Envision Implementation Guide

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Introduction

The Envision Implementation Guide can be used during the setup process of Envision to guide you through the recommended implementation process. This guide will provide step by step instructions in logical order. It is important to setup the program in this order so that you do not have to continuously go back into different lists and make changes to the items in a list. For example, it is best to setup your Resources and Resource Categories before setting up your services, so that when you are creating your list of services, you will not need to go back through the entire service list to select the correct Resource Category. It is also important to setup your list of services and commission plans before setting up your list of employees so that when you are setting up your list of employees, you will be able to select Qualified Services and assign the correct Commission Plan for each employee.

The steps provided in this guide are the recommended steps for setting up Envision. It is not a requirement to complete the setup in the order provided and not all of the steps are required. For example, you may not have Resources or Packages that need to be entered into the program. These steps can be skipped if they are not necessary. Also, the program is customizable in many ways, making the program unique for each user. The features and capabilities available in the program are determined by the license that you have purchased for the program as well as the preferences and security that you decide to setup within the program. If there is a feature or option mentioned in this guide that you do not see on your screen, this is probably due to the version that was purchased or the options set in your Security Profiles and Program Preferences.

The Checklist on the following page will allow you to check off the items completed as you complete the implementation process.

If you need additional help, please call our Technical Support Hotline:

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Implementation Checklist

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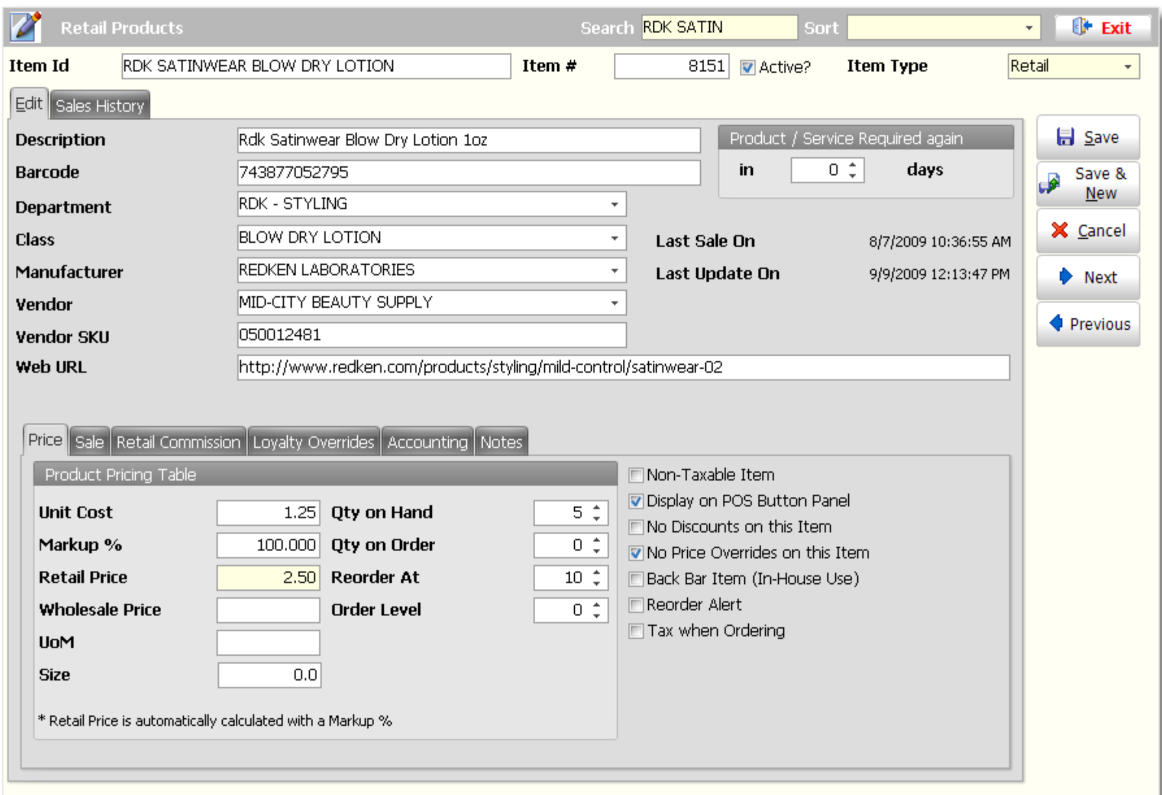
1. Enter Retail Products / Inventory Departments

The Retail Product List allows you to enter the products you sell or use as Back Bar items. It is best to start with this list first because this list will take the most amount of time to setup. This is due to the fact that there are normally a large amount of retail products sold and there is also more information that you will enter for retail products than other items (services, employees, etc.). It is best to enter as much information as possible and to setup the information correctly the first time so that you will not need to go back through and edit your retail list a second time.

1. Click on **"Inventory"** on the Menu Bar at the top of the screen.

2. Select **"Retail Products"** from the drop down menu.

3. Click the **"New"** button at the top of the list. The following screen will open without any information filled in.



4. Enter the name of the product in the **"Item Id"** field. The Item Id must be unique.

Item Id Tips:

Size: If you sell different sizes or types of an item, you should also enter the size or type of the item in this field. A separate item record should be created for each size or type.

Abbreviated Name or Acronym: You may also abbreviate the name of the product in this field. If you choose to abbreviate the name or enter an acronym, make sure that it is a name or acronym that everyone who will be using the Appointment Calendar and Point Of Sale screen will be able to remember when searching for the item.

Abbreviated Name of Manufacturer: You can also enter an abbreviation of the name of the manufacturer at the beginning of the "Item Id" so that it is easier to search for all items made by that manufacturer. If the name of the manufacturer is at the beginning of the name, all of the items from this manufacturer will be displayed next to each other when searching for an item.

5. Enter a description for the product in the **"Description"** field.

You may enter exactly what you entered in the "Item Id" field or you may enter a longer more descriptive name here. You may also enter the description provided by the vendor or manufacturer. The name you enter here is what will be displayed on the Inventory List and printed on Receipts, Purchase Orders and reports.

6. Scan the barcode of the product in the **"Barcode"** field if you will be using a barcode scanner.

If you have a barcode scanner connected to your computer, you may scan the UPC code on the product and the code will be entered here automatically. If there is not a barcode associated with the item, you may enter a unique number in this field if you would like to print your own Inventory Labels or you may choose to have the program enter the Item No. of the product in this field.

Set Inventory Barcode to Item No. Setting: If you would like the program to automatically enter the "Item No." into the barcode field, you will need to turn on the option, "Set Inventory Barcode to Item No." under the "General Options" screen of your Program Preferences. To turn this setting on, click on "Company" on the Menu Bar of Envision and select "Setup Program Preferences" from the menu. When the Program Preferences window opens, click on the "General Options" button on the left.

7. Select an Inventory **"Department"** for the product you are entering.

This field is available to further organize your inventory items. The Inventory Department is the category that you would enter this item into. This is valuable when you are printing reports or viewing a large Inventory List and only want to see for example, "Redken Styling Products". You may setup an unlimited amount of departments. These departments will also be used for selecting products at the Sales Register. Product buttons can be used if you will not be using a barcode scanner. A department must be assigned to each product to be able to use product buttons at the Sales Register.

Creating Inventory Departments: You must create a list of Inventory Departments before you are able to select a department here. To add an Inventory Department, click on "Inventory" on the Menu Bar of Envision and select "Inventory Department List" from the menu. You will then be able to create your list of Inventory Departments.

Inventory Department Tip: If you sell products that are made by a manufacturer that you carry a large amount of, you may want to separate your departments into smaller groups so that it is easier to find that item at the Sales Register. For example, a manufacturer like Redken has many different lines. Examples for departments for Redken are RDK - Shampoo, RDK - Conditioner, RDK - Styling, RDK - Treatments and RDK - For Men. By setting the departments up this way, you are able to click on these departments and see a smaller grouping of products.

8. Select a **"Class"** for the product you are entering (optional).

The class is a subcategory of the department. The Class, along with "Department", can help you organize your inventory into logical groups. Some examples of Class might be, "Hairspray", "Cleanser", "Moisturizer", etc. Using the Class field will allow you to view a smaller inventory grouping when running sales reports. These classes can be used to run the "Sales by Inventory Department - Sales by Department / Class" report.

Creating Inventory Class Types: You must create a list of Inventory Classes before you are able to select a class here. To add an Inventory Class, click on "Inventory" on the Menu Bar of Envision and select "Inventory Class Types" from the menu. You will then be able to create your list of Inventory Class Types.

9. Select a **"Manufacturer"** for the product.

The Manufacturer is the company that makes the product. Selecting a Manufacturer for your products will allow you to run reports for specific manufacturers.

Creating a list of Manufacturers: You must create a list of Manufacturers before you are able to select a manufacturer here. To add a Manufacturer, click on "Inventory" on the Menu Bar of Envision and select "Manufacturers" from the menu. You will then be able to create your list of Manufacturers.

10. Select a **"Vendor"** for the product.

The Vendor is the company that you purchase this product from. Select from the Vendor list the Primary Vendor you use to purchase this item. Selecting a Vendor is extremely important for creating Purchase Orders.

> **Creating a list of Vendors:** You must create a list of Vendors before you are able to select a Vendor here. To add a Vendor, click on "Inventory" on the Menu Bar of Envision and select "Vendors" from the menu. You will then be able to create your list of Vendors.

11. Enter the **"Vendor SKU"** (optional).

Enter the "Vendor SKU" that the primary vendor uses for this item. The Vendor SKU is the number that is displayed next this item on the invoice. It is an identification number for your vendor that is used during the ordering process. Entering this information will be useful for creating accurate Purchase Orders because the Vendor SKU will be printed on Purchase Orders.

12. Enter a **"Web URL"** (optional).

Enter the URL of the website for this item into this field. You will be able to easily access the web page specified by right clicking on top of the item in the Sales Register and selecting the "Web Link" option.

13. Enter the number of days in which this product should be purchased again in the **"Product / Service Required Again"** field (optional).

You may run the Product / Service Expiration Report to find out which clients need to purchase products again or come in for a service again. This report can be reached by clicking on "Reports" in the Menu Bar, selecting the Client Report Menu followed by the Product / Service Expiration Report.

14. Enter the **"Unit Cost"** of the product.

This is your cost per unit and the amount that you pay when this product is purchased from your vendor. If you pay $36 per case of 12, you would enter $3 for a single product.

15. Edit or enter the **"Markup %"** if necessary. If you do not wish to enter a Markup %, you may enter only the **"Retail Price"**.

If you enter a "Markup %", the program will automatically calculate the "Retail Price" for you. If your cost changes, the Retail Price will automatically change for you, based on the Markup %. If the Markup % field is left blank, you will be able to enter your own Retail Price. The most common Markup % is 100%. This will double the cost of the item to set the Retail Price.

16. Enter a **"Wholesale Price"** if necessary.

The Wholesale Price is the amount that a Booth Renter would pay for this particular item. Since a Booth Renter may sell the retail products that you purchase to their clients, you may want to charge them a specific price that is a marked up price of your cost. The Booth Renter can then sell the product to their clients at their own price. In a sense, you will be acting as a vendor to your Booth Renters. When a bill is created for a booth renter, this price will be added to their bill for each time that they sold this product.

17. Enter a Unit of Measure into the **"UOM"** field, such as "Ea" for each or OZ for ounces (optional). You can also enter the **"Size"** below the "UOM". Entering this information is optional, this screen will be the only screen that you will see this information.

18. In the **"Qty on Hand"** field, enter the quantity you currently have in stock for this item.

If you are entering your list of retail items and are currently selling these products as well, it will not be necessary to enter the "Qty On Hand" because you will need to do a Physical Count of them again, before you Go Live with the program.

19. Leave the **"Qty on Order"** at "0". This number will automatically change when you create a Purchase Order.

This amount is the quantity on order or the amount that you are waiting to receive. You may leave this quantity at a zero amount and the program will automatically enter the quantity on order for you. This field will be updated when you create a Purchase Order that contains this product.

20. Enter the level you wish to reach before you need to reorder this product in the **"Reorder At"** field. This can be used as the minimum or the maximum of this product. A quantity is necessary for the "Autofill" feature of Envision's Purchase Orders.

- **Reorder At - Minimum Quantity**

To use the "Reorder At" as the minimum, you will need to enter the minimum quantity that you would like to keep on hand for this product into the "Reorder At" field and enter how many you would like to order when you get down to the minimum quantity into the "Order Level" field. By doing this, the program will automatically reorder the quantity specified, when you have reached the minimum quantity and when you create a Purchase Order in Envision. For example, if your minimum of a product is 3 and you would like to order 3 more when you have reached the minimum, you would enter a quantity of 3 into the "Reorder At" field and a quantity of 3 into the "Order Level" field.

You may leave the Order Level set to zero if you would like to order the difference between the On Hand and Reorder At, however it will only add this product to a Purchase Order when the item has fallen BELOW the Reorder At amount. So, if you set the Reorder At as the minimum, it will not order this item until it has fallen below the minimum. If you decide to do this, you may want to make the minimum quantity slightly larger so that you do not fall below your minimum.

- **Reorder At - Maximum Quantity (Most Commonly Used)**

To use the "Reorder At" as the maximum, you will need to enter the maximum quantity that you would like to keep on hand for this product into the "Reorder At" field and leave the "Order Level" set to zero. By doing this, the program will automatically reorder the difference between the On Hand and the Reorder At quantities, when a Purchase Order is created in Envision. For example, if your maximum of a product is 5, you would enter a quantity of 5 into the "Reorder At" field and leave the "Order Level" set to zero. If the current "Qty On Hand" amount is 2, the "Reorder At" is 5 and the "Order Level" is zero, the program will automatically order 3 of this item when a Purchase Order is created.

21. In the **"Order Level"** field, enter the quantity of this item you normally reorder if you have to order a specific amount or if you are using the "Reorder At" as the "Minimum Quantity". If you are using the "Reorder At" as the "Maximum Quantity" leave the "Order Level" set to zero if you would like to order the difference between the "Qty on Hand" and the "Reorder At".

22. Edit the Sales Tax options (optional).

Check the **"Non-Taxable Item"** box if this item does not have sales tax charged on it when sold.

Check the **"Tax when Ordering"** box if you must pay sales tax on this item when you order it from your supplier (vendor). This is usually not checked as you are buying wholesale and re-selling, but this box will usually be checked for Backbar products. Tax is usually applied to Backbar products when purchased from a Vendor because you will not be selling these products to your clients, you will be using them as "In-house" items.

23. Check the **"No Discounts on this Item"** and **"No Price Overrides on this Item"** check boxes if necessary (optional).

Check the **"No Price Overrides on this Item"** check box if you do not want to allow any price adjustments for this item during the checkout process. Checking this option will allow you to easily monitor discounts when viewing sales reports.

Monitoring Discounts: If you do not want to completely turn off the ability to discount an item but would like to monitor discounts, check only the "No Price Overrides" option. You will be able to easily see discounts when you run sales reports, but you will not be able to see price overrides unless you know the original price of every item.

24. Check the **"Back Bar Item (In-House Use)"** check box, only if this product is never sold to your clients, but

used to run your business. For example, professional color products, Pine Cleaner, and Toilet Paper.

25. Check the **"Reorder Alert"** check box if you would like to be reminded when the product needs to be reordered (optional).

Check this box to show an alert at the Sales Register when this item is selected for sale. The alert will appear when the inventory of this item falls to or below the "Reorder At" level you set.

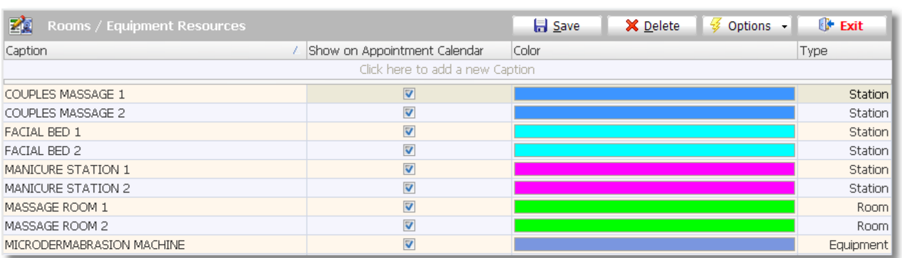
26. Click the **"Save"** button on the right to add the item to the list or click the **"Save & New"** button to add the item and open a blank entry screen. The **"Save & New"** button can be used when you are entering one item after another.

2. Setup Resources / Assign Resources to Categories

Resources are rooms, stations, or equipment that need to be available for appointments that are scheduled. It is best to setup your resources if they are shared between employees and if you need to keep track of the availability of these resources when scheduling appointments.

1. Click on **"Appointment"** on the Menu Bar at the top of this screen.

2. Select **"Rooms / Equipment Resources"** from the drop down menu.



Caption	Show on Appointment Calendar	Color	Type
COUPLES MASSAGE 1	☑		Station
COUPLES MASSAGE 2	☑		Station
FACIAL BED 1	☑		Station
FACIAL BED 2	☑		Station
MANICURE STATION 1	☑		Station
MANICURE STATION 2	☑		Station
MASSAGE ROOM 1	☑		Room
MASSAGE ROOM 2	☑		Room
MICRODERMABRASION MACHINE	☑		Equipment

3. Click in the row labeled **"Click here to add a new Caption"**.

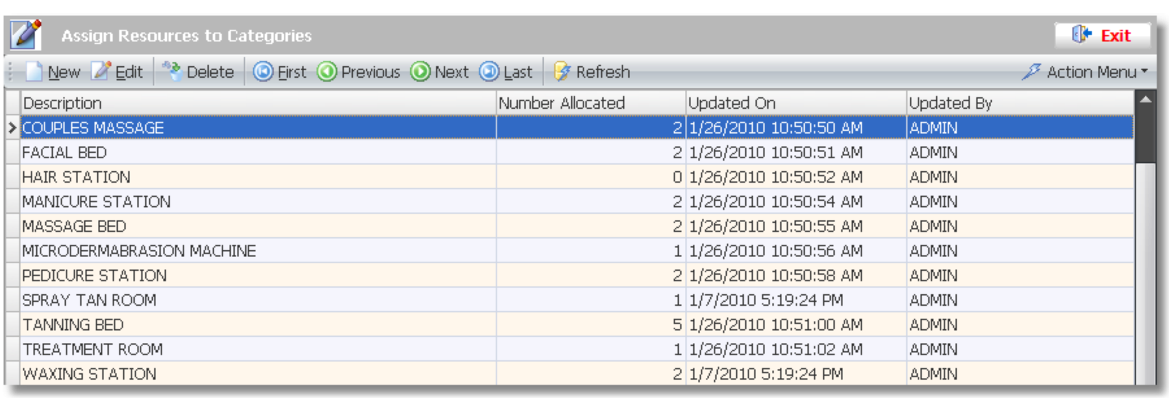
4. Enter the name of the resource in the **"Caption"** field.

5. Select a color and type for the resource by clicking on the drop down arrow.

6. Click the **"Save"** button to add the resource to the list.

7. Click on **"Appointment"** on the Menu Bar at the top of the screen.

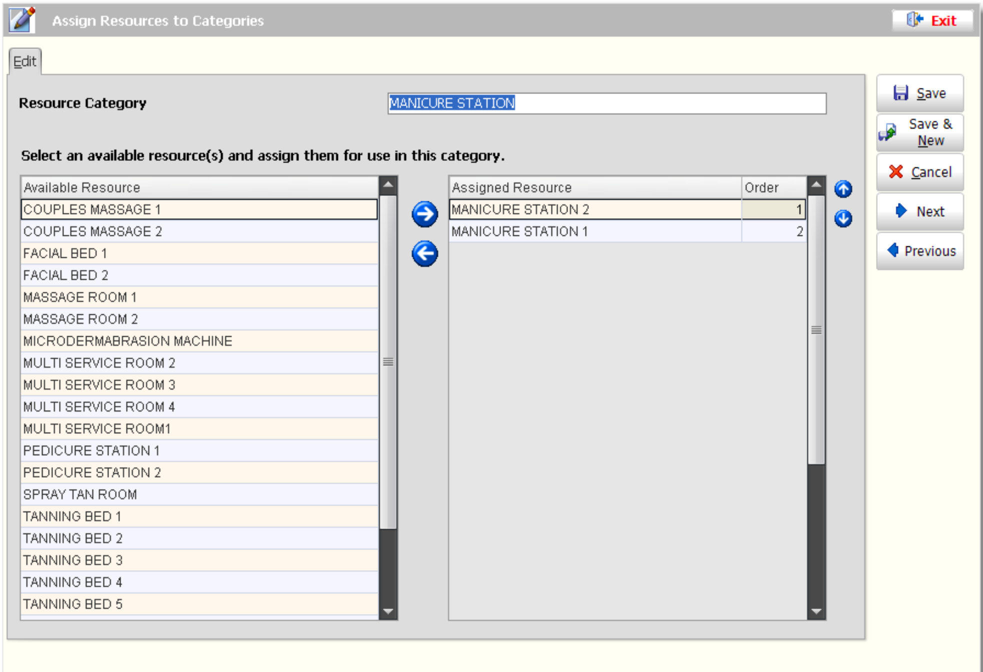
8. Select **"Assign Resources to Categories"** from the drop down menu.



