and click ADD to add the product you wish to the receipt in the Purchase screen.

- **To choose a Course**
    - ❖ Once a staff member is selected you may click on the Courses button in Step 3 – Items and a list of available courses will appear as buttons. Only 15 buttons appear at any one time so if you wish to choose more you can click the gold up and down arrows above the buttons. Once you select a course button – the course and price will appear in the receipt.

- **To choose a Voucher**
    - ❖ Once a staff member is selected you click on the Vouchers button in Step 3 – Items and a blue box will appear asking you to choose a voucher number. If you have numbers already printed on your vouchers or Gift Cards – then type this in here. If you wish the system to generate a number for you then click on the Wizard Hat. Automatically generated Memento voucher numbers start from 1. Then click next.
    - ❖ Now enter the amount of money you wish to put on the voucher and click OK. The voucher will appear in the Receipt section.

- **To make an Open Sale or use Hot Keys**
    - ❖ To make a general or open sale you need to click the Hot Keys button in Step 3 – Items after selecting a staff member.
    - ❖ Then click the Open Sale button in the bottom section of the Purchase Screen. A blue box will appear where you need to enter the amount of the open sale, enter a description and select whether it is a product or a service.
    - ❖ Other Hot keys are items that are very popular that you sell a lot of and would like to access them in the shortest time possible. (To Add a product or service to the hot key list you need to go to the Manager and stock or service section of the manual)

4) <u>To Pay</u>

Once you have completed the first three steps the Orange PAY button in the bottom right hand corner of the screen will become active. Once you click on this it takes you to the Payment Types screen.

- **Payment Types**
    - ❖ To select a payment type click on the buttons marked CASH, CREDIT etc and enter the amount of cash or credit etc that the client is offering. If the amount that the client is paying exactly matches the amount they owe then click the TOTAL button beside their payment method and this will automatically enter the exact amount in.

- **Credit Card or Debit Card (e.g. Switch or Laser)**
    - ❖ If the client is paying by credit or debit card, you will need to put the client's card through your credit card system first to confirm they have paid before entering it into Memento.

- **Vouchers in the system**
    - ❖ If the client is paying by voucher, then you will need to click the voucher button and enter in the voucher number and click next. If the voucher is in the system then the amount remaining on the voucher will appear in the blue box. You then must enter the amount of the voucher the client wishes to deduct from it and press OK.

- **Vouchers not in the system**
    - ❖ You need to click the Voucher button and enter the voucher number. A box will appear saying this voucher is not in the system – you will click OK. Then an ADD button will appear. You click on this and you can enter the voucher number of this voucher and then click next. Then you enter the amount of the voucher and click OK. The voucher is now in the system and you need to complete the instruction in d) above to use this voucher.

- **To use multiple Payment Types**
    - ❖ You can select more than one payment method if a client is paying half in cash and half with voucher for example. Just click the CASH button and enter how much cash they are giving you and then click on the other payment type and type in the amount.

- **To Open the till and print a receipt**
    - ❖ Once you have a payment method selected the PAY button in the bottom right hand corner will become active and when you press this – a receipt will print and the till will open. A box will also appear to tell you if the client is due any change.

Other Functions in the Purchase Screen

- **Discounts**
  - ❖ ***On individual items*** - You can enter a discount on a product or service during Step 3 above. Once you have entered a service, course or product into the receipt section to the right of Step 3, you can select the item in the list and press the Discount button underneath the receipt list. A blue box will appear with discount type where you can choose Percentage or Flat discount. A flat discount is for example €5 off a service. Then you use the number pad to enter the amount of the discount.
  - ❖ ***Total Discount*** - You can enter a total discount for everything by clicking on the grey total bar underneath the receipt list. This will turn orange once selected and then you click on the discount button as in above.

- **Editing the price of an item**
  - ❖ If you select an item in the receipt section to the right of Step 3, you can change the price by clicking on the Price button at the bottom of the receipt list. This will throw up a Number pad where you can press clear and enter the new amount you wish to charge for an item.

- **To Clear the screen**
  - ❖ If you make a mistake at any time you can click CLEAR at the bottom of the purchase screen and this clear all your entries.

- **To Delete an item from the Receipt list**
  - ❖ If you wish to delete an item from the receipt list – select it and then click on the Deduct button underneath the receipt list and this will remove it.

- **Refunds**
    - ❖ To make a refund on an item, you need to enter the item as if you were selling it (See Step 3) and then before you go to Step 4, you select it in the Receipt List and click the Refund button underneath the item and it will change it to a minus amount. If you wish to give money back, you then continue to Step 4, don't enter a payment type and the system will prompt you to give the client change when you click PAY.

- **Exchanging a Product**
    - ❖ To exchange an item, you need to enter the item as if you were selling it (See Step 3) and then before you go to Step 4, you select it in the Receipt List and click the Exchange button underneath the item and it will change it to a minus amount. Then you enter the new item you wish to exchange it for in Step 3. If there is any price difference between the items then you will need to enter more payment in Step 4.

- **Opening the Client Card from the Purchase screen**
    - ❖ You can open the client card after step 1, if the client name is selected you click on the CARD button on the right of the name and it will open the card. After you have made any changes if you click OK it will take you back to the Purchase screen.

- **Adding Notes to a service from the purchase screen**
    - ❖ Once you have added a service in Step 3, if you click on the NOTES button at the very bottom of the Purchase screen, a big box will appear that lets you add/edit the notes for that service for that client. For example you can enter the colour notes etc. Once you have made your note you click OK and return to the purchase screen.

- **To deduct Professional or Salon stock**
  - ❖ You don't need to enter any of the Steps 1-4. Instead just go to the purchase screen and click on the PROFESSIONAL Button at the very bottom of the Purchase Screen. The same barcode symbol and SELECT button will appear as in Adding a Product in Step 3 – c) and d) above. Once you scan in the professional item it will be automatically deducted from the Stock. If you don't have a barcode you can select the item manually from the list as in Step 3 – d) and this will automatically deduct the item from stock. You do not need to click Pay after this.

- **To take out Petty Cash or Sundries**
  - ❖ If you wish to take money out of the till, you can click on the SUNDRIES button at the very bottom of the Purchase Screen. You need to enter the Amount. Then select whether it is a deposit or withdrawal and then type in the reason why you are doing this into the Description.

- **How come when I sell more than one voucher with the Wizard Hat – it shows the same voucher number for each voucher?**
  - ❖ This is because the voucher numbers are only confirmed when you complete payment for a transaction. When the final PAY button has been pressed a pop up will appear for each voucher so you can confirm the voucher number. The numbers here will be different. The reason for this is because if you have more than one till and are selling a voucher at the same time the numbers may be the same when you click the voucher hat but will be different when you click PAY.

Appointments

1) Layout

- **Layout of columns**

❖ The default time segments are in half hour slots, with the start time set as the opening time for the salon and the end time set as the closing time for the salon.

