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Where Technology Meets Style.



Salon & Spa Software

Envision's Initial Setup and Quick Reference Guide

Table of Contents

Part I Introduction	1
Part II Setup	2
1 Retail Item Setup	2
2 Service Item Setup	6
3 Package / Series Setup	10
4 Employee Setup	14
5 Employee Schedule Setup	20
6 Program Preference Setup	22
7 Security Setup	34
8 Resource Setup	36
Part III Calendar Features	38
1 Scheduling an Appointment	38
2 Editing an Appointment	40
3 Moving an Appointment	41
4 Repeating an Appointment	43
5 Canceling an Appointment	44
6 Booking Standing Appointments	45
7 Group Booking	46
8 Confirm an Appointment	47
9 Check In / Begin Servicing / Finish Servicing	48
10 Blocking Employee Time	48
11 Printing Appointment Schedules	50
12 Printing Work Tickets	51
13 View Client's Next Appointment	52
14 Check Service Price	52
15 View Audit Screen and Cancellations	53
16 Checking a Client Out	54
Part IV Sales Register Features	56
1 Open Drawer	56
2 Checking a Client Out	57
3 Credit Card Processing	59
4 Entering Tips	63
5 Selling a Gift Certificate	64
6 Discounting	65

7	Combining Tickets	66
8	Selling and Redeeming Packages / Prepaid Items	69
	Selling and Redeeming a Series Package	69
	Selling a Series Package	69
	Selling a Series Package as a Gift	71
	Scheduling a Series Package	75
	Redeeming a Series Package	76
	Selling and Redeeming a Multiple Service Package	77
	Selling a Multiple Service Package	77
	Selling a Multiple Service Package as a Gift	79
	Scheduling a Multiple Service Package	83
	Scheduling a Multiple Service Package - Prepaid (Paid In Advance)	85
	Checking Out a Multiple Service Package	87
	Redeeming a Multiple Service Package - Prepaid (Paid In Advance)	88
	Selling and Redeeming a Prepaid Item	90
	Selling a Prepaid Item	90
	Selling a Prepaid Item as a Gift	92
	Scheduling a Prepaid Item	96
	Redeeming a Prepaid Item	97
9	Deleting an Item From a Ticket	98
10	Returns / Refunds	99
11	Recalling a Ticket	100
12	Voiding a Ticket	101
13	Z-Out Procedures	103
Part V Employee Features		108
1	Employee Time Clock	108
2	Manage Time Cards	109
	Adding Time Card Records	109
	Editing Time Card Records	110
	Removing Time Card Records	110
3	Employee Teams	111
4	Employee Work History	112
5	Email Employee Schedules / Notices	113
Part VI Client Features		114
1	Adding a Client	114
	Adding a Client at the Sales Register	114
	Adding a Client When Scheduling an Appointment	115
	Adding a Client In The Client List	116
2	Adding a Client Formula	117
3	Checking a Client's Gift Certificate Balance	118
4	Checking a Client's Prepaid Balance	118
5	Checking a Client's Sales History	119
	Purchase History - Scheduling an Appointment	119
	View History - Sales Register	119
	Purchase History - Client List	120

6	On Account Payments	120
	Placing a Payment On Account	120
	Making On Account Payments.....	121
	Placing a Credit On Account	123
	Using a Credit On Account	124
Part VII Inventory Control		126
1	Purchase Orders	126
2	Receiving Inventory	128
3	Physical Counts	129
4	Backbar Procedures	130
	Professional Consumables.....	130
	Manual Backbar Tracking.....	131
	Creating a Backbar Client and Backbar Discount Plan.....	131
	Tracking Backbar Products	132
	Tracking Backbar/Retail Products.....	133
	Backbar Reports.....	135
	Ordering Backbar Products.....	135
5	Printing Inventory Labels	136
	Printing Labels from the Inventory Menu	136
	Printing Received Inventory Labels	137
Part VIII Payroll		139
1	Setup Commission Plans	139
	Straight Commission Plan	139
	Sliding Scale Commission Plan	141
	Inventory Department Commission Plan	143
2	Employee Payroll Settings	144
3	Running Payroll	145
4	Payroll Reports	148
	Payroll Detail Report	148
	Payroll Commission Report	149
	Employee Payroll Sheets.....	151
	Employee Hours Worked Report	152
	Employee Tips Report	154
Part IX Marketing		155
1	Creating a Marketing Template	155
2	Creating Marketing Filters	163
	Client Options Tab	164
	Appointment Options Tab	167
	Sales Options Tab	168
	SQL Filter Tab	169
	Filter Buttons	169
3	Marketing Filter Examples	170
	Welcome Filter	170
	Inactive Clients Filter	171
	Short Notice Filter	173

Top Clients Filter	175
Service Provider's Clients Filter	176
Birthday Filter	178
Client Type Filter	179
All Clients Filter	181
4 Email Marketing Procedures	182
Part X Reports	184
Index	0

Introduction

The Initial Setup and Quick Reference Guide can be used during the setup process of Envision and while you are learning how to use Envision. This guide will provide step by step instructions. 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. The steps provided are for the most commonly used features. There may be some additional steps that you may need to take for additional options. 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.

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

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Setup

Retail Item Setup

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 to 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" on 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, cleaning products, 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.

Service Item Setup

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.

Services

Search ALL Sort [v] [Exit]

Item Id ALL OVER COLOR Item # 74 [Active?] Item Type Service

Edit Price / Time Exceptions Service Package Professional Consumables Sales History

Description All Over Color Product / Service Required again in 42 days

Barcode

Department HAIR - CHEMICAL

Class COLOR Last Sale On 9/1/2009 12:26:15 PM

1st Resource Last Update On 9/4/2009 1:51:36 PM

Service Type HAIR - CHEMICAL

Web URL

Price Sale Scheduling Options Service Commission Loyalty Overrides Accounting Notes

Service Pricing Table

Level 1	70.00	Level 6	95.00
Level 2	75.00	Level 7	65.00
Level 3	80.00	Level 8	0.00
Level 4	85.00	Level 9	0.00
Level 5	90.00	Level 10	0.00

Non-Taxable Item
 Display on POS Button Panel
 No Discounts on this Item
 No Price Overrides on this Item

Save Save & New Cancel Next Previous Update Service Types

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.

Package / Series Setup

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.

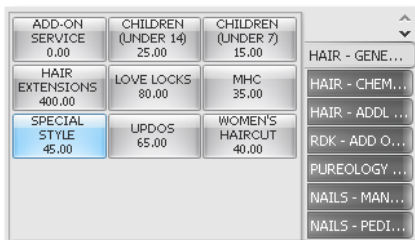
6. It is not necessary to enter a barcode number for package items, however you may enter your own unique barcode number into the "**Barcode**" field or you may leave the default that Envision placed here if you have chosen to have the program enter the Item No. of the item in this field. This is the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

Seq #	Item Id	Qty	Description	Retail	Price	Extend
Click here to add a new row						
1	1 HOUR SWEDISH MASSAGE	1	1 HOUR SWEDISH MASSAGE	85.000	76.500	76.50
2	FACIAL	1	Facial	85.000	76.500	76.50
3	LUNCH	1	Lunch	15.000	13.500	13.50
4	ULTIMATE SPA MANICURE	1	ULTIMATE SPA MANICURE	45.000	40.500	40.50
5	ULTIMATE SPA PEDICURE	1	ULTIMATE SPA PEDICURE	65.000	58.500	58.50

Assign a price or discount to entire package			Value
Price	0.00	Set Discount % or Package Price	295.00
% Disc	10.00		Retail Price 265.50
			% Discount 10.00

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.

Employee Setup

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 Employee 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".

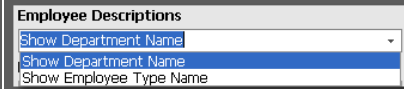
10. Click on the "**Other**" tab at the top of the screen.

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.



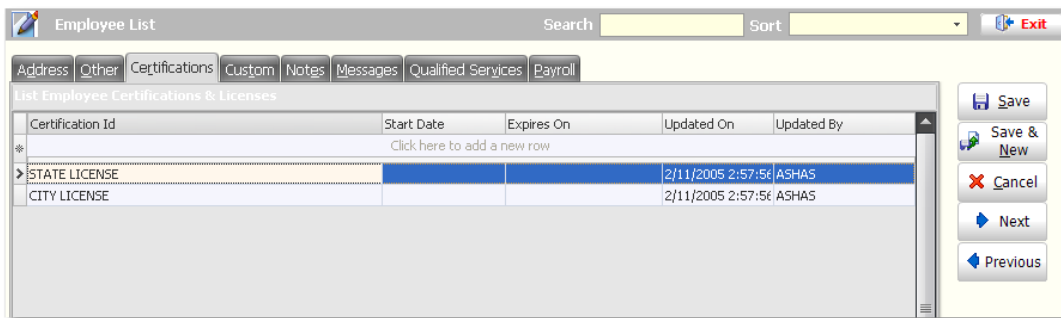
12. Select the Employee's "Birthdate" and "Date Started" if you would like to keep this information on record.

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.

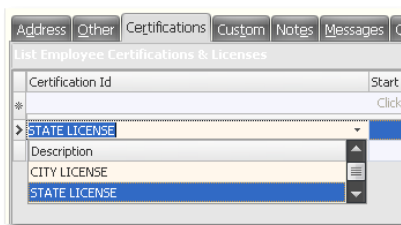
Setting Up Security: There are three parts to setting up the Program Security. First Security Profiles are created, then Passwords and Security Profiles are assigned to each employee, and last is enabling the Program Security. This is the second step of setting up the security. For more information on 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.

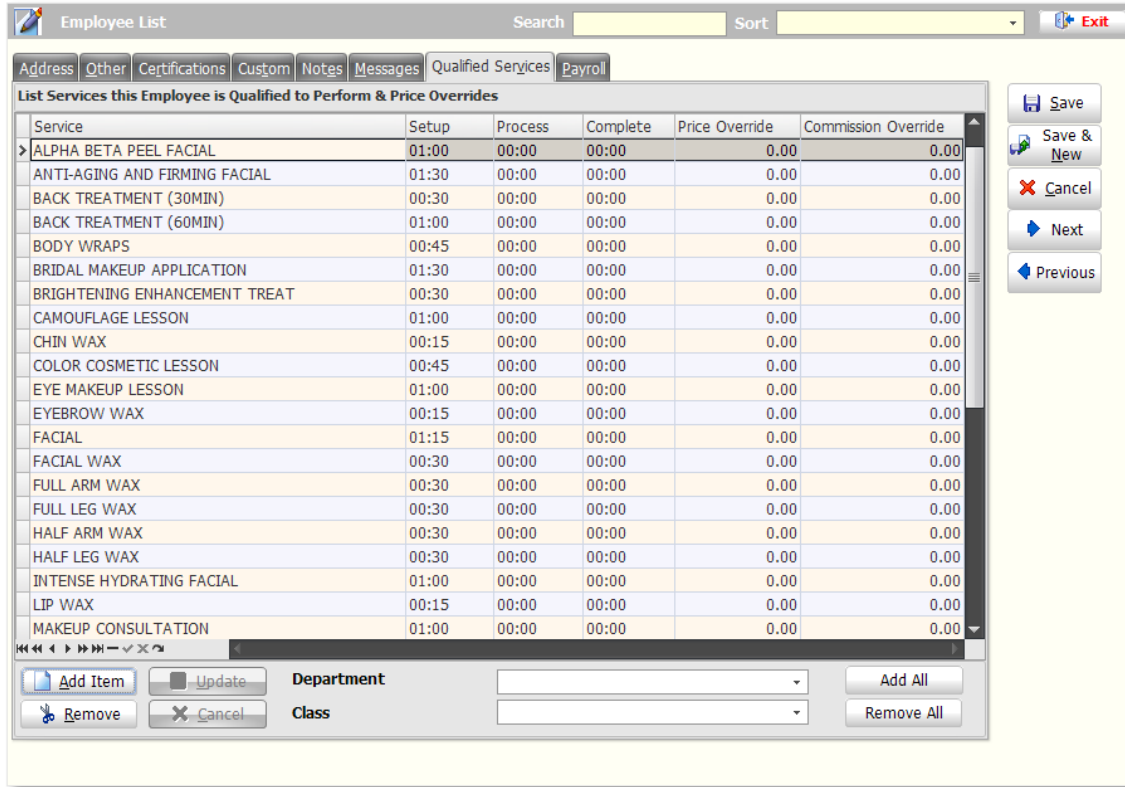
Employee Notes: The notes entered here can also be viewed in the Appointment Calendar. These notes should not be personal or private notes for the employee. The notes entered here can be used to assist your Front Desk with scheduling appointments if there is any information that the employee needs to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

Entered On	Entered By	Alert	Note	Received	Updated Or	Updated By
8/7/2009 4:23:31 PM	ASANTIAGO	<input checked="" type="checkbox"/>	Please complete a physical count of inventory today			ADMIN

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. 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.

The screenshot shows the 'Employee List' window with the 'Payroll' tab selected. The window title is 'Employee List' and it includes search and sort fields. The 'Payroll' tab is active, showing the following fields and options:

- Hourly Wage:** 8.00
- Yearly Salary:** 0.00
- Commission Plan:** ESTHETIC COMMISSION PL
- Daily Booth Rental Fee:** 0.00
- POS Emp Ded Allow:** 0.00
- Employee Client Link:** (dropdown menu)
- Self Employed / Independent Contractor
- Booth Renter / Self Employed - Do not charge tax
- Pay Type:** Hourly
- Employment Status:** Full Time
- Payroll Period:** Weekly
- Pay Greater of Wages or Commissions

On the right side of the screen, there are several buttons: Save, Save & New, Cancel, Next, and Previous. At the bottom of the window, there are tabs for 'Payroll Options', '2009 YTD Payroll Figures', and 'Adjustments'.

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.

Employee Schedule Setup

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.

The screenshot displays the 'Employee Schedule Setup' window. The main area is a grid with columns for days of the week (Sun Sep 27 to Sat Oct 03) and rows for employees. The employees listed are USE, ADMIN; CREW, ANNE; DUNTS, BARBARA; RIDGES, BRENDA; SWANSON, CAMILLE; CONNOR, CARRIE; MORRIS, COLLEEN; MARLOW, CONNER; COLLINS, DANIKA; COLE, DEBRA; and MARTIN, DONNA. Each row shows the employee's name, phone number, and total hours for the week. The 'DUNTS, BARBARA' row is highlighted, and a callout box points to the 'Add Mode' button in the Monday column.

On the right side, there is a calendar view for September 2009 and a form for editing the selected employee's schedule. The form includes fields for Name, Work Date, Start Time, End Time, Break Time, Type, and Optional Assistant. Below the form are buttons for 'Update', 'Cancel', 'Clear Selected Day', and 'Copy Schedule'. A callout box points to the 'Update' button.

At the bottom of the window, there is a footer that reads: 'Double click on the cell you wish to modify / Or on Name for Monthly Calendar'.

Numbered callout boxes provide instructions:

3. Double left click on a day to enter the Start Time and End Time.
4. Enter the "Start Time", "End Time", "Break Time", and "Type" here. You can also select an optional assistant if necessary.
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.

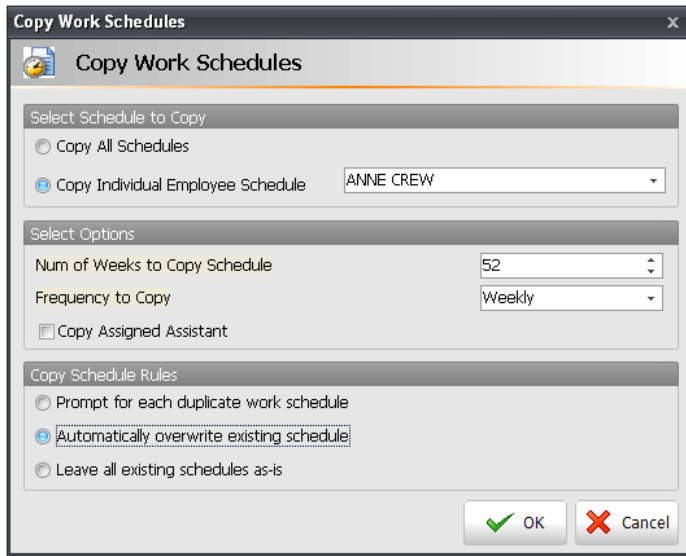
3. Double Left Click on the cell for the day you would like to modify.
4. Enter the "**Start Time**", "**End Time**", "**Break Time**", and "**Type**" on the right.

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.

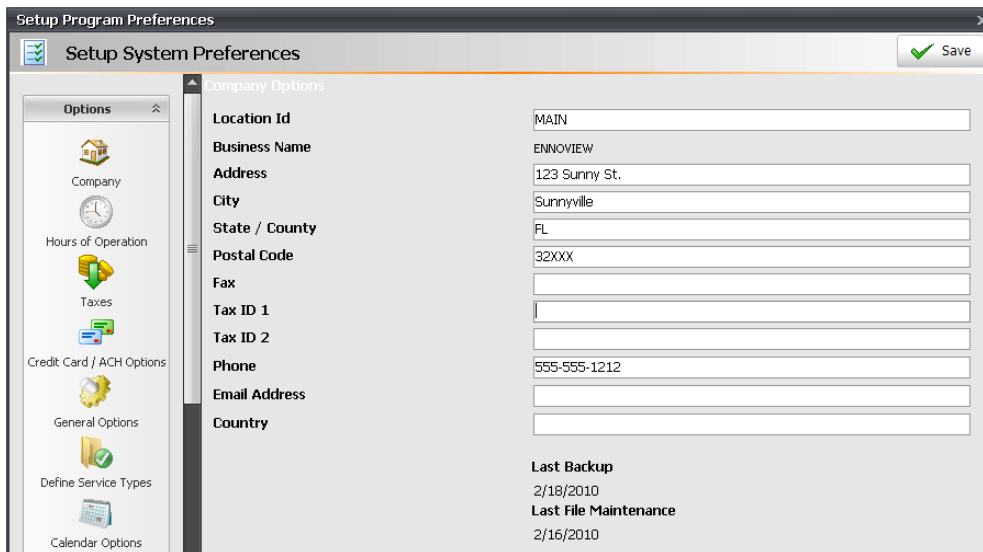
In case you have created future weeks schedules for this employee, you may not want to overwrite them. For example, you may have gone 8 weeks into the future to change a days schedule for this employee because of personal reasons. There are 3 options you may use to determine If and How you will overwrite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

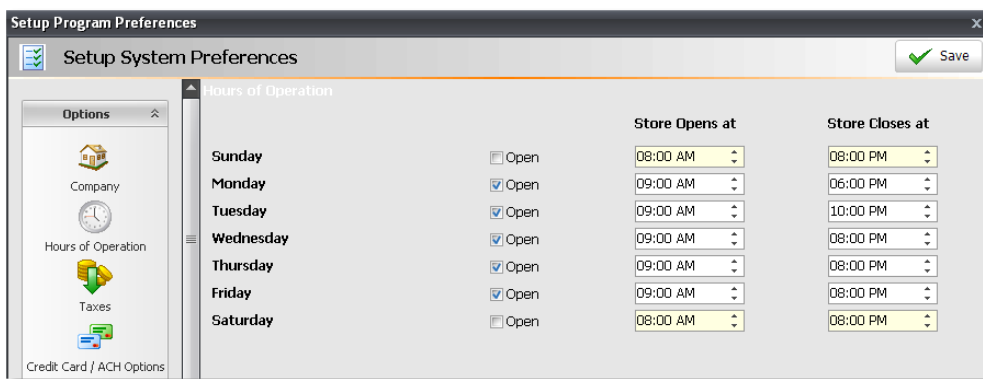
Program Preference Setup

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.