Description	Number Allocated	Updated On	Updated By
COUPLES MASSAGE	2	1/26/2010 10:50:50 AM	ADMIN
FACIAL BED	2	1/26/2010 10:50:51 AM	ADMIN
HAIR STATION	0	1/26/2010 10:50:52 AM	ADMIN
MANICURE STATION	2	1/26/2010 10:50:54 AM	ADMIN
MASSAGE BED	2	1/26/2010 10:50:55 AM	ADMIN
MICRODERMABRASION MACHINE	1	1/26/2010 10:50:56 AM	ADMIN
PEDICURE STATION	2	1/26/2010 10:50:58 AM	ADMIN
SPRAY TAN ROOM	1	1/7/2010 5:19:24 PM	ADMIN
TANNING BED	5	1/26/2010 10:51:00 AM	ADMIN
TREATMENT ROOM	1	1/26/2010 10:51:02 AM	ADMIN
WAXING STATION	2	1/7/2010 5:19:24 PM	ADMIN

9. Click on the **"New"** button on the Tool Bar at the top of this list to create a new Resource Category.

This screen allows you to create Resource Categories and then assign available resources to the category you are creating.



10. Enter a new Category in the **"Resource Category"** field at the top of this screen.

11. Move the resources for this category from the available list to the assigned list with the right arrow button in between these two lists.

For example, in the image above, the resource category is "Manicure Station". The "Manicure Station 1" and "Manicure Station 2" resources have been moved from the "Available" list to the "Assigned" list. Whenever a service is selected in the Appointment Calendar that requires the "Manicure Station" Category, the program will check if either the "Manicure Station 1" or "Manicure Station 2" resource is available.

12. Click the **"Save"** button after assigning resources to the category to add the category to the list.

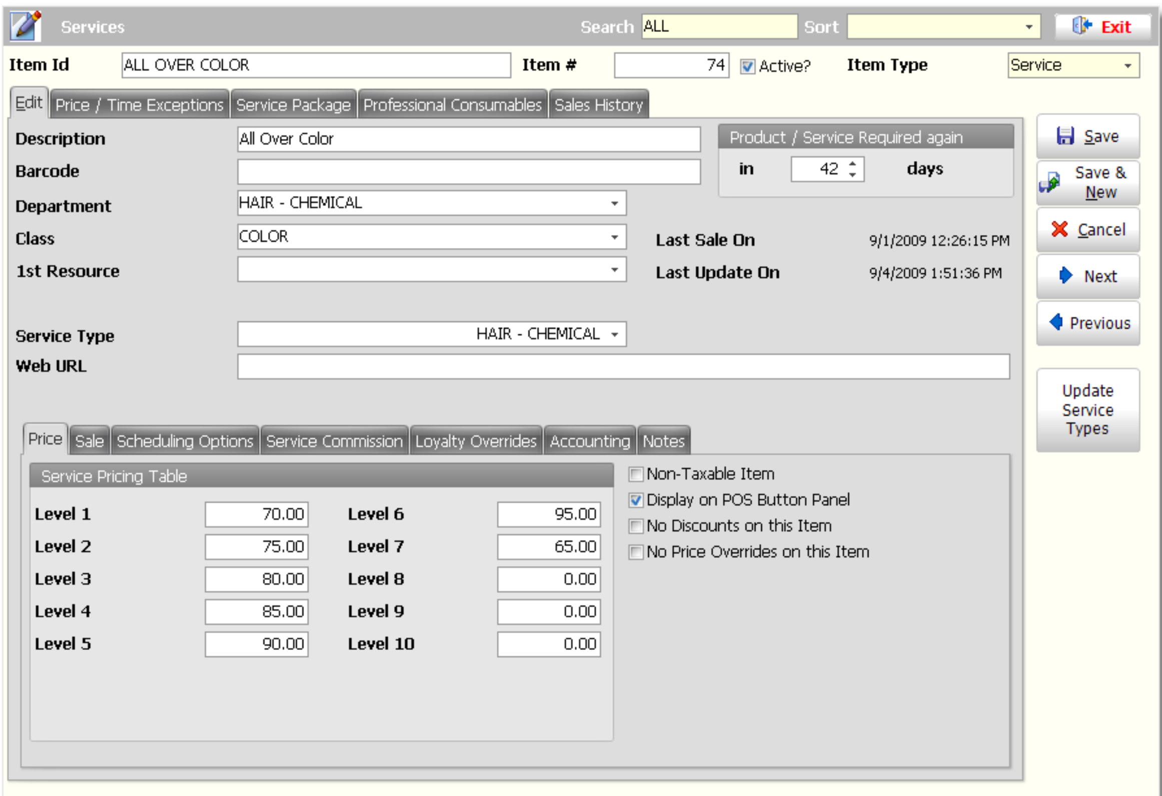
3. Enter Service Items / Inventory Departments

It will be necessary to setup your list of Services so that you are able to setup which services each Employee is qualified to perform and so that you can schedule appointments and create sales transactions for the services provided.

1. Click on **"Inventory"** on the Menu Bar at the top of the screen.

2. Select **"Services"** from the drop down menu.

3. Click the **"New"** button to add a new service to the list or click the "Edit" button to edit a service in the list. The following screen will open without any information filled in.



4. Enter the name of the service in the **"Item Id"** field.

You may abbreviate the name in this field, however if you choose to abbreviate the name, make sure that it is a name that everyone who will be using the Appointment Calendar and Sales Register screen will be able to remember when searching for the item. The Item Id must be unique.

Tips:

Types: If you offer different types of a service, you should also enter the type of the service in this field. A separate item record should be created for each type of service. For example, if you offer massage services, it would be best to enter a separate item for each type of massage for pricing, scheduling, and reporting purposes.

Abbreviated Name or Acronym: You may also abbreviate the name of the product in this field. If you choose to abbreviate the name or enter an acronym, make sure that it is a name or acronym that everyone who will be using the Appointment Calendar and Point Of Sale screen will be able to remember when searching for the item.

5. Enter a description in the **"Description"** field. The name you enter here is what will be displayed on your

product buttons in the Sales Register and printed on receipts and reports.

6. It is not necessary to enter a **"Barcode"** for services, however you may enter a number if you would like to print a sheet of barcodes for your services.

7. Select or add an Inventory **"Department"** for the service you are entering.

This field is available to further organize your inventory items. The Inventory Department is the category that you would enter this item into. This is valuable when you are printing reports or viewing a large Inventory List and only want to see for example, "Chemical Services". These departments will also be used for selecting services at the Sales Register. Product buttons can be used to select or add a service to a ticket. Clicking on a button for the service will be much easier than searching through a list of services. A department must be assigned to each service to be able to use product buttons at the Sales Register.

Creating Inventory Departments: You must create a list of Inventory Departments before you are able to select a department here. To add an Inventory Department, click on "Inventory" on the Menu Bar of Envision and select "Inventory Department List" from the menu. You will then be able to create your list of Inventory Departments.

Tip: If you provide different types of services, you may want to separate your departments into smaller groups so that it is easier to find that service at the Sales Register. For example, if you provide Hair Services, Nail Services, Massage Services and Esthetic Services, it would be best to create a separate department for each type of service. Examples for departments for services are Service - Hair or Hair Services, Service - Chemical or Chemical Services, Service - Nails or Nail Services, Service - Massage or Massage Services and Service - Esthetic or Esthetic Services. By setting the departments up this way, you are able to click on these departments and see a smaller grouping of services.

8. Select or add an Inventory **"Class"** for the service you are entering (optional).

The class is a subcategory of the department. The Class, along with "Department", can help you organize your inventory into logical groups. Some examples of Class might be, "Color", "Highlights", "Perm", "Straightener", etc. Using the Class field will allow you to view a smaller inventory grouping when running sales reports. These classes can be used to run the "Sales by Inventory Department - Sales by Department / Class" report.

Creating Inventory Class Types: You must create a list of Inventory Classes before you are able to select a class here. To add an Inventory Class, click on "Inventory" on the Menu Bar of Envision and select "Inventory Class Types" from the menu. You will then be able to create your list of Inventory Class Types.

9. Select the required resource for the service you are adding in the **"1st Resource"** field (optional).

Select the type of resource (room, station, or equipment) that this service requires. Please refer to the "Resource Setup" section of this guide for more information on setting up your resources.

10. Select the **"Service Type"** for the service you are adding.

The "Service Type" is used in Sales Analysis Reports. The "Service Type" is a category separate from the Inventory Department but can be setup exactly the same as the Inventory Department if you wish.

11. In the **"Product / Service Required Again"** field, enter the number of days in which this service should be performed again (optional).

You may run the Product / Service Expiration Report to find out which clients need to purchase products again or come in for a service again. This report can be reached by clicking on "Reports" on the Menu Bar, selecting the Client Report Menu followed by the Product / Service Expiration Report.

12. Enter a **"Web URL"** (optional).

Enter the URL of the website for this item into this field. You will be able to easily access the web page specified by right clicking on top of the item in the Sales Register and selecting the "Web Link" option.

13. Enter the different Levels of prices that you use for your services. If you only have one price for your

services, enter this price in the **"Level 1"** field.

Enter the price you charge for a service into the "Level 1" field if you do not have different levels of pricing based on experience. The ten levels provided are only used for businesses that have different levels of pricing based on experience. The purpose is to pay more for a service performed by a more experienced employee. Enter how much will be charged for a service in each price level that your employees will be set to.

For example, if you have a stylist with 10 years experience you may set them to Level 5 in the Employee screens. You may also have a stylist who is very new to the trade and set them to Level 1. Now when you enter "Hair Styling" into inventory as a "Service Item", you enter $25 in "Level 1", $30 in "Level 2", $35 in "Level 3", $40 in "Level 4", and $50 in "Level 5". When the client gets their hair styled, how much they are charged at the POS will depend upon which Employee is selected (an employee must be selected for every sale in the POS).

Employee Service Price Level Setting: To set the Service Price Level for each employee, click on "Employee" on the Menu Bar of Envision and select the "Employee List" from the menu. Double click on top of an employee's name and click on the "Other" tab. You will find a section in the middle of the screen labeled "Service Price Level". Select the appropriate price level for each employee.

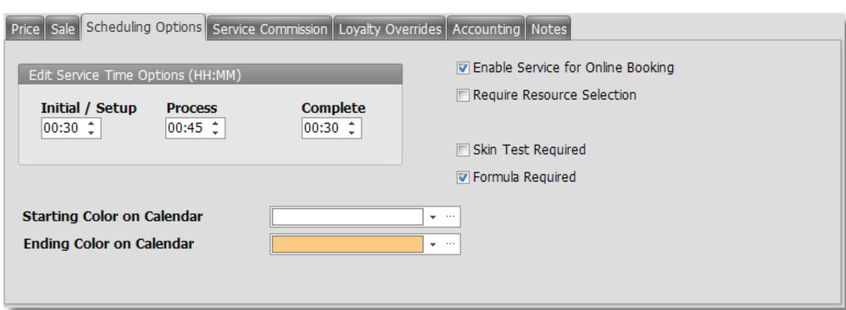
14. Check the **"Non-Taxable Item"** check box if the Inventory item is non-taxable. Some states charge sales tax on all services or some services. If you will not be checking the "taxable" check box for service items in your Program Preferences on the "Tax Options" screen, it will not be necessary to check this box.

15. Check the **"No Discounts on this Item"** and **"No Price Overrides on this Item"** check boxes if necessary.

Check the "No Price Overrides on this Item" check box if you do not want to allow any price adjustments for this item during the checkout process. Checking this option will allow you to easily monitor discounts when viewing sales reports.

Monitoring Discounts: If you do not want to completely turn off the ability to discount an item but would like to monitor discounts, check only the "No Price Overrides" option. You will be able to easily see discounts when you run sales reports, but you will not be able to see price overrides unless you know the original price of every item.

16. Click on the **"Scheduling Options"** tab to enter the amount of time it takes to complete the service.



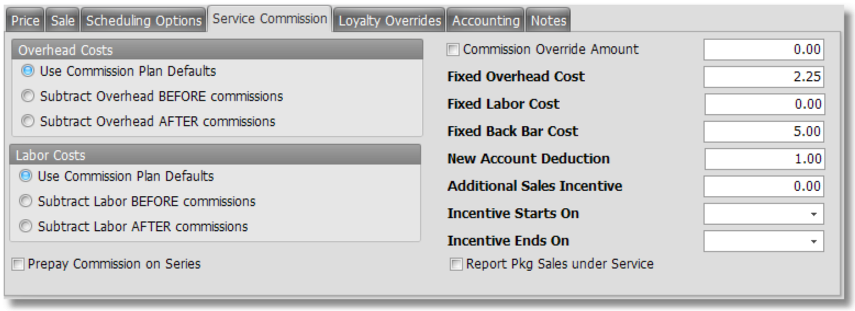
The three items in this area are the default times that you will setup for this service. This is the time that will be used if you do not have specific times setup for each employee under their Qualified Services list in the Employee List.

- **Initial time for Service:** All service items need a time filled in to this field. It is the best estimate of the time it takes to perform the service. Use 15-minute increments only. For example, 1 hour would be entered as 01:00, or 30 minutes would be entered as 00:30. For most service items this is the only time needed. For a chemical service, this would be the amount of time that it takes to apply the color or chemical to the hair.

- **Process:** Enter a time (once again 15 minute increments only) here if a delay is required during this service. For example, this would be necessary you apply color and must wait 30 minutes for processing time before you wash, rinse, and style. Entering a time here will allow you to schedule another service with a different client during this time. This allows you to maximize the use of the service provider's time. If you enter a time here, you must enter a "Completion Time".

- **Completion Time:** Enter a time here only if you entered a "Process" time above. This is the time it takes to finish the service after the delay.

17. Click on the **"Service Commission"** tab if you need to override the commission for this particular service. Please keep in mind that this is only an override, this is not where you will be setting up commission. Check the **"Commission Override"** check box and enter a dollar amount in the **"Commission Override"** field if you would like your service providers to receive a specific dollar amount instead of their commission percentage for the service (optional).



18. Enter any costs associated with this service. The **"Fixed Overhead Cost"**, **"Fixed Labor Cost"** and **"New Account Deduction"** are deductions from the employee's pay. If you wish to retain a small amount of money from the employee's commission each time this item is sold, check these boxes. The "New Account Deduction" is a dollar amount to deduct from an employee's commission when they sell this service to a new client. This is used to offset the advertising costs associated with obtaining new clients. The "Fixed Overhead Cost" and "Fixed Labor Cost" fields are associated with the "Overhead Cost" and "Labor Cost" choices on the left. The **"Fixed Backbar Cost"** is the amount of money that this service costs the business. This will affect the "Cost" and "Profit" figures on sales reports.

19. Select the Overhead and Labor options for the service if these options will be different than what is set in your commission plans.

- Select **"Use Commission Plan Defaults"** if you would like to use the settings in the commission plan setup for your employees.

- Select **"Subtract Overhead / Labor before commissions"** to subtract the dollar amount from the total sales of this item before calculating the
commission.

- Select **"Subtract Overhead / Labor after commissions"** to take the dollar amount directly from the calculated commissions.

20. Click the **"Save"** button on the right to add the item to the list or click the **"Save & New"** button to add the item and open a blank entry screen. The **"Save & New"** button can be used when you are entering one item after another.

4. Setup Packages / Series List

Packages will allow you to combine items (services and/or retail) so that you may sell these items together at a discounted price. If the package is discounted, your clients will be more enticed to purchase the items that are included in the package because they are being sold at a discounted rate. When a package is sold, this is guaranteed revenue for your business and also allows you the opportunity to upsell items to your clients when they come in for their package or when they come in for one of the items in a series package. A Package can contain either physical products, Services, or Tanning. A package can be a combination of different types of services or you can make a series package. A series package is a prepaid package of the same service in multiple quantities. Selling a prepaid series package also guarantees your business revenue, allows you the opportunity to upsell and also increases your business' retention.

Here are some examples or each:

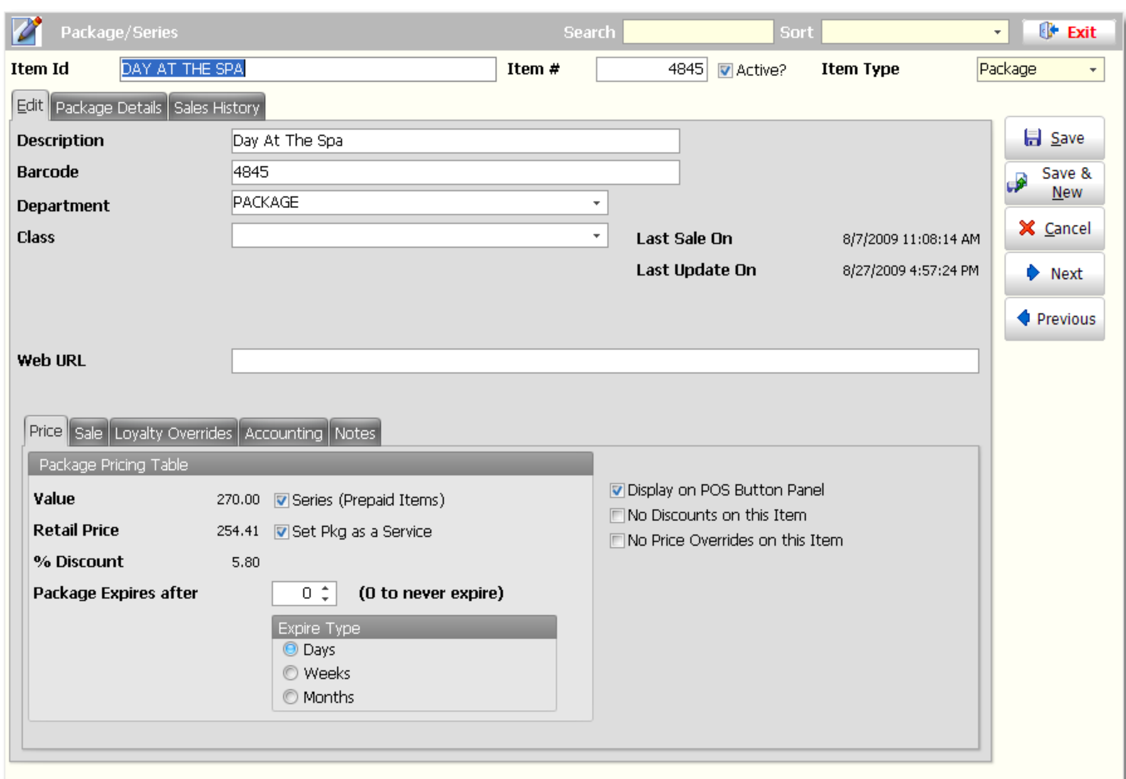
- **Day Package:** A 1 Hour Massage, Facial, Manicure and Pedicure can be combined for a day package or Mother's Day Special.

- **Series (Prepaid):** Offer a package of Pedicures or Massages for a prepaid price that is discounted from the individual prices. Envision will track the customers' use of these packages. Each time the client visits for one of their prepaid items, the item will be deducted from their available prepaid items.

1. Click on **"Inventory"** on the Menu Bar at the top of the screen.

2. Select **"Package / Series"** from the drop down menu.

3. Click the **"New"** button to add a new Package / Series to the list or click the "Edit" button to edit a Package / Series in the list. The following screen will open without any information filled in.



4. Enter the name of the package into the **"Item Id"** field. You may abbreviate the name in this field, however if you choose to abbreviate the name, make sure that it is a name that everyone who will be using the Appointment Calendar and Sales Register screen will be able to remember when searching for the item. The Item Id must be unique.

Item Id Tips:

Types: If you sell different types of a package, you should also enter the type of the package in this field. For example, if you offer different types of pedicures and you are creating a package of pedicures, it would be best to enter the type of pedicure in the Item Id field so that separate items are created for the different types of pedicure packages. This is necessary for pricing, scheduling, and reporting purposes.

Abbreviated Name or Acronym: You may also abbreviate the name of the product in this field. If you choose to abbreviate the name or enter an acronym, make sure that it is a name or acronym that everyone who will be using the Appointment Calendar and Point Of Sale screen will be able to remember when searching for the item.

5. Enter the name of the package into the **"Description"** field. You may enter the same name that was entered in the "Item Id" field, or you can enter a longer more descriptive name here. The Description will be displayed at the Sales Register and will be printed on your receipts.