❖ To increase the time segments to 15 or 5 minute segments, click on the Plus Magnification button on the right hand side of the screen.

❖ To decrease the time segments to 1 hour segments, click on the Minus Magnification button on the right hand side of the screen.

❖ When the time segments are in a decreased/increased state, and you can't see all the appointments for the day, use the golden up or down arrows on the right hand side of the screen to scroll through the appointments for the day.

- **Time Scale and Staff Members**

❖ The current Time Line is marked on the screen by a red horizontal line, this will move down the screen during the day in relation to the PC clock's current time.

❖ Availability / Unavailability of the staff members are show by two colours (White/Grey) in relation to their schedules. If a staff member is availability their column will be white in colour and if a staff member is unavailability their column will be grey in colour.

❖ If the Hide On button is visible in the bottom right hand corner of the screen then you will only see the staff scheduled in for that day.

❖ If the Hide Off button is visible in the bottom right hand corner of the screen then you will see all the staff members including those not scheduled in for that day.

❖ The appointment screen will show all the staff members who are scheduled in for that day – when there are more than four staff members on the appointment screen, you can click on the Show 4 button at the bottom of the screen to group four staff member a one time.

❖ Use the left/right golden arrows to scroll through the staff members in groups of four.

❖ To view all the staff members at the same time again, click the Show All button at the bottom of the screen.

- **Selecting a Date**

❖ To view any day in the following seven days to currently selected date, click on one of the seven day button at the top of the screen.

❖ To view the previous day click on the "< Day" button.

❖ To view the next day click on the "> Day" button.

❖ To view the current day but on the previous week click on the "<< Week" button.

❖ To view the current day but on the next week click on the ">> Week" button.

❖ To select any date, click on the "Date" button in the top right hand corner of the screen and use the pop-up calendar to select the date you want.

- **Additional Buttons & Legend**

❖ To refresh the screen click on the refresh button on the right hand side of the screen (Insert PIC).

❖ To print information on the appointment screen, highlight a staff member and click on the printer button on the right hand side of the screen. There are 4 options select one and it will be printed to your default printer.

a. Select Column (Only Appointment)
b. All Columns (Only Appointment)
c. Select Column (With Service History)
d. All Columns (With Service History)

- **Legend**
  - ❖ Red Flag – Client Info not complete.
  - ❖ Red Cross – Client has medical history.
  - ❖ Golden Star – New Client
  - ❖ Pen Icon – Client has notes
  - ❖ Green Star – Client has a preferred staff member
  - ❖ Red Star – Client's appointment is not with their preferred staff member

2) ***<u>Making an appointment</u>***

- **Making a single appointment.**
  - ❖ Double click on a staff member's column at the requested time for the appointment.

- **Entering in a new client**
  - ❖ Type in the first, last name and mobile number into Client fields in step 1. If the name and number is not recognised then the button on the right hand side will turn orange and read ADD. If you click the ADD button this will add the client to your database and also create a client card. The ADD button will now read CARD.

- **Choosing an existing client**
  - ❖ Type in the first letter of the first name or last name or both and this will bring up all the clients starting with that letter – to select one of these you can click on the name with your finger or the mouse. The full name and mobile (if they have one) will now appear and the button on the right hand side of the name will read CARD.

- **Accessing the client card**
  - ❖ Click on the Button labelled "CARD" in the top right hand corner of the screen and that client'

- **Choosing a Staff Member**
  - ❖ The staff member who was click on to enter this screen will be automatically chosen for this appointment.
  - ❖ To select a different Staff member click on the button labelled “2 Staff” and select the new staff member from the bottom of the page.

- **Choosing a Service**
  - ❖ Click on the button labelled “3 Service” highlighted in orange.
  - ❖ All your service categories will appear as buttons in the bottom section of the purchase screen. (To add services and service categories please go to the Manager section of the manual.) Once you click a Service category – all the services that belong to that category will appear as buttons in the bottom section of the Purchase screen. You will see a number in brackets beside/under the service name and this is the retail price of the service. Only 15 buttons appear at any one time so if you wish to choose more you can click the gold up and down arrows above the buttons.

- **Choosing multiple Services**
  - ❖ Once you have selected a service, if you click on the Service Categories button above the services or on the Services button you may select another category and add another Service to the appointment information.

- **Set Appointment**
  - ❖ To confirm the details are correct and make the appointment click on the “SET” button in the bottom right hand corner of the screen.

- **Clear the Information**
  - ❖ Click on the CLEAR button at the bottom of the screen.

- **Cancel the Information**
  - ❖ Click on the CLOSE button at the bottom of the screen.

- **Print the Information**
  - ❖ Click on the print button on the bottom of the page to print the information.

- **View the Client’s Notes**
  - ❖ Click on the notes button on the bottom of the page to view the client’s notes.

- **Pay for Appointment**
  - ❖ Click on the pay button on the bottom of the page to pay for the appointment – this will bring you to the POS screen.

- **Using Rooms and Room view**
  - ❖ To use the room view select the room tab at the top of the screen – note that this has the same functionality as the appointment page so the steps above in making and viewing appointments can be used here.

- **Making an appointment from a course**
  - ❖ If the client has a course a pop-up message will appear if you want to use this select yes if not select no.
  - ❖ If you select Yes, then the course button will be activate – if you select it, all of that client‘s courses will appear at the bottom of the page.
  - ❖ Select the one you want to use.

- **Clipboard - Copy & Paste**
    - ❖ Select the appointments you want to copy/move. Click on the clipboard button on the right hand side of the screen.
    - ❖ Confirm the selected the appointments to copy/move – click ok.
    - ❖ That info is on the clipboard now. Go to the time and date you want to copy/move it to and Click on the clipboard button on the right hand side of the screen.
    - ❖ There are six options
        - Copy to same position
        - Copy to selected time
        - Move to same position
        - Move to selected time
        - Deleted Clipboard
        - Cancel

- **Moving an appointment**
    - ❖ You can also move an appointment by physically dragging and dropping using the Mouse or Touch Screen.
    - ❖ Or by changing the date and time in the appointment in appointment card.

- **Activate an appointment.**
    - ❖ Select an appointment and click the Activate button at the bottom of the screen.

- **Deactivate an appointment**
    - ❖ Select an appointment and click the Deactivate button at the bottom of the screen.

- **Delete an appointment**
    - ❖ Select an appointment and click the Delete button at the bottom of the screen, click OK to confirm.

- **Booking out time for lunch**
    - ❖ Select a staff member and click on the lunch button at the bottom of the screen. Select a start and end time and click ok.
    - ❖ To delete a lunch for a staff member - Select a staff member and click on the lunch button at the bottom of the screen and click delete.