		Store Opens at	Store Closes at
Sunday	<input type="checkbox"/> Open	08:00 AM	08:00 PM
Monday	<input checked="" type="checkbox"/> Open	09:00 AM	06:00 PM
Tuesday	<input checked="" type="checkbox"/> Open	09:00 AM	10:00 PM
Wednesday	<input checked="" type="checkbox"/> Open	09:00 AM	08:00 PM
Thursday	<input checked="" type="checkbox"/> Open	09:00 AM	08:00 PM
Friday	<input checked="" type="checkbox"/> Open	09:00 AM	08:00 PM
Saturday	<input type="checkbox"/> Open	08:00 AM	08:00 PM

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.

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

Tax Options

Select Appropriate Region (Presets Tax Options)

- US Sales Tax
- Canadian (GST / PST or HST)
- Canadian (Quebec / Prince Edward GST/QST)
- European VAT
- Australian GST
- New Zealand GST

Setup Rates

		Rate 1	Rate 2	Rate 3
Retail Products	<input checked="" type="checkbox"/> Taxable	6.500	0.000	0.000
Service Items	<input type="checkbox"/> Taxable	10.000	0.000	0.000
Tanning Products	<input type="checkbox"/> Taxable	10.000	0.000	0.000
Memberships	<input type="checkbox"/> Taxable	10.000	0.000	0.000
Gift Certificates	<input type="checkbox"/> Taxable	0.000	0.000	0.000

Tax Included in Product Price
 Compound Tax Rate 2 (Include Ticket Total + Tax 1)
 Compound Tax Rate 3 (Include Ticket Total + Tax 2)

Setup Tax Options

- Remove Tax Line on Printed Receipt
- Add Tax to Gift Certificates

Tax Name

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).

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

Credit Card Options

Credit Card Processor Selection

- Credit Card Software Terminal (Credit & Debit Transactions)
- ICVerify (Credit Transactions Only)
- UK Only - Yes Pay

Preauthorize Credit Card Receipts to Allow for Tip Entry (**May cause higher Processing Fees**)

Credit Card Terminal Software Setup | ICVerify | Credit Card Processing Information

Please call 1-407-253-0913 for help setting up a merchant account.

PNS Merchant No. (MID)
Client No. (CID)
Terminal No. (TID)
User Name
Password

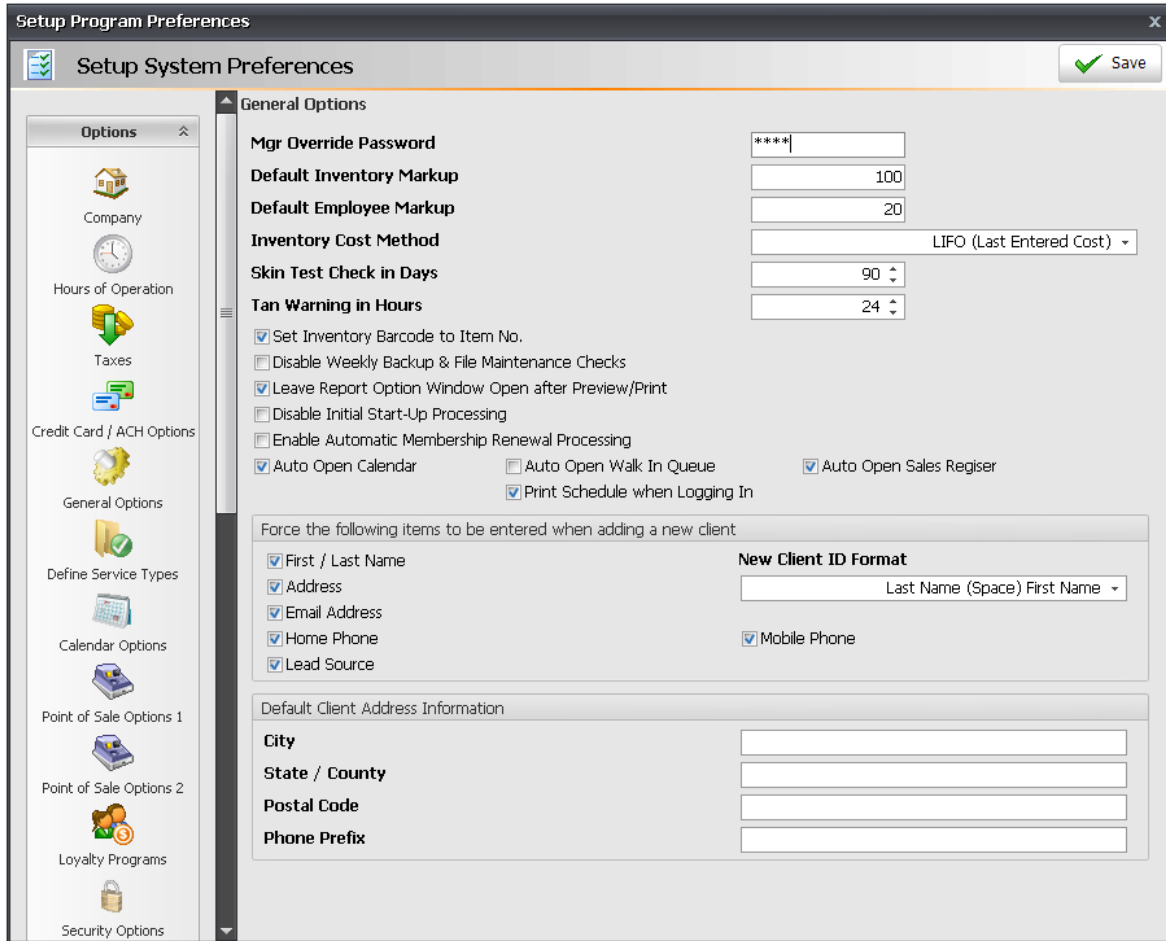
ACH Username / Password Information

User Name
Password

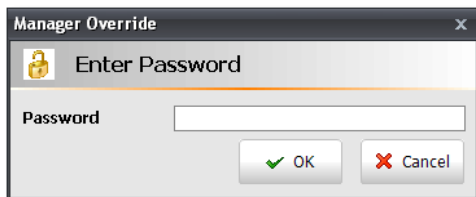
Please call 1-407-253-0913 to setup an ACH account for membership billing.

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:

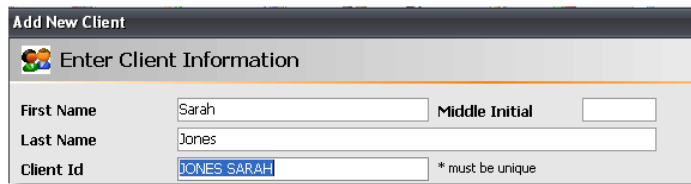
- Recall Ticket
- Void Ticket
- Remove Ticket
- No Sale
- Pay Out
- Override Time Clock (Override Button on the Time Clock screen)

- 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.

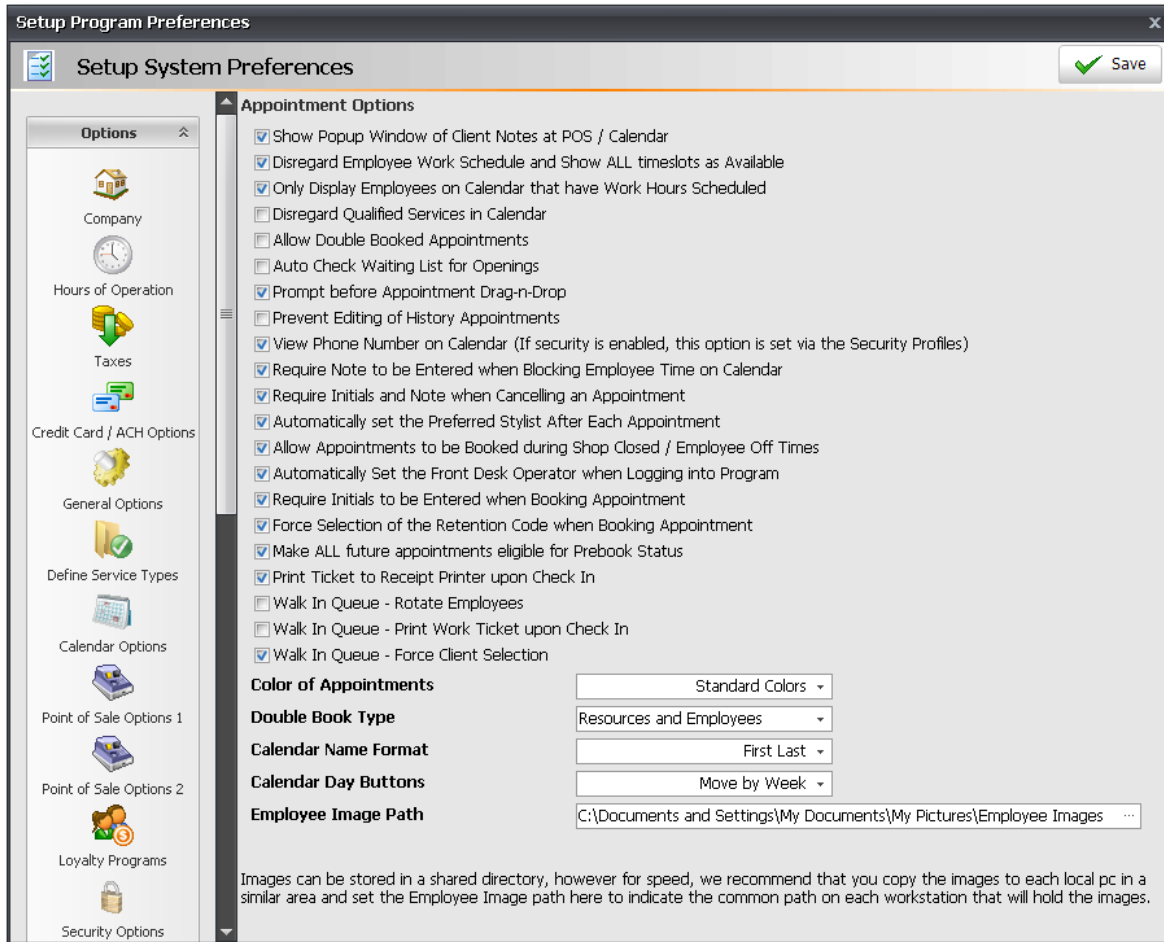
13. Enter the "**Default Employee Markup**" (optional). If you markup your products by a small percentage when products are sold to your employees, enter a number that is a percent of markup that will be used as the default for Employee purchases. Setting a percentage here will automatically set the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

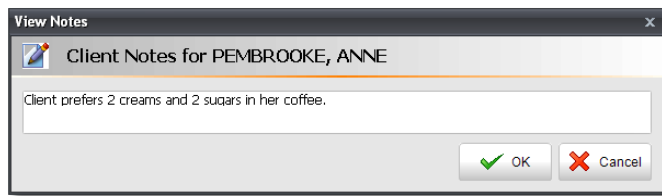


The screenshot shows a dialog box titled "Add New Client" with a sub-header "Enter Client Information". It contains three input fields: "First Name" with the value "Sarah", "Middle Initial" which is empty, and "Last Name" with the value "Jones". Below these is a "Client Id" field containing "JONES SARAH" with a note "* must be unique".

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



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.

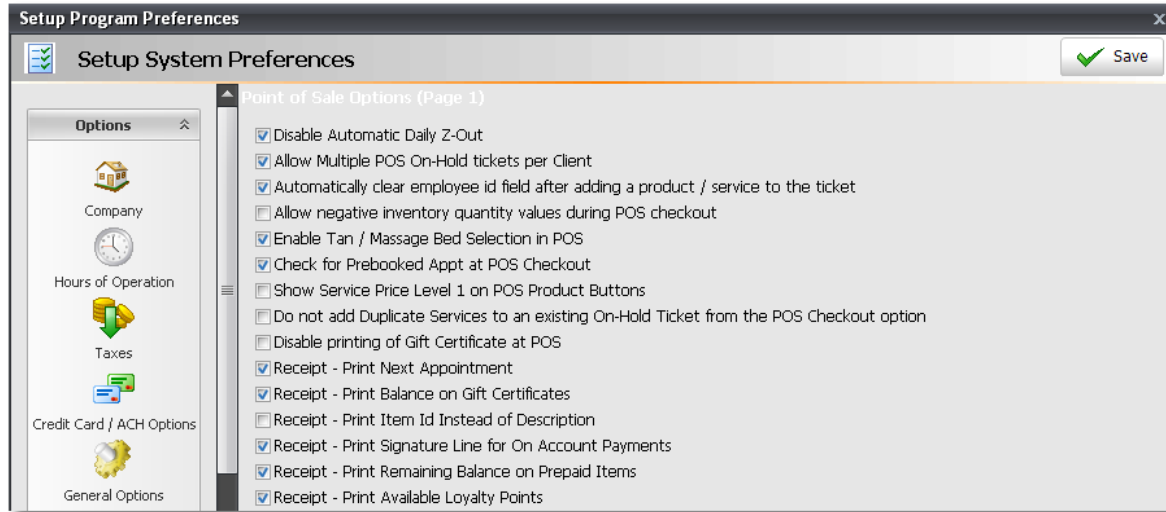
24. Check the **"Require Initials and Note when Canceling an Appointment"** option if you would like to force your employees to enter their initials and a reason when canceling an appointment in the Calendar. They will not be able to cancel an appointment without entering this information.

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.

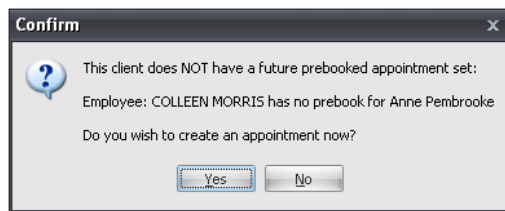
28. Click on the **"Point of Sale Options 1"** button on the left.



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.

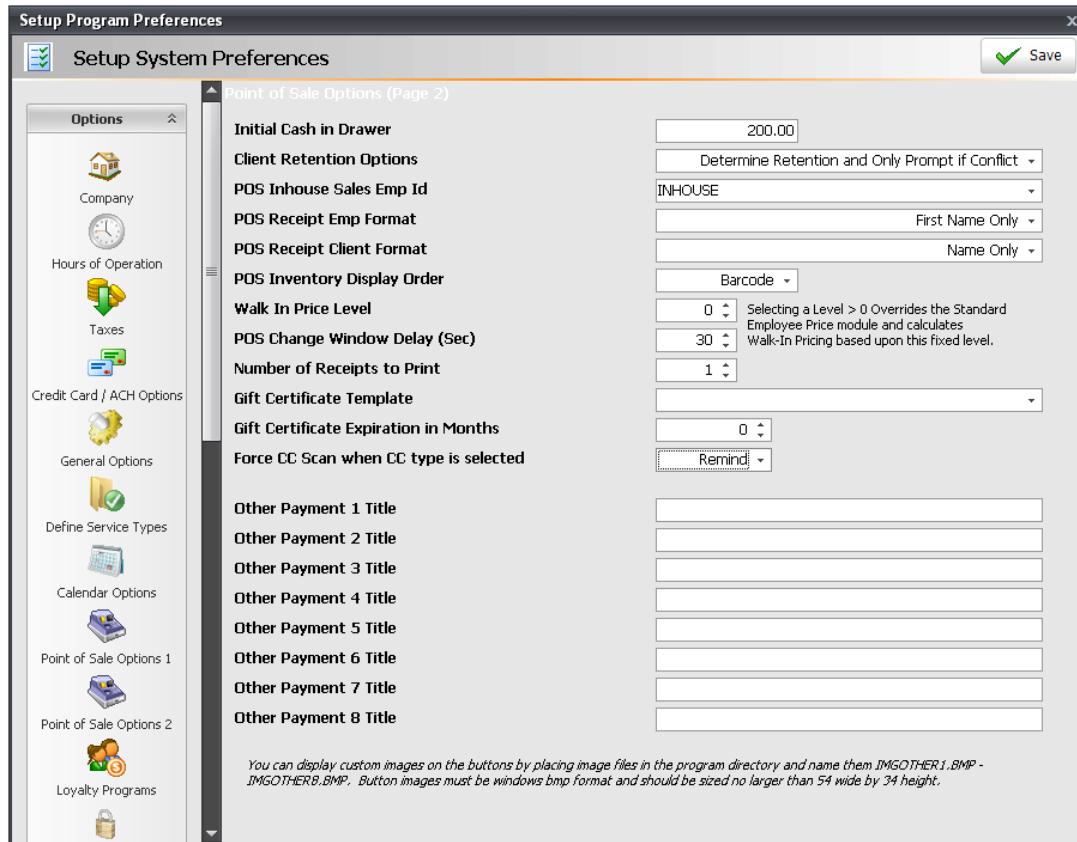
34. Check the **"Receipt - Print Signature Line for On Account Payments"** option if you will be using the On Accounts payment feature. This will print a signature line on your receipts when the "On Account" payment type has been selected.

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.

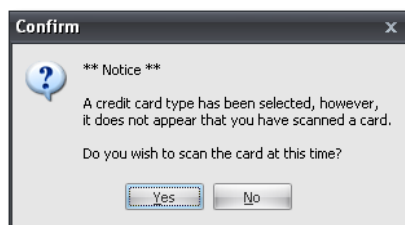
37. Click on the **"Point of Sale Options 2"** button on the left.