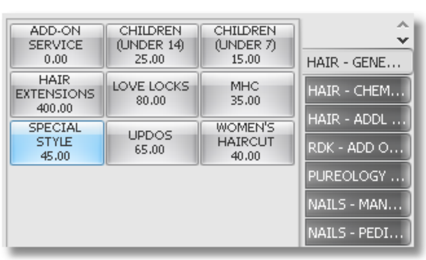
6. It is not necessary to enter a barcode number for package items, however you may enter your own unique barcode number into the **"Barcode"** field or you may leave the default that Envision placed here if you have chosen to have the program enter the Item No. of the item in this field. This is the option"Set Inventory Barcode to Item No." under the "Options" tab on the "Program Preferences" screen.

Set Inventory Barcode to Item No. Setting: You will need to turn on the option, **"Set Inventory Barcode to Item No."** under the **"General Options"** screen of your Program Preferences.

Path to Setting: To turn this setting on, click on **"Company"** on the Menu Bar of Envision and select **"Setup Program Preferences"** from the menu. When the Program Preferences window opens, click on the **"General Options"** button on the left.

7. Select a **"Department"** from your list of Inventory Departments. It is best to create a separate department for your packages so that they are easier to locate at the Sales Register. If you are selling a Series (Prepaid) package and the name of the package is similar to the name of the service, it will be difficult to differentiate between the single service item and the package. By placing the package in a separate department, this problem will not occur.

The Departments that you setup are also the departments that create the department tabs in the Sales Register. In the Sales Register you are able to turn on Product Buttons (displayed below). Because you will not be using a barcode to select these packages, these product buttons will be your main method for adding a package to a ticket in the Sales Register. These product buttons are all placed into categories, which are the Inventory Departments. When an item is assigned to an Inventory Department and you are displaying your product buttons in the Sales Register, a button will appear for that item when you click on the correct Department Tab.



Creating Inventory Departments: You must create a list of Inventory Departments before you are able to select a department here. To add an Inventory Department, click on **"Inventory"** on the Menu Bar of Envision and select **"Inventory Department List"** from the menu. You will then be able to create your list of Inventory Departments.

8. Select a **"Class"** from your list of Inventory Class Types (optional). The class is a subcategory of the department. The Class, along with "Department", can help you organize your inventory into logical groups. Some examples of Class might be, "Salon", "Spa", "Massage", etc. Using the Class field will allow you to view a smaller inventory grouping when running sales reports. These classes can be used to run the "Sales by Inventory Department - Sales by Department / Class" report.

Creating Inventory Class Types: You must create a list of Inventory Classes before you are able to select a class here. To add an Inventory Class, click on **"Inventory"** on the Menu Bar of Envision and select **"Inventory Class Types"** from the menu. You will then be able to create your list of Inventory Class Types.

Path to Report: Click on **"Reports"** on the Menu Bar of Envision, select **"Sales by Inventory Department"** and then select **"Sales by Department / Class"** from the menu that appears to the right.

9. Enter a **"Web URL"** (optional).

Enter the URL of the website for this item into the "Web URL" field. You will be able to easily access the web page specified by right clicking on top of the item in the Sales Register and selecting the "Web Link" option.

10. Check the **"Series (Prepaid Items)"** check box if necessary.

For having a short name and only one check box, this is one of the most powerful features of the program. It tells the program that this item is packaged by "Count". If you wish to create a pre-paid package that must be used within a time period, you would not check this box. You would select the number of weeks in the "Package Expires After" field.

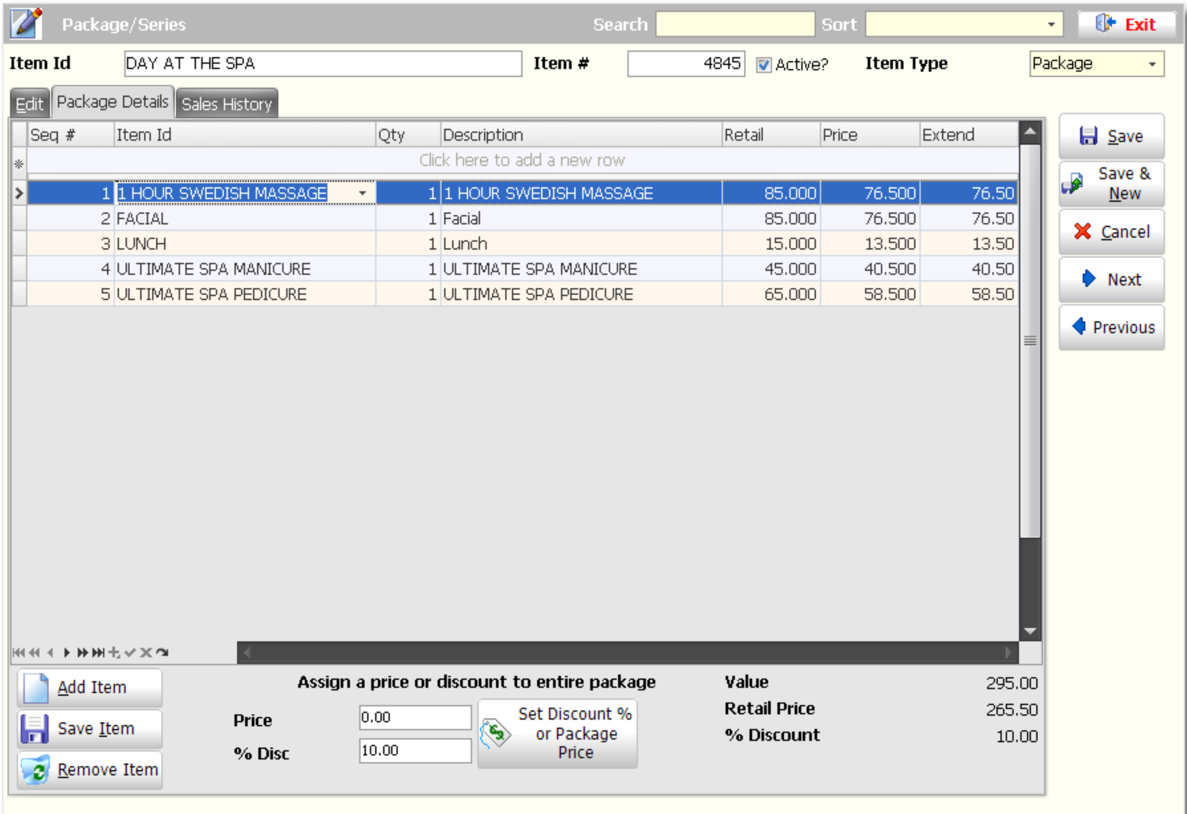
By checking this box, you are telling the program this package will be used up when the client checks out at the Sales Register, the number of times equal to the "Qty" you set on the "Package Details" screen. This also allows you to track the usage of the items the client has prepaid for. For example, if you wish to create a prepaid package of 10 Swedish Massages, you would check this box on the "Package Details" screen and select the inventory item Swedish Massage. Then enter a quantity ("Qty") of 10. When a client gets a Swedish Massage and checks out at the Sales Register, you would offer to sell them the package of 10, explaining that this is a savings over the individual purchases. If the client decides to purchase the package, you would select the package from inventory, select the client from your client listing (add them "On the Fly" if they're not already entered), and complete the sale. The package count of 10 is assigned to this customer and they are charged for the total package (prepaid). You will then need to create a separate sales transaction for the Swedish Massage they used that day. When their Client Id is selected along with the Swedish Massage, the Extended Price of the service will be "$0.00" because they paid for the service when they purchased the package in the first sales transaction. The count on their prepaid Swedish Massages will be reduced to 9. The next time they come in for this service, and they are checked out in the Sales Register, they will not be charged but their count will be reduced to 8. Envision will not charge the client at the Sales Register for this item until all the items in their package have been used.

11. Check the **"Set Pkg as a Service"** check box if you would like to report your Packages as a Service Type item.

12. Use the **"Package Expires After/Expire Type"** fields if you would like the package to expire after a certain amount of days, weeks or months.

You may set an expiration to this package if you would like to limit the amount of time that a client has to use this package. Select "Days", "Weeks", or "Months" in the "Expire Type" section for the amount you enter in the "Package Expires After" field.

13. Click the **"Package Details"** tab at the top of the screen to select the items and quantities of the items that will be included in the package.



14. Click in the field labeled **"Click here to add a new row"** or click the **"Add Item"** button to add an item to this list. All the items that make up the "Package" you are putting together can be selected here. Click the drop down arrow that appears to open a drop down menu of your inventory items. After selecting the first item, enter how many of that item will be included in this package under the **"Qty"** column. You may also set the order that these items should be scheduled in under the column labeled **"Seq #"**. You will not need to set the "Seq #" if the items you will be selecting are selected in the correct order.

15. Enter a **"Price"** or **"%Disc"** in the **"Assign a price or discount to entire package"** section at the bottom of this screen.

The "Price" field and "% Discount" fields at the bottom of this screen work in conjunction with the large **"Set a Discount % or Package Price"** button. You may enter a flat price for the package into the "Price" field. When you click the "Set Discount % or Package Price" button, the program will automatically calculate the percent of discount, individual item "Package" prices and the "% Discount" amounts. This greatly simplifies the task of pricing packages. If you choose to enter a "% Disc" instead of a flat package "Price", the same automatic events will occur.

16. Click the "Set Discount % or Package Price" button to set the price.

17. Click the **"Save"** button on the right to add the package to the list or click the **"Save & New"** button to add the package and open a blank entry screen. The **"Save & New"** button can be used when you are entering one item after another.

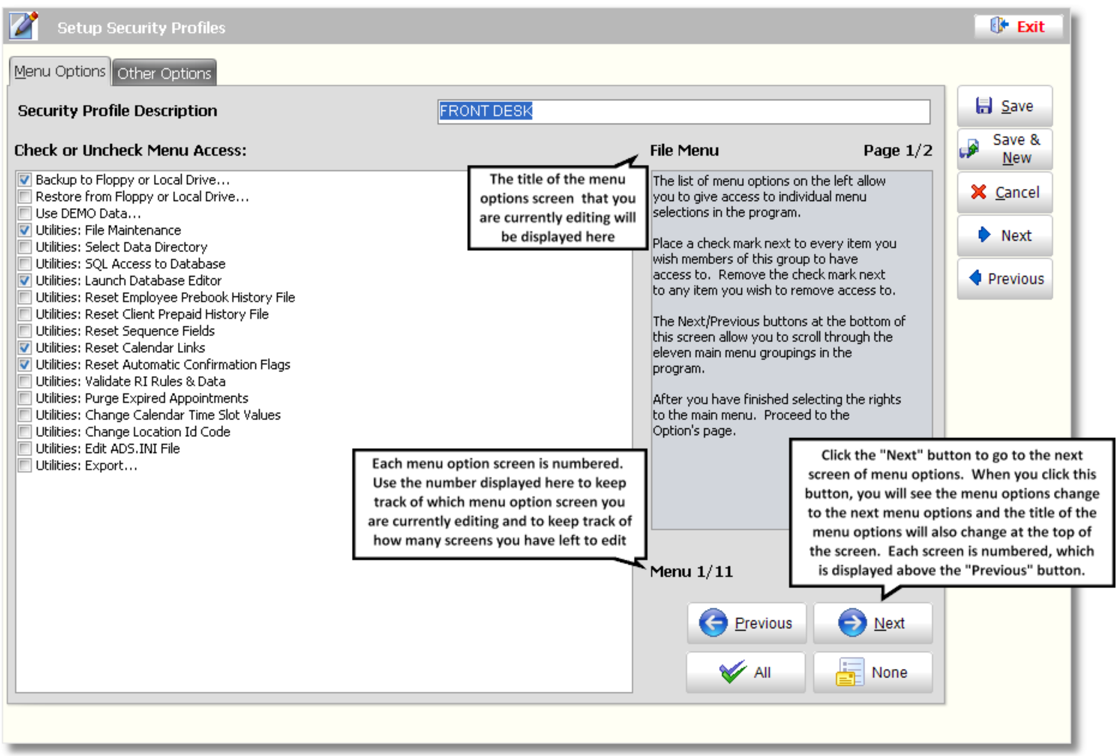
5. Setup Program Security

The following instructions will walk you through the three different parts of setting up your program security. You will first need to setup your security profiles, then you will need to assign passwords and security levels to each employee in your Employee List and finally you will be able to enable the program security.

1. Click on **"Company"** on the Menu Bar at the top of Envision.

2. Select **"Setup Security Profiles"** from the drop down menu.

3. Click on the **"New"** button on the Tool Bar at the top of this list to create a new Security Profile.



4. Enter a name for the Security Profile you are creating, at the top of this screen.

5. Under the **"Menu Options"** tab, check and uncheck the items that this profile will have access to.

6. Click the **"Next"** button in the lower right hand corner to open the next screen of Menu Options.

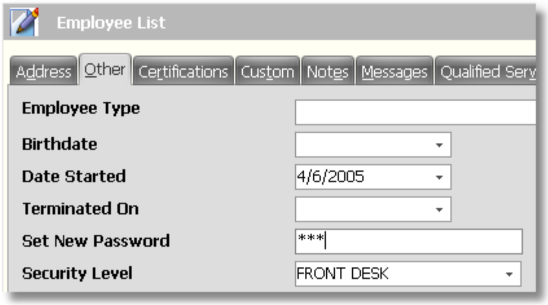
7. When you have finished going through all of the Menu Option screens, click on the **"Other Options"** tab.

8. Place a check mark next to every item you wish members of this group to have access to.

9. Click the **"Save"** button to save the new security profile you have created or **"Save & New"** to create additional security profiles.

10. After creating security profiles for the different levels of access that you would like to use, you will need to assign passwords and security levels to each employee. Click on **"Employee"** on the Menu Bar of Envision and select the **"Employee List"** from the menu.

11. Double click on top of an employee's name to open their record and click on the **"Other"** tab.



12. Enter a password in the **"Set New Password"** field and select a **"Security Level"** from the drop down menu.

13. Click the **"Next"** button on the right to go to the next employee's record.

14. After setting a Password and selecting a Security Level for each employee, you will then need to enable the program security. Click on **"Company"** on the Menu Bar of Envision and select **"Setup Program Preferences"** from the menu.

15. Click on the **"Security Options"** button on the left.

16. Check the **"Enable Program Security"** checkbox to turn on the security. You will not be able to check this box until every employee in your Employee List has a Password and Security Level set to their employee record.

17. Select a **"Default Security Profile"**. This should be the profile with the least access.

18. Select the method that you would like your employees to use to login to the program from the **"Employee Timecard / Login"** menu. They can login by entering their Employee Id and Password, with an Employee Id Card or both.

19. If you would like the system to automatically Logout if the system has been inactive for certain amount of seconds, enter how many seconds in the **"Inactivity Logout"** field.

20. If you would like your employees to be prompted / forced to enter a new password after a certain amount of days, enter how many days in the **"Forced Password Change"** field.

21. Click the **"Save"** button in the upper right hand corner to save these settings.

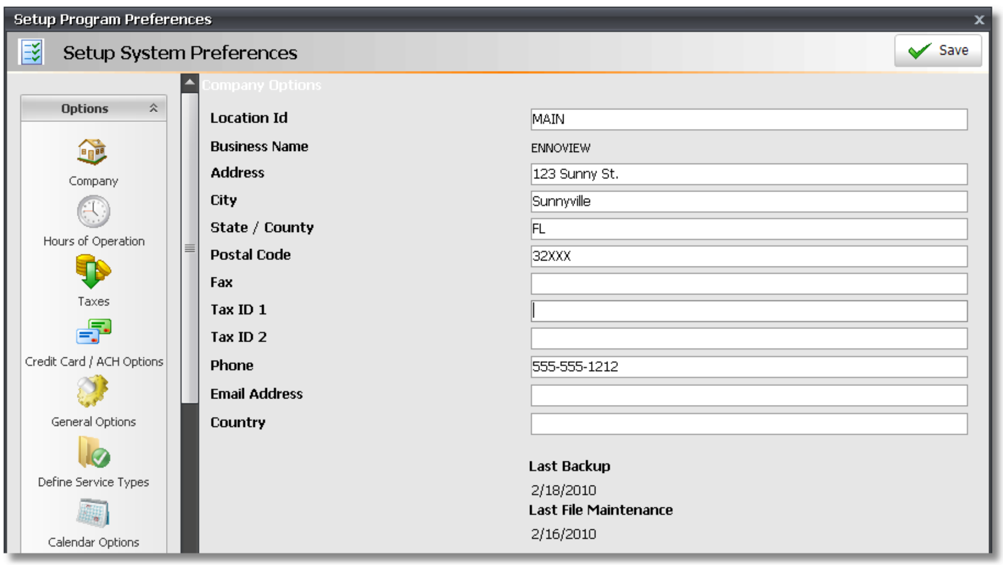
6. Setup Program Preferences

These setup screens should be completed before you start using the program. They set the operation of nearly every screen in the program. The preferences explained here are only the preferences most commonly used. For more information on all of the preferences, please refer to the Envision Users' Guide or Help File. These preferences will depend on how you run your business. All of the preferences available in your Program Preferences are optional. The settings suggested in this guide are only suggestions. It is completely up to you if you would like to turn these options on or off.

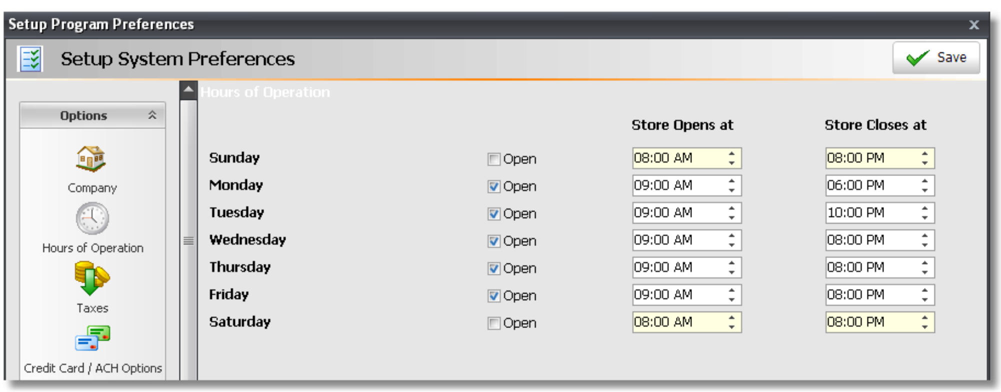
1. Click on **"Company"** on the Menu Bar of Envision

2. Select **"Setup Program Preferences"** from the menu.

3. On the **"Company Options"** screen, enter your Company Information.



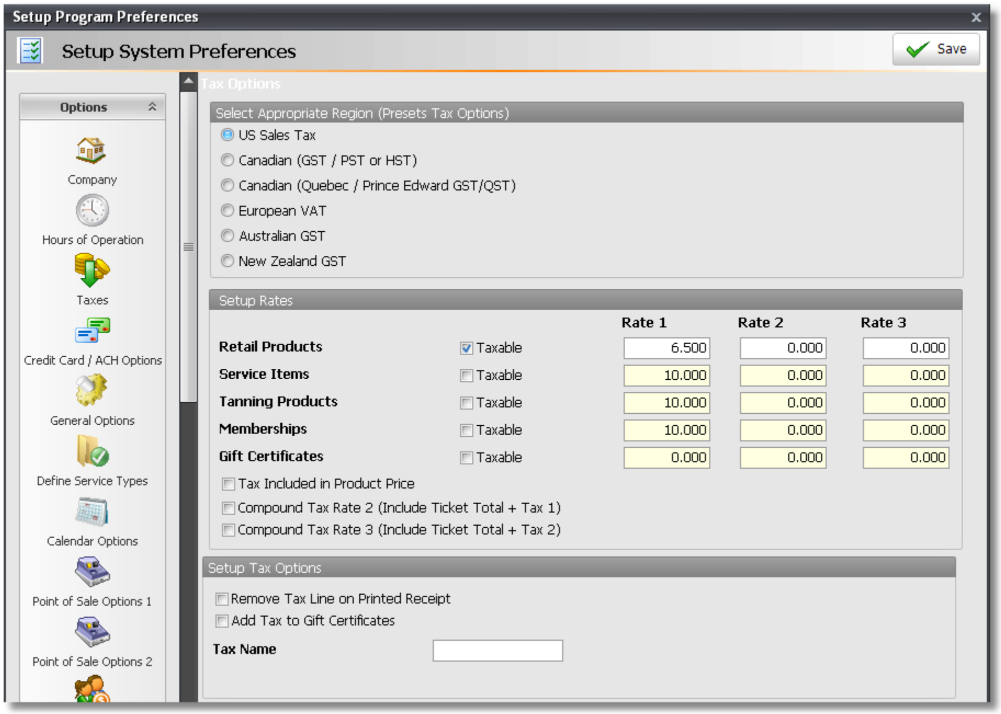
4. Click on the **"Hours of Operation"** button on the left.