3) <u>Extra Buttons to Edit Services</u>

- ❖ Date – Change the date by a pop-up calendar.
- ❖ Time - Change the time by a pop-up Clock.
- ❖ Duration (+/-) – Click these to increase/ decrease the duration of the selected service
- ❖ Price – Change the price for the service.
- ❖ Delete – delete the service.
- ❖ Previous/Next – scroll through the listed services.
- ❖ Repeat – shows a list of previous service the client has had.

Clients

1) *General*

- **Searching for a client**
  - ❖ Searching for clients in Memento6 is as easy as typing the clients' first name, last name or mobile number into the text bars at the top of the client module.
  - ❖ If the client is in your database then they should show up on the screen below the text box where you entered your query.
  - ❖ Instead of deleting clients Memento has an added feature where non returning clients can be archived instead of deleted (see Archiving Clients section). This allows for the client details to be retained. If you wish to search the client records to include archived clients then make sure that the show archived button is checked. If you wish to search all archived clients only then ensure that the archived only button is checked.

- **Adding, Modifying and Deleting clients.**
  - ❖ The client screen has a number of buttons to help in the adding, modification and deletion of clients.

- **Adding a client**
  - ❖ To add a new client into your records click on the Add button on the bottom of the screen. This will open a client card where the client details, medical records, credit terms etc can be filled in.(See Contact Details Section)

- **Modifying client details**
  - ❖ If you need to modify some details for a client i.e. change of address, phone number etc the best way to do this is to search for the client (using previously outlined steps) highlight the client name and

then click Modify button at the bottom of the screen. This will take you to the client card where all details can be modified.

- ### Deleting a Client
  - ❖ Client records can be deleted. Much the same way as modifying client details the deletion of clients works in the same way. Choose the client, highlight the client and then hit the Delete button at the bottom of the page. Consider archiving clients instead of deleting the records.
  - ❖ NB Once a client record is deleted it is NOT retrievable

- ### Contact Details
  - ❖ When adding or modifying a new client you will be presented with a screen that allows you to enter details about your clients.
  - ❖ This screen is divided into 3 sections (see Figure1 below)
  - ❖ Section 1 allows the addition of name, mobile phone number, landline and e-mail address.
  - ❖ There are 4 check boxes on the right hand side of Section 1 these are
    1. SMS Consent – When checked the client will receive text messages, when unchecked the client will not receive any correspondence from Memento.
    2. Completed – When checked Memento will assume that all fields are filled in. This should be left unchecked if there are still client details that need to be inputted.
    3. Archive – As mentioned earlier there is an option in Memento 6 that allows you to Archive clients instead of deleting them. If you wish to archive a client just select your client and click on the Archive check box
    4. Banned – Memento 6 provides a provision for banning clients. If there are some clients who constantly miss appointments or have bad credit terms then they can be flagged by clicking the Banned check box

2) Section 2

Section 2 shows a number of tabs that can be customised for each client. They include:

- Contact Details
- Medical History
- Patch Test Results
- Service History
- Product History
- Courses
- Credit Terms
- Notes
- Extras

- **Contact Details**
  - ❖ Add Client birthday (Click on the icon with the 7)
  - ❖ Put the Client into a Client Category (Client Categories are defined in the Manager Section)
  - ❖ Add the date that the client first comes into the shop (this is automatically populated)
  - ❖ If a Client had a preferred Staff member it can be added here.
  - ❖ Define what promotions and advertisements are working by adding referrals into the Where did you hear about us? field

- **Medical History**
  - ❖ Allows medical details to be added into the client card. These can be added by checking each box with the corresponding medical conditions.

- **Patch Tests**
  - ❖ Add details of Patch Tests and/or see results of previous Patch Tests.

- **Service History**
  - ❖ Lists all treatments received by a client including appointments where the client was a no show. The Service History tab shows the Date, Staff Member, Description, Fee and Notes for each appointment.

- **Product History**
  - ❖ This works much like Service History only showing any Product purchases by a particular client.

- **Courses**
  - ❖ This will show all Courses purchased by a client and will also show any treatments used on the course and also the balance remaining on the course.

- **Credit Terms**
  - ❖ This allows a business to give Credit to certain customers. The credit terms and credit card details can be added into this section. This can be activated by clicking the Activate Account checkbox. When credit terms are activated the client can then get products and services on credit.

- **Notes**
  - ❖ Any notes regarding the client can be added into this section.

- **Extras**
  - ❖ Extras show any details relating to a client voucher and also allows Client Loyalty to be activated.

End of Day

1) <u>How to run E.O.D.</u>

- **E.O.D stands for End of Day**
  - ❖ To run the E.O.D. Report click on the Manager Tab to the left of the screen then choose EOD.
  - ❖ When clicked you will see a screen that shows the Start Date, the End Date and the Till ID for each EOD.
  - ❖ Choose the date for the EOD you wish to run and click the Stop Current button at the bottom of the screen.
  - ❖ When clicked a pop-up appears asking if you wish to stop adding transactions to the current EOD report. If you want to continue click Yes, if not Click No.
  - ❖ If you proceed you will be asked if you wish to cash up, click Yes.
  - ❖ Once you have proceeded you will be prompted to enter the amount of your daily transactions i.e. You will have to enter the cash, credit, debit and cheque amounts into the system by clicking on each button and entering the amounts.
  - ❖ If the amounts that you enter match the amount recorded by Memento you will be brought to the EOD report if not Memento will tell you that it has different totals.
  - ❖ You can go through the sales of the day by choosing the sales option in the Manager section. This will give a full list of all transactions recorded by Memento during the day. If a transaction was entered incorrectly then it can be modified or deleted in the sales section.
  - ❖ You will be asked whether you wish to re-enter the totals. Once you are happy with the totals proceed to the EOD report which will show the figures recorded by Memento versus the figures inputted. The report can then be printed for your records.

Manager

To get to the Manager Section, click on the Manager Button on the left hand side of the screen in the navigation column.

Settings

1) Business

- **Salon Details**
- **Viewing salon details**
    - ❖ On the Salon details tab is the information that Phorest hold on your Company. The name and address information is also used on the top of the receipt that is printed at the end of purchases.
    - ❖ To change the information on this screen you need to contact Phorest, get them to change the details and then you update your licence in the Support section of the Manager Screen.
- **Setting VAT**
    - ❖ To set the vat on Products or Services, click on the drop down menu for the option you want to change and select the percentage you want to use.
    - ❖ If the percentage you want to use is not listed, then click on the "ADD" button beside the option you want to change. Enter the percentage you want to use and click ok to save that percentage to the drop down menu. Then repeat the step above.
- **Company Logo**
    - ❖ To set/change your company logo click on the logo box (this will be blank if it's the first time you are setting the logo). A pop-up window will appear, from here locate where the logo is saved on your PC. Double click on the logo file OR highlight it and click open – this

will set your company logo to the file chosen. NOTE ~ the file must be in the format of a BITMAP file.