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.

Setup Program Preferences

Setup System Preferences Save

Point of Sale Options 2

Loyalty Programs

Security Options

Setup User Defined Fields

Appointment Reminders

Email Preferences

SMS Preferences

TeleVox Preferences

Payroll Options

GL Account Preferences

Web Site Options

Themes

Appointment Reminders

Reminder Frequency and Method of Delivery (Place Longest Reminders at the top of the list!)

Enable Automated Appointment Confirmations

1. **Reminder Frequency** 10 Days Before Appointment

Reminder Type Via Email

2. **Reminder Frequency** 5 Days Before Appointment

Reminder Type Both Email & SMS

3. **Reminder Frequency** Morning Of Appointment

Reminder Type Via SMS

Time Restrictions for Appointment Reminders

Send appointment reminders automatically throughout the day.

Only send appointment reminders during the following time frame. (Only valid for Freq > 1 Day)

Start Time 09:00 AM **Limit Auto Reminders Processing to Station**

End Time 08:00 PM WORKSTATION 2

SMS Confirmation Message Email Confirmation Message

NOTICE: The overall length of your reminder message must be equal to or smaller than the maximum message limit imposed by your provider. Most SMS messages are limited to 160 characters.

Message

Appointment Reminder on <ApptDate> at <ApptTime> for <ServiceList> Respond Yes to confirm.

90/160

View SMS Actions

First Name Last Name Services Appointment Date Appointment Time

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.

The screenshot shows the 'Setup Program Preferences' window with the 'Email Options' tab selected. The left sidebar contains various preference categories, with 'Email Preferences' highlighted. The main area contains the following fields and options:

- Outgoing Mail Server (SMTP):** smtp.domain.com
- Mail Server User Name:** yourusername%domain.com
- Mail Server Password:** *****
- Mail Server Port:** 25
- SMTP Server Authentication Type:**
 - UserName / Password
 - NTLM
 - CRAMMD5
- Owner's Email Address:** owneremail@domain.com
- Salon's Email Address:** businessemail@domain.com

At the bottom, there is a button labeled 'Validate Account and Send Test Email'. Below this button, the word 'INVALID' is displayed in red text.

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.

The screenshot shows the 'Setup Program Preferences' window with the 'SMS Options' tab selected. The left sidebar contains various preference categories, with 'SMS Preferences' highlighted. The main area contains the following fields and options:

- Client Id:** [Empty field]
- Username:** [Empty field]
- Password:** [Empty field]
- SMS Country Code Prefix:** 1
- SMS Account:** INVALID
- Confirm Key:** yes [Empty field] Cancel Key: cancel [Empty field]
- Buttons:** Validate Account & Check Balance, View SMS Billing History
- Checkboxes:**
 - Automatically notify employee on appointment cancellations.
 - Automatically notify employee on new appointments scheduled for today.
 - Automatically notify employee on Client Check In
 - Allow Clients to Cancel Appointments via SMS by texting above key
- Modify SMS Messages 160 character length:**
 - Waiting List Message | Walk-In Queue Message | Employee Cancel Message | Employee Today Message
 - Please call the salon, we now have an opening on the schedule for your appointment.
- Character Count:** 83/160
- Buttons:** First Name, Last Name, Services, Appointment Date, Appointment Time

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.

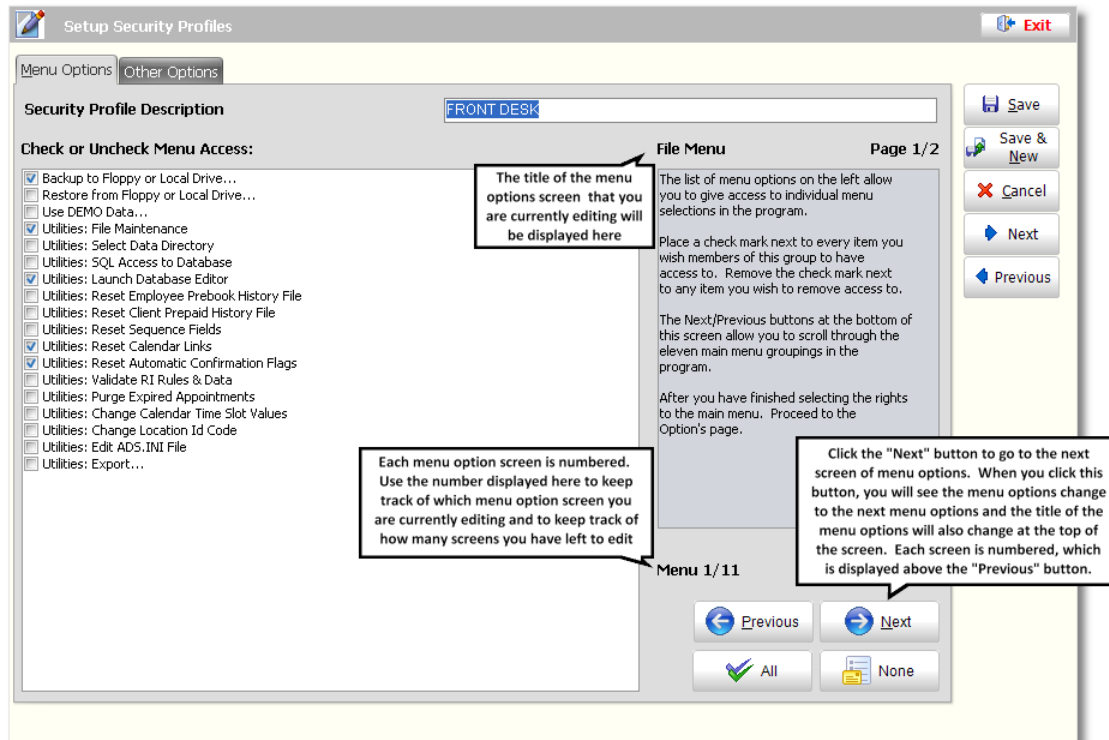
55. Enter your Online Booking account information in the fields provided. If you have not setup a Web Site account yet and would like to do this, please contact us at 1-407-253-0913 or via email at sales@ennoview.com.

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

Security Setup

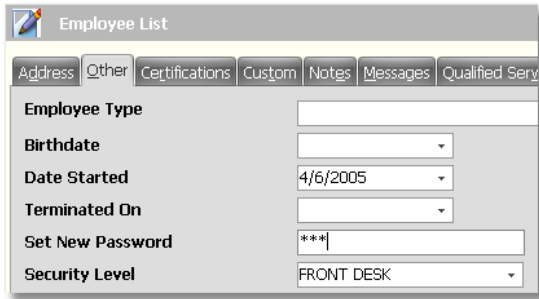
The following instructions will walk you through the three different parts of setting up your program security. You will first need to setup your security profiles, then you will need to assign passwords and security levels to each employee in your Employee List and finally you will be able to enable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



Employee List

Address Other Certifications Custom Notes Messages Qualified Serv

Employee Type

Birthdate

Date Started 4/6/2005

Terminated On

Set New Password ***

Security Level FRONT DESK

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.



Activate and Enable Default Security Options

Enable Program Security

Default Security Profile SERVICE PROVIDERS

Employee Timecard / Login Login via Employee Id and Password

Inactivity Logout (Seconds, 0 = Disable) 0

Forced Password Change (Days, 0 = Disable) 0

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.

Resource Setup

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.

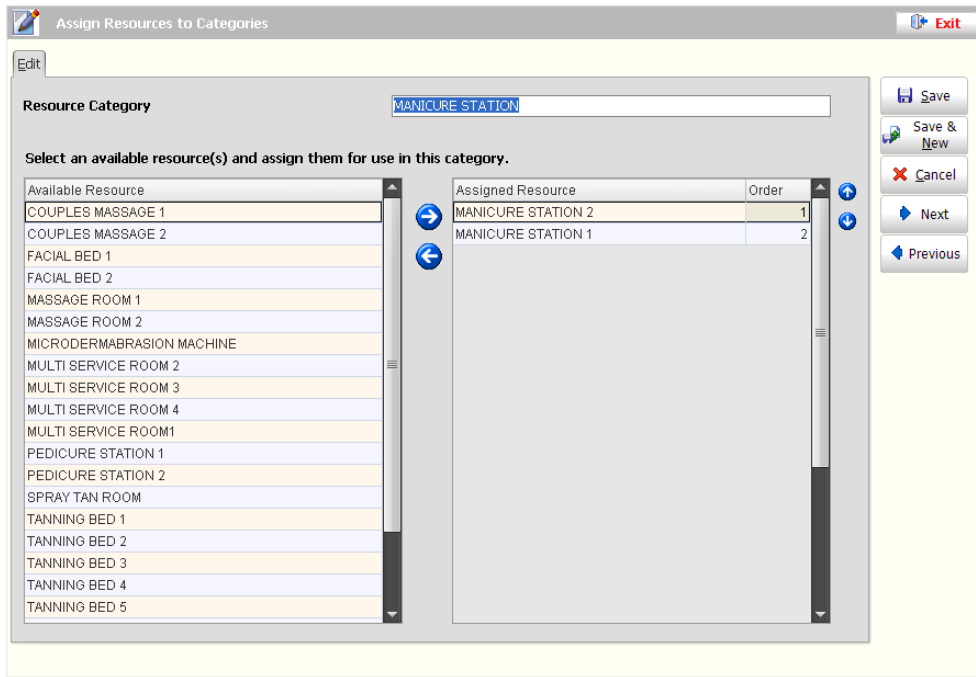
Caption	Show on Appointment Calendar	Color	Type
Click here to add a new Caption			
COUPLES MASSAGE 1	<input checked="" type="checkbox"/>	[Blue]	Station
COUPLES MASSAGE 2	<input checked="" type="checkbox"/>	[Blue]	Station
FACIAL BED 1	<input checked="" type="checkbox"/>	[Cyan]	Station
FACIAL BED 2	<input checked="" type="checkbox"/>	[Cyan]	Station
MANICURE STATION 1	<input checked="" type="checkbox"/>	[Magenta]	Station
MANICURE STATION 2	<input checked="" type="checkbox"/>	[Magenta]	Station
MESSAGE ROOM 1	<input checked="" type="checkbox"/>	[Green]	Room
MESSAGE ROOM 2	<input checked="" type="checkbox"/>	[Green]	Room
MICRODERMABRASION MACHINE	<input checked="" type="checkbox"/>	[Blue]	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
MESSAGE 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.

Calendar Features

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.

Schedule Appointment

Step 1 Select a Client MATHIS CHARLENE

Name MATHIS, CHARLENE First Visit 11/23/2004
 Phone H: 555-555-9826 M: 555-555-1784 W: Last Visit 8/19/2009 10:58
 Balance Due 0.00 Birthday 2/17/2005
 GC Outstanding 100.00 Active Prepays Available

Retention
 New Client
 Salon Client
 Repeat/Request
 Referral

Cancel Changes
 Add Client
 Edit Client

Details Book Multiple Services Slots Available Available Prepays Purchases Appointment List Cancel / No Shows

Step 2 Enter Appointment Details (Prefers Female Only)
 (Prefers: CAMILLE SWANSON)

Appt Date 10/1/2009 Appt Time 02:30 PM Employee Id CARRIE CONNOR

Service Id MANICURE Show All
 Room / Equipment MANICURE STATION
 Group HILLARY'S BRIDAL PARTY

Adjust Service Times
 Initial Setup 00:45 Process 00:00 Complete 00:00 Reset

Date	Time	Employee	Description	Department
10/1/2009	12:00 PM	CAMILLE SWANSON	UPDOS	HAIR - GENERAL
10/1/2009	01:00 PM	ANNE CREW	BRIDAL MAKEUP APPLICATION	ESTHETIC - MAKEUP

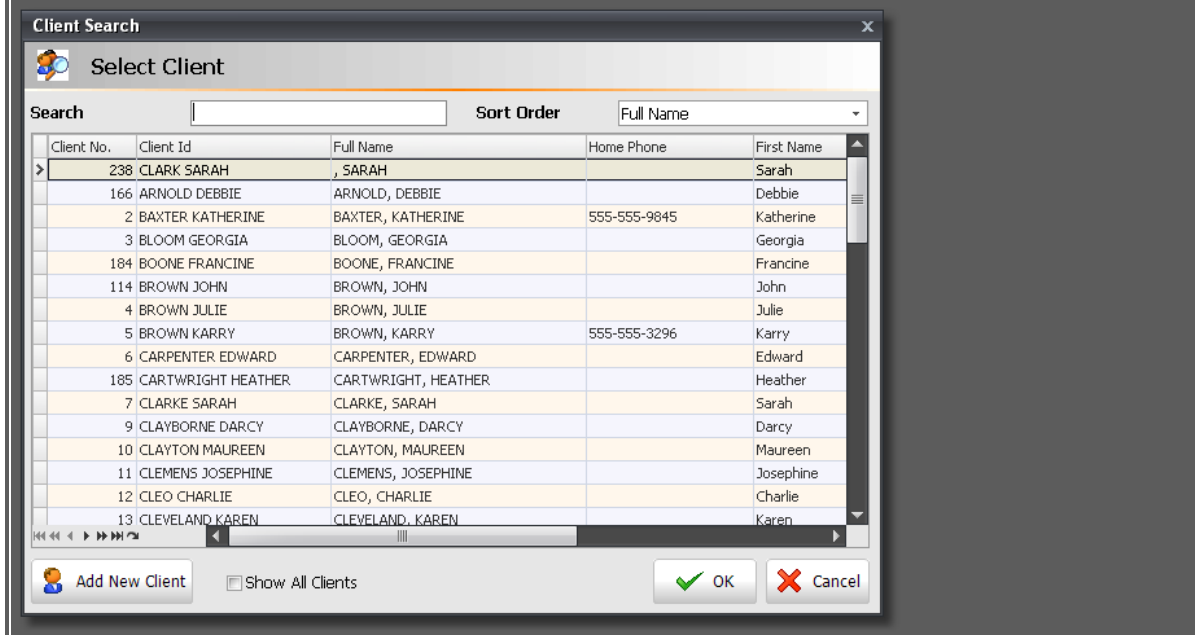
Booked On 12/22/2009 02:32 PM by FDO ADMIN Updated On 12/30/1899 12:00 AM By ADMIN

Book & Save Return to Schedule
 Book & Add Additional Services
 Finished Return to Schedule
 POS Checkout
 Print Options
 Images Options

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.

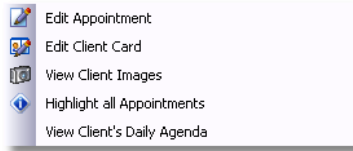
- **Book & Add:** Click this button if you would like to schedule more services for the same client. The Appointment Time will change to the next available time for the client and employee and the Service Id field will clear so that you may select an additional service.

Editing an Appointment

There are multiple ways to edit an appointment. Below are instructions for making changes to an appointment that has already been scheduled.

Edit Appointment Option

1. Right click on top of the appointment.



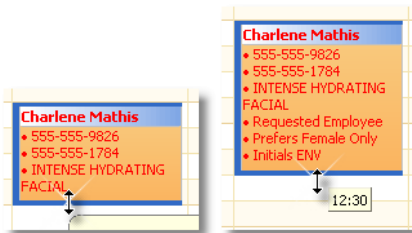
2. Select "Edit Appointment" if you need to make changes to a scheduled appointment.

Double Click to Edit an Appointment

Double left click on top of an appointment to open the scheduled appointment. This will allow you to make changes to the appointment.

Drag To Extend or Shorten The Length

1. Left click on top of the appointment so that it is highlighted with a blue border around the appointment.



2. Place your mouse arrow at the bottom of the appointment until you see a double sided arrow.
3. Left click again, but hold down the left click on your mouse this time.
4. Drag your mouse arrow down or up (the appointment will become longer or shorter) until the length of the appointment is the desired length of time. Let go of the left click once the appointment's length of time is correct.

Moving an Appointment

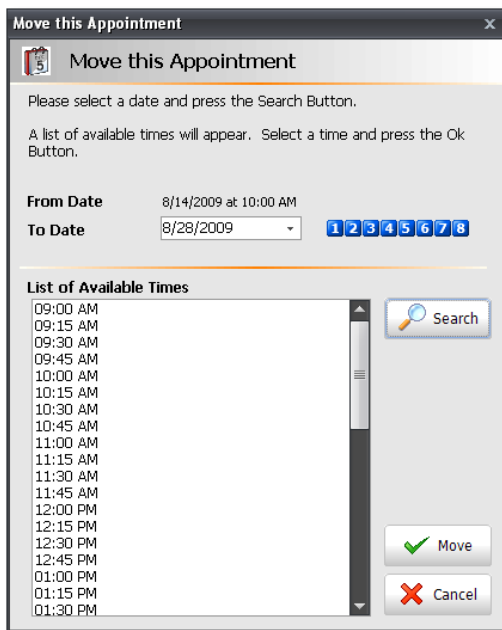
There are multiple ways of moving an appointment in Envision. You can drag n' drop the appointment to the timeslot that you would like to move the appointment to, you may Cut & Copy the appointment and then paste it in the timeslot that you would like to move the appointment to or you may use the "Move Appointment" feature by right clicking on top of the appointment.

Move Appointment Feature:

1. Right click on top of the appointment.



2. Select "Move Appointment" from the menu.



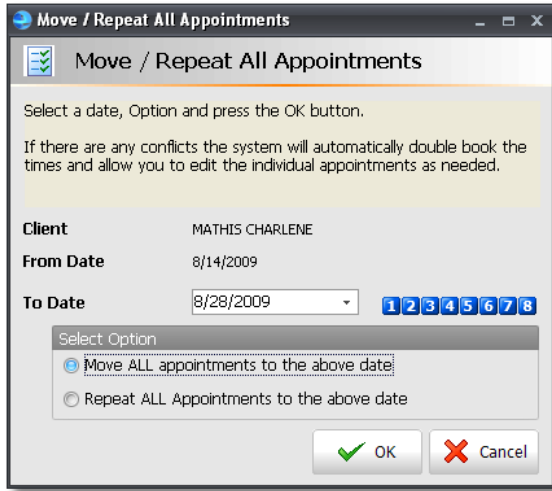
3. Select the date that you would like to move the appointment to and click the "Search" button.
4. A list of Available Times will appear. Select the desired time and click the "Move" button.

Move/Repeat All Appointments:

1. Right Click on top of the appointment.



2. Select the **"Move/Repeat All Appointments"** option.



3. Select the date that you would like to move the appointment to and select the **"Move ALL appointments to the above date"** option.

4. Click the **"OK"** button. You will be moved to that day in the calendar so that you can check if there are any other appointments scheduled at that time.