5. Check the days that your store will be open in the check boxes to the right of the weekdays that you will be open. Enter the **"Store Opens At"** and **"Store Closes At"** hours in the fields to the right of each weekday.

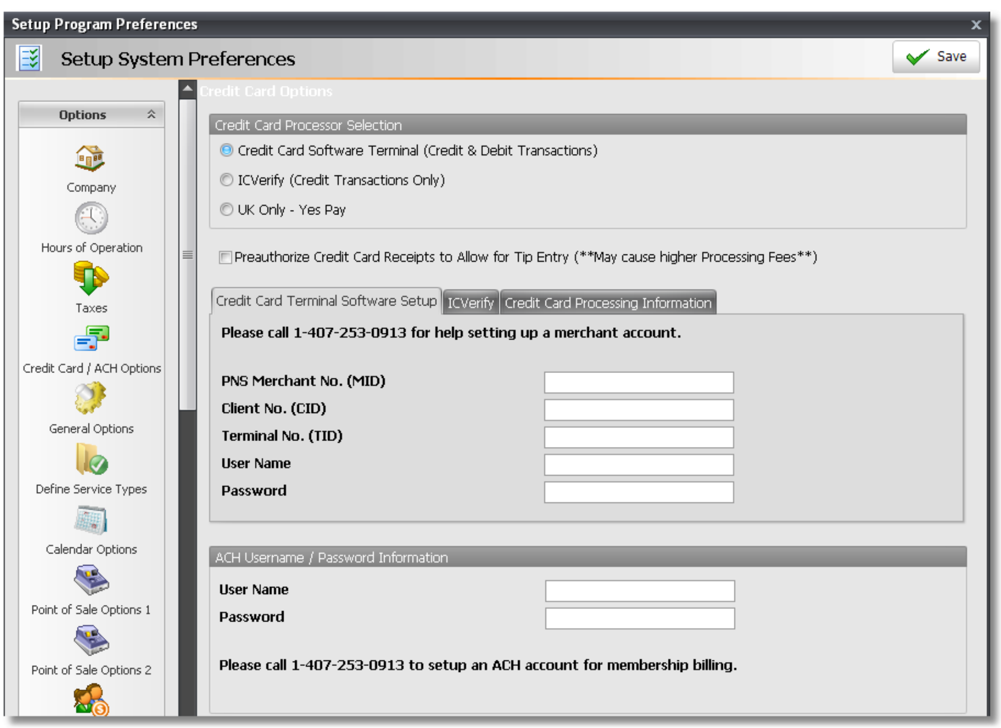
Scheduling Outside of Your Store Hours: If you would like to schedule appointments before or after your store hours, enter additional hours in the "Store Opens At" and "Store Closes At" fields. For example, if you close at 7 PM but still allow appointments to be scheduled at 7:30 PM, you will need to open your hours to 8 PM or 9 PM so that you are able to see those time slots in the calendar. If the hours are set to close at 7 PM, you will not be able to see anything past 7 PM.

6. Click on the **"Taxes"** button on the left.



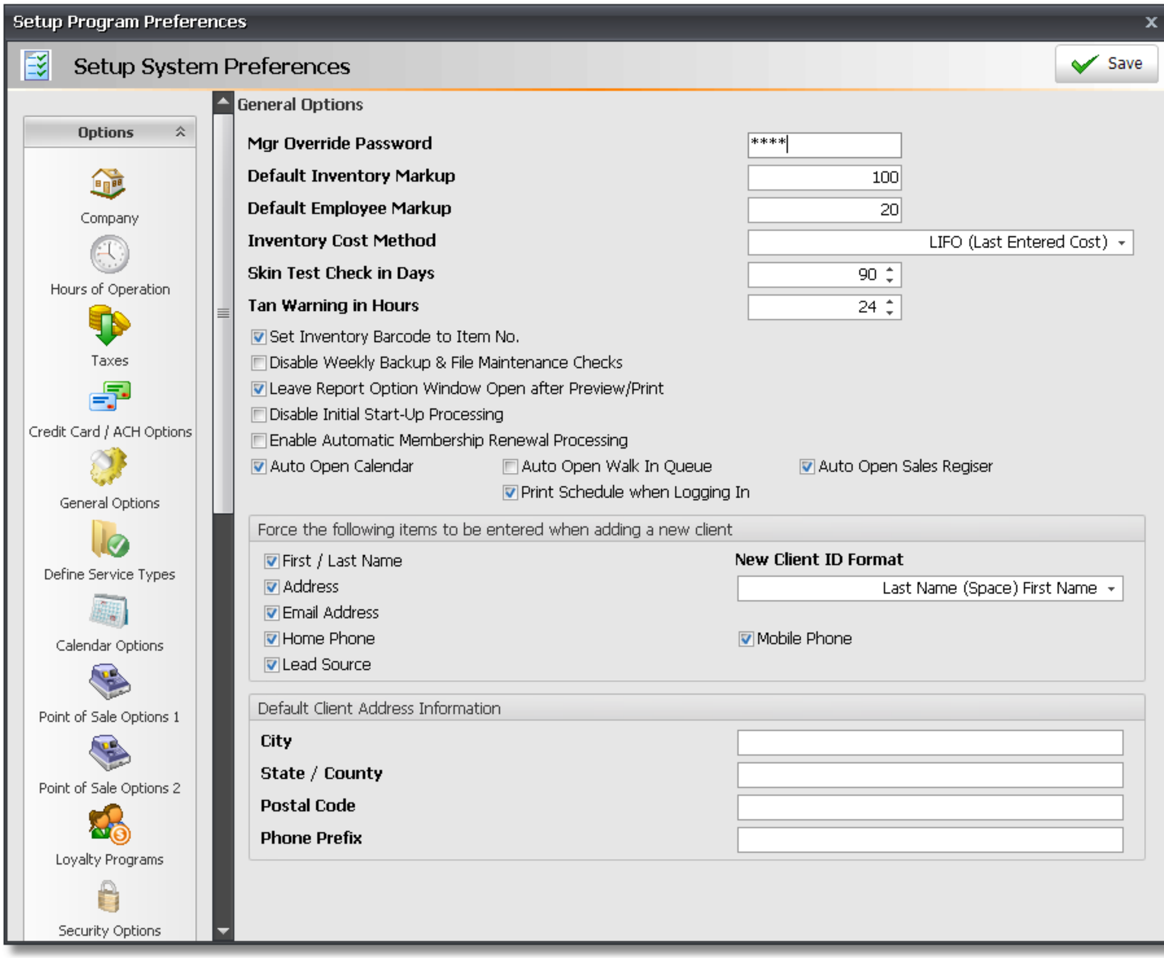
7. Select the appropriate Tax Region and setup your tax rates by checking which items are taxable and entering the correct tax rates in the fields to the right. The tax rate should be entered as a whole number. For example, if your tax rate is 7%, this should be entered as "7.000". The "Rate 2" and "Rate 3" fields are for city or county taxes. Entering these types of taxes as separate tax rates will allow you to keep separate records of each type of tax so that you can run reports with these tax rates separated into their own separate totals.

8. Click the **"Credit Card / ACH Options"** button on the left (optional).

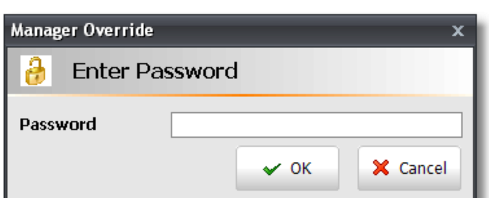


9. If you have purchased Envision's Credit Card Processing Module or if you are using the ACH Billing Module, you will need to setup your account information here. Fill in the information provided to you for your merchant account.

10. Click on the **"General Options"** button on the left.



11. Enter the **"Mgr Override Password"** in the first field at the top.



Whenever the program detects that a manager approval for an action is required, you will be asked for this password. As the password is entered it will be shown as asterisks to prevent anyone from viewing it. You will be asked for this password when you use any of the following features:

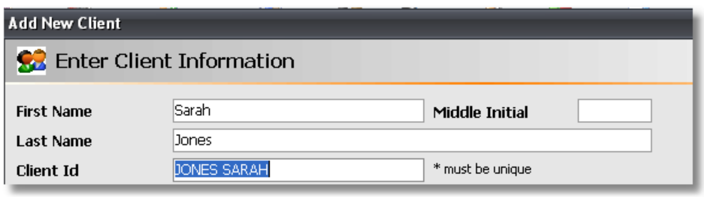
- Recall Ticket
- Void Ticket
- Remove Ticket
- No Sale
- Pay Out
- Override Time Clock (Override Button on the Time Clock screen)

- Discount Button when discounts are turned off

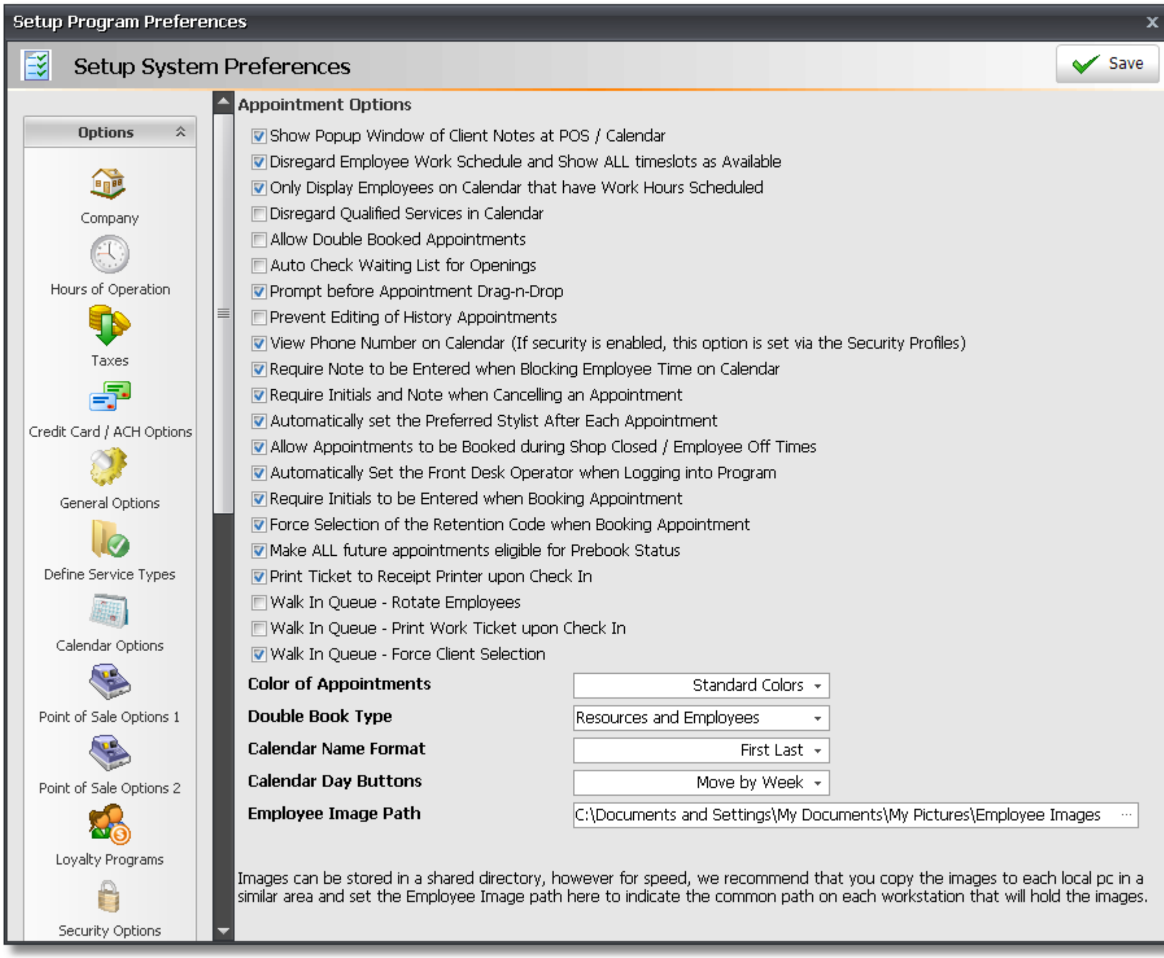
12. Enter the **"Default Inventory Markup"** in the field provided. The Inventory Markup is a percentage that will be filled in automatically for each new retail item added to your retail list. Remember, it is only a default and can be changed for particular inventory items as you enter them. Use whole numbers, for example "100" for 100%. 100% is the most common setting.

13. Enter the **"Default Employee Markup"** (optional). If you markup your products by a small percentage when products are sold to your employees, enter a number that is a percent of markup that will be used as the default for Employee purchases. Setting a percentage here will automatically set the "Employee Price" from retail products, based on the cost of the product.

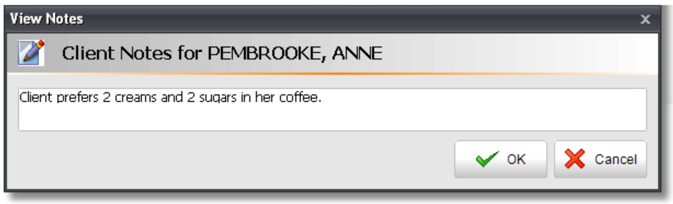
14. Select the **"New Client ID Format"**. This selection is one of the most important settings in your Program Preferences. This option will set the format that you will use to search for your clients. When adding a Client outside of your Client List, the Client Id can automatically be entered for you. The system is defaulted to enter the first initial and last name of the client, however we strongly recommend setting this New Client Id Format to Last Name (Space) First Name, First Name (Space) Last Name, First Name / Last Name or Last Name / First Name. Selecting clients will be much easier with any of these Client Id formats and you will not come across a situation where you will need to enter a number in a Client Id because more than one client has the same first initial and last name.



15. Click on the **"Calendar Options"** button on the left.


Setup Program Preferences
Setup System Preferences
Save
Options
Company
Hours of Operation
Taxes
Credit Card / ACH Options
General Options
Define Service Types
Calendar Options
Point of Sale Options 1
Point of Sale Options 2
Loyalty Programs
Security Options
Appointment Options
Show Popup Window of Client Notes at POS / Calendar
Disregard Employee Work Schedule and Show ALL timeslots as Available
Only Display Employees on Calendar that have Work Hours Scheduled
Disregard Qualified Services in Calendar
Allow Double Booked Appointments
Auto Check Waiting List for Openings
Prompt before Appointment Drag-n-Drop
Prevent Editing of History Appointments
View Phone Number on Calendar (If security is enabled, this option is set via the Security Profiles)
Require Note to be Entered when Blocking Employee Time on Calendar
Require Initials and Note when Cancelling an Appointment
Automatically set the Preferred Stylist After Each Appointment
Allow Appointments to be Booked during Shop Closed / Employee Off Times
Automatically Set the Front Desk Operator when Logging into Program
Require Initials to be Entered when Booking Appointment
Force Selection of the Retention Code when Booking Appointment
Make ALL future appointments eligible for Prebook Status
Print Ticket to Receipt Printer upon Check In
Walk In Queue - Rotate Employees
Walk In Queue - Print Work Ticket upon Check In
Walk In Queue - Force Client Selection
Color of Appointments
Standard Colors
Double Book Type
Resources and Employees
Calendar Name Format
First Last
Calendar Day Buttons
Move by Week
Employee Image Path
C:\Documents and Settings\My Documents\My Pictures\Employee Images
Images can be stored in a shared directory, however for speed, we recommend that you copy the images to each local pc in a similar area and set the Employee Image path here to indicate the common path on each workstation that will hold the images.

16. Check the **"Show Popup Window of Client Notes at POS / Calendar"** option if you would like client notes to popup when the client is selected. When you select a Client in the Appointment Calendar or Point of Sale, notes that have been entered for the client will automatically pop up. This could be an important reminder for your front desk staff or the employee that is booking the appointment.



17. Uncheck the **"Disregard Employee Work Schedule and show ALL timeslots as Available"** check box if you have setup your employees' schedules. If you do not plan on entering the hours that your employees work or if their schedule varies, it will not be necessary to uncheck this option.

18. Check **"Only Display Employees on Calendar that have Work Hours Scheduled"** if you would like to only display employees that are actually scheduled to work on the current day. If you have a large listing of employees, this will make the list smaller when viewing the calendar and the employees that are displayed will have wider columns, allowing you to view more information about the appointments scheduled.

19. Uncheck the **"Disregard Qualified Services in Calendar"** check box if you have setup your employees' list of qualified services. To setup the qualified services for each employee, open the Employee List and click on the "Qualified Services" tab when an employee record is open.

20. Check the **"Prompt before Appointment Drag-n-Drop"** check box if you would like a warning to popup when dragging and dropping an appointment into a different timeslot. If someone drags and drops an appointment by accident, they will be asked if they are sure they would like to move the appointment. This gives them the opportunity to cancel the move if this was done by accident.

21. Check the **"Prevent Editing of History Appointments"** check box if you do not want your employees to be able to go to a past date in the Calendar and edit information about the appointments on past dates.

22. Leave the **"View Phone Number on Calendar"** option checked if you would like your employees to view the client phone numbers on top of the appointments.

23. Check the **"Require Note to be Entered when Blocking Time on Calendar"** option if you would like to force your employees to enter their initials and a reason when blocking out time in the Calendar. They will not be able to block out time without entering this information.

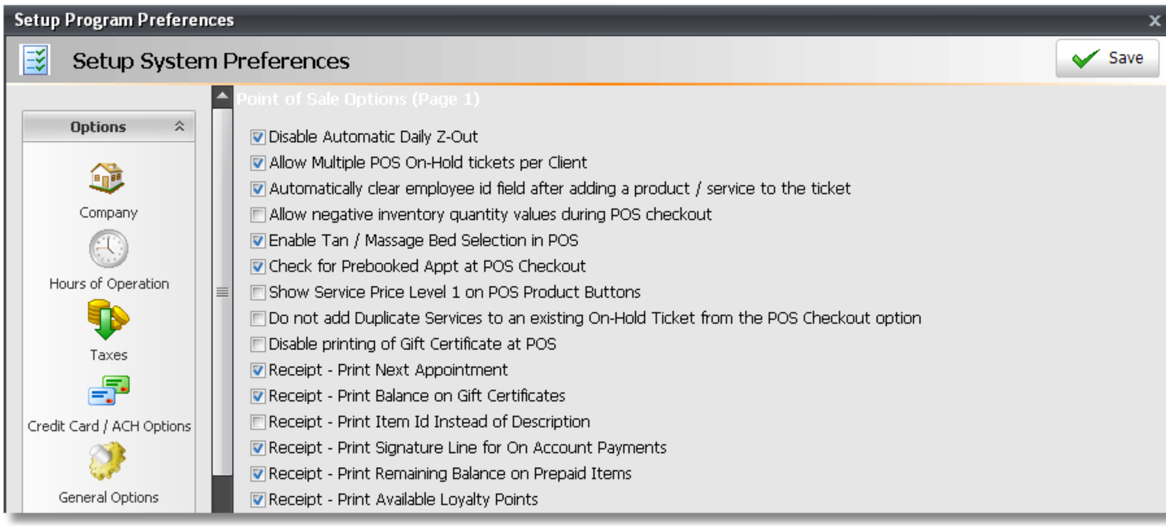
24. Check the **"Require Initials and Note when Canceling an Appointment"** option if you would like to force your employees to enter their initials and a reason when canceling an appointment in the Calendar. They will not be able to cancel an appointment without entering this information.

25. Check the **"Automatically Set the Front Desk Operator when Logging into Program"** option if you are running reports that track Add-On sales and Prebooks and would like to view who was set as the "FDO" when there was an Add-On or a Prebook scheduled.

26. Check the **"Require Initials to be Entered when Booking Appointment"** option if you would like to force your employees to enter their initials when booking an appointment in the Calendar. They will not be able to book an appointment without entering their initials.

27. Check the **"Force Selection of the Retention Code when Booking Appointment"** option if you would like to keep track of how many of your clients were "New Client", "Salon Client (Returning Clients)", "Repeat / Request" or "Referral". This can be used for the "Client Count Summary" report.

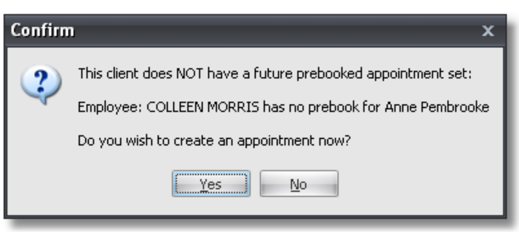
28. Click on the **"Point of Sale Options 1"** button on the left.



29. Check the **"Disable Automatic Daily Z-Out"** option if you will be performing a Z-Out (Reconciling your Cash Drawer) every night or every morning before the start of business for the next day. If you will be performing the Z-Out each night or each morning, it will not be necessary to have the program automatically do the Z-Out. Leaving this check box unchecked will create an extra drawer for the day if you close the drawer and then the program closes the drawer again.