- **Business Hours**
- **Selecting a Month**
  - ❖ Click on the “<<Month” button to go to the previous month.
  - ❖ Click on the “>>Month” button to go to the next month.
  - ❖ The button in the middle of the “<<Month” & “>>Month” buttons will be highlighted with the current months name, click this to go straight to the current month.
- **Setting up business hours**
  - ❖ Double click on the date you want to set/change, on this screen select an end date (By default it will be 2 years in the future). To set a schedule check the ratio button so it has a black dot in it (this is done by default). Select the Start time and end time for the open hours for that day.
  - ❖ If you want to repeat these details for the future, select a repeat interval in the drop down menu – eg if you selected a Monday and set the repeat interval to 1 the same opening hours would be set for every Monday until the end date selected.
- **Deleting business hours**
  - ❖ Click on the date you want to delete and the double click on the delete button at the bottom left hand side of the screen. Select an until date (to delete one day select the same date) and the repeat interval of the days you want to delete and then click delete - eg if you selected a Monday and set the repeat interval to 1 the same opening hours would be deleted for every Monday until the end date selected.

- **Adding holidays**
  - ❖ To add a holiday, double click on the date you want to set/change, on this screen set a holiday check the ratio button so it has a black dot is in it Day(s) Off.
  - ❖ Select a status for the day off.
  - ❖ Select if the holiday is an annual holiday by checking the option box, if it not an annual holiday uncheck the option box.

- **Extra Hours**
  - ❖ Double click on the date you want to set/change, on this screen select an end date (By default it will be 2 years in the future). To set a schedule check the ratio button so it has a black dot in it (this is done by default). Select the start time and end time for the open hours for that day.
  - ❖ Check the Extra Hours option box and select the start time and end time.
  - ❖ If you want to repeat these details for the future, select a repeat interval in the drop down menu – eg if you selected a Monday and set the repeat interval to 1 the same opening hours would be set for every Monday until the end date selected.

- **Holidays**

- **Viewing Holidays**
  - ❖ This is the third tab on the top of the screen. Use the Golden Up/Down buttons to scroll through the listed holidays.
  - ❖ You can also search by date – use the date drop down menu.
  - ❖ You can also search by description – enter a description into the box provided and this will narrow you search.

2) <u>System</u>

- **General**
- **Set up printers**
  - ❖ Select a Receipt Printer from the Receipt Printer drop down menu. If you want to print off 2 receipts at a time – check the option beside the drop down menu.
  - ❖ Select an A4 Printer from the Default Printer drop down menu.
- **Set additional payment types**
  - ❖ You can add in 2 extra payment types by entering the name of the new payment types in the field provided. If they are part of a hotel service check the "maitre d" option to the right hand side of the payment type.
- **Customise the receipt**
  - ❖ You can customise the top and bottom of the receipt – just enter the text in the textboxes provided.
- **Select commission structure**
  - ❖ Select the commission structure by checking the ratio button so it has a black dot in it (None by default or select Flat System).
- **Select till to be Marketing Module Enabled**
  - ❖ Check the option box "Marketing Module Enabled Till"
- **Select option to use Service Category Colour**
  - ❖ Check the option box "Use Service Category Colour"
- **Select the number of no shows to become serial**
  - ❖ Enter a number in the textbox provided to set the number of no shows before they become serial.

- **SMS**
- **Configure SMS settings**
  - ❖ Enter in your Username, password, phone number and the SMS Prefix

- **Configure automatic SMS reminder / time**
  - ❖ Firstly type in your reminder text, you can use the auto insert data on the right hand side of the screen to personalise the test message.
  - ❖ Then click the option box “Automatic SMS Reminder”.
  - ❖ Select a time that you want to send the automatic SMS reminders by clicking in the box provided.

- **Email/Proxy**
- **Configure SMTP and Proxy settings.**
  - ❖ For the SMTP settings enter the SMTP Mail Server, Username, and Password and port number.
  - ❖ For the Proxy Settings enter the Proxy Username, Password and the ByPass.

3) <u>Access</u>

- **Set up access levels for**
- **Owner, Manager, Senior, Employee & Trainee**
  - ❖ Select one of the levels above from the drop down meni, this will show a list of access tasks.
  - ❖ To allow all sub-tasks for a task just check the option box for that task.

❖ To allow access to only some of the sub-tasks, double click on the task, the sub-tasks will appear. Just check the option box for the sub-task to be allowed access for that level.

- **Granting Full Access**

❖ To give everyone full access; click the “Full Access” button (This is done by default) so that it is GREY in colour.

4) ***Categories***

- **Set up categories for:**
- **Services, Products, Clients, Staff, Brands(Supplier must be set up first), Departments, Sources, Credit Card**

❖ Above are the 7 types of categories you can Setup, Edit or Delete – they are all treated the same with 2 exceptions (see below).

❖ Select the category you want to change by clicking on that tab at the top of the page.

❖ Click “Add” and type in the new information for that category and click ok.

❖ Click “Edit” and change the information for that category and click ok.

❖ Highlight the information you want to delete from that category - Click “Delete” and then confirm the deletion.

❖

Exceptions ~

❖ In the Service Tab you can associate a colour to each service entered into the system.

❖ In the Brands Tab you can associate up to 3 suppliers to each brand.

5) <u>Resources</u>

- **Set up a machine**
    - ❖ Click on the “Add” button; enter the machine name and description
    - ❖ Click on the “Edit” button to change any of the information.
    - ❖ Click on the “Delete” button to remove the chosen machine.

- **Set up a room**
    - ❖ Click on the “Add” button, enter the Room name and description, you can also associate service to each room. Just select the option box beside the services you want to associate to that room.
    - ❖ Click on the “Edit” button to change any of the information.
    - ❖ Click on the “Delete” button to remove the chosen room.

Services

This area of the manager section deals with services, treatments and treatment related services like courses, client courses and client loyalty.

1) <u>Services</u>

- **To create a Service or Treatment**
    - ❖ Click on the SERVICES button and then click on the ADD button at the bottom of the screen.
    - ❖ Select a service category (These are set up in CATEGORIES in SETTINGS in MANAGER)
    - ❖ Enter a description of the service or treatment.
    - ❖ Enter the length of the service in minutes. The minimum length of a service is 5 minutes. Therefore you are unable to delete the 5 until

you have entered another number greater than 5. You can use the up and down gold arrows to increase the duration by 1 min segments.

❖ Click OK – the service is now created and appears in the service list

- ### Optional Options in Services

❖ DEPARTMENTS - When you are creating a service you can select a department so that every time a service is sold it goes under that department in the reports. Departments are setup in CATEGORIES.

❖ MACHINES - You can select a machine which means that every time you book in a SERVICE – a machine is automatically selected.

❖ COST OF SERVICE – if you enter a cost of service – this allows you to track the profitability of services in the reports.