Drag n' Drop Appointment:

1. To drag n' drop appointments, left click on top of the appointment and hold down your left click.
2. Drag your mouse arrow to the timeslot that you would like to move the appointment to.
3. Let go of the left click.

Cut & Copy Appointment:

1. Right click on top of the appointment.



2. Select the **"Cut & Copy Appointment"** option from the menu.
3. Go to the timeslot that you would like the appointment moved to.
4. Right click in the timeslot and select **"Paste"** from the menu.

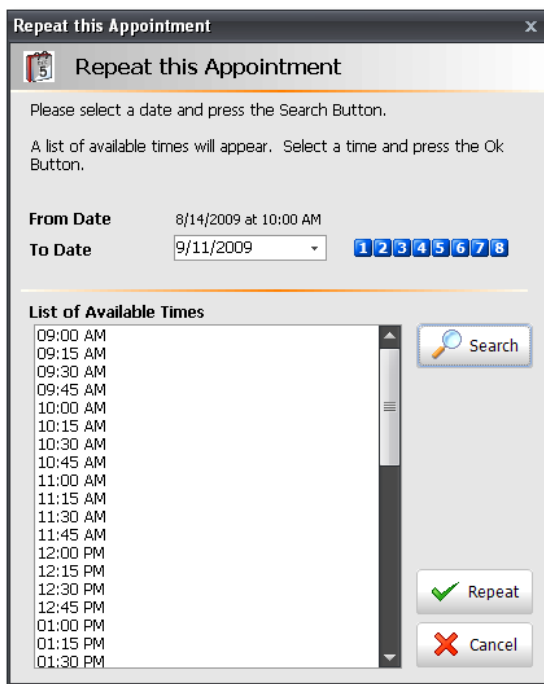
Repeating an Appointment

Use this feature to repeat an existing appointment. The repeat option will make a copy of the appointment for a new date and time. This saves you from having to create a brand new appointment if the client wants to book the same service with the same employee.

1. Right click on top of the appointment.



2. Select "Repeat Appointment" from the menu.



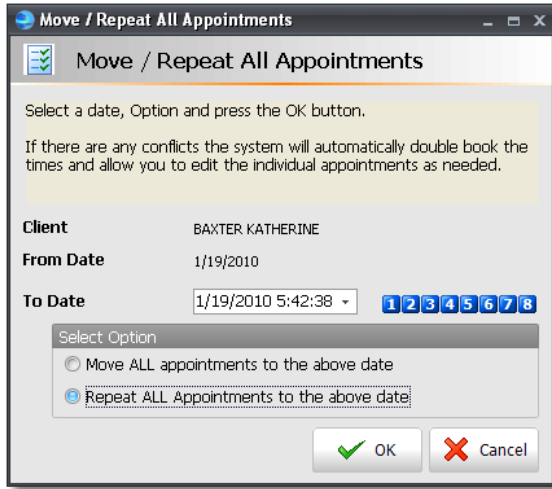
3. Select the date for the repeat appointment and click the "Search" button.
4. A list of Available Times will appear. Select the desired time and click the "Repeat" button.

Move/Repeat All Appointments:

1. Right Click on top of the appointment.



2. Select the "Move/Repeat All Appointments" option.

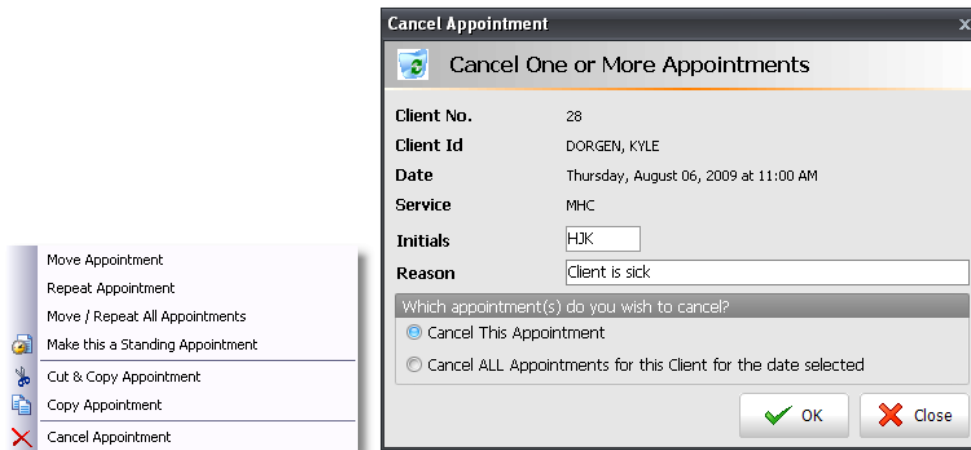


3. Select the date that you would like to repeat the appointment on and select the "Repeat ALL appointments to the above date" option.
4. Click the "OK" button. You will be moved to that day in the calendar so that you can check if there are any other appointments scheduled at that time.

Canceling an Appointment

Select this option if you need to cancel the existing appointment. This option will remove the appointment from the calendar.

1. Right click on top of the appointment.

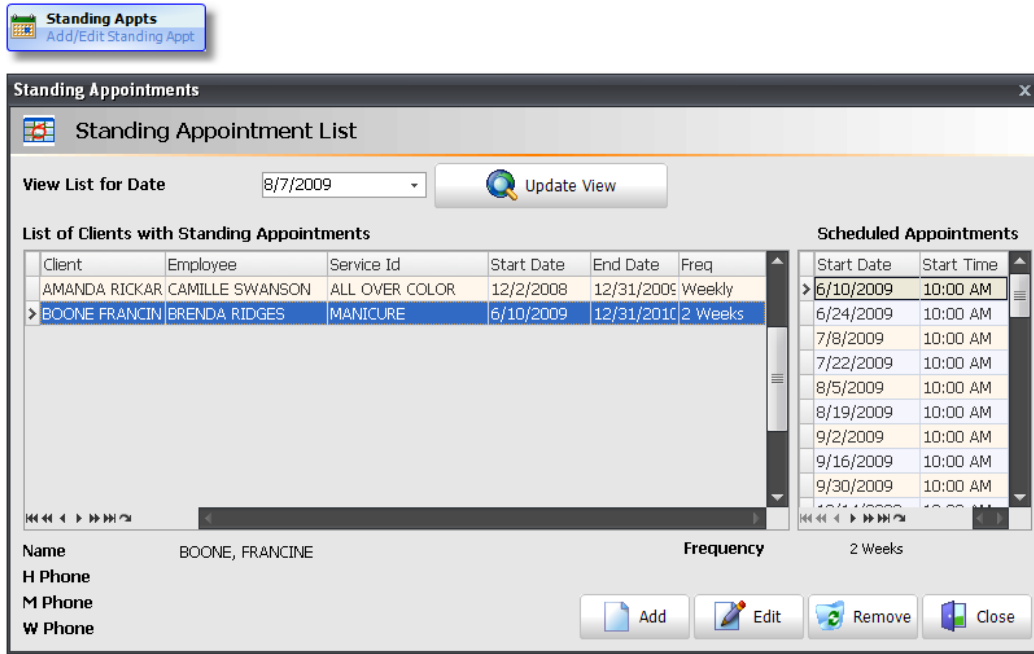


2. Select "Cancel Appointment" from the menu. The initials of the person that is canceling the appointment can be entered as well as a reason.
3. Click the "OK" button to cancel the appointment.

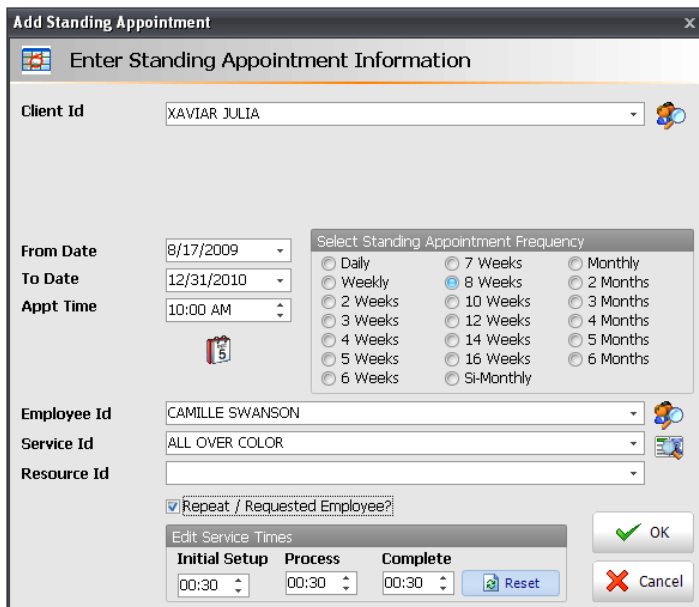
Booking Standing Appointments

There are two different ways to book standing appointments in the Calendar. You can make an existing appointment a standing appointment by right clicking on top of the appointment and selecting "Make this a Standing Appointment" or by clicking the "Standing Appts" button on the right side of the Calendar. Below are instructions for booking a standing appointment by clicking the "Standing Appts" button. Both methods of scheduling standing appointments will have the same instructions, however when you choose the option, "Make this a Standing Appointment" by right clicking on top of an existing appointment, most of the information will already be filled in for you. You will only need to verify the dates and frequency of the standing appointments.

1. Click on the "**Standing Appts**" button on the right side of the calendar.



2. Click the "**Add**" button on the Standing Appointments screen.



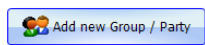
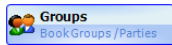
3. Select the Client for the appointment you would like to add as a Standing Appointment.
4. Select the **"From Date"** and **"To Date"**. The program will schedule appointments between these dates depending on the frequency you select.
5. Select the **"Standing Appointment Frequency"**. This is how often the client will be coming in for their appointment.
6. Enter the **"Appt Time"**.
7. Select the Employee and Service for the appointment you are adding. You can also select a resource if necessary.
8. Check **"Repeat / Requested Employee"** if you would like the standing appointments to be included in the Repeat/Request count.
9. Click the **"Ok"** button to add the appointment. The program will automatically schedule the appointments in the calendar. If there are any conflicts with the appointments you are scheduling, a pop up will appear with a list of appointments that are already scheduled.

Make an Existing Appointment a Standing Appointment: You may also make an existing appointment a Standing Appointment by right clicking on top of the appointment and selecting "Make this a Standing Appointment".

Group Booking

The Group Booking feature of Envision allows you to book appointments for Groups and Parties so that their appointments are all linked with each other. This will make it easier for you to view all of their appointments together and you can also check them all out together, under the client that is the organizer.

1. Click the **"Groups"** button on the right hand side of the Calendar.



2. Click the **"Add new Group / Party"** button at the bottom of the screen to add a group to the list.

Group Description	Client	Arrives On	Arrives At	No. of Guests	Mobile Phone
HILLARY'S BRIDAL PARTY	VARGO HILLARY	8/13/2009	10:00:00	6	

Group Details | Appointment Summary

Organizer: VARGO HILLARY

Description: HILLARY'S BRIDAL PARTY

Arrival Date / Time: 8/13/2009 10:00 AM

Number in Party: 6 Bill All to Organizer

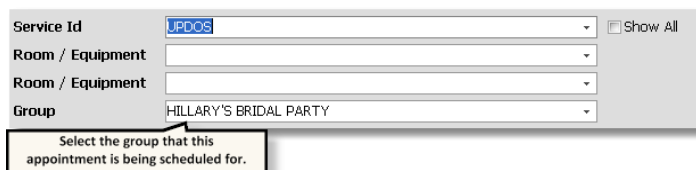
Calendar Colors: [Color Selection]

Notes: Created on Thursday, August 13, 2009

Print Summary

Add new Group / Party Save Cancel Ok

3. Select the client that will be the organizer. For example, if you are entering a group for a Bridal Party, the organizer is usually the bride or bride's mother.
4. Enter a "**Description**" for the Group or Party. This is the name that you will use to search for the group/party.
5. Select the date and time that the group or party will be arriving for their appointments.
6. Enter the number of clients that will be arriving with this party.
7. Check the "**Bill All to Organizer**" box if the organizer of the party would like to pay for the entire group's services.
8. Select the colors that you would like displayed on each appointment when this group is selected.
9. Enter notes into the "**Notes**" field if there is anything that you need to remember or keep on record for this group/party.
10. Click the "**Save**" button to save the group or to save changes made to the group/party.
11. When scheduling appointments for each member of the group / party, you will need to choose the group that the appointment should be under.



Service Id: UPDOS Show All

Room / Equipment:

Room / Equipment:

Group: HILLARY'S BRIDAL PARTY

Select the group that this appointment is being scheduled for.

Confirm an Appointment

There are three available selections for manually confirming appointments in the calendar. Automated Appointment Confirmations can be setup in your Program Preferences.

1. Right click on top of the appointment.



2. Select "**Confirm Appointment - Talked to Client**", "**Confirm Appointment - Left Message**" or "**Send Appointment Confirmation (Email, SMS)**".

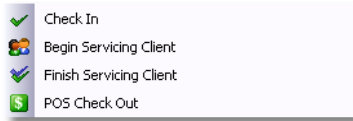
- **Confirm Appointment - Talked to Client:** Select this option to place an icon on the appointment that shows that this appointment was confirmed and someone has spoken with the client.
- **Confirm Appointment - Left Message:** Select this option to place an icon on the appointment that shows that this appointment was confirmed by a message that was left for the client.
- **Send Appointment Confirmation (Email, SMS):** Select this option to send an appointment confirmation by email to the selected client. Your email settings must be configured correctly for this to work.

Setup Automated Appointment Confirmations: Automated Appointment Confirmations can be setup by clicking on "Company" on the Menu Bar of Envision and selecting "Setup Program Preferences" from the menu. When the Program Preferences screen opens, scroll down to the "Appointment Reminders" option on the left.

Check In / Begin Servicing / Finish Servicing

You may place icons on top of appointments to let you know what the status of the appointment is. This is useful when you are busy and need to find out who has been helped, who is waiting to be serviced and who needs to be checked out.

1. Right click on top of the appointment.



2. Select "**Check In**", "**Begin Servicing Client**" or "**Finish Servicing Client**" to place an icon on the appointment.

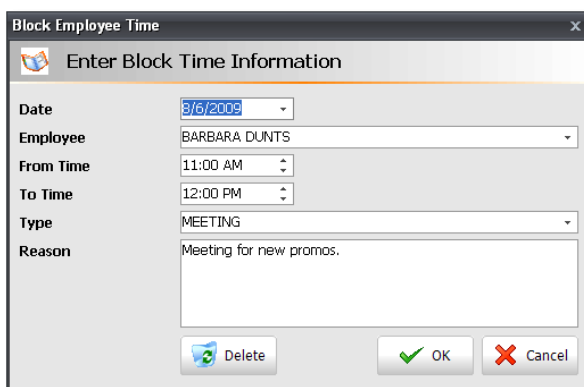
- **Check In:** Select this option to place an icon on the client's appointment to show that they have arrived.
- **Begin Servicing Client:** Select this option to place an icon on the appointment to show that the client is with the service provider.
- **Finish Servicing Client:** Select this option to place an icon on the appointment to show that the client's appointment is finished and they are ready to be checked out.

Blocking Employee Time

There are two different ways to block employee time in the Calendar. You can block a single time or you can block multiple times for all employees or just one employee. Below are instructions for both.

Block a Single Time:

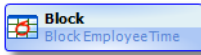
1. First, left click on a time slot and holding down the mouse's left click button, drag the cursor over multiple time slots to select (highlight) them. This comes in handy for blocking out time for one day that an employee will not be available for appointments. For example, if an employee needs to leave in the middle of their shift for a doctor's appointment.
2. Once the correct time slots are highlighted, right click on top of the highlighted timeslots and select "**Block Employee Time**". The "**Date**", "**Employee**", "**From Time**" and "**To Time**" will be entered automatically for you.



3. Select a "**Type**" (optional), enter a reason and click the "**OK**" button to approve the blocked time.

Block Multiple Time Slots:

1. Click on the "Block Employee Time" button on the right side of the calendar.



Block Multiple Time Slots

This option allows you to block a range of dates / times on the Appointment Calendar for All Employees or a Single employee.

Select Employee or Leave Blank for All

Employee: GINGER MORRISON

Select Starting Date / Time / Days to Block

Starting With Date: 8/7/2009

From Time: 10:00 AM

To Time: 10:30 AM

No. of Weeks: 1

Type: MEETING

Reason: Meeting

Select Days to Block

Monday Wednesday Friday Sunday

Tuesday Thursday Saturday

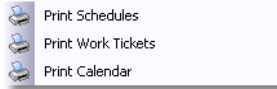
Block Cancel

2. Select the "**Employee**" that you would like to block out time for. If you need to block time for every employee in the calendar, leave the Employee selection blank.
3. Select the "**Starting With Date**". Select the date of the first day this time will be blocked for.
4. Select the "**From Time**" and "**To Time**". This is the time that will be blocked each day.
5. Enter the "**No. of Weeks**" that this time must be blocked if the time you are blocking will be the same for a period of time. If this time does not need to be blocked out for more than a week, leave the "No. Of Weeks" set to "1".
6. Enter a "**Reason**" for the time you are blocking. An example for a reason could be "Lunch" or "Medical Appointment".
7. Select the days of the week for the time you are blocking if the time you need to block is for specific days of the week. You will need to check one of the days of the week even if you are blocking out time for only one day.
8. Click the "**Block**" button when finished.

Printing Appointment Schedules

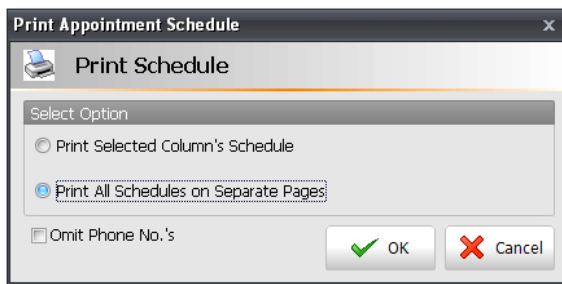
You may choose to print schedules for your service providers if you would like them to have a print out of their appointments for the day. There are two available formats for the appointment schedules.

1. Click the "**Actions**" button in the upper right hand corner of the calendar.



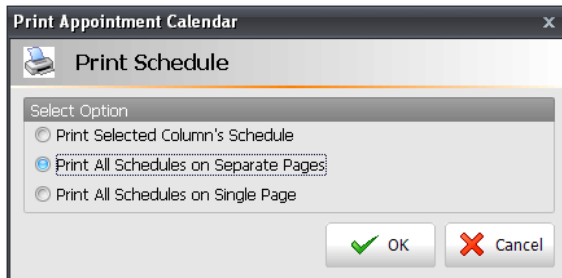
2. Select "**Print Schedules**" or "**Print Calendar**".