30. Check the **"Automatically clear employee id field after adding a product / service to the ticket"** option if your clients are serviced by multiple service providers in one day. Every time a service or product is added to a ticket you will be asked to select the employee that performed the service or sold the product to the client.

31. Check the **"Check for Prebooked Appt at POS Checkout"** option to receive a prompt if a client does not have a future appointment. When you click the "Sale / Cash Out" button to complete their sales transaction, you will be asked if you would like to create an appointment before checking the client out. If you click "Yes", the program will open or return to the Appointment Calendar.



32. Check the **"Receipt - Print Next Appointment"** option if you would like the client's next appointment printed on their receipt.

33. Check the **"Receipt - Print Balance on Gift Certificates"** option if you would like the client's remaining gift certificate balance printed on their receipt. This will be printed if they use their gift certificate for the transaction that the receipt is being printed for.

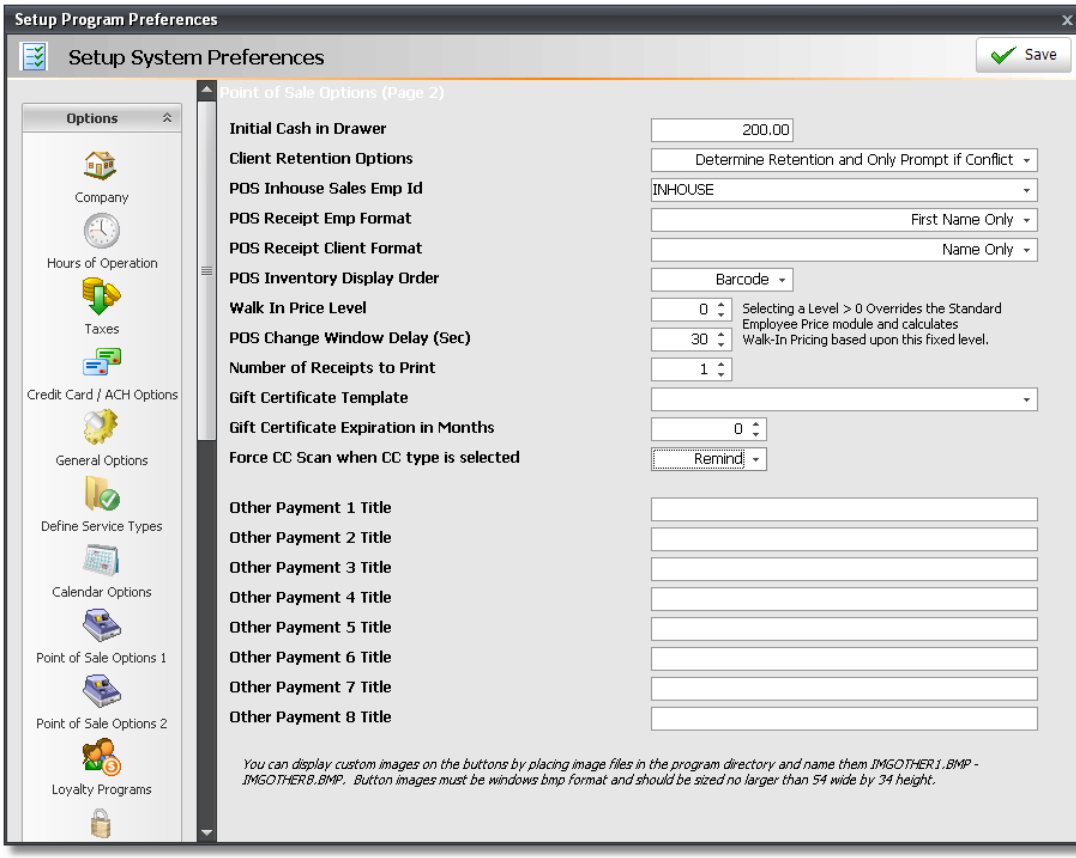
34. Check the **"Receipt - Print Signature Line for On Account Payments"** option if you will be using the On Accounts payment feature. This will print a signature line on your receipts when the "On Account" payment type has been selected.

35. Check **"Receipt - Print Remaining Balance on Prepaid Items"** if you would like the client's remaining

prepaid item balance printed on their receipt. This will be printed if they use one of their prepaid items on the transaction that the receipt is being printed for.

36. Check **"Receipt - Print Available Loyalty Points"** option if you would like the client's amount of available loyalty points printed on their receipt. This will be printed if the client has used any loyalty points on the transaction that the receipt is being printed for.

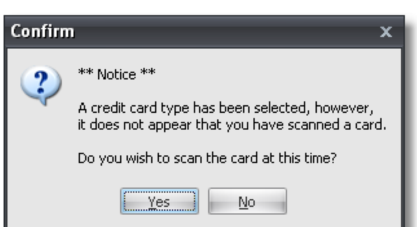
37. Click on the **"Point of Sale Options 2"** button on the left.



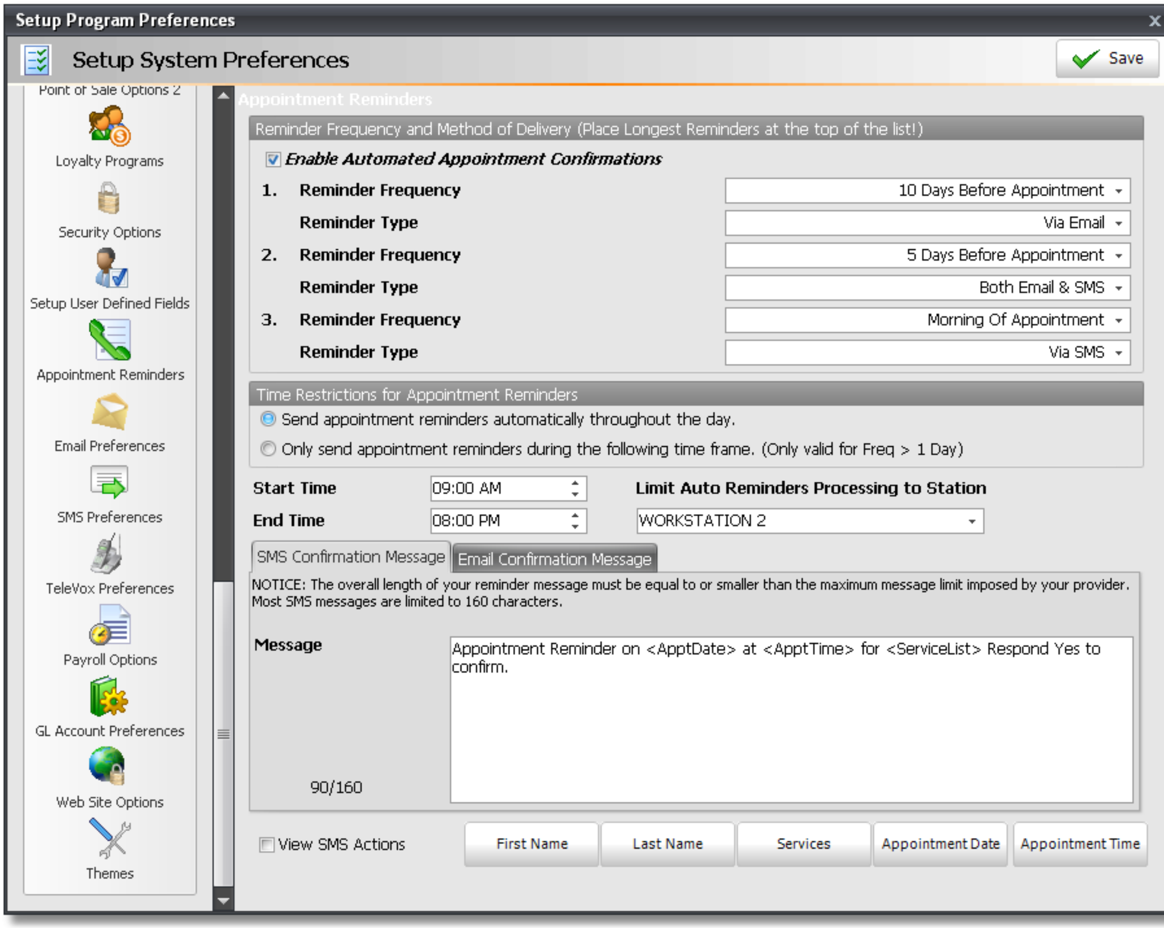
38. Enter the **"Initial Cash in Drawer"** in the field provided. This is the default amount that will show up on the Z-Out window. This amount can be changed each morning when the starting balance is counted.

39. If you will be using a barcode scanner, set the **"POS Inventory Display Order"** to **"Barcode"**.

40. If you will be using Envision's Credit Card Processing Module, set the **"Force CCard Scan if CC Payment Type Selected"** option to **"Remind"** or **"Require"**. If you select the "Remind" option and someone forgets to process a credit card when a credit card payment type is selected, you will be reminded to process the card before completing the sales transaction. If you select the "Require" option, they will not be able to complete the transaction without processing a credit card first.



41. If you would like to send out Automated Appointment Reminders, click on the **"Appointment Reminders"** button on the left.

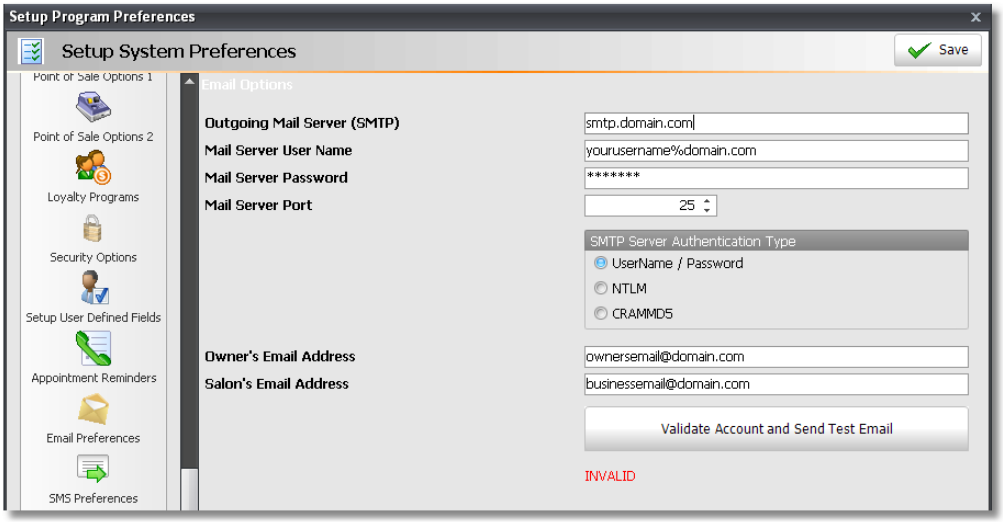


42. Setup the frequencies that you will be using for Appointment Confirmations. For example, if you would like to send a confirmation via email seven days before your clients' appointments, choose the "7 Days Before Appointment" Reminder Frequency and then set the "Reminder Type" to "Via Email". You can also send another email one or two days before your clients' appointments and then a text message the morning of their appointment, so they can be reminded up to 3 times. You can set all three of the Reminder Frequency settings or just one or two of them. You will need to setup your Email Preferences and SMS Preferences before you are able to send the Automated Appointment Confirmations via email and SMS.

43. If you do not want Appointment Confirmations sent throughout the day, select the **"Only send appointment reminders during the following time frame"** in the **"Time Restrictions for Appointment Reminders"** section and set the **"Start Time"** and **"End Time"**. Appointment Reminders will only be sent during the times set here. You can also select a station that Appointment Reminders will be sent from if you do not want Appointment Reminders sent from all workstations that have Envision installed.

44. Check the **"Enable Automated Appointment Confirmations"** check box when you are ready to turn on the Automated Appointment Confirmations. It would be best to setup your Email Preferences and SMS Preferences before checking this box.

45. If you will be sending out Automated Appointment Confirmations or Email Marketing, click on the **"Email Preferences"** button on the left.



46. Enter the **"Outgoing Mail Server (SMTP)"** in the field provided. If you are not sure what this is, your email provider should be able to provide you with this information.

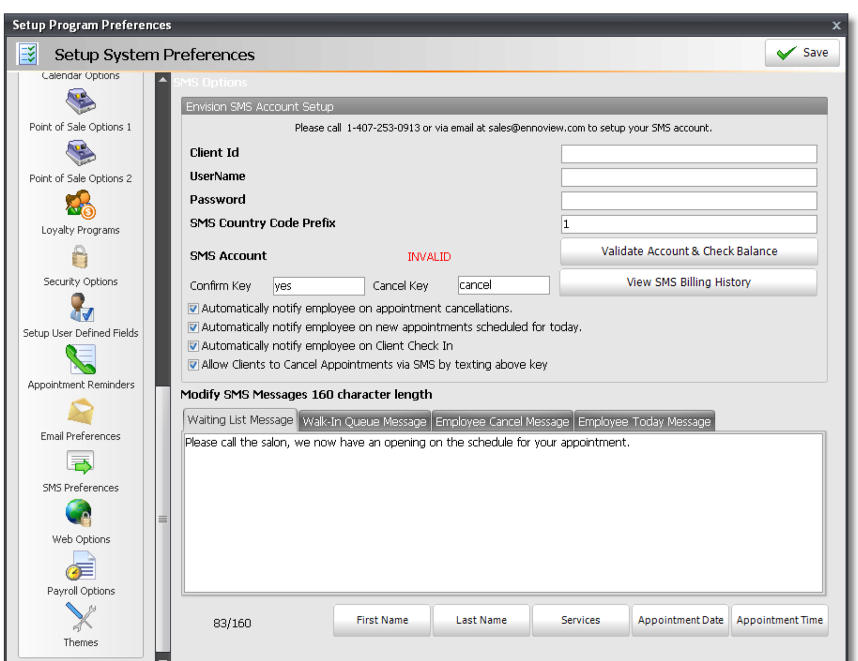
47. Enter the **"Mail Server User Name"** and **"Mail Server Password"** in the fields provided. If you are not sure what this information is, your email provider should also be able to provide you with this information.

48. The most commonly used **"Mail Server Port"** is **"25"**, however you may need to enter a different port number depending on the port used by your email provider.

49. Enter the **"Owner's Email Address"** and the **"Salon's Email Address"** into the fields provided.

50. Click the "Validate Account and Send Test Email" button to test these settings. The word "Valid" will be displayed below this button when the settings have been validated.

51. If you have signed up for an Envision SMS Account, click on the **"SMS Preferences"** button on the left.



52. Enter your SMS Account information into the fields provided. You can also check your balance, history and edit your SMS messages. If you are not signed up for an SMS Account and would like to be, please contact us at 1-407-253-0913 or email us at sales@ennoview.com to setup your SMS account.

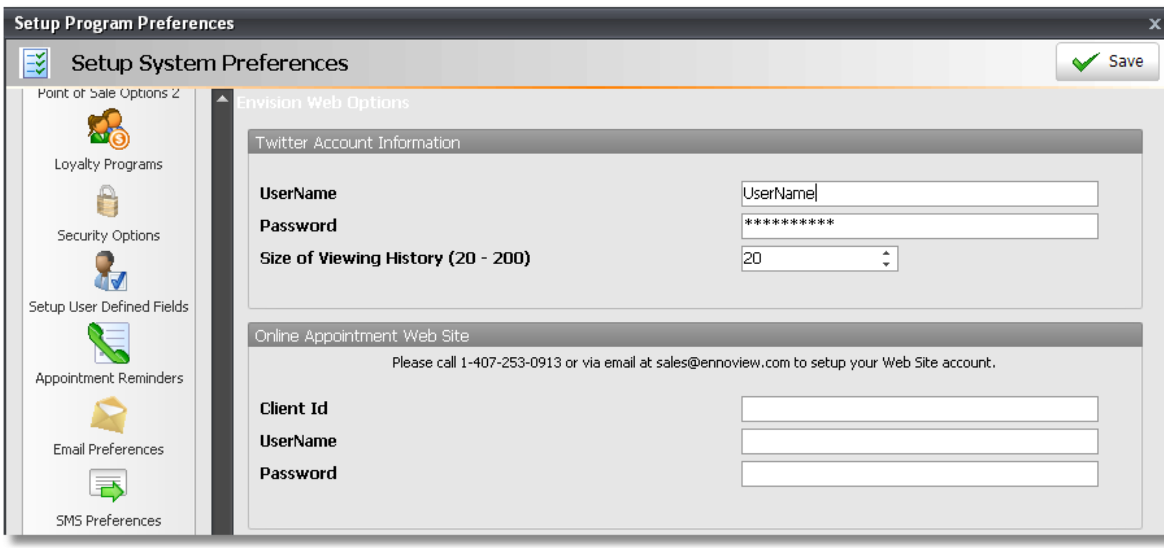
53. Check the **"Automatically notify employee on appointment cancellations"** check box if you would like a text message sent your employees when one of their appointments has been canceled.

54. Check the **"Automatically notify employee on new appointments scheduled for today"** check if you would like a text message sent to your employees when a new appointment is scheduled for them on the current day.

55. Check the **"Automatically notify employee on Client Check In"** check box if you would like a text message sent to your employees when their client is checked in.

56. Check the **"Allow Clients to Cancel Appointments via SMS by texting above key"** check box if you would like your clients to be able to automatically cancel their appointment by texting the word that you enter into the **"Cancel Key"** field above.

53. If you have a Twitter Account for your business or if you are using one of Envision's Online Booking options, click on the **"Web Options"** button on the left.



54. Enter your Twitter Account Information in the fields provided.

55. Enter your Online Booking account information in the fields provided. If you have not setup a Web Site account yet and would like to do this, please contact us at 1-407-253-0913 or via email at sales@ennoview.com.

56. Click the **"Save"** button in the upper right hand corner of the **"Setup Program Preferences"** screen to save your settings.

7. Setup Commission Plans

If you will be using Envision to calculate commissions for payroll, it will be important to setup Commission Plans before setting up your Employee List. There are multiple ways of setting up Commission Plans. The following instructions will provide steps for setting up a Straight Commission Percentage Plan, a Sliding Scale Commission Plan and an Inventory Department Commission Plan.

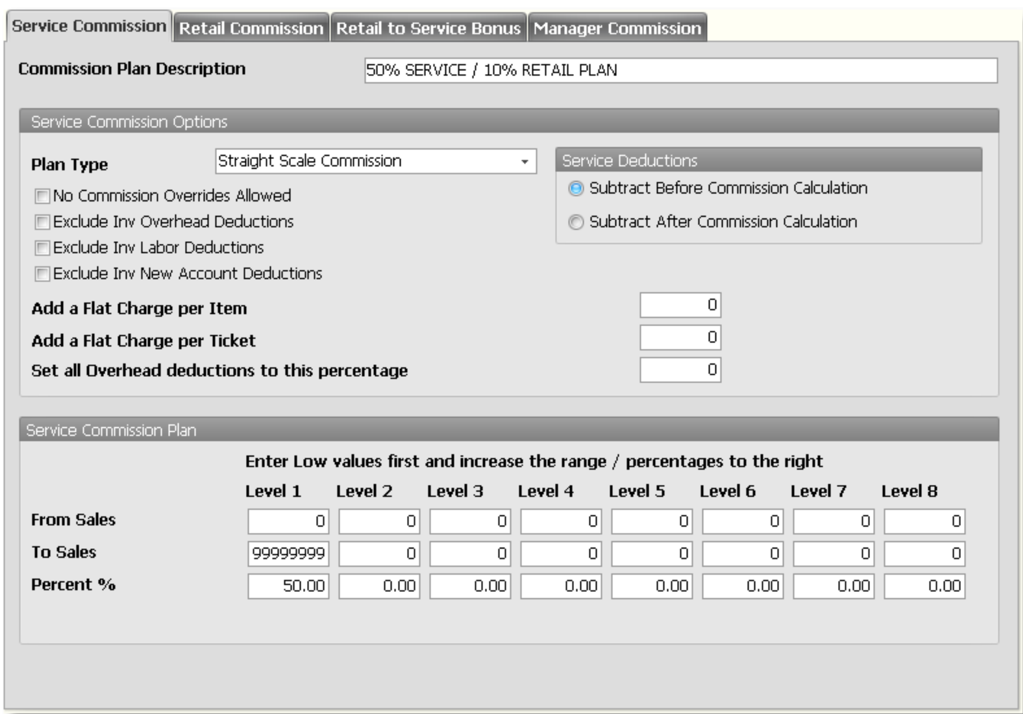
Straight Commission Plan

The following instructions are for setting up a Straight Commission Plan of 50% for service items and 10% for retail items.