❖ VAT – if you tick VAT then every time that service is sold it will automatically include VAT at the rate set in SYSTEM in SETTINGS.

❖ HOTKEY – if you tick Hotkey then the service will appear in the PURCHASE screen under (3) ITEMS under HOTKEYS.

- ### To Create a Service or Treatment with Stages

❖ Follow steps i. to iii. in a) above. The length of a staged service and price of a staged service should not be entered as these are calculated from the sum total of all the times and prices of the stages within the staged service.

❖ Click on ADD STAGE at the bottom of the screen.

❖ Enter a DESCRIPTION of the stage.

❖ MIN GAP TIME – this is the time allowed between each stage. For the first stage – you should leave this at zero.

❖ Enter the length of the stage in minutes. The minimum length of a stage is 5 minutes. Therefore you are unable to delete the 5 until you have entered another number greater than 5. You can use the up and down gold arrows to increase the duration by 1 min segments.

- ❖ Enter the price of the stage – this price can be used to calculate commission for staff who just do that stage in a service or treatment.
- ❖ You may also enter a cost of stage which is used to calculate the profitability of that stage.
- ❖ Click OK to save the stage and you will see the STAGE in the STAGES list at the bottom area of the screen. To add another stage click ADD STAGE button and follow steps iii to vii above.
- ❖ DELETING OR EDITING a STAGE: You can edit or delete stages by selecting them in the stages list and using the DELETE and EDIT button at the bottom of the screen.

o To Edit or Delete a Service

- ❖ Select a service in the list and then click the EDIT button at the bottom of the screen to edit or change a service.
- ❖ Select a service in the list and then click the DELETE button at the bottom of the screen to delete a service.

o To Search for a Service

- ❖ You can search for a service by its DESCRIPTION and/or CATEGORY in the fields at the top of the SERVICES list to the right of the magnifying glass symbol.

2) <u>Courses</u>

This is how you can sell a group of services at a discount. For example 4 facials for price of 3. You can only have one type of service in a course.

o To Create a Course of Treatments

- ❖ Click COURSES button and then click the ADD button at the bottom of the screen.
- ❖ Type in the name of the course.
- ❖ Select Unit type SESSIONS.
- ❖ Select how many sessions or units of a service are in the course.

- ❖ Type in the price of the course in total.
- ❖ Select the service or treatment which represents the individual unit of the course. You can only select a service from the SERVICE list.

To Create a Sunbed Course

- ❖ Click COURSES button and then click the ADD button at the bottom of the screen.
- ❖ Type in the name of the course.
- ❖ Select Unit type MINUTES.
- ❖ Select how many minutes in the course.
- ❖ Type in the price of the course in total.
- ❖ Select the sunbed service which represents the individual unit of the course. You can only select a service from the SERVICE list.

To Edit or Delete a Course

- ❖ Select a course in the list and then click the EDIT button at the bottom of the screen to edit or change a course.
- ❖ Select a course in the list and then click the DELETE button at the bottom of the screen to delete a course.

To Search for a Service

- ❖ You can search for a service by its DESCRIPTION and/or CATEGORY in the fields at the top of the SERVICES list to the right of the magnifying glass symbol.

3) ***Client Courses***

This is a list of all the courses you have sold to clients. You sell courses through the Purchase screen but you can also ADD a client course in this section. To view the USED CLIENT COURSES, tick the used courses box.

- **To Add a Client Course**
  - ❖ Click the CLIENT COURSES button and then click the ADD button at the bottom of the screen.
  - ❖ Select the client who bought the courses.
  - ❖ Select the purchase and expiration dates.
  - ❖ Select how many sessions, units or minutes they have remaining.
  - ❖ Click OK to save the client course

- **To View or Edit a Client Course**
  - ❖ Search for the client course and select it.
  - ❖ Then click the EDIT button at the bottom of the screen.
  - ❖ To view when the client used the sessions, units of minutes of the courses click on the HISTORY tab near the top of the screen.

- **To Delete a Client Course**
  - ❖ Search for the client course and select it.
  - ❖ Select the course and click the DELETE button at the bottom of the screen.

4) ***Client Loyalty***

This is where you setup the rewards for clients who have a client loyalty card.

- **To activate a client loyalty card**
  - ❖ Go to the client section and open up a client card.
  - ❖ Select the EXTRAS tab.

- ❖ Tick the ACTIVATE box beside client loyalty and enter a loyalty card number or scan in a loyalty barcode.

- **To determine how many loyalty points for services and products**
  - ❖ Click on the CLIENT LOYALTY button
  - ❖ Tick the ACTIVATE box.
  - ❖ Enter how many loyalty points for services and products

- **To setup rewards for client loyalty points**
  - ❖ Click on the REWARDS tab at the top of the screen.
  - ❖ Click on the ADD button at the bottom of the screen.
  - ❖ Enter the name of the reward.
  - ❖ Enter the amount of points the reward kicks in.
  - ❖ You can choose a FREE SERVICE, FREE PRODUCT or DISCOUNT as a reward by clicking the SERVICE, PRODUCT or DISCOUNT button.
  - ❖ Click OK to save this reward.
  - ❖ You can EDIT or DELETE a reward by selecting it in the Rewards list and clicking the EDIT or DELETE button.

- **How do clients collect their rewards?**
  - ❖ Every time a client spends on services or products they gain loyalty points.
  - ❖ Every time you enter a client's name in the Purchase screen, an orange box will appear under their name with their point's total.
  - ❖ If you click the orange loyalty box – the rewards available to that client will appear at the bottom of the screen.

Products

1) Stock

- **Navigating the Stock Screen**
- **Stock Type Tabs**
    - ❖ Click on the “Stock” button on the manager screen and using the Stock Type tabs at the top of the page you can view the stock in four different categories Retail, Professional, Colour and All.
- **Search Menus**
    - ❖ You can use the search drop down menus to find individual stock items, the more information you enter the more accurate the search results will be. Note that only 50 stock items will be show on the stock display screen at any one time so use the search function to find what you’re looking for.
- **Add a new stock item**
- **One Item**
    - ❖ Click on the “Stock” button on the manager screen and then click on the “ADD” button. Fill in the details, noting that any field that is highlighted in RED must have information entered in that field. Make sure that the option boxes for VAT, Hotkeys and Commissions are checked if needed for the product you are entering. When all the information is entered click ok and the details will be saved to the database.
- **Multiple Items**
    - ❖ Click on the “Stock” button on the manager screen and then click on the “ADD” button. Fill in the details, noting that any field that is highlighted in RED must have information entered in that field. Make

sure that the option boxes for VAT, Hotkeys and Commissions are checked if needed for the product you are entering. Then check the option boxes to the right of the information that will be the same for the next item to be entered. When all the information is entered click next and the details will be saved to the database. It will now allow you to enter in another item with the information you check already filled in. Now repeat the process until you have entered in all the stock items.