Print Schedules



Selecting this option will present you with a screen offering two choices. You can "**Print Selected Column's Schedule**" to print a schedule for the column you have selected (has a highlighted timeslot) or you may select to "**Print All Schedules on Separate Pages**".

Print Calendar

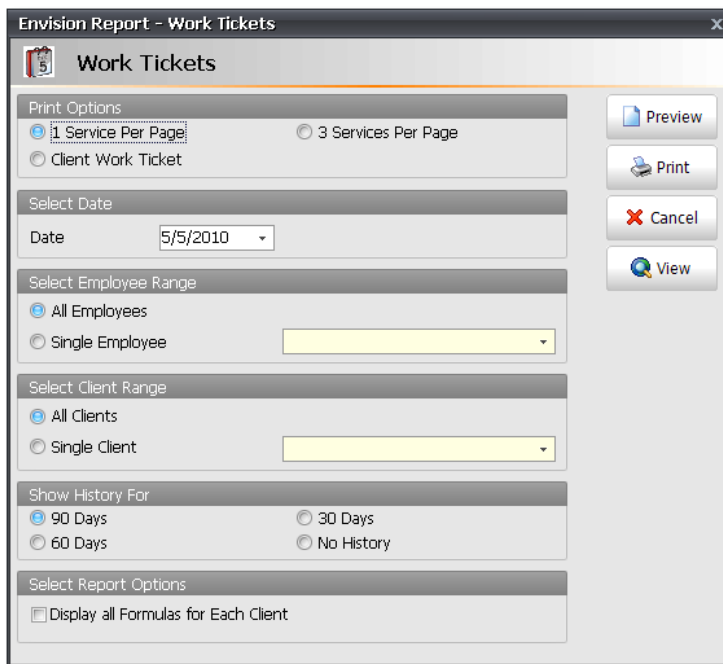


The "Print Calendar" option will print the schedule in the calendar format. Selecting this option will present you with a screen offering three choices. You can choose the "**Print Selected Column's Schedule**" option to print a schedule for the column you have selected (has a highlighted timeslot) or you may select to "**Print All Schedules on Separate Pages**". You can also "Print All Schedules on Single Page" if you would like a printout of the entire Calendar on one sheet of paper.

Printing Work Tickets

Work Tickets will provide information about the services that a client has scheduled, a listing of their product and service history, a listing of their formulas and will also include the client's notes. The work tickets can be provided to your service providers so that they have all of the client's information with them at their station. The ability to view their product and service history will allow your service providers to up sell products and services to the client based on what the client has come in for in the past and the formulas and notes will help your service providers service their clients better. Below are instructions for printing Work Tickets.

1. Click on the "Actions" button in the upper right hand corner of the Calendar.
2. Select the "Print Work Tickets" option from the menu.
3. The following screen will appear, providing you with three types of work tickets.

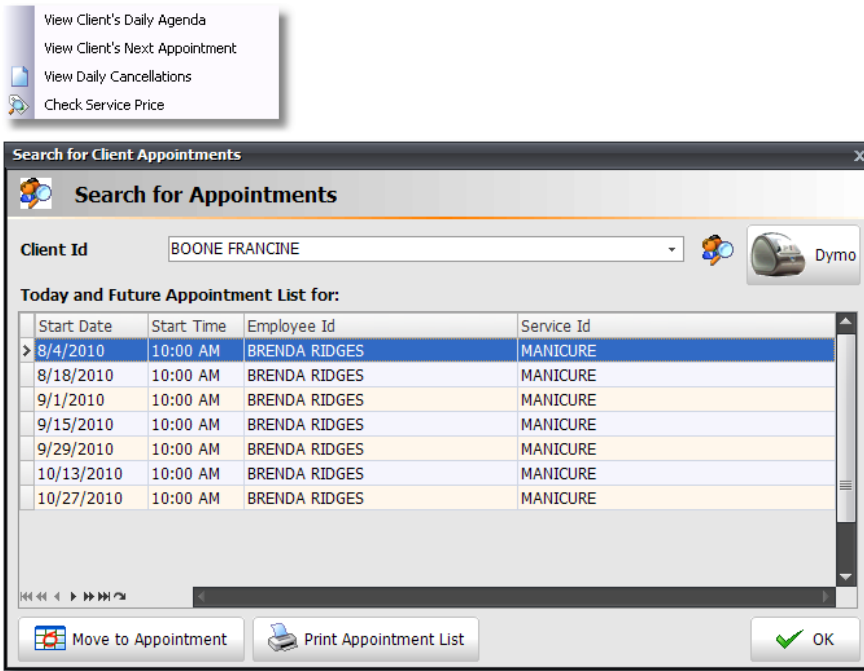


4. Select a Work Ticket Type from the three options provided. The most commonly used options are "3 Services Per Page" and "Client Work Ticket". The "3 Service Per Page" option will print three work tickets on one sheet of paper, for each service scheduled in the Calendar. This will result in multiple work tickets for one client if the client has multiple services scheduled. You will also need to cut the work tickets after printing them. The "Client Work Ticket" option will print one sheet of paper for each client with a listing of all the services they have scheduled on ticket.
5. If you are printing Work Tickets the night before, change your "Date" to the next day's date.
6. You can also choose to print Work Tickets for one service provider or for one client.
7. After selecting the Work Ticket options, click the "Print" or "Preview" button.

View Client's Next Appointment

The "**View Client's Next Appointment**" feature allows you to quickly check when a client's future appointments are scheduled.

1. Click the "**Actions**" button in the upper right hand corner of the calendar.

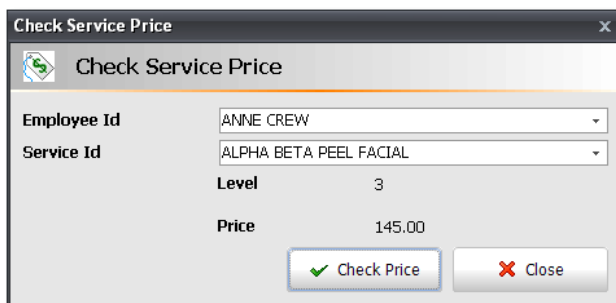


2. Select the Client that you would like to view an appointment listing for. The listing of appointments will appear as soon as the client is selected.
3. Click the "**Print Appointment List**" button if the client would like a printed list of their appointments.
4. Click the "**Move to Appointment**" button if you need to move to that appointment in the calendar.

Check Service Price

The "**Check Service Price**" feature allows you to quickly check how much an employee charges for a service or what service price level the employee is set to.

1. Click the "**Actions**" button in the upper right hand corner of the calendar.



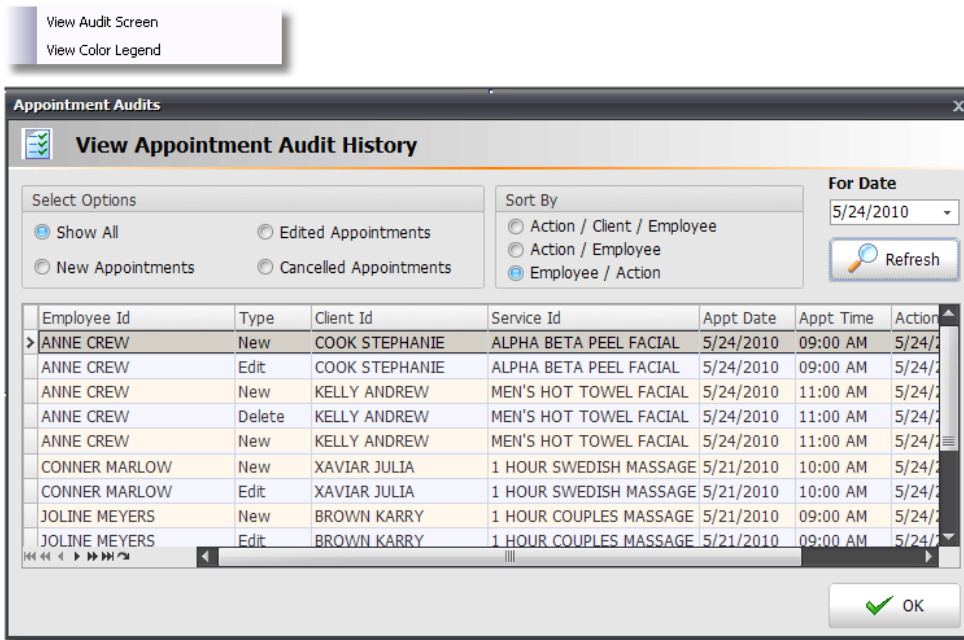
2. Select the "**Check Service Price**" option from the menu.
3. Select the employee that will be performing the service in the "**Employee Id**" field.

4. Select the service that the employee will be performing in the "Service Id" field.
5. Click the "Check Price" button. The "Level" and "Price" will update after clicking this button.

View Audit Screen and Cancellations

The Audit screen will show when appointments were scheduled, edited and canceled.

1. Click the "Actions" button in the upper right hand corner of the calendar.



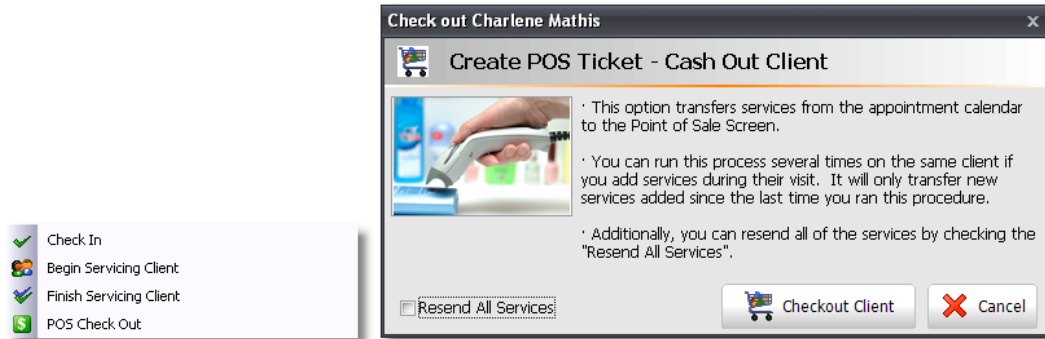
2. Select whether you would like to view "New Appointments", "Edited Appointments" or "Canceled Appointments".
3. Click the "Refresh" button after making your selection.

The list that appears will display information about when appointments were scheduled, edited and canceled. If Initials were entered when the appointment was scheduled, you will be able to determine who scheduled the appointment.

Checking a Client Out

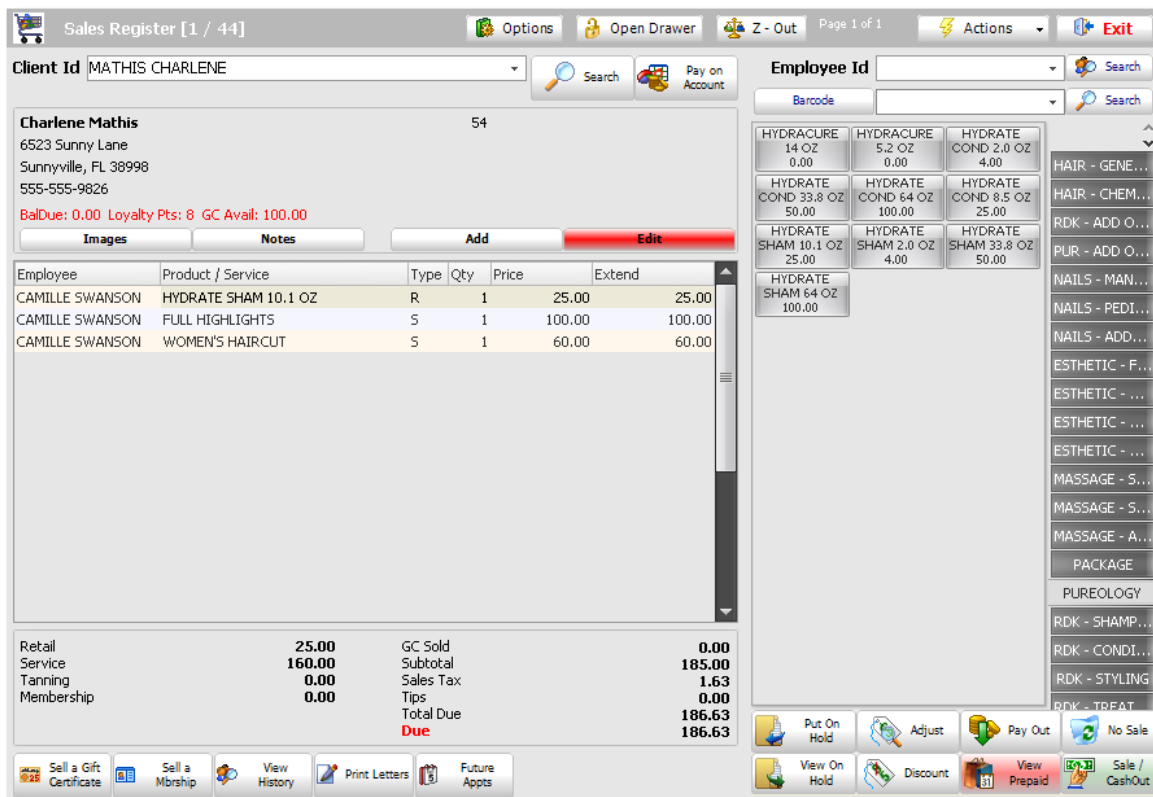
The POS Checkout feature transfers services from the Appointment Calendar to the Point of Sale screen. You can run this process several times on the same client if you add services during their visit. It will only transfer new services added since the last time you ran this procedure. Additionally, you can resend all the services by checking "Resend All Services" in the lower left hand corner.

1. Right click on top of one of the client's appointments.



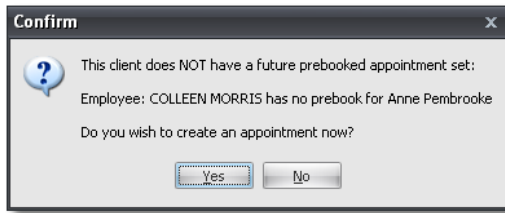
2. Select "POS Check Out" from the menu.

3. Verify that you are checking out the correct client by reviewing the client's name at the top of the Check Out popup screen and click the "Checkout Client" button at the bottom of this screen. The services will be transferred to the Sales Register.



4. Review the information on the ticket and add any additional products or services that the client is purchasing. You can also edit an item by double clicking on top of it. An "Edit Selected Item" window will open so that you can change the price of the item, apply discounts, use loyalty points or use a coupon.

5. Click the "Sale / Cash Out" button in the lower right hand corner of the screen.
6. A popup may appear asking you if you would like to schedule the client's next appointment. Click "Yes" to return to the calendar or click "No" to continue on to the Payment Panel.



7. On the Payment Panel, select the type of payment that the client will be using.

Total Tips Allocated	0.00
Total Due	176.63
Due	176.63

Entering Tips: Please refer to the "Entering Tips" instructions for steps on entering tips.

Credit Card Processing Instructions: Please refer to the "Credit Card Processing" Instructions if you are using Envision's integrated credit card processing or if you need to enter tips, please refer to the "Entering Tips" instructions.

7. Edit the amount that the client is paying under the "Payment 1" button and/or the "Payment 2" button.
8. Click the "Cash Out" button to complete and save the transaction.

Sales Register Features

Open Drawer

When you open the Sales Register in the morning, the following screen will popup for you to enter the Beginning Cash Drawer Total.

Counts			
100's	0	=	0.00
50's	0	=	0.00
20's	0	=	0.00
10's	0	=	0.00
5's	0	=	0.00
2's	0	=	0.00
1's	0	=	0.00

Count Coins			
2.00	0	=	0.00
1.00	0	=	0.00
0.50	0	=	0.00
0.25	0	=	0.00
0.20	0	=	0.00
0.10	0	=	0.00
0.05	0	=	0.00
0.01	0	=	0.00

Change: 0.00 Manual

Beginning Cash Drawer Total: 200.00

Ok

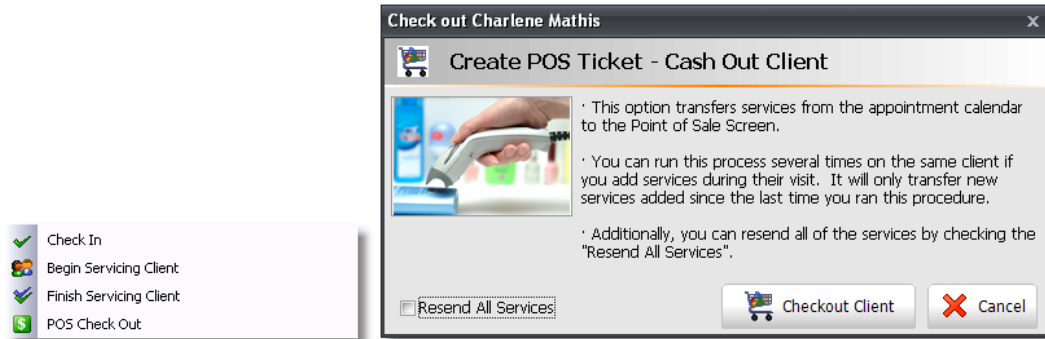
1. Enter the quantity of each type of bill and coin that you have in the drawer. For example, if you have 5 ten dollar bills in the drawer, you would enter "5" in the ten dollar bill field. The total will be automatically calculated for you at the bottom of the screen.