1. Click on **"Accounting"** on the Menu Bar of Envision.

2. Select **"Commission Plans"** from the menu.

3. Click on the **"New"** button at the top of the list.



4. Enter a name for the Commission Plan in the **"Commission Plan Description"** field.

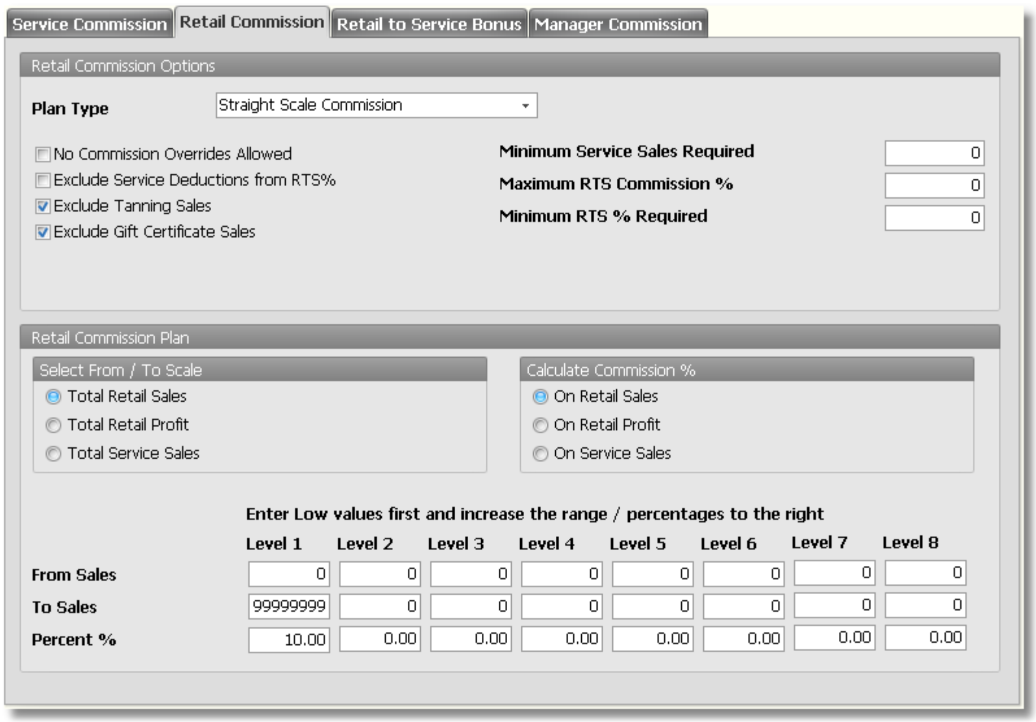
5. Click on the drop down arrow in the **"Plan Type"** field and select the **"Straight Scale Commission"** plan type.

6. Leave the **"From Sales"** field under the **"Level 1"** column set to zero.

7. Click in the **"To Sales"** field under the **"Level 1"** column and enter **"99999999"**.

8. Click in the **"Percent %"** field under the **"Level 1"** column and enter **"50"**.

9. Click on the **"Retail Commission"** tab at the top of the screen.



10. Click on the drop down arrow in the "Plan Type" field and select the "Straight Scale Commission" plan type.

11. Check the **"No Commission Overrides Allowed"** check box if you do not want commission overrides for retail items to affect the retail commission for anyone under this commission plan. If you have any Commission Overrides setup for any of your retail items, they will not be used with this box checked.

12. Check the **"Exclude Tanning Sales"** check box if you sell tanning services and do not want anyone under this commission plan to receive commission on Tanning sales.

13. Check the **"Exclude Gift Certificate Sales"** check box if you do not want anyone under this commission plan to receive commission on Gift Certificate sales.

14. Leave the **"From Sales"** field under the **"Level 1"** column set to zero.

15. Click in the **"To Sales"** field under the **"Level 1"** column and enter **"99999999"**.

16. Click in the **"Percent %"** field under the **"Level 1"** column and enter **"10"**.

17. Click the **"Save"** button on the right.

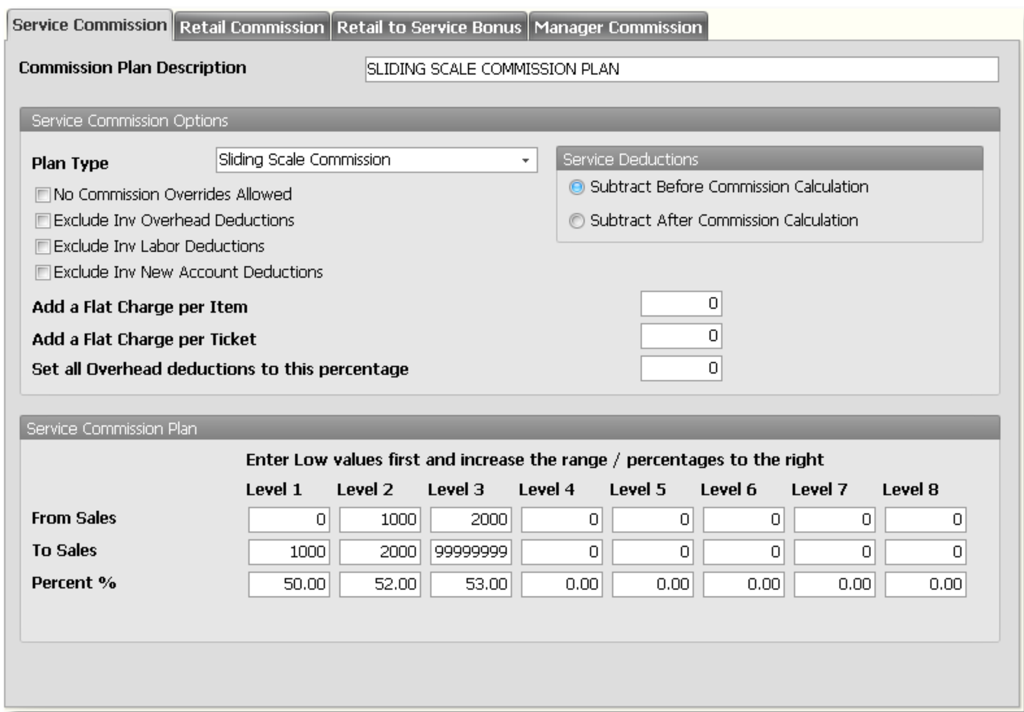
Sliding Scale Commission Plan

The following instructions are for setting up a Sliding Scale Commission Plan. The Sliding Scale Commission for service will specifically be from $0 to $1000, 50%, from $1000 to $2000, 52%, and from $2000 and up, 53%. The Sliding Scale Commission for Retail will specifically be from $0 to $500, 10%, from $500 to $1000, 15% and from $1000 and up, 17%.

1. Click on **"Accounting"** on the Menu Bar of Envision.

2. Select **"Commission Plans"** from the menu.

3. Click on the **"New"** button at the top of the list.



4. Enter a name for the Commission Plan in the **"Commission Plan Description"** field.

5. Click on the drop down arrow in the **"Plan Type"** field and select the plan type.

Sliding Scale Commission vs. Straight Scale Commission: You can choose either the "Straight Scale Commission" plan type OR the "Sliding Scale Commission" plan type for a Sliding Scale Commission Plan. Using the sliding scale commission specified for these instructions and in the image above, if an employee sells $1500 in Service Sales and you would like to pay the employee 52% on the entire $1500, you would select a "Straight Scale Commission" plan type. If you would like to pay the employee 50% on the first $1000 and then 52% on the remaining $500, select the "Sliding Scale Commission" plan type.

6. Leave the **"From Sales"** field under the **"Level 1"** column set to zero.

7. Click in the **"To Sales"** field under the **"Level 1"** column and enter **"1000"**.

8. Click in the **"Percent %"** field under the **"Level 1"** column and enter **"50"**.

9. Click in the **"From Sales"** field under the **"Level 2"** column and enter **"1000"**.

10. Click in the **"To Sales"** field under the **"Level 2"** column and enter **"2000"**.

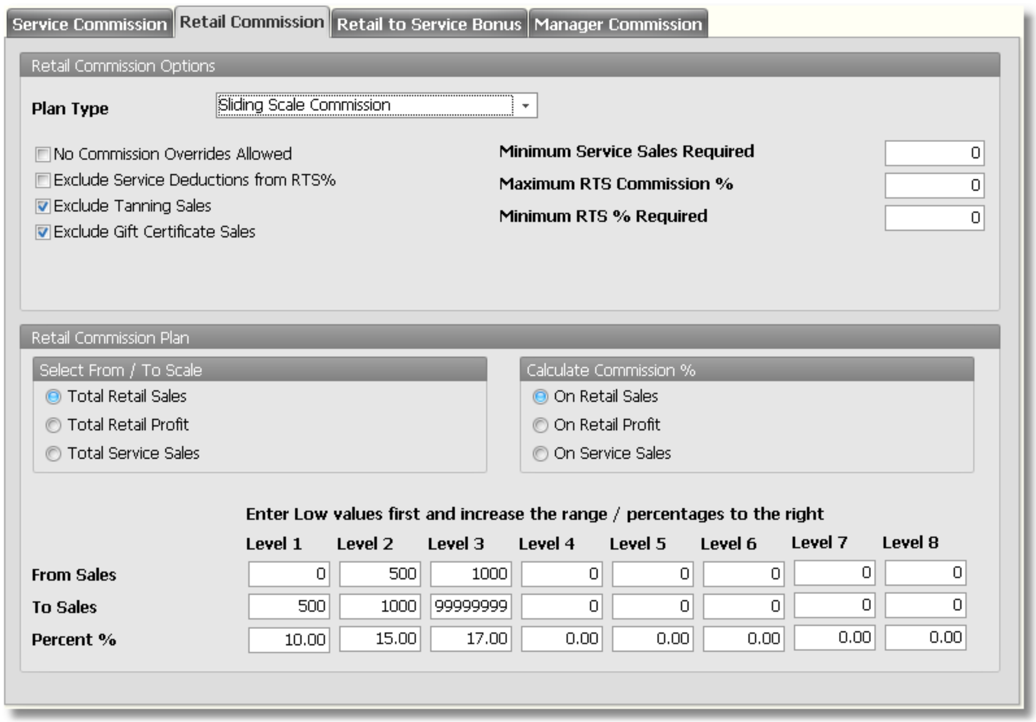
11. Click in the **"Percent %"** field under the **"Level 2"** column and enter **"52"**.

12. Click in the **"From Sales"** field under the **"Level 3"** column and enter **"2000"**.

13. Click in the **"To Sales"** field under the **"Level 3"** column and enter **"99999999"**.

14. Click in the **"Percent %"** field under the **"Level 3"** column and enter **"53"**.

15. Click on the **"Retail Commission"** tab at the top of the screen.



16. Click on the drop down arrow in the **"Plan Type"** field and select the plan type.

> **Sliding Scale Commission vs. Straight Scale Commission:** You can choose either the "Straight Scale Commission" plan type OR the "Sliding Scale Commission" plan type for a Sliding Scale Commission Plan. Using the sliding scale commission specified for these instructions and in the image above, if an employee sells $550 in Retail Sales and you would like to pay the employee 15% on the entire $550, you would select a "Straight Scale Commission" plan type. If you would like to pay the employee 10% on the first $500 and then 15% on the remaining $50, select the "Sliding Scale Commission" plan type.

17. Check the **"No Commission Overrides Allowed"** check box if you do not want commission overrides for retail items to affect the retail commission for anyone under this commission plan. If you have any Commission Overrides setup for any of your retail items, they will not be used with this box checked.

18. Check the **"Exclude Tanning Sales"** check box if you sell tanning services and do not want anyone under this commission plan to receive commission on Tanning sales.

19. Check the **"Exclude Gift Certificate Sales"** check box if you do not want anyone under this commission plan to receive commission on Gift Certificate sales.

20. Leave the **"From Sales"** field under the **"Level 1"** column set to zero.

21. Click in the **"To Sales"** field under the **"Level 1"** column and enter **"500"**.

22. Click in the **"Percent %"** field under the **"Level 1"** column and enter **"10"**.

23. Click in the **"From Sales"** field under the **"Level 2"** column and enter **"500"**.

24. Click in the **"To Sales"** field under the **"Level 2"** column and enter **"1000"**.

25. Click in the **"Percent %"** field under the **"Level 2"** column and enter **"15"**.

26. Click in the **"From Sales"** field under the **"Level 3"** column and enter **"1000"**.

27. Click in the **"To Sales"** field under the **"Level 3"** column and enter **"99999999"**.

28. Click in the **"Percent %"** field under the **"Level 3"** column and enter **"17"**.

29. Click the **"Save"** button on the right.

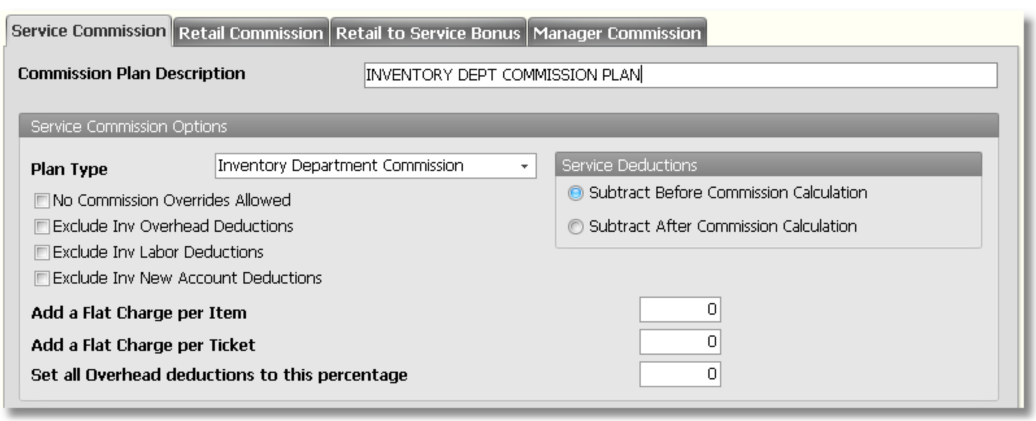
Inventory Department Commission Plan

The following instructions are for setting up an Inventory Department Commission Plan. The percentage will depend on the percentage setup for each Inventory Department. The Inventory Department Commission Plan can only be setup for Service Commission.

1. Click on **"Accounting"** on the Menu Bar of Envision.

2. Select **"Commission Plans"** from the menu.

3. Click on the **"New"** button at the top of the list.

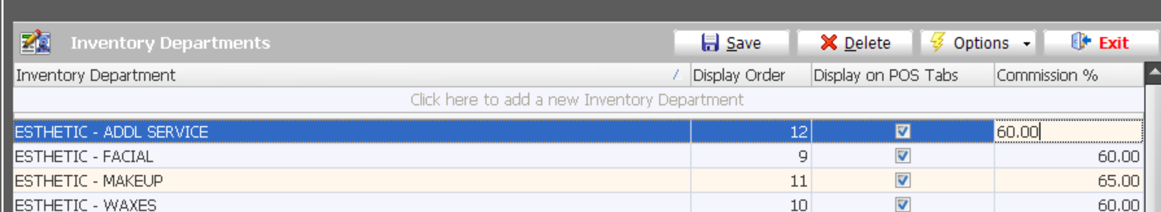


4. Enter a name for the Commission Plan in the **"Commission Plan Description"** field.

5. Click on the drop down arrow in the **"Plan Type"** field and select the **"Inventory Department Commission"** plan type.

6. Click the **"Save"** button on the right.

Inventory Department Commission Percentages: To setup the percentages for each Inventory Department, click on "Inventory" on the Menu Bar of Envision and select "Inventory Departments" from the menu. Click in the "Commission %" field on the right side of the list and enter the correct commission percent for each service department.



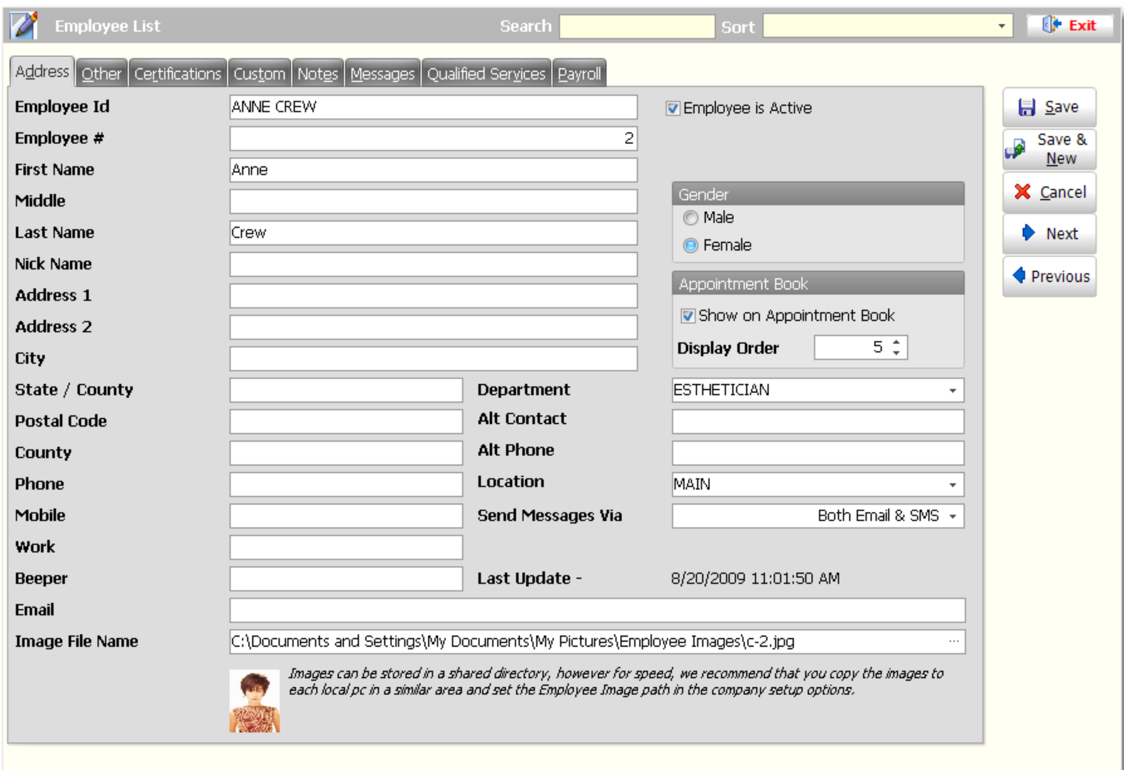
8. Setup Employee List

It will be necessary to setup your list of employees so that you are able to schedule appointments for them and select them as the service provider or sales person for sales transactions.

1. Click on **"Employee"** on the Menu Bar at the top of the screen.

2. Select the **"Employee List"** from the drop down menu.

3. Click the **"New"** button on the Tool Bar to add a new employee to the list or you may left click on an employee's name (must be highlighted) and click the "Edit" button to edit the employee's file.



4. Enter an **"Employee Id"** at the top of this screen. The Employee ID is used to Login/Logout an employee and is also used for searching for an Employee in the Point of Sale or Appointment Calendar windows. It is best to enter a name into this field.

5. Enter all available employee contact information on this **"Address"** screen.

6. Uncheck the **"Show in Appointment Book"** check box if the employee you are entering does not take appointments.

Appointment Book Settings: If the employee is front desk staff, they will not need their own column in the calendar. You may also specify the Display Order. The number that you enter into the Display Order field will specify which column the employee shows up in on the Appointment Calendar.