- **Edit an existing stock item**
  - ❖ Click on the "Stock" button on the manager screen and then highlight the stock item you want to edit and click on the "EDIT" button. Edit the details, noting that any field that is highlighted in RED must have information entered in that field. Make sure that the option boxes for VAT, Hotkeys and Commissions are checked if needed for the product you are entering. When all the information is entered click ok and the details will be saved to the database.

- **Delete an existing stock item**
  - ❖ Click on the "Stock" button on the manager screen and then highlight the stock item you want to delete and click on the "DELETE" button. Then confirm the deletion by clicking OK, otherwise click cancel.

- **Create a new order**
  - ❖ Click on the "Stock" button on the manager screen and click on the "CREATE ORDER" button. This will insert a column called "Q" in the stock display screen. Highlight the stock you want to add to the order and double click on the "Q" column of the stock item. A number pad will appear enter the quantity you want to order and click OK. Repeat this for each of the stock items you want to order and when finished click OK in the bottom right hand corner of the screen to confirm the order. This will transfer you to the Order Screen.

- **Importing Stock**
  - ❖ Click on the “Stock” button on the manager screen and click on the “IMPORT” button. Locate the file that you want to import – noting that the file must be in CSV format. When located click open and that data will be loaded onto the system. Caution ~ if the imported data is already on the system you will duplicate the entries.

2) <u>Orders</u>

- **Navigating the Order Screen**
- **Search Menus**
  - ❖ There are two options here the order number field and the supplier field.
  - ❖ Type in the order number and if the order number exists it will retrieve the information for that order.
  - ❖ Select a supplier from the supplier drop down menu and any orders that are associated to that supplier will appear.
- **Option Box Filters**
  - ❖ Check on one of the option box filters to show the order that relate to that filter. The four filters are Unsent, Sent, Remaining and Arrived.
- **Edit an existing order**
  - ❖ Click on the “Order” button on the manager screen and then highlight the order you want to edit and click on the “EDIT” button. At the moment you can select each stock item from the order and click on arrived enter in the amount that arrived and click OK.
  - ❖ Feature that will be add to this screen are Adding, Editing, Deleting and sending by email.
- **Delete an order**
  - ❖ Feature to be added

3) Suppliers

- **Navigating the Order Screen**
- **Search Fields**
  - ❖ There are two options here the Company Name and Contact Name.
  - ❖ Type in either of these fields and if the details exist it will retrieve the information for that company/contact name.
- **Add a new supplier**
  - ❖ Click on the "Supplier" button on the manager screen and then click on the "ADD" button. Fill in the details, when all the information is entered click ok and the details will be saved to the database.
  - ❖ For the fields Email 1-3 and Website, click the "GO" button and it will send an email and open up a web browser.
- **Edit an existing supplier details**
  - ❖ Click on the "Supplier" button on the manager screen and then click on the "Edit" button. Edit the details, when all the information is entered click ok and the details will be saved to the database.
  - ❖ For the fields Email 1-3 and Website, click the "GO" button and it will send an email and open up a web browser.
- **Delete an existing supplier**
  - ❖ Click on the "Supplier" button on the manager screen and then highlight the supplier you want to delete and click on the "DELETE" button. Then confirm the deletion by clicking OK, otherwise click cancel.

4) Measurements

- **Add a new measurement**
  - ❖ Click on the "Measurements" button on the manager screen and then click on the "ADD" button. Fill in the details, when all the

information is entered click ok and the details will be saved to the database.

- **Edit an existing measurement**
  - ❖ Click on the “Measurements” button on the manager screen and then click on the “Edit” button. Edit the details, when all the information is entered click ok and the details will be saved to the database.

- **Delete an existing measurement**
  - ❖ Click on the “Measurements” button on the manager screen and then highlight the measurement you want to delete and click on the “DELETE” button. Then confirm the deletion by clicking OK, otherwise click cancel.

Staff

This area of the manager section deals with everything staff related.

1) ***Staff Members***

- **To create a Staff Member, User or Employee**
  - ❖ Click on the STAFF MEMBERS button and then click the ADD button at the bottom of the screen.
  - ❖ Type in the staff member’s first and last name at the top of the screen.
  - ❖ Click on the USER ACCESS tab.
  - ❖ Select an ACCESS level and enter a PIN code for the staff member. This is used by the staff member to log into the system.
  - ❖ Click OK to save the staff member into the list.

- **Optional options in creating Staff Member**
  - ❖ CONTACT DETAILS – you can enter a mobile number, address, email and gender in the CONTACT tab.
  - ❖ STAFF CATEGORY – You can select a staff category in the CONTACT tab.
  - ❖ QUALIFICATIONS – You can select which services and service categories the staff member is qualified to carry out in the system under the QUALIFICATIONS tab.
  - ❖ HOURLY WAGE – You can enter a basic hourly rate under the qualifications tab.
  - ❖ STAFF COLOUR – you can give the staff member a colour for the appointment book under the USER ACCESS tab.
  - ❖ HIDE STAFF MEMBER from APPOINTMENT screen – you can hide the staff member from the appointment screen or POS screen under the USER ACCESS tab.
  - ❖ STAFF BIRTHDAY – under USER ACCESS.
  - ❖ COMMISSIONS LEVEL – you select the staff member's commission level under USER ACCESS.

2) <u>Schedules</u>

This is where you setup schedules or rosters for staff members to show when staff are available on the appointment book and also for calculating staff working hours and basic hourly wages.

- **To Create a Staff Schedule**
  - ❖ Click SCHEDULES button and then select a staff member in the staff member list on the right hand side.
  - ❖ Double click on the date you wish to start a schedule.
  - ❖ Click on the start time and enter it into the number pad.
  - ❖ Click on the end time and enter it into the number pad.
  - ❖ Select a repeat interval. Zero means the schedule does not repeat – i.e its just for the date selected. One means the schedule will repeat

every week on that day. Two means the schedule will repeat every two weeks and so on.

- ❖ Click OK to save the schedule

- o **To Delete a Schedule or Add a Day Off**
  - ❖ Select the day you wish to delete.
  - ❖ Click the DELETE button at bottom of the screen.
  - ❖ Select an END date for the deleting to stop.
  - ❖ Select a repeat interval. Zero means the delete does not repeat – i.e its just for the date selected. One means the delete will repeat every week on that day. Two means the delete will repeat every two weeks and so on.
  - ❖ Click DELETE. A day with no schedule in it is a Day Off.

- o **To Enter a Training Day, Sick Day or Holiday**
  - ❖ Double click on the day you wish to add a training, sick or holiday day.
  - ❖ Select DAY(S) OFF.
  - ❖ Select HOLIDAY, TRAINING, SICK or OTHER from the Status drop down. If you select other you can type in a description.
  - ❖ Click OK to save this day into the schedule. Each status type has a different colour.