2. Click the "OK" button when finished.

Checking a Client Out

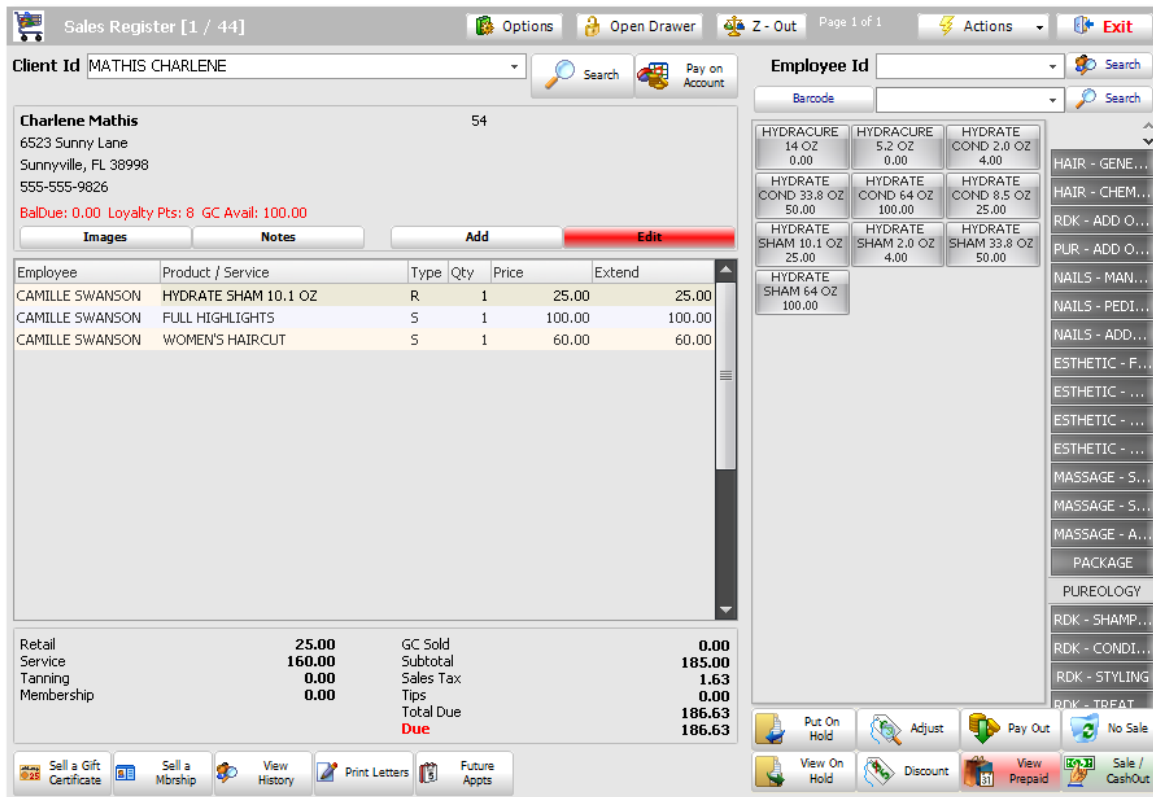
The POS Checkout feature transfers services from the Appointment Calendar to the Point of Sale screen. You can run this process several times on the same client if you add services during their visit. It will only transfer new services added since the last time you ran this procedure. Additionally, you can resend all the services by checking "Resend All Services" in the lower left hand corner.

1. Right click on top of one of the client's appointments.



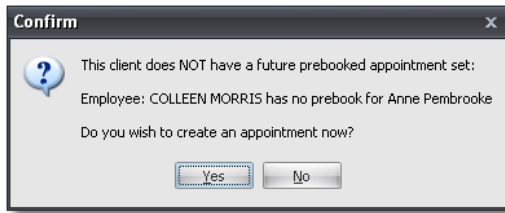
2. Select "POS Check Out" from the menu.

3. Verify that you are checking out the correct client by reviewing the client's name at the top of the Check Out popup screen and click the "Checkout Client" button at the bottom of this screen. The services will be transferred to the Sales Register.



4. Review the information on the ticket and add any additional products or services that the client is purchasing. You can also edit an item by double clicking on top of it. An "Edit Selected Item" window will open so that you can change the price of the item, apply discounts, use loyalty points or use a coupon.

- Click the **"Sale / Cash Out"** button in the lower right hand corner of the screen.
- A popup may appear asking you if you would like to schedule the client's next appointment. Click **"Yes"** to return to the calendar or click **"No"** to continue on to the Payment Panel.



- On the Payment Panel, select the type of payment that the client will be using.

Total Tips Allocated	0.00
Total Due	176.63
Due	176.63

Entering Tips: Please refer to the "Entering Tips" instructions for steps on entering tips.

Credit Card Processing Instructions: Please refer to the "Credit Card Processing" Instructions if you are using Envision's integrated credit card processing or if you need to enter tips, please refer to the "Entering Tips" instructions.

- Edit the amount that the client is paying under the **"Payment 1"** button and/or the **"Payment 2"** button.
- Click the **"Cash Out"** button to complete and save the transaction.

Credit Card Processing

1. Create a sales transaction in the Sales Register and click the "Sale / Cash Out" button in the lower right hand corner of the screen.

Sales Register [1 / 44]

Client Id: MATHIS CHARLENE

Employee Id: 54

Charlene Mathis
6523 Sunny Lane
Sunnyville, FL 38998
555-555-9826
BalDue: 0.00 Loyalty Pts: 8 GC Avail: 100.00

Employee	Product / Service	Type	Qty	Price	Extend
CAMILLE SWANSON	HYDRATE SHAM 10.1 OZ	R	1	25.00	25.00
CAMILLE SWANSON	FULL HIGHLIGHTS	S	1	100.00	100.00
CAMILLE SWANSON	WOMEN'S HAIRCUT	S	1	60.00	60.00

Retail	25.00	GC Sold	0.00
Service	160.00	Subtotal	185.00
Tanning	0.00	Sales Tax	1.63
Membership	0.00	Tips	0.00
		Total Due	186.63
		Due	186.63

Buttons: Put On Hold, Adjust, Pay Out, No Sale, View On Hold, Discount, View Prepaid, Sale / Cash Out

2. When the Payment Panel appears, click the "Print Ticket" button to print a receipt so that the client may fill in tip information.

OnAcct: 7 8 9
4 5 6
1 2 3
0 . CE
Backspace

Other 1 Other 2 Employee Deduction
Other 3 Other 4 Other 5
Other 6 Other 7 Other 8

Fast Cash Keys: \$1 \$5 \$10 \$20 \$50 \$100

Enter negative (-) amount for credit or Refund

Payment 1 & 2 Payment 3 & 4

Payment 1 Payment 2

Note

Print Ticket Cash Out Return POS

Total Tips Allocated: 0.00
Total Due: 0.00
Change: 0.00

YOUR SALON
123 Sunny St.
Sunnyville, FL 32xxx
555-555-1212

Ticket: 0000000000
Drawer: 22 Station: 1
Date: 4/2/2008 Time: 02:12:01 pm

Client: 62
Corey Moore

Men's Haircut @ 23.00
1
xx Serviced By: Camille

SUBTOTAL	23.00
TOTAL	23.00
CASH	0.00
CHANGE	0.00

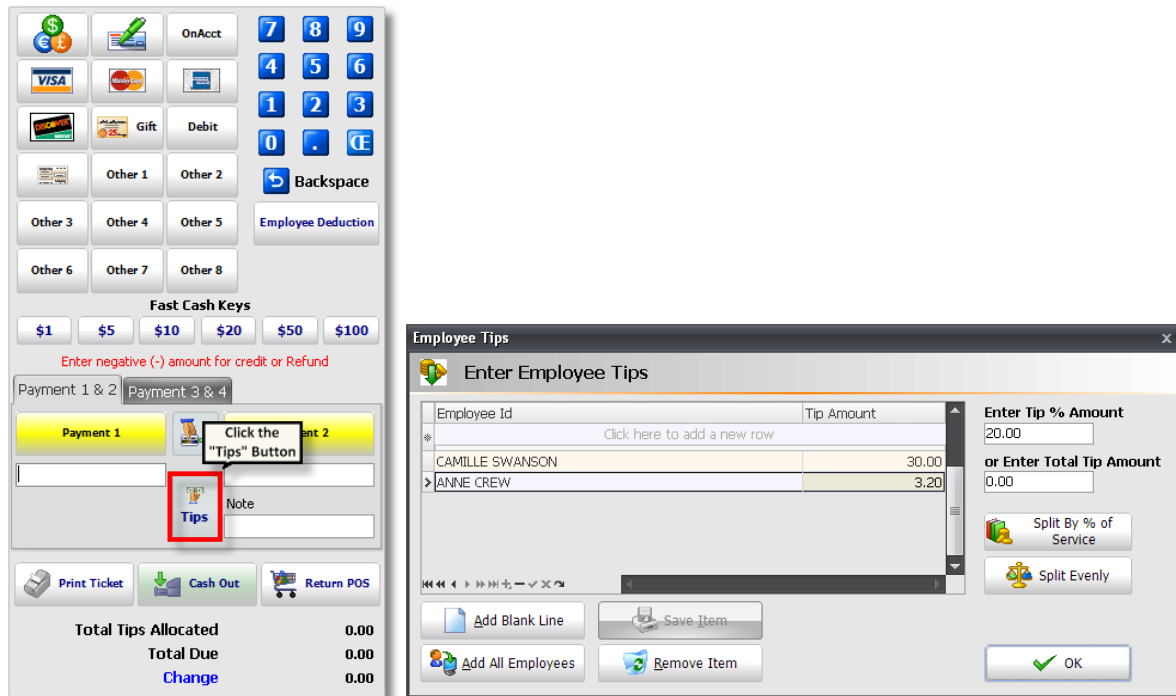
TIP: _____

TOTAL: _____

X: _____
I AGREE TO PAY THE ABOVE TOTAL AMOUNT
ACCORDING TO THE CARD ISSUER AGREEMENT.

Thank you for your business
Please come see us again!

3. After the client enters the desired tip amount, click on the **"Tips"** button to enter the tip. The following screen will appear when you click on the "Tips" button on the Payment Screen.



4. Click in the field labeled **"Click here to add a new row"** and click on the drop down arrow to select an employee.

Selecting Multiple Employees: If you need to select more than one employee, click on the "Add Blank Line" button at the bottom of the screen or click the "Add All Employees" button to add all of the employees on the ticket.

5. Enter the amount of the tip to the right of each employee's name or enter an amount in the **"Enter Total Tip Amount"** or a percentage in the **"Enter Tip % Amount"** field on the right.

Entering Tip Amounts: If there are multiple employees, you may enter a specific amount for each employee in the "Tip Amt" field to right of their Employee Id, or you may enter a "Total Tip Amount" in the field on the right. The "Total Tip Amount" is the total amount that the client gives to you for more than one employee. You may also enter a "Tip % Amount". If you are entering tips for only one employee or if you are entering a specific amount for each employee, click the "OK" button after entering the tip amount.

Splitting Tips Automatically: Click either "Split By Pct of Service Done" or "Split Evenly" if you have entered a "Total Tip Amount" or a "Tip % Amount". "Split By Pct of Service Done" will split the tip between the employees on the ticket according to the percent of service that was done by each employee. The employee that performed a more expensive, time consuming or difficult service (depending on the price of the service) will receive the larger tip. "Split Evenly" will split the total tip amount evenly for each employee on the ticket.

6. Click the **"OK"** button when finished. The Total Tip amount will automatically be added to the Payment 1 Type that is highlighted.

7. Select the type of credit card the client will be using.

The screenshot shows a payment terminal interface with the following elements:

- Top row: Currency selection (Euro, Dollar), OnAcct button, and numeric keypad (7, 8, 9).
- Second row: VISA, MasterCard, and Discover logos, followed by numeric keypad (4, 5, 6).
- Third row: American Express logo, a callout box with the text "Select the type of payment here" pointing to the card logos, and numeric keypad (1, 2, 3).
- Fourth row: Other 1, Other 2, and Backspace button.
- Fifth row: Other 3, Other 4, Other 5, and Employee Deduction button.
- Sixth row: Other 6, Other 7, Other 8.
- Fast Cash Keys section: \$1, \$5, \$10, \$20, \$50, \$100 buttons.
- Text: "Enter negative (-) amount for credit or Refund"
- Payment selection: Payment 1 & 2, Payment 3 & 4 buttons.
- Payment 1 and Payment 2 input fields.
- Tips input field with a "TIPS" icon.
- Bottom row: Print Ticket, Cash Out, Return POS buttons.
- Summary section:

Total Tips Allocated	0.00
Total Due	0.00
Change	0.00

8. After entering the tip, click the credit card processing button to process the card.



The screenshot shows the "Credit / Debit Transactions" dialog box with the following details:

- Title: Credit Transaction - Scan Card
- Section: Transaction Summary

Total Goods / Services	192.63
Tip Amount	33.20
Debit Cash Back	0.00
Amount to Charge Card	225.83
- Warning: **** You MUST enter ALL tips PRIOR to processing the credit card! ****
- Section: Manual Card Entry (Cannot be used for debit transactions!)
 - Card Number: (Used for Manual Entry Only) Use CC on File
 - Name on Card:
 - Expiration Date:
 - CVV Code:
- Text: "Make sure your cursor is blinking in this field before swiping the card" (callout box pointing to the Card Number field)
- Text: "Please swipe the credit / debit card or manually enter the information and press the process button." (small text below CVV Code)
- Section: Credit / Debit Approval:
- Buttons: Process, Cancel

9. Click in the "Card Number" field so that your cursor is blinking in that field and swipe the card. The card will be processed as soon as you swipe the card, so make sure that the amounts are correct and that you have entered a tip before swiping the card.

10. A message will appear stating whether the transaction has been declined or approved and the Authorization Number will be automatically entered in the "Authorize No." field.

Processing a Second Time: You DO NOT need to click the credit card button to process the transaction again unless you receive the "Credit Card Declined" message. If the card is swiped and processed a second time, the client will be charged a second time if the transaction has already been approved.

11. Click the "Cash Out" button to complete the sale.



12. A prompt will appear for printing a receipt. Click "Yes" if you would like two receipts printed with the Signature line.

Merchant / Customer Copies: For a Merchant and Customer copy of the receipt, the correct Receipt Print Style must be selected in the Station Configuration. To open the Station Configuration, click on "Company" on the top menu and select "Station Configuration". Open the station that is using the receipt printer by double left clicking on top of it in the list. The Receipt Print Style is located on the "Printer" tab in the lower left hand corner. Select "Single Ply Paper - Merchant/Customer Copies".

```

YOUR SALON
123 Sunny St.
Sunnyville, FL 32xxx
555-555-1212

Ticket: 0000000464
Drawer: 22          Station: 1
Date: 4/2/2008 Time: 04:20:48 pm

Client: 62
Corey Moore

Men's Haircut
  1
** Serviced By: Camille @      23.00

SUBTOTAL      23.00
TIP           5.00
=====
TOTAL         28.00

VISA AUTH: TRNING      28.00
CHANGE           0.00

CARD TYPE: VISA
ACCOUNT: #*****8175
NAME:
APPROVAL CODE: TRNING
AMOUNT: 28.00

TIP: _____
TOTAL: _____

X: _____
I AGREE TO PAY THE ABOVE TOTAL AMOUNT
ACCORDING TO THE CARD ISSUER AGREEMENT.

```

Thank you for your business
Please come see us again!
**** Merchant Copy ****

```

YOUR SALON
123 Sunny St.
Sunnyville, FL 32xxx
555-555-1212

Ticket: 0000000464
Drawer: 22          Station: 1
Date: 4/2/2008 Time: 04:20:48 pm

Client: 62
Corey Moore

Men's Haircut
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** Serviced By: Camille @      23.00

SUBTOTAL      23.00
TIP           5.00
=====
TOTAL         28.00

VISA AUTH: TRNING      28.00
CHANGE           0.00

CARD TYPE: VISA
ACCOUNT: #*****8175
NAME:
APPROVAL CODE: TRNING
AMOUNT: 28.00

TIP: _____
TOTAL: _____

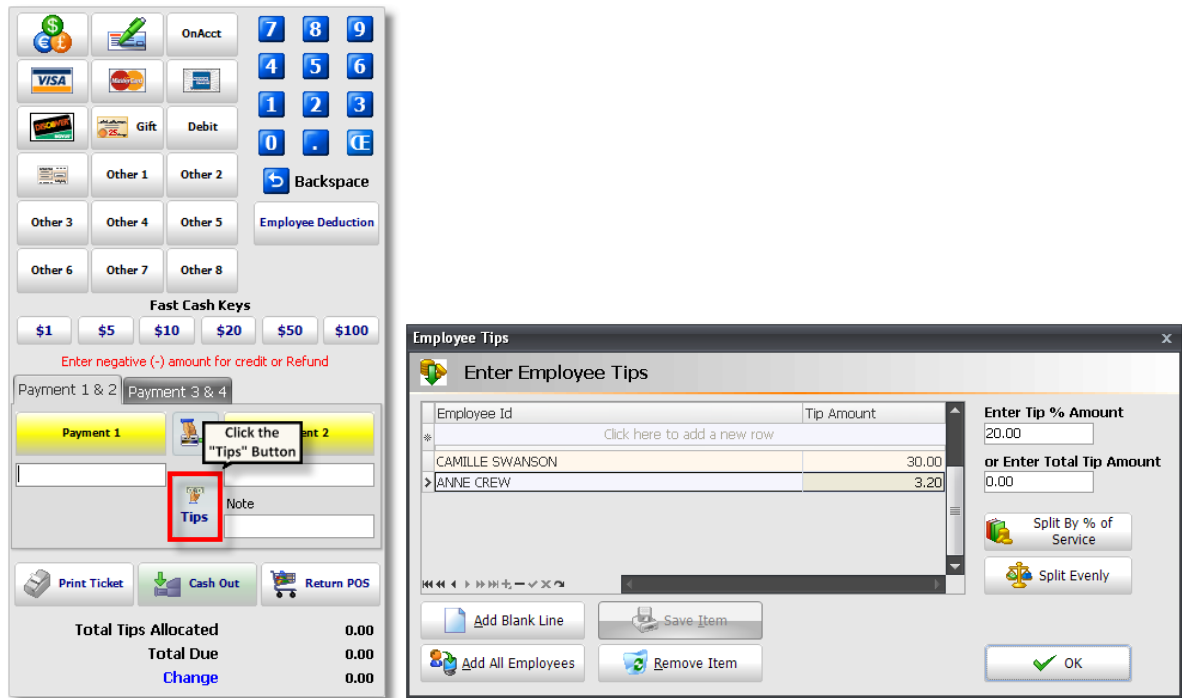
X: _____
I AGREE TO PAY THE ABOVE TOTAL AMOUNT
ACCORDING TO THE CARD ISSUER AGREEMENT.

```

Thank you for your business
Please come see us again!
**** Customer Copy ****

Entering Tips

1. Click the "Tips" button on the Payment Panel screen.



2. Click in the field labeled "Click here to add a new row" and click on the drop down arrow to select an employee.

Selecting Multiple Employees: If you need to select more than one employee, click on the "Add Blank Line" button at the bottom of the screen or click the "Add All Employees" button to add all of the employees on the ticket.

3. Enter the amount of the tip to the right of each employee's name or enter an amount in the "Enter Total Tip Amount" or a percentage in the "Enter Tip % Amount" field on the right.