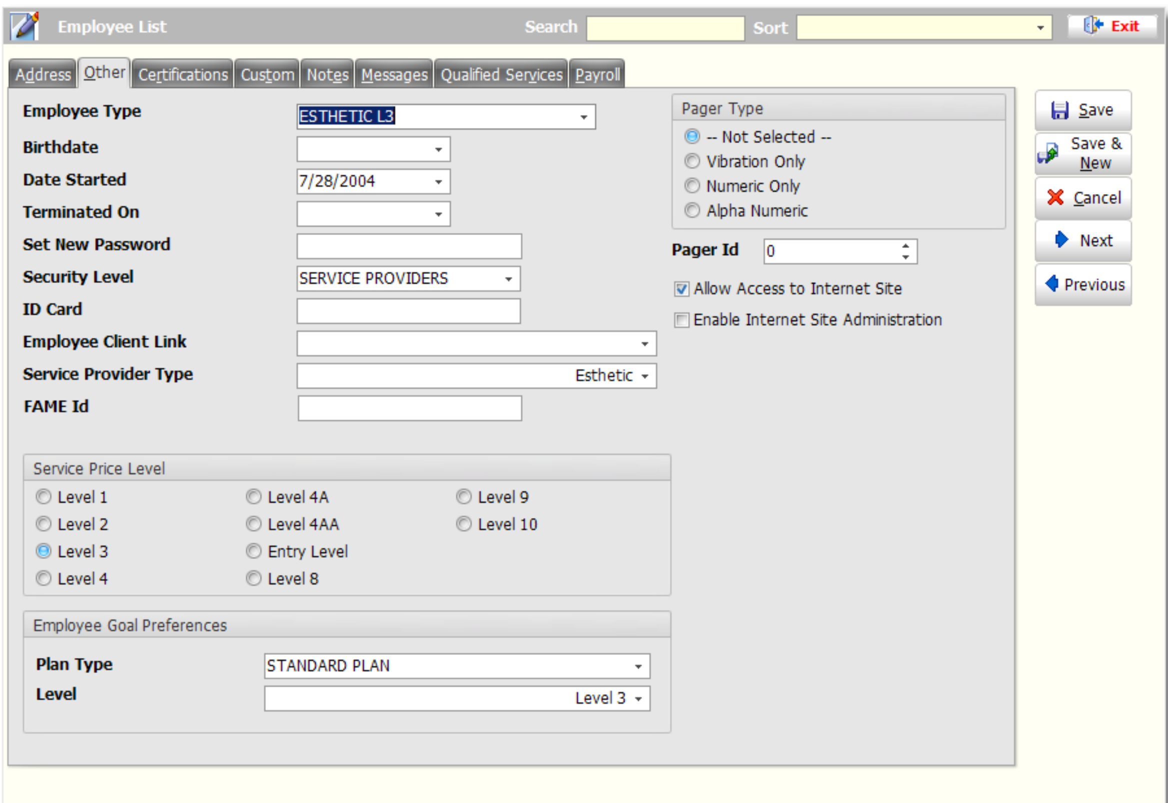
7. Select or add a "**Department**" for the employee. Select the Employee Department by clicking on the drop down arrow in the Department field. Setting up departments for your employees will allow you to view employees in the Calendar by the Employee Department. For example, if you have Stylists, Nail Techs, Estheticians and Massage Therapists and would like to view only your Stylists to book a haircut appointment, you will be able to click on a department for your stylists if you have created an Employee Department for this.

Creating Employee Departments: You must create a list of Emloyee Departments before you are able to select a department here. To add an Employee Department, click on **"Employee"** on the Menu Bar of Envision and select **"Employee Departments"** from the menu. You will then be able to create your list of Employee Departments.

8. Select a **"Location"** if you have multiple business locations and you are using the Enterprise version of Envision, select the appropriate location that the employee normally works at.

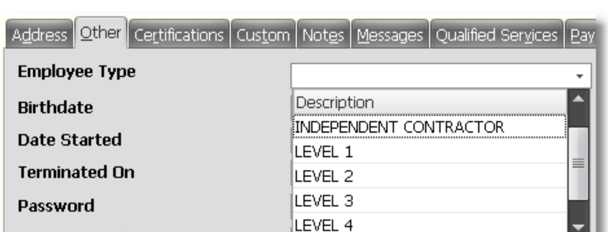
9. In the **"Send Messages Via"** field, select the method that the employee prefers to have messages and confirmations sent to them. Envision can send messages to the employee to inform them of a new appointment or a canceled appointment. If the employee does not use a phone for text messaging, you will need to select "Email Only" or "Disable Confirmations" if they do not want to receive any confirmations. If they use their phone for text messaging they will probably prefer the "SMS Only" option or "Both Email & SMS".

10. Click on the **"Other"** tab at the top of the screen.



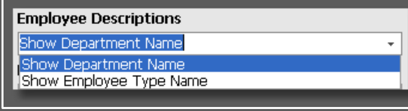
11. Select or add an **"Employee Type"** (optional).

You may create or select an Employee Type if your Employee Departments have different types of employees under each department. You may also use this for categorizing your employee. An example of an Employee Type would be Hair Color Specialist, or you may use the Type to specify which level the employee is. It is not necessary to enter an Employee Type, however they can be displayed below the employee's name at the top of their column in the calendar.



Setting Up Employee Types: To setup your Employee Types, click on "Employee" on the Menu Bar of Envision and select "Employee Types" from the menu.

Displaying Employee Types on the Calendar: To display the Employee Types below the employee's name at the top of their column in the calendar, click on the "Calendar" button on the Tool Bar at the top and click on the "Theme" button at the top of the calendar. Click on the drop down arrow to select the "Employee Description" in the lower right hand corner. You can display the Employee Department or the Employee Type.



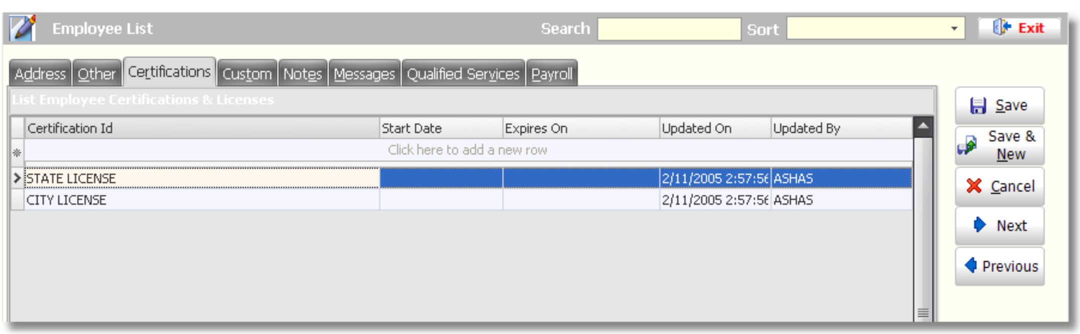
12. Select the Employee's **"Birthdate"** and **"Date Started"** if you would like to keep this information on record.

13. Enter a **"Password"** and select a **"Security Level"** if you will be using the Time Clock and Program Security (optional). A password for each employee will need to be entered if you would like to use Envision's Security feature and Time clock. This is the password that each Employee will need to Log In and Log Out with. The Pager Type and Page ID are to be entered if you are using the pager system.

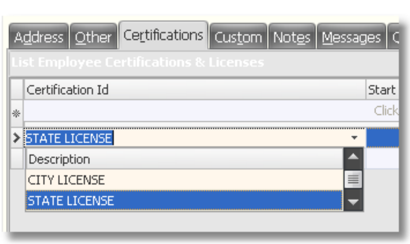
Setting Up Security: There are three parts to setting up the Program Security. First Security Profiles are created, then Passwords and Security Profiles are assigned to each employee, and last is enabling the Program Security. This is the second step of setting up the security. For more information on setting up the Security Profiles, please refer to the "Setup Security" section of this guide. For information on enabling the security, please refer to "Enable Program Security" under the "Setup Program Preferences" section of this guide.

14. Select a **"Service Price Level"** if your employees are setup for different levels of pricing based on experience (optional). The Service Price Level is the level associated with the price levels you setup for services. This is the price level that the employee will charge their clients.

13. Click on the **"Certifications"** tab at the top of this screen if your employees have certifications or licenses that you need to keep on record.



14. To add certifications to this list, click in the field labeled **"Click here to add a new row"**. Clicking in this field will provide a drop down arrow. Click the drop down arrow to select the first certification from your list. If you need to add additional certifications, click in the blank row directly below the row where the first certification was selected. The first certification will move to the second row and you will be able to add an additional certification by clicking in the field labeled "Click here to add a new row". After selecting the Certification, enter the dates the Certification is good for. If a Certification or qualification has no expiration date, leave that field blank.

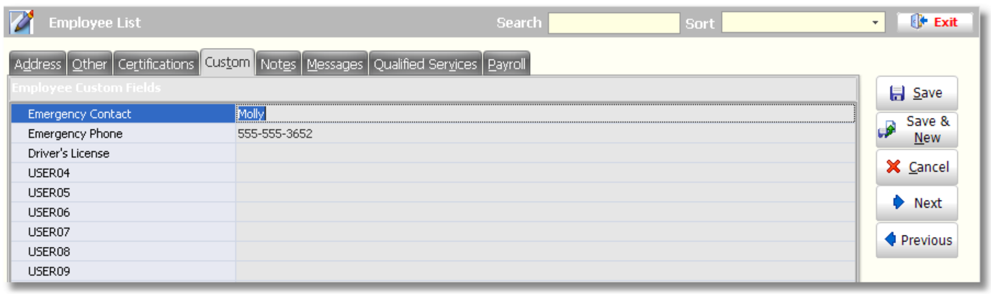


Setting Up Employee Certifications: To create your list of Employee Certifications, click on "Employee" on the Menu Bar of Envision and select "Employee Certifications" from the menu.

15. Select the **"Start Date"** and **"Expires On"** date of the Certification.

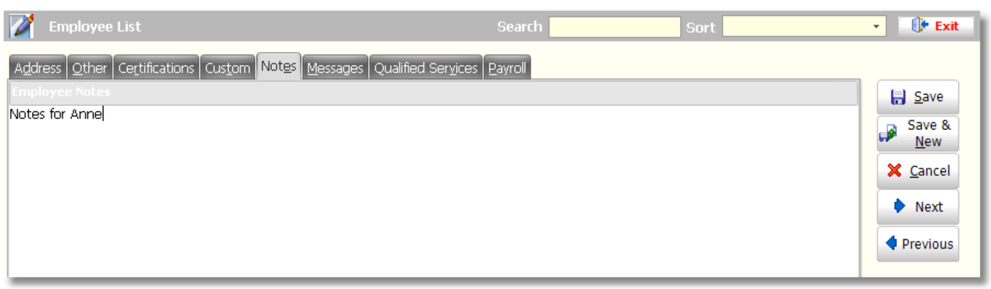
Removing Certifications: If you would like to remove a certification, right click on top of the certification in the list and select "Remove this Item".

16. Click on the **"Custom"** tab at the top of this screen if you would like to enter information into your User Defined Fields for the employee.



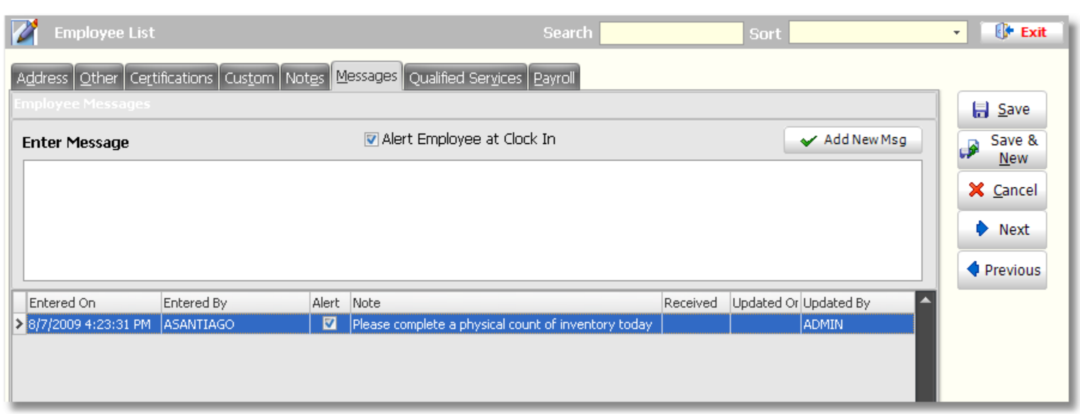
Setting Up Custom Fields: To setup your custom fields, click on "Company" on the Menu Bar of Envision and select "Setup Program Preferences" from the menu. Click on the "Setup User Defined Fields" button on the left to enter your own User Defined Fields.

17. Click on the **"Notes"** tab at the top of this screen if you would like to enter notes about this employee that you may want to keep on record.



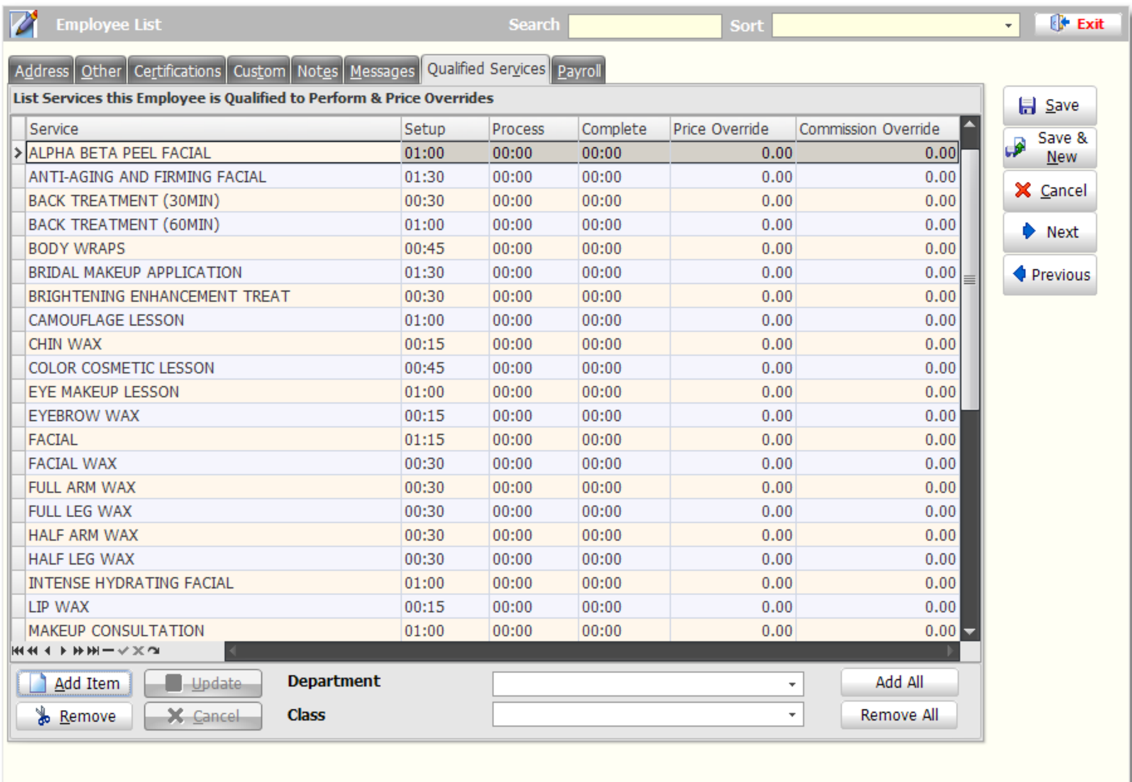
Employee Notes: The notes entered here can also be viewed in the Appointment Calendar. These notes should not be personal or private notes for the employee. The notes entered here can be used to assist your Front Desk with scheduling appointments if there is any information that the employee needs to remember when scheduling an appointment for this service provider.

18. Click on the **"Messages"** tab at the top of this screen. Use the Messages screen to send a message to an employee when they clock in with the Employee Time Clock.



Employee Messages: The Message screen can be used when a message needs to be passed on to an employee and you are not sure if they will receive the message or if you do not have time to give them the message yourself. You may enter the message in this screen and it will pop up when they clock in. You will also be able to see when the message was received.

19. Click on the **"Qualified Services"** tab at the top of this screen. Select the services that the employee is qualified to perform. To do this, click the "Add Item" button in the lower left hand corner of this screen or you may select a service department in the lower right hand corner of this screen and click the "Add All" button to add all of the services from the selected department.



20. You may also enter a specific price that this employee charges for these services if they charge a different price than the one you have entered in the service list (optional).

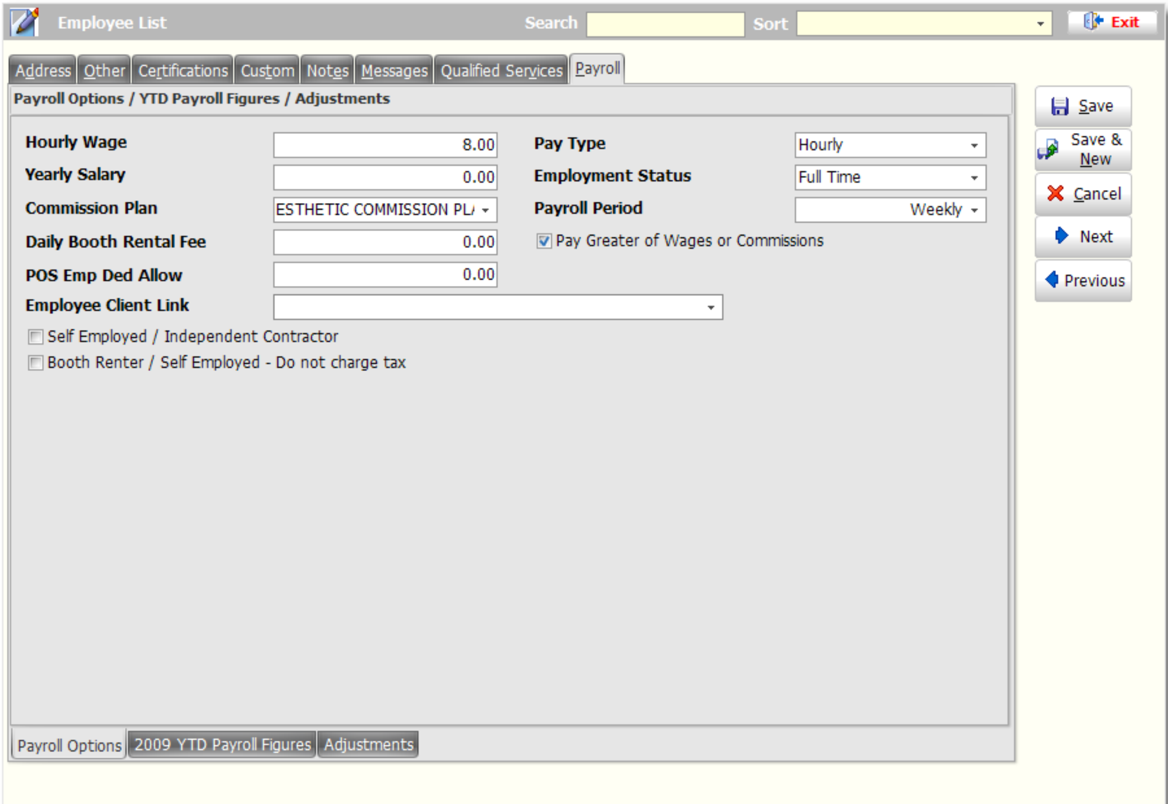
Employee Price: If the employee does not charge a different price than the prices you have setup for each service, leave the price at "0.00".

21. Enter the amount of time that it takes for this employee to complete the selected services.f When this employee is selected in the Appointment Calendar for an appointment, the times that you enter here will override the time that you have set for the service in the Service List.

22. Enter a specific dollar amount in the Commission Override field if the employee needs to receive a specific dollar amount of commission for a specific service (optional).

Commission Override: It is not necessary to enter an amount in this field if you would like the employee to be paid according to the Commission Plan you will be setting up for your employees. It is only necessary to enter a dollar amount here when the employee will be receiving a specific dollar amount instead of their commission percentage.

23. Click on the **"Payroll"** tab at the top of this screen. Enter the employee's payroll information on this screen. A Commission Plan can only be selected after you have set up your Commission Plan List.



Setup Commission Plans: Commission Plans can be setup by clicking on "Accounting" on the Menu Bar of Envision and selecting "Commission Plans" from the menu.

Pay Greater of Wages or Commission: The "Pay Greater of Wages or Commission" option allows you to pay an employee whichever is greater during the payroll period. If their hourly wage or yearly salary is greater than the commission they make during the payroll period, the payroll will pay this amount instead of the amount they made from commissions.