- o **To Enter a Split Shift or Extra Hours**
  - ❖ Double click on an existing schedule or on a blank day.
  - ❖ Enter the first start time and end time.
  - ❖ Tick EXTRA HOURS.
  - ❖ Enter a later start and end time.
  - ❖ Click OK to save the extra hours.

- o **To Edit a Schedule**
  - ❖ Double click on a schedule
  - ❖ Make changes

- ❖ Select the repeat interval for the changes
- ❖ Click OK to save changed schedule.

3) ***Commissions***

This is where you can setup the commission levels - for example what percentage staff would earn for selling particular product brands.

- **To Add a Commission Level**
  - ❖ Click the COMMISSIONS button, and then click the ADD button at the bottom of the screen.
  - ❖ Enter the name of the Commissions Level and Click OK.
  - ❖ You can click SET ALL above Services and select PERCENTAGE and then input the percentage. This inputs a percentage for all services. You can do the same with products.
  - ❖ To enter a percentage for a particular service category – click on the PLUS symbol to the right of the service category or product brand.
  - ❖ To specify a percentage for a particular service – double click on the service category and then click on the percentage to the right of the service.
  - ❖ Click OK to save this commission level.

- **To Edit a Commission Level**
  - ❖ Click the COMMISSIONS button.
  - ❖ Select the Commissions level you wish to edit from the drop down and then change the percentages.
  - ❖ To edit the name of a commission's level – select the level from the drop down and then click the EDIT button.

- **To Delete a Commission Level**
  - ❖ Click the COMMISSIONS button.
  - ❖ Select the Commissions level you wish to delete from the drop down and then click the DELETE button at the bottom of the screen.

- **To Activate Commissions**
  - ❖ Click on SYSTEM and then select FLAT SYSTEM under Commissions.

- **To select a Commission Level for a Staff Member**
  - ❖ Click the STAFF MEMBERS button.
  - ❖ Double click on the staff member.
  - ❖ Click the USER ACCESS tab.
  - ❖ Select the Commission level from the Commission drop down.
  - ❖ Click OK to save this setting.

Financials

1) <u>Reports</u>

- **Open up reports**
  - ❖ Click on the "Reports" button on the manager screen and then on this page there is a list of report categories (Financial, Staff, Clients, Services, Products, Vouchers and Other).

- **Open up report categories – e.g. Staff**
  - ❖ Click on the Staff Category and a sub menu will appear. From here select the report you want to run, depending on the report you select on the right hand side information criteria will appear.

- **Use Information Criteria**
  - ❖ Fill in the requested information criteria on the right hand side of the screen. When this is filled in you are then ready to view your report. Click on the "VIEW" button and the report will be created. When the report is in view use the navigation buttons to scroll through the pages of the report.

- **Print Report**
    - ❖ Fill in the requested information criteria on the right hand side of the screen. When this is filled in you are then ready to view your report. Click on the “Print” button to print off the report. This will printer to the default printer listed in the Systems section of the manager screen.

- **Email Report**
    - ❖ Fill in the requested information criteria on the right hand side of the screen. When this is filled in you are then ready to view your report. Click on the “Email” button and the report will be created. Enter in the email address that you want to send it to and click OK.

- **Open up report as HTML, PDF or EXCEL file**
    - ❖ Fill in the requested information criteria on the right hand side of the screen. When this is filled in you are then ready to view your report. Which ever option you pick HTML, PDF or Excel the report will be in viewed in that format.

2) <u>Vouchers</u>

- **Add a voucher**
    - ❖ Click on the “Voucher” button on the manager screen and click on the “ADD” button. There are three steps 1) Select a client – Click on the search button and select the client you want to add the voucher in for. 2) Select the Dates – Enter in the Issue and Expiration Dates. 3) Enter in the amount of the voucher.
    - ❖ If you want to add in notes for this particular voucher click on the notes tab and type in the notes. When finished click OK and the voucher information will be saved to the database.

- **Edit a voucher**
    - ❖ Not currently available – Will be available in a new update.

- **Delete a voucher**
  - ❖ Select the voucher you want to delete by clicking on it and highlighting it. Then click on the "DELETE" button. Then confirm the deletion by clicking OK, otherwise click cancel.

- **Search for a voucher**
  - ❖ To search for a voucher from the voucher list, either type the name of the voucher owner in the name text box at the top of the page or type the serial number of the voucher in the serial number text box at the top of the page.
  - ❖ To show the used voucher check the option box "Used Vouchers".

3) <u>EOD</u>

- **Stop a current EOD and start a new one**
  - ❖ To stop the current EOD, make sure the current EOD is highlighted in the list of EOD transactions, if not click on it. When it is highlighted click on the "STOP CURRENT" button and then confirm the stop current process by clicking OK, otherwise click cancel. Now you will be asked to cash up (See step below), choose yes or no.

- **Cash up EOD**
  - ❖ You can cash up after stopping the current EOD or by clicking on the "Cash Up" button at the bottom of the screen. When cashing up the first screen that you see is the till's state, here is were you enter in all the totals for the Cash, Credit Cards, Debit Cards and Cheques that you have taken in for that period.
  - ❖ Click OK when you enter the totals.
  - ❖ If your totals (physical till totals) don't match the totals processed on the system, you will be prompted to re-enter the totals again. If you are happy with the total click no otherwise click yes to re-enter.

- ❖ You will then be asked if you want to view the EOD report, click yes or no. If you do view the EOD report and want to print it out, click on the "Print" at the bottom of the screen.
- ❖ To view any of the old EOD reports, highlight the report in the list and click on the "VIEW" button.

4) <u>Sales</u>

- **Edit a transaction**
  - ❖ To edit a sales transaction, highlight the transaction you want to change and click the "EDIT" button, this will bring you to the Purchase Screen – edit the details on the purchase and confirm your changes (See the Purchase Section of the Manual for help).

- **Delete a transaction**
  - ❖ Select the sales transaction you want to delete by clicking on it and highlighting it. Then click on the "DELETE" button. Then confirm the deletion by clicking OK, otherwise click cancel.

- **Sundries**

- **Add Sundry**
  - ❖ Click on the "Sales" button on the manager screen and select the "Sundries" tab at the top of the screen. Click on the "Add" button at the bottom of that screen. Then enter an amount of the sundry, then the type of sundry (Withdrawal or Deposit) and then enter a description. Then confirm the sundry by clicking OK, otherwise click cancel.

- **Edit Sundry**
  - ❖ Click on the "Sales" button on the manager screen and select the "Sundries" tab at the top of the screen. Click on the "Edit" button at the bottom of that screen. Then edit the current information, from here confirm the sundry changes by clicking OK, otherwise click cancel.

- **Delete Sundry**
  - ❖ Click on the “Sales” button on the manager screen and select the “Sundries” tab at the top of the screen. Then click on the “DELETE” button. Then confirm the deletion by clicking OK, otherwise click cancel.