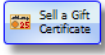
Entering Tip Amounts: If there are multiple employees, you may enter a specific amount for each employee in the "Tip Amt" field to right of their Employee Id, or you may enter a "Total Tip Amount" in the field on the right. The "Total Tip Amount" is the total amount that the client gives to you for more than one employee. You may also enter a "Tip % Amount". If you are entering tips for only one employee or if you are entering a specific amount for each employee, click the "OK" button after entering the tip amount.

Splitting Tips Automatically: Click either "Split By Pct of Service Done" or "Split Evenly" if you have entered a "Total Tip Amount" or a "Tip % Amount". "Split By Pct of Service Done" will split the tip between the employees on the ticket according to the percent of service that was done by each employee. The employee that performed a more expensive, time consuming or difficult service (depending on the price of the service) will receive the larger tip. "Split Evenly" will split the total tip amount evenly for each employee on the ticket.

4. Click the "OK" button when finished. The Total Tip amount will automatically be added to the Payment 1 Type that is highlighted.

Selling a Gift Certificate

1. Click the "Sell a Gift Certificate" button in the lower left hand corner of the Sales Register.



Note: Before clicking the "Sell a Gift Certificate" button on the POS screen, you must select the client who is purchasing this certificate. If they are new to your shop, take this opportunity to get their name and address and add them to your Client list. Do this the same way as described above for the recipient of the gift.

A screenshot of a software dialog box titled "Sell Gift Certificate". The dialog box has a title bar with a close button (X) and a small icon. The main area contains several fields and options:

- Amount:** A text input field containing "100.00".
- Sold By:** A dropdown menu showing "CAMILLE SWANSON".
- Gift Card No.:** An empty text input field.
- Optional Features:** A section with two checkboxes: "Add Tax to Amount of Gift Certificate" and "Comp this Gift Certificate", both of which are unchecked.
- Purchased For:** A dropdown menu showing "MITCHELL LOU ANNE".
- Note:** An empty text input field.
- Starts On:** A date dropdown menu showing "8/17/2009".
- Expires On*:** A date dropdown menu showing "8/17/2019".

At the bottom of the dialog box, there is a button labeled "Add New Client" with a person icon, and two buttons labeled "OK" (with a green checkmark) and "Cancel" (with a red X). A small asterisked note is located below the "Expires On*" field: "* Many area's place restrictions on the use of expiration dates on Gift Certificates. Please verify the laws in your area before you use this field."

2. Enter the Amount of the Gift Certificate.
3. Select the "Sold By" employee that is selling the Gift Certificate.
4. Swipe the card or enter a number (if you have your own numbers for Gift Certificates) in the "Gift Card No." field.
5. Select the client that will be using the gift certificate in the "Purchased For" field. If the client has not been added to your Client List, click the "Add New Client" button in the lower left hand corner.
6. Select a "Starts On" and "Expiration Date" for the gift certificate (optional). Today's date will automatically be entered into the "Starts On" date for the Gift Certificate. You may change this date to any date in the future.
7. Click the "OK" button when finished.

Discounting

To Discount an item in the Sales Register, double click on top of it or click the "Discount" button in the lower right hand corner of the Sales Register.

Adjust Screen:

1. If you double clicked on top of the item, click on the "Discount" tab of the Edit Selected Item window. You will see the following screen.

The screenshot shows the 'Edit Selected Item' window with the following details:

- Employee Id:** BARBARA DUNTS
- Price:** 25.00
- Description:** Hydrate Shampoo 10.1 Oz
- Discount Tab:**
 - Select Standard Discount Options:**
 - No Discount
 - Discount By a Percentage
 - Discount By a Fixed Amount
 - Set Price to a Fixed Amount
 - Amount:** 0.000
 - Note:** (empty field)
- Optional Additional Line Item Discount Amounts:**
 - Additional Membership Discount:** 0.00000
 - Amount 1:** 0.00
 - Amount 2:** 0.00
 - Amount 3:** 0.00
 - Amount 4:** 0.00
- Buttons:** OK, Cancel, Delete

2. Select the "**Type**" of discount you would like to apply to this item. There are 4 choices available to select from.

3. Enter the amount of discount in the "**Amount**" field to the right. The amount depends on the discount type selected on the left. If you chose "**Discount By a Percentage**", you would enter a percentage as a whole number into this field. If you chose "**Discount By a Fixed Amount**" or "**Set Price to a Fixed Amount**", you would enter a dollar amount into this field.

4. Enter a note if necessary.

5. Click the "**OK**" button at the bottom.

Discount Button:

1. If you clicked the "**Discount**" button at the bottom of the Sales Register, the following screen will appear.

2. Select the "**Type**" of discount you would like to apply to this item. There are 4 choices available to select from.

3. Enter the amount of discount into one of the amount fields provided. The field and the amount depends on the discount type selected at the top. If you chose "**Discount By a Percentage**", you would enter a percentage as a whole number into the "Discount %" field. If you chose "**Discount By a Fixed Amount**", you would enter a dollar amount into the "Discount By Fixed Amount" field. If you selected "**Set Price to a Fixed Amount**", you would enter a dollar amount into the "Set Price To" field.

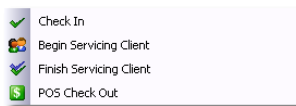
4. Enter a note if necessary.

5. Click the "**OK**" button at the bottom.

Combining Tickets

You may need to combine tickets if one person would like to pay for multiple people. For example, if a mother and daughter come in for appointment, the mother will probably want to pay for the daughter as well. There is a very easy way to do this from the calendar.

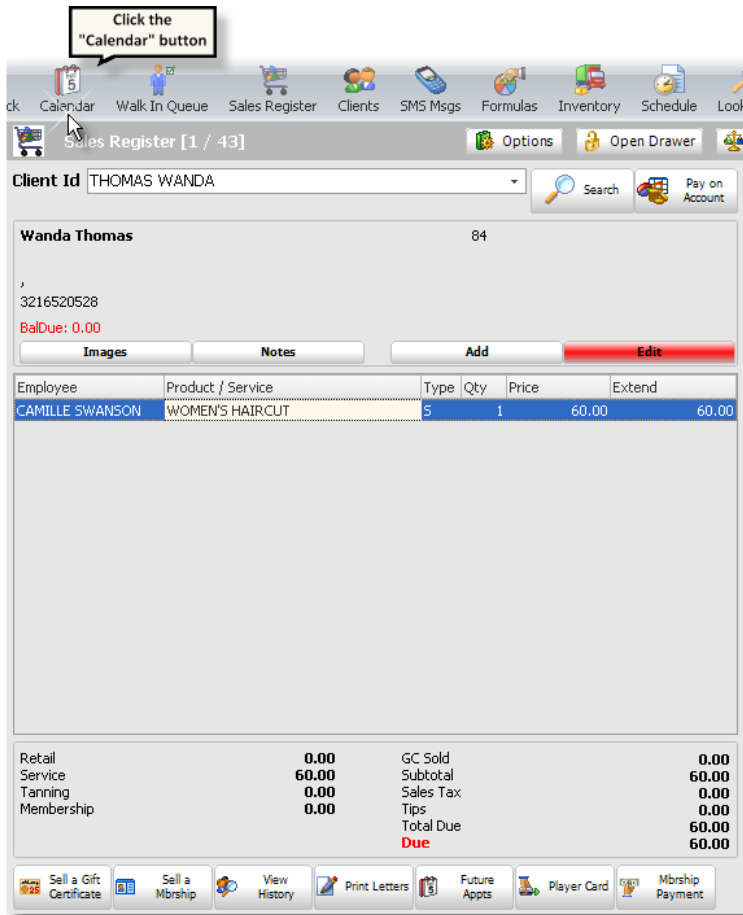
1. Right click on top of the mother's appointment in the calendar and select the "**POS Checkout**" option.



Which Client To Checkout First: It is extremely important to checkout the client that is paying for everything first!

2. Click the "**Check Out Client**" button.

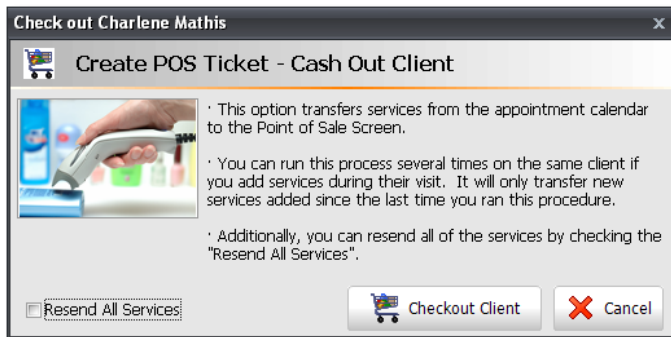
3. The mother's services will be transferred to the Sales Register. Leave her ticket open in the Sales Register and click on the **"Calendar"** button on the Tool Bar of Envision to go back to the Calendar.



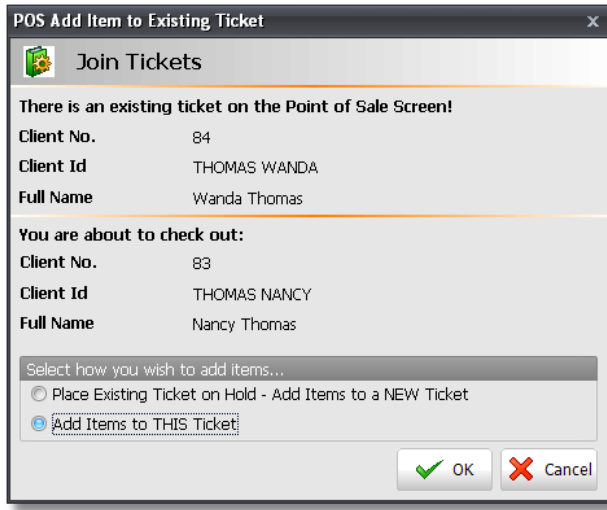
4. Right click on top of the daughter's appointment and select the **"POS Checkout"** option.



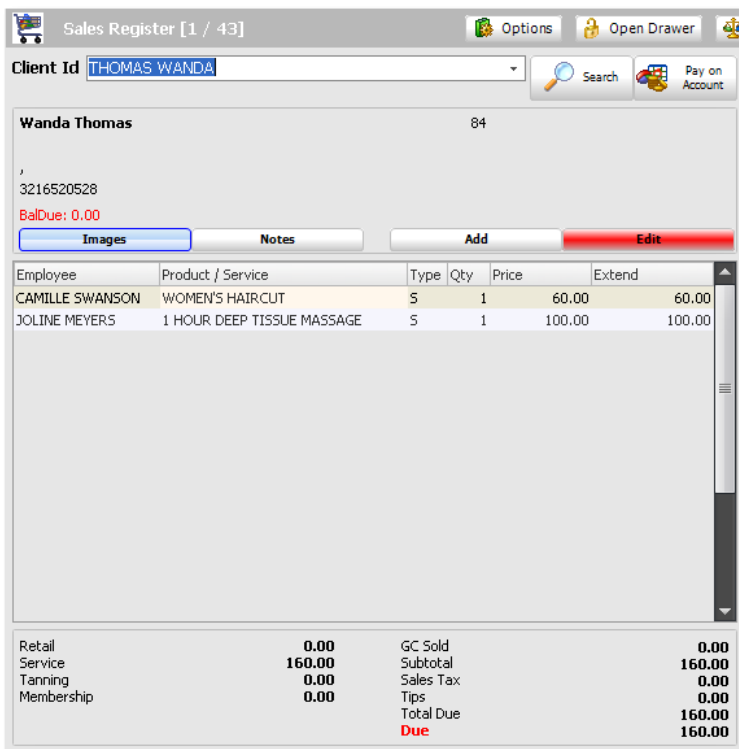
5. Click the **"Checkout Client"** button.



6. When the Sales Register opens you will see the following screen pop up, asking you what you would like to do.



7. Choose the second option at the bottom, "**Add Items To Ticket**" and click "**OK**". The daughter's services will then be added to the ticket. Their sales history will also remain separate.



8. Complete the sale by clicking the "**Sale/Cash Out**" button, selecting a payment type and clicking the "**Cash Out**" button.

Selling and Redeeming Packages / Prepaid Items

Envision has the capability of tracking prepaid items and packages sold to your clients so that when the client comes back, you know what package or prepaid item was sold to the client, how many items they originally purchased and how many they have left. There are different types of packages and different methods for selling, scheduling and redeeming packages and prepaid items. Below is a listing of what will be covered in this section of the guide:

- Selling and Redeeming a Series Package
- Selling and Redeeming a Multiple Service Package
- Selling and Redeeming a Prepaid Item

Selling and Redeeming a Series Package

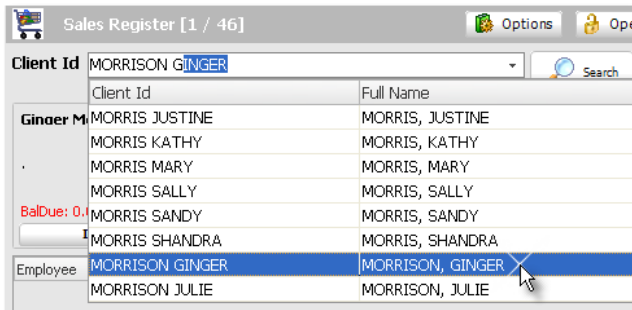
A Series Package is a package of one service that a client prepays for in advance. For example, a spa might sell a package of six massage services that has been discounted because all six services will be paid for in advance. Below are instructions for selling, scheduling and redeeming this type of package.

Selling a Series Package

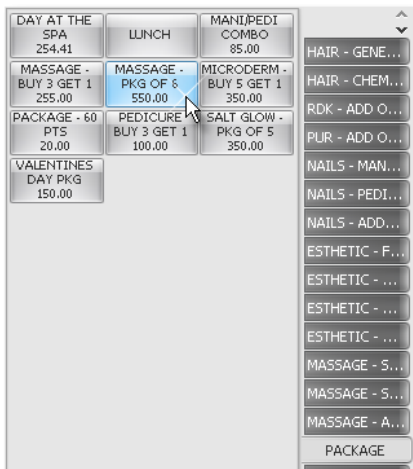
1. Click on the "Sales Register" button on the Tool Bar of Envision.



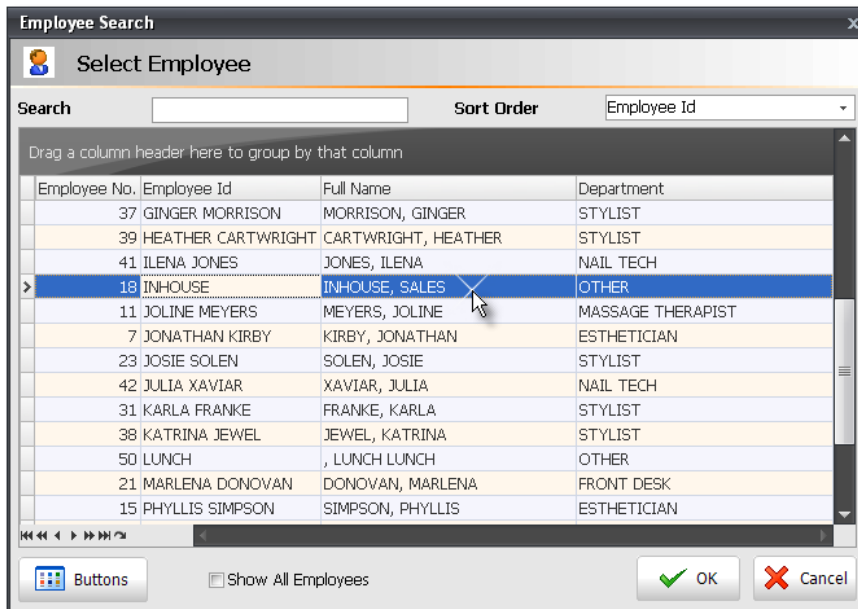
2. At the top of the Sales Register screen, select the client that the package is being sold to.



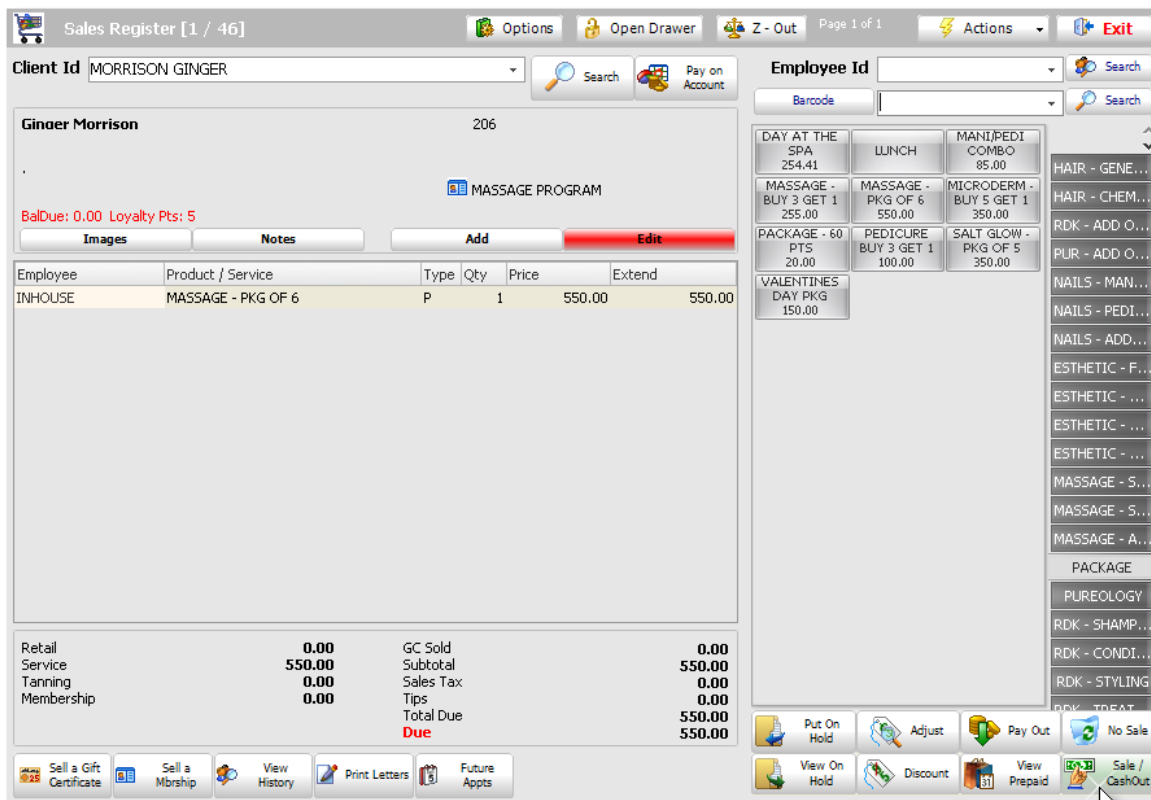
3. Click on the button for the Package / Series item being sold.