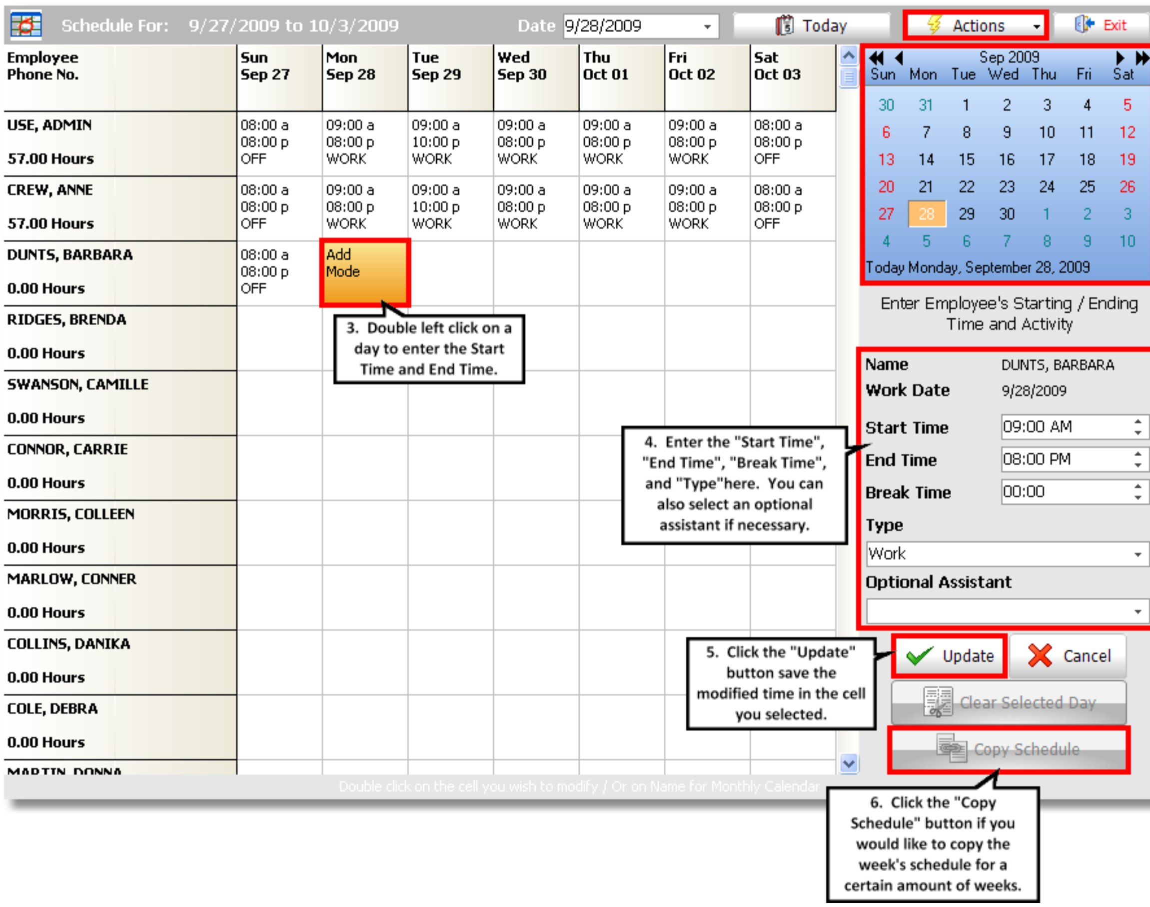
24. Click the **"Save"** button on the right to add the employee to the list or click the **"Save & New"** button to add the employee and open a blank entry screen. The **"Save & New"** button can be used when you are entering one employee after another.

9. Setup Employee Schedules

The Employee Schedule is where you will set the hours that each employee is available for in the Appointment Calendar.

1. Click on **"Employee"** on the Menu Bar at the top of the screen.

2. Select **"Employee Schedule"** from the drop down menu.



3. Double Left Click on the cell for the day you would like to modify.

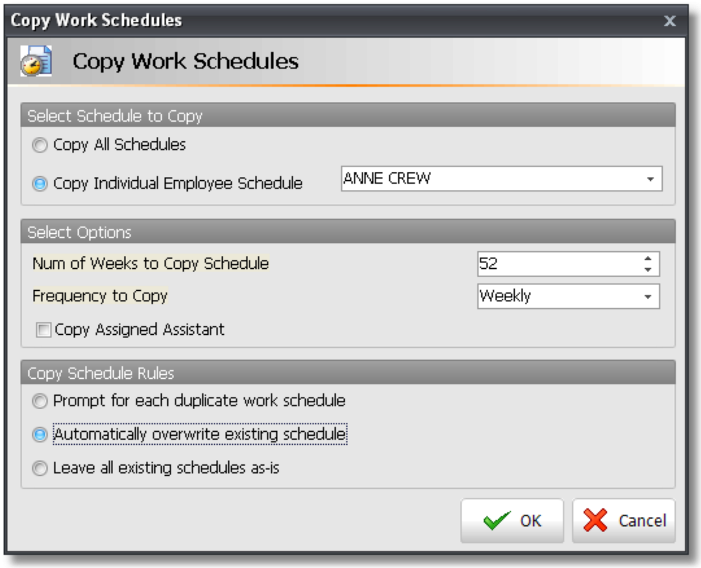
4. Enter the **"Start Time"**, **"End Time"**, **"Break Time"**, and **"Type"** on the right.

Under each employee's name and telephone number are the total Hours scheduled for the week. Don't forget to schedule in "Break Time" for meals and breaks. These deduct from the total hours for the week. You can also clear a selected day for an employee by highlighting the day and clicking the "Clear Selected Day" button.

5. Click the **"Update"** button save the modified time in the cell you selected.

6. Click the **"Copy Schedule"** button if you would like to copy the week's schedule for a certain amount of weeks.

The following screen appears when you click the "Copy Schedule" button. This screen allows you to copy a schedule you have created for one week to as many weeks as you wish. If there are duplicates already scheduled in the destination time period you will be warned and allowed to make choices.



7. Select either **"Copy All Schedules"** or **"Copy Individual Employee Schedule"**. If you select an Individual schedule, you must select the employee from the drop down list in the Employee field to the right.

8. In the **"Num of Weeks to Copy Schedule"** field, use the small arrow buttons to select how many weeks you want to copy the schedule you created. For example, if you would like to copy the employee's schedule out for a year, enter "52" into the number of weeks field.

9. Select the **"Frequency to Copy"**. This is how often the employee has this schedule. If they have the same schedule every week, the frequency should be set to **"Weekly"**. If they have the same schedule every other week, the frequency should be set to **"2 Weeks"**. If this is the case, you will need to go to the very next week in the calendar, enter their schedule for that week and then copy that week's schedule out for a frequency of **"2 weeks"**. This will create a schedule of two different weeks that alternate. This is commonly used if an employee works every other Friday or Saturday.

10. Select the **"Copy Schedule Rules"** option that you would like to use.

In case you have created future weeks schedules for this employee, you may not want to overwrite them. For example, you may have gone 8 weeks into the future to change a days schedule for this employee because of personal reasons. There are 3 options you may use to determine If and How you will overwrite future schedules.

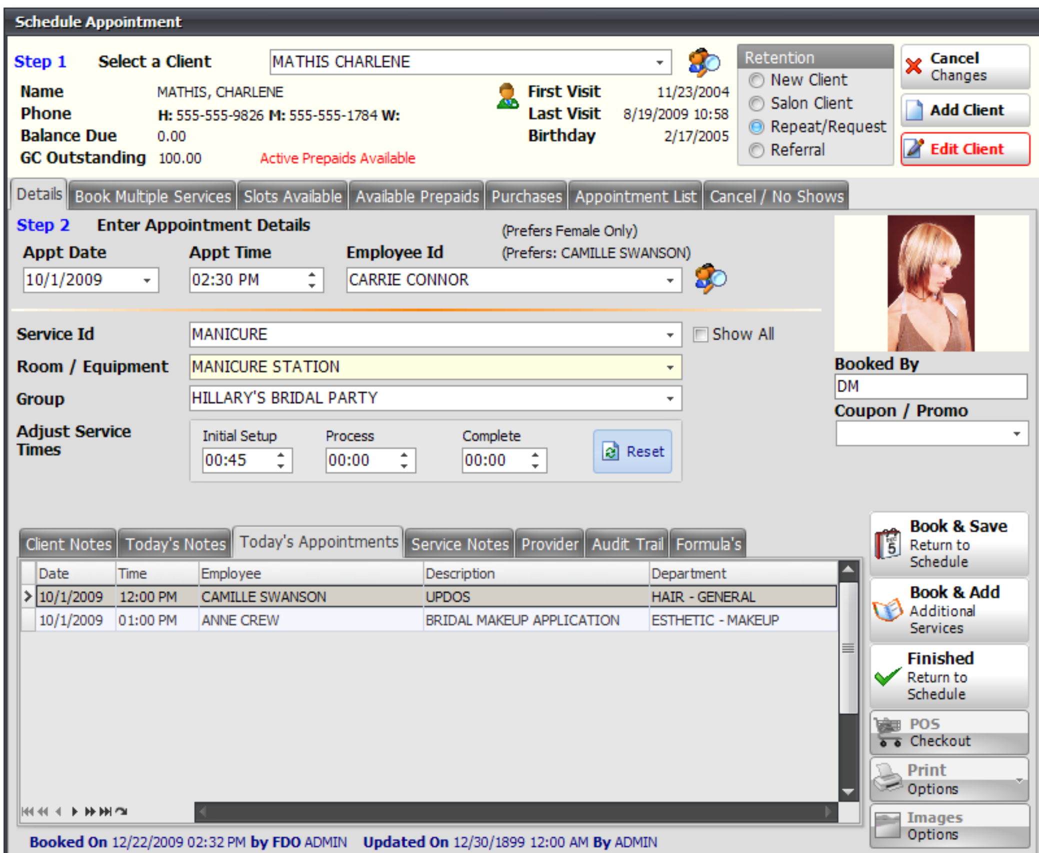
- **Prompt for each:** You will be prompted before overwriting future schedules.
- **Automatically Overwrite:** This will overwrite all future weeks without prompting you.
- **Leave all Existing:** This will not overwrite any future weeks.

10. Transfer Appointments into the Envision Calendar

Before you are able to schedule appointments in Envision for new appointments or for new clients, you will need to transfer appointments from your old program or old appointment book into the Envision Calendar. In order to do this efficiently, it would be best to select a "Go Live Date" for Envision. The "Go Live Date" is the date that you would like to start using Envision exclusively. After deciding what the best date is to do this, you will want to start entering all of the appointments that are already scheduled on that date and any appointment scheduled after that date, into the Envision Calendar. By doing this, all of your appointments will be in the Envision Calendar when you start to use the program. You will not need to go back to the old program or appointment book to check for an appointment. This also will give you the opportunity to add the clients into Envision that already have an appointment scheduled. Below are instructions for scheduling an appointment.

The instructions here are simple instructions for scheduling an appointment.

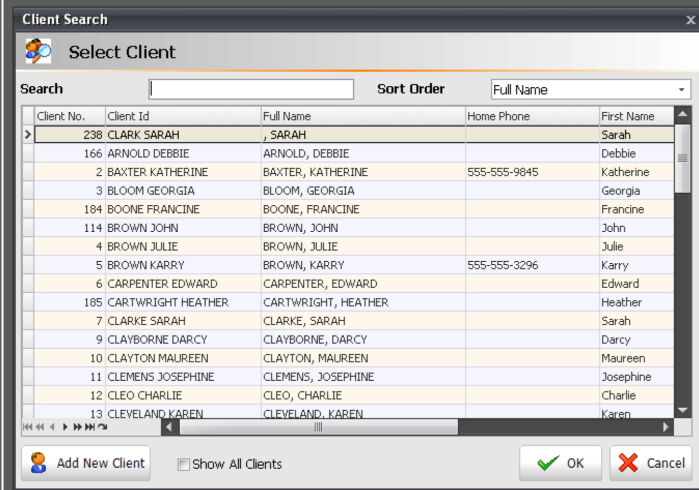
1. Double left click on a time slot in the correct employee's column for the appointment you would like to schedule. It is important that you click on the correct timeslot. This will automatically set the "Appt Date", "Appt Time" and "Employee Id" for you.



2. Select the client that you are scheduling the appointment for or click on the **"Add Client"** button to the right to add the client to your Client List.

Selecting a Client: Start typing in the name of the client to narrow down the search. This will populate names into the Client ID field. If there are similar names in your Client List, the program will narrow down the search by every additional letter you enter. You may also click on the drop down arrow in the "Client Id" field to get a drop down list of clients you may select from.

Searching for a Client: Click on the small button (icon of two people with a magnifying glass) to the right of the Client ID field to populate the Client Search screen. This button will open a list of your clients. This screen will allow you to search for a client by their "Full Name", "Home Phone", "Client No." or "Client Card No." Click the "Add New" button to add a client to this list.



3. Select the Client **"Retention"** Type if required. Select whether the client is a new client, a salon client, if they requested to see that employee or if they were referred.

4. Select the **"Service Id"** for the appointment you are scheduling. Click the small drop down arrow and select the service to be performed for this appointment. You may also click on the search button to the right of the Service Id field to open a list of services. You may make this list smaller by selecting a specific department.

Note: The Date, Time and Employee have already been selected because you have double left clicked on a specific time slot.

5. Edit the time if necessary in the **"Adjust Service Times"** fields. The time that it takes to complete the service will appear as soon as you select a service. If the client or employee needs more or less time for this service, you may edit the time before you complete the scheduling of the appointment.

6. Select a **"Resource"** if necessary. If a resource such as a Massage Room is required for this service, click the drop down arrow and select the resource from the listing. If you have selected a Resource Category for the service you have selected for this appointment, the resource field will show the selected resource category grayed out.

7. Enter your initials in the **"Booked By"** field if required. Initials of the employee that is booking the appointment may be entered into this field. This may be useful if there are any discrepancies of who booked the appointment.

8. Click the **"Book & Save"** or **"Book & Add"** button.

- **Book & Save:** This button will save the information you have entered, close this screen, and bring you back to the Appointment Schedule screen.

- **Book & Add:** Click this button if you would like to schedule more services for the same client. The Appointment Time will change to the next available time for the client and employee and the Service Id field will clear so that you may select an additional service.

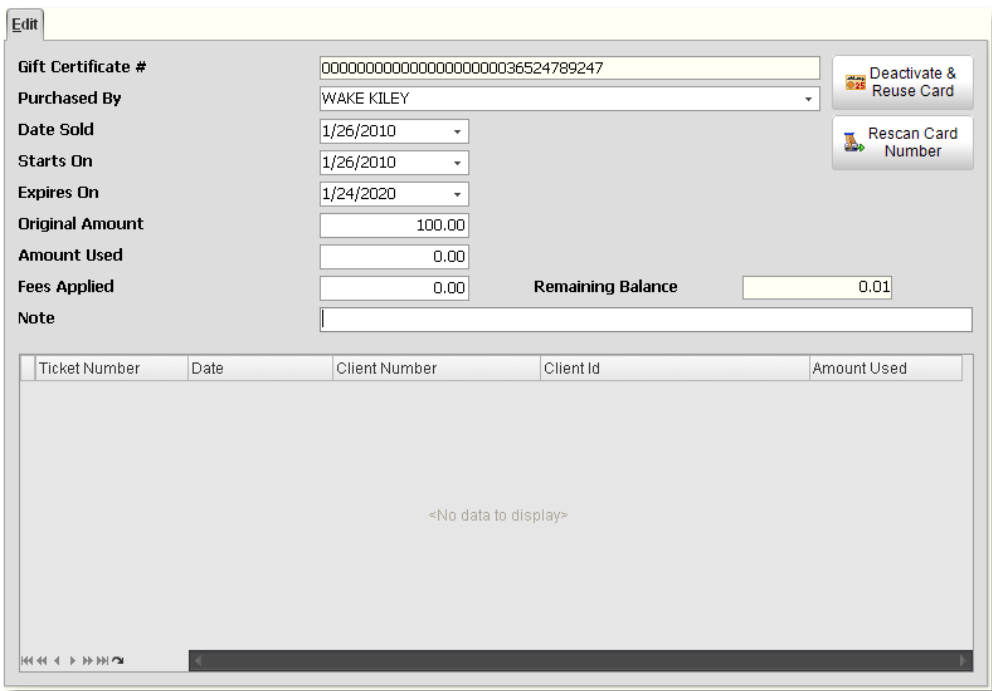
11. Transfer Gift Certificates into Envision

If there are outstanding gift certificates that are not in Envision that you would like your clients to be able to redeem and if you would like to keep track of the remaining balances for these gift certificates in Envision, it would be best to manually enter these into the Gift Certificates list in Envision. This can be very time consuming if there are many outstanding gift certificates. If you do not wish to do this, you can use one of the "Other" payment types in the Sales Register for old gift certificates, however Envision will not be able to provide a remaining balance for these gift certificates, you will need to track this manually. Below are instructions for manually entering a gift certificate in Envision that has already been sold.

1. Click on **"Client"** on the Menu Bar of Envision.

2. Select **"Gift Certificates"** from the menu.

3. Click on the **"New"** button at the top of the list.



4. Enter the gift certificate number or gift card number into the **"Gift Certificate #"** field. After entering this number and clicking in another field, zeros will be add to the front of the number, this is normal and should not be changed.

5. Select from your Client List the **"Purchased By"** client. This is the client that paid for the gift certificate.

6. If you know the original date that the gift certificate was sold on, select the **"Date Sold"**. If not, select today's date.

7. Edit the **"Starts On"** and **"Expires On"** date if necessary.

8. Enter the **"Original Amount"** that the gift certificate was purchased for.

9. If the gift certificate has already been used before, enter the amount into the **"Amount Used"** field.

10. Enter a **"Note"** if necessary.

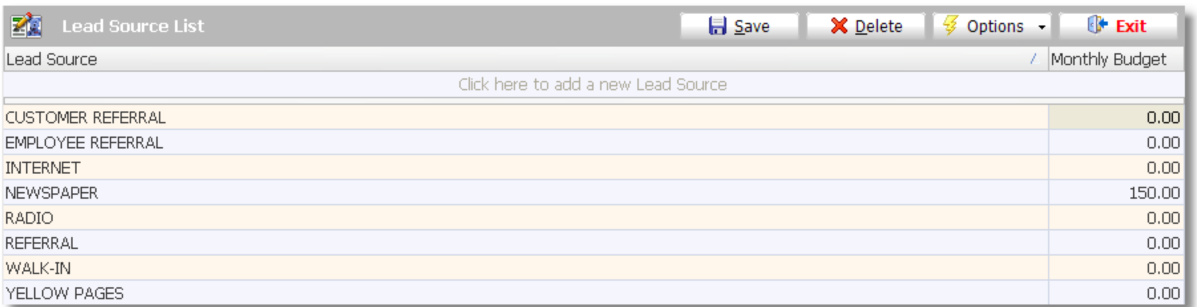
11. Click the **"Save"** button on the right.

12. Setup Lead Source List

Setting up your list of Lead Sources is necessary for entering new clients into the program. The Lead Source is how the client has heard of you. When adding a client, it is best to ask how they heard of you so that you can select their Lead Source when adding the client. This will allow you to run Lead Source Analysis reports to find out which types of advertising are working the best and which ones might not be necessary. You can also find out how many clients came from a specific Lead Source and how much money they spent.

1. Click on **"Client"** on the Menu Bar of Envision.

2. Select **"Lead Source List"** from the menu.



3. Click in the row labeled **"Click here to add a new Lead Source"**.

4. Enter the name of the Lead Source in the **"Lead Source"** field.

5. Enter the amount of money you normally spend per month on this type of advertising in the **"Monthly Budget"** field.

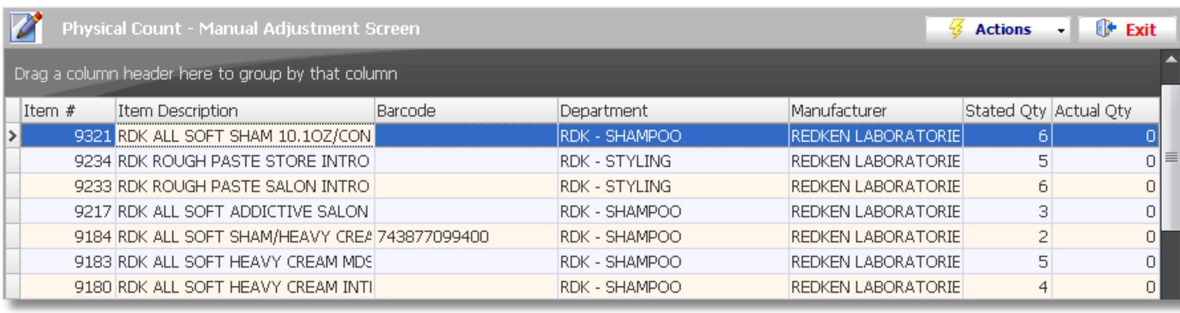
6. Click the **"Save"** button at the top of this screen.

13. Physical Count – Count Retail

Before you start to sell retail in Envision, you will need to perform a Physical Count of all your retail products so that the program has an accurate count of how many products you currently have. You can enter the "Qty On Hand" when you are setting up your list of retail products, however if you are currently selling those retail products while setting up the program, you will need to recount them before you start using the Sales Register in Envision. Once the first count has been completed, the system will automatically deduct the amount sold from the "Qty On Hand" each time an item is sold and the quantity will increase each time a Purchase Order is received. Even though the program will automatically reduce and increase the quantity of your retail products, it is still a good idea to perform a Physical Count every month or every three months to ensure that the program has an accurate count.

1. Click on **"Inventory"** on the Menu Bar of Envision.

2. Select **"Physical Count - Manual Adjustment Screen"** from the menu.



3. Click on the **"Actions"** button in the upper right hand corner and select **"Print Item Count Worksheet"** from the menu.

4. Select the preferred options and click the **"Print"** button to print a worksheet that can be used to write down how many products you have for each item listed.

5. On the **"Physical Count - Manual Adjustment Screen"**, enter the correct quantity for each item under the **"Actual Qty"** column.

Actual Qty: You will only need to enter a number in this field if the quantity you counted is different than the "Stated Qty". If you need to change the "Stated Qty" to zero, enter a negative amount of the "Stated Qty" into the "Actual Qty" field. This will bring the amount to zero when you update the list.

6. After entering the **"Actual Qty"** for each item that needs to be edited, click the **"Actions"** button again and select **"Update Inventory Quantities"**.

Notes