Housekeeping

1) Support

- **Checking the current/available version**
  - ❖ In the top left hand corner is a listing of the current and available versions of the system software.
- **How to update the software**
  - ❖ Click on the “Update” button to update the system, when the update is downloaded you will be prompted to run through the install of the update. Follow the instructions and then re-start Memento 6.
- **IP Address Information**
  - ❖ In the top right hand corner is a listing of the Internal and External IP addresses.
- **Renew Licence**
  - ❖ If you need to renew the system licence, click on the “Renew Licence” button and then re-start Memento 6.
- **Launch Mozilla Firefox**
  - ❖ To launch the internet browser Mozilla Firefox to surf on the net, click on the “Launch Mozilla Firefox” button.

- **System Support Fixes**
  - ❖ Any fixes that need to be run on the system will be located on this page to be run – please check with the Phorest HelpDesk before running any System Support Fixes.

2) __Backup__

- **Save a backup locally**
  - ❖ This is the default option for backing up if it is not selected; check the option box beside “save it locally”.
  - ❖ Select the folder you want to save it to by clicking on the “Browse” button and select a destination for the backup file.
  - ❖ Click on the “Save” button.
  - ❖ Confirm that the Backup is successful by clicking ok.

- **Email a backup**
  - ❖ This is not the default option for backing up; check the option box beside “send it to an email address”.
  - ❖ Type in the email address to sent it to.
  - ❖ Click on the “Save” button.
  - ❖ Confirm that the Backup is successful by clicking ok.

- **Set up Remote Backup**
  - ❖ Select Central or Local Server
  - ❖ Central server restore will restore the database on the main PC in your network. This is the PC that all the other PCs connect to so they can access your information.
  - ❖ Local server restore will restore the database on the PC you are currently working on.

- **Restore from Backup**
    - ❖ Select the server restore type as in above (Central or Local).
    - ❖ Locate the backup file that you want to restore from by clicking on the browse button.
    - ❖ Click the save button.
    - ❖ Confirm that it is ok to go ahead with the restore.
    - ❖ When the restore is finished, re-start Memento 6.

3) <u>About</u>

- **Memento Terms and Conditions of Use**

Diary

1) Diary

The Diary section is an internal scheduler for staff. Reminders pop up at the scheduled time wherever the user is in the software.

- **To Create a Reminder**
  - ❖ Click on the DIARY button. This section works in a similar way to Appointments.
  - ❖ Select the day you want at the top of the screen.
  - ❖ Double click on the time you want.
  - ❖ Select the staff member from the drop down list at the top of the screen.
  - ❖ Enter a description of the reminder in the SUBJECT field in the middle of the screen.
  - ❖ Click OK to save the reminder.

- **Options when Creating a Reminder**
  - ❖ CLIENTS: When creating a reminder you can select a client that the reminder relates too using the Client search mechanism underneath the Staff Member drop down list.
  - ❖ TIME and DATE: You can change the time and date of the reminder when creating the reminder using the options in the middle of the screen.
  - ❖ LOCATION: You can write in a location for the reminder – for example the reminder may be a meeting for a staff member in a Café. This location will appear on the reminder page in brackets beside the SUBJECT.
  - ❖ REMINDER in ADVANCE: You can choose how many minutes in advance you wish the reminder to appear as a pop up. The default is

30 minutes but you can either write in a new amount or use the up and down arrows to add or deduct minutes.

❖ DESCRIPTION: You can write a detailed description of the reminder in addition to the SUBJECT.

- **Coming Soon**
    - ❖ Automatic Birthday Text Messages (SMS)
    - ❖ Automatic Low Stock Reminders

Marketing

This section is where you send out EMAILS, LETTERS and TEXT MESSAGES (SMS). It is also where you send SMS appointment reminders. Click on MARKETING in the left MAIN MENU.

1) Marketing Messages

- **To send a text message (SMS) to clients**
  - ❖ Click on MARKETING MESSAGES.
  - ❖ Type in your message – you are limited to 160 characters which is the standard text message length on all mobile phones.
  - ❖ If you want to do a SMS Mail Merge – you can put in a client's name into the message by clicking on the <client first name> button on the right hand side of the message area. You can also insert a client's birthday using the <Client birthday> button.
  - ❖ You can save this message as a template by clicking the orange SAVE button at the bottom of the screen. You will need to enter a name for the template.
  - ❖ Click CONTINUE.
  - ❖ If you wish to skip the Email/Letters, click CONTINUE again to go the RECIPIENTS screen.

- **To send an Email/Letter to Clients**
  - ❖ Click on MARKETING MESSAGES.
  - ❖ Click on the COMPOSE EMAIL/LETTERS tab.
  - ❖ Type in your message. You can use the font and styling buttons at the top of the screen.

- ❖ If you want to use the client’s name, address etc. in the letter/email, you click the buttons on the right of the screen that read: <client first name> and <client address>.
- ❖ You can save this message as a template by clicking the orange SAVE button at the bottom of the screen. You will need to enter a name for the template.
- ❖ Click CONTINUE.

o **Recipients and Filters**

- ❖ DATE FILTERS: You can select which clients to send a marketing messages depending on what dates they visited the business or not.
- ❖ CLIENT INFO FILTERS: These choices depend on the general information of the client in the client section – for example their preferred staff member or Client Category.
- ❖ PRODUCT or SERVICE FILTERS: The most popular choices for marketing depend on what products or services clients have purchased.
- ❖ OTHER FILTERS: You can select an individual client by click ADD at the bottom of the screen. You may also select all the clients in the database using the ADD ALL button.
- ❖ All the filtered clients will appear in the right hand column. You may delete anyone from this list by selecting them and clicking DELETE along the bottom of the screen.

o **Send**

- ❖ When you are ready to send the message click the orange CONTINUE button in the bottom right hand corner.
- ❖ This will now show up all the people who will get your message.
- ❖ To confirm click the orange SEND button.

2) *Appointment Reminders*

- **To send SMS appointment Reminders**
  - ❖ Click on MARKETING in the left hand menu.
  - ❖ Click on REMINDER MESSAGES.
  - ❖ The bottom section displays a list of appointment reminders. The top section shows the reminder message of the selected appointment reminder below.
  - ❖ Appointment reminders for today will load up as default. If you wish to view tomorrow's appointment reminders, click the orange TOMORROW button above the reminders list. To go to another date click the DATE button and select the date you want. You can also click the DAY > button to jump one day ahead.
  - ❖ All the reminders will be ticked as default. If you do not wish to send a reminder, un-tick it.
  - ❖ Click the orange SEND button on the bottom right of the screen to send the reminders.
  - ❖ Any reminders that do not have a mobile number will not be sent and will remain in the list after you have clicked send.
  - ❖ After the reminders have sent, the screen will return to TODAYS appointment reminders.

3) *Send History*

- ❖ This is where you go to view previously sent messages.