4. Select the "Inhouse" employee or the employee that is selling the package.



5. Add additional items to the ticket if necessary and click the "Sale / CashOut" button.



6. Select a payment type and click the "Cash Out" button.

Selling a Series Package as a Gift

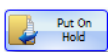
If the client that is purchasing the package is going to be giving the package to another client as a gift, you will need to combine two tickets into one if you would like to keep sales history that shows that a different client purchased the package. If you do not need to keep sales history that shows that the package was purchased by a different client, then you can select the client that will actually be using the package items.

If you would like to keep sales history on the actual client that purchased the Package, follow the instructions below:

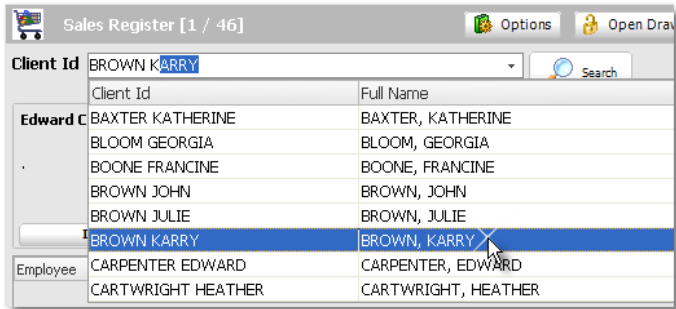
1. At the top of the Sales Register screen, select the client that is purchasing the package.

Client Id	Full Name
BAXTER KATHERINE	BAXTER, KATHERINE
BLOOM GEORGIA	BLOOM, GEORGIA
BOONE FRANCINE	BOONE, FRANCINE
BROWN JOHN	BROWN, JOHN
BROWN JULIE	BROWN, JULIE
BROWN KARRY	BROWN, KARRY
CARPENTER EDWARD	CARPENTER, EDWARD
CARTWRIGHT HEATHER	CARTWRIGHT, HEATHER

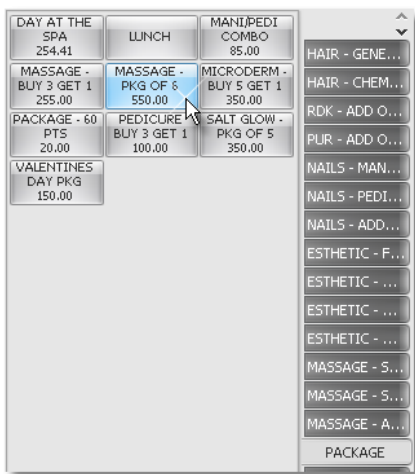
2. Click the "Put On Hold" button in the lower right hand corner of the Sales Register.



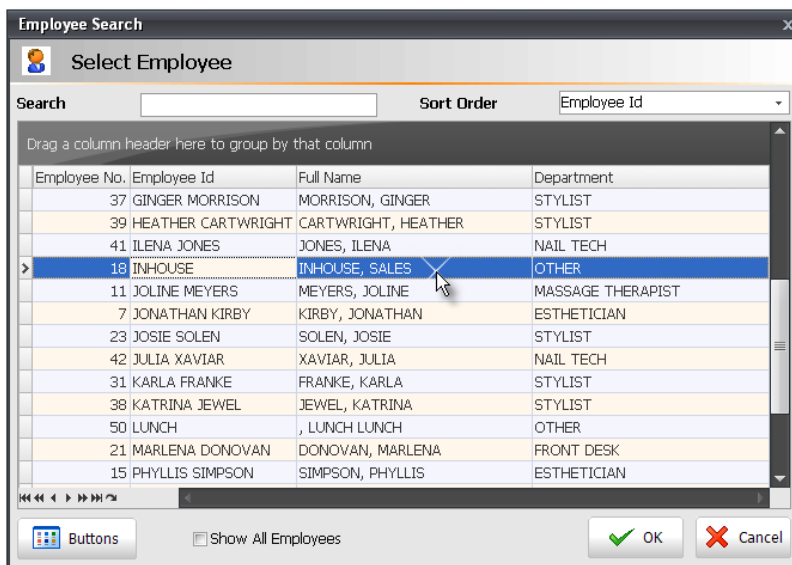
3. Select the client that will actually be using the items in the package.



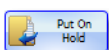
4. Click on the button for the Package / Series item being sold.



5. Select the "Inhouse" employee or the employee that is selling the package.



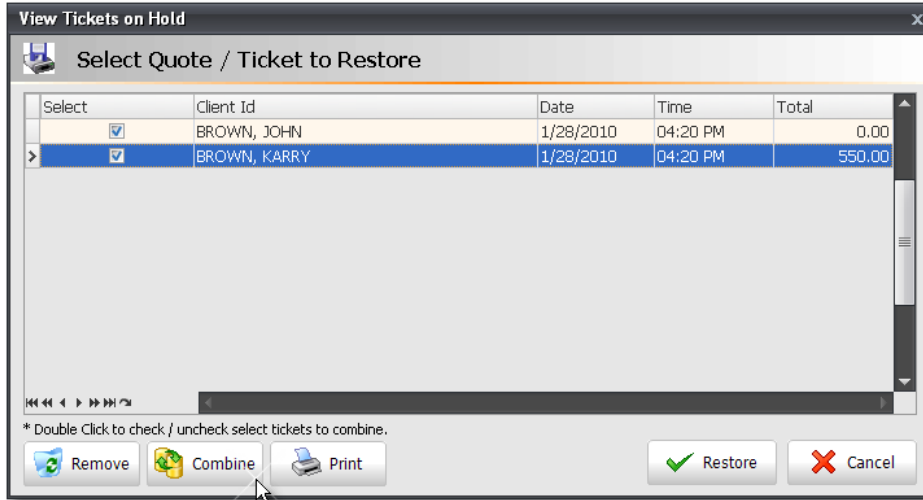
6. Click the "Put On Hold" button again so that the two tickets can be combined.



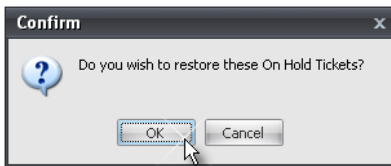
7. Click the "View On Hold" button to open the list of tickets that are currently "On Hold".



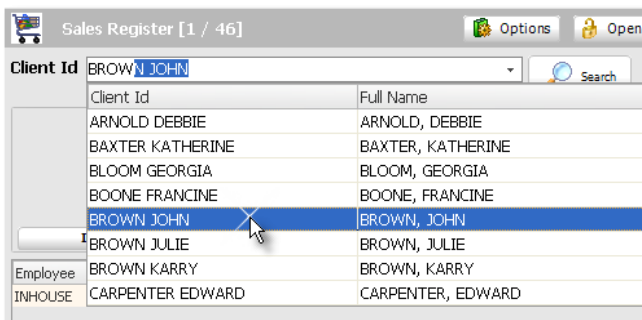
8. The following screen will open. Double click in the "Combine" check boxes next to the two tickets that need to be combined.



9. Click the "Combine" button at the bottom of the screen.



10. At the top of the Sales Register, select the client that is purchasing the package again.



11. Add additional items to the ticket if necessary and click the "Sale / CashOut" button at the bottom of the screen.

Sales Register [1 / 46] Options Open Drawer Z - Out Page 1 of 1 Actions Exit

Client Id BROWN JOHN Search Pay on Account

John Brown 114

BalDue: 0.00

Images Notes Add Edit

Employee	Product / Service	Type	Qty	Price	Extend
INHOUSE	MASSAGE - PKG OF 6	P	1	550.00	550.00

Retail	0.00	GC Sold	0.00
Service	550.00	Subtotal	550.00
Tanning	0.00	Sales Tax	0.00
Membership	0.00	Tips	0.00
		Total Due	550.00
		Due	550.00

Put On Hold Adjust Pay Out No Sale

View On Hold Discount View Prepaid Sale / CashOut

12. Select a payment type and click the "Cash Out" button.

OnAcct 7 8 9

VISA 4 5 6

Gift Debit 1 2 3

Other 1 Other 2 0 . CE

Other 3 Other 4 Other 5 Backspace

Other 6 Other 7 Other 8 Employee Deduction

Fast Cash Keys

\$1 \$5 \$10 \$20 \$50 \$100

Enter neagative (-) amount for credit or Refund

Payment 1 & 2 Payment 3 & 4

VISA Payment 1 Payment 2

550.00

Authorize No. Tips Note

Print Ticket Cash Out Return POS

Total Tips Allocated 0.00

Total Due 550.00

Change 0.00

Scheduling a Series Package

When scheduling an appointment for a client that has prepaid items, it is important to select the correct prepaid item so that when the client is checked out, the correct prepaid item will be deducted from their available prepaid items.

1. On the "Schedule Appointment" screen, select the client in the "Step 1" area.
2. If the client has prepaid items, you will see "Active Prepaids Available" displayed in red text in the client information area at the top of the scheduling screen.

Step 1 Select a Client BROWN KARRY

Name BROWN, KARRY First Visit 8/17/2004
 Phone H: 555-555-3296 M: W: Last Visit 12/10/2009 09:35
 Balance Due 0.00 Birthday 12/15/2009
 GC Outstanding 0.00 **Active Prepaids Available**

Retention: New Client Salon Client Repeat/Request Referral

Buttons: Cancel Changes, Add Client, Edit Client

3. Click the "Available Prepaids" tab.

Schedule Appointment

Step 1 Select a Client BROWN KARRY

Name BROWN, KARRY First Visit 8/17/2004
 Phone H: 555-555-3296 M: W: Last Visit 12/10/2009 09:35
 Balance Due 0.00 Birthday 12/15/2009
 GC Outstanding 0.00 **Active Prepaids Available**

Retention: New Client Salon Client Repeat/Request Referral

Buttons: Cancel Changes, Add Client, Edit Client

Details | Book Multiple Services | Slots Available | **Available Prepaids** | Purchases | Appointment List | Cancel / No Shows | eCharts

Step 2 Enter Appointment Details

Appt Date: 1/28/2010 Appt Time: 10:00 AM Employee Id: ANNE CREW (Prefers:)

4. Click the "Select Prepaid Service" button to schedule an appointment for the prepaid service.

Schedule Appointment

Step 1 Select a Client BROWN KARRY

Name BROWN, KARRY First Visit 8/17/2004
 Phone H: 555-555-3296 M: W: Last Visit 12/10/2009 09:35
 Balance Due 0.00 Birthday 12/15/2009
 GC Outstanding 0.00 **Active Prepaids Available**

Retention: New Client Salon Client Repeat/Request Referral

Buttons: Cancel Changes, Add Client, Edit Client

Details | Book Multiple Services | Slots Available | Available Prepaids | Purchases | Appointment List | Cancel / No Shows | eCharts

Step 2 Enter Appointment Details

Buttons: **Select Prepaid Service**, Add All Prepaid Services

Description	Interval	Count	Remaining	Starts On	Ends On	Expires
> 1 HOUR SWEDISH MASSAGE	C	6	6	5/24/2007		5/24/2057

5. The prepaid service will be moved over to the "Details" tab of the "Schedule Appointment" screen. Continue scheduling the appointment as you normally would to complete the scheduling of the prepaid service.

Step 2 Enter Appointment Details

Appt Date: 1/28/2010 Appt Time: 10:00 AM Employee Id: JOLINE MEYERS (Prefers:)

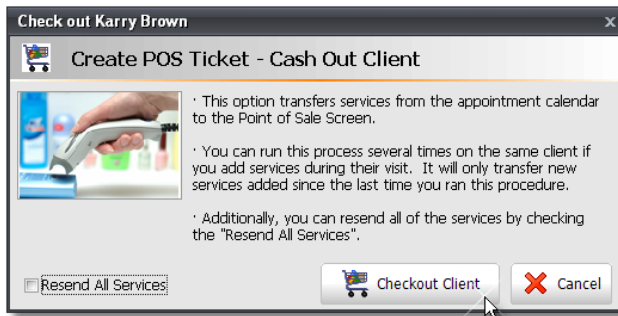
Service Id: 1 HOUR SWEDISH MASSAGE Show All

Room / Equipment: MESSAGE BED

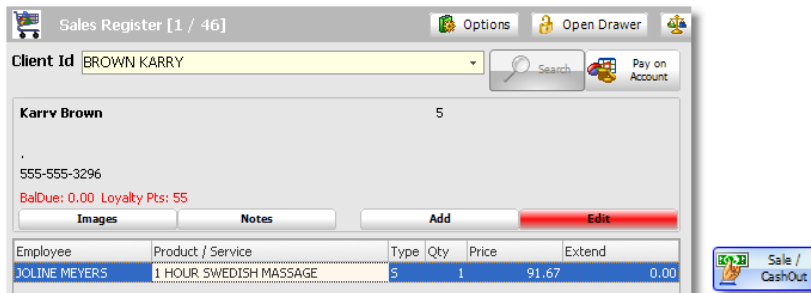
Redeeming a Series Package

When a client has purchased a Series Package, it is important that the prepaid items are redeemed correctly so that the program can keep track of how many prepaid items the client has left and so that the employee performing the service can receive commission for the service when the service has been completed.

1. When the client is ready to be checked out, right click on top of the client's appointment and select the **"POS Checkout"** option from the menu.
2. Verify that you are checking out the correct client and click the **"Checkout Client"** button.



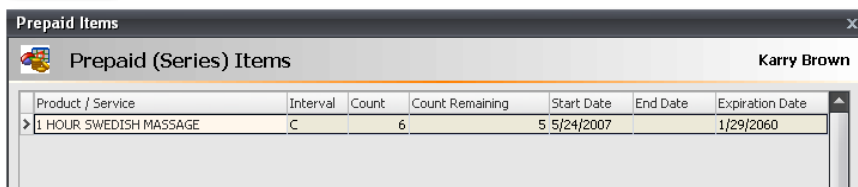
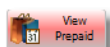
3. The services that the client was scheduled for will be moved into the Sales Register. The prepaid items that client was scheduled for will be displayed with the package **"Price"** and an **"Extended"** price of **"\$0.00"**. Add additional items to the ticket if necessary and click the **"Sale / Cash Out"** button.



4. Select a payment type if there is an amount due and click the **"Cash Out"** button. If there is not an amount due, just click the **"Cash Out"** button to complete the sale.



5. When the sale has been completed, the prepaid items will be deducted from the amount of prepaid items that the client has available. The amount remaining will be printed on the client's receipt and you can also check their available prepaids by selecting the client again at the top of the Sales Register. The **"View Prepaids"** button will turn red if the client has available prepaid items. Click the **"View Prepaids"** button to view the amount of remaining prepaid items.



Selling and Redeeming a Multiple Service Package

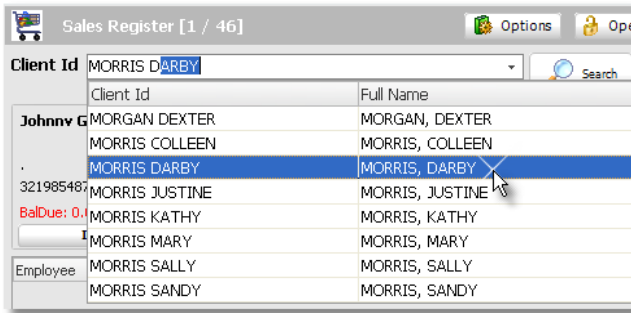
A multiple service package might be a "Day Package" where a client purchases or prepays for a full day of services. For example, you might have a "Valentine's Day Package" that includes a massage, facial, manicure and pedicure. If a client is calling to schedule this type of package for themselves, then there is no need to sell the package in advance, you can just go straight to the Calendar and use the "Book Multiple Services" feature. If the client would like to prepay for the package or if the package is going to be given to another client as a gift, then you will need to sell the package in advance. Below are instructions for doing this.

Selling a Multiple Service Package

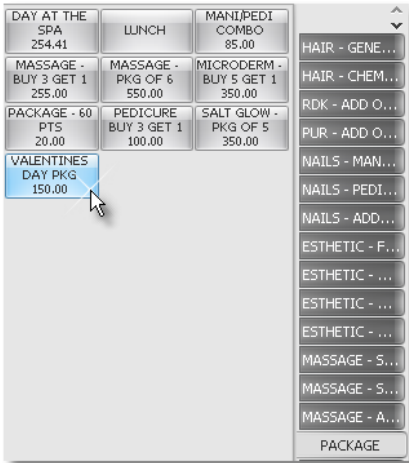
1. Click on the "Sales Register" button on the Tool Bar of Envision.



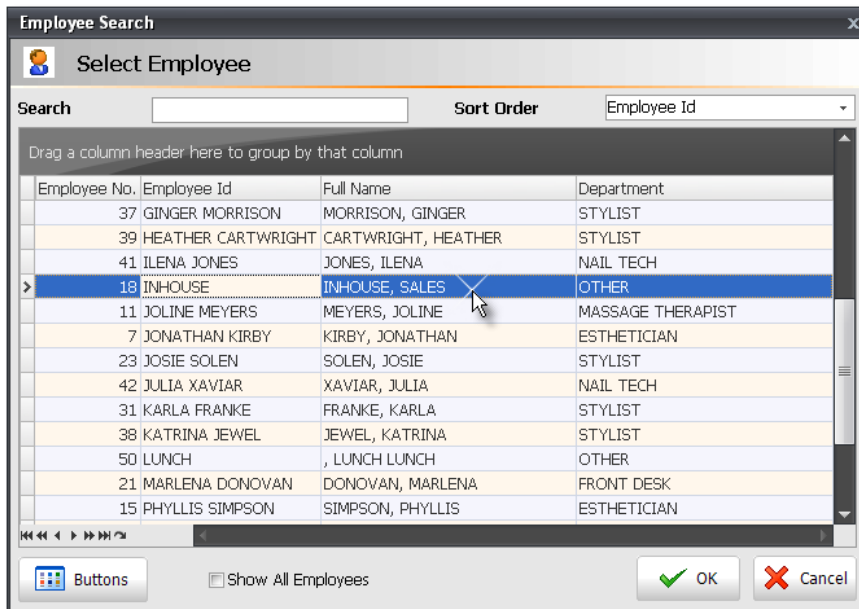
2. At the top of the Sales Register screen, select the client that the package is being sold to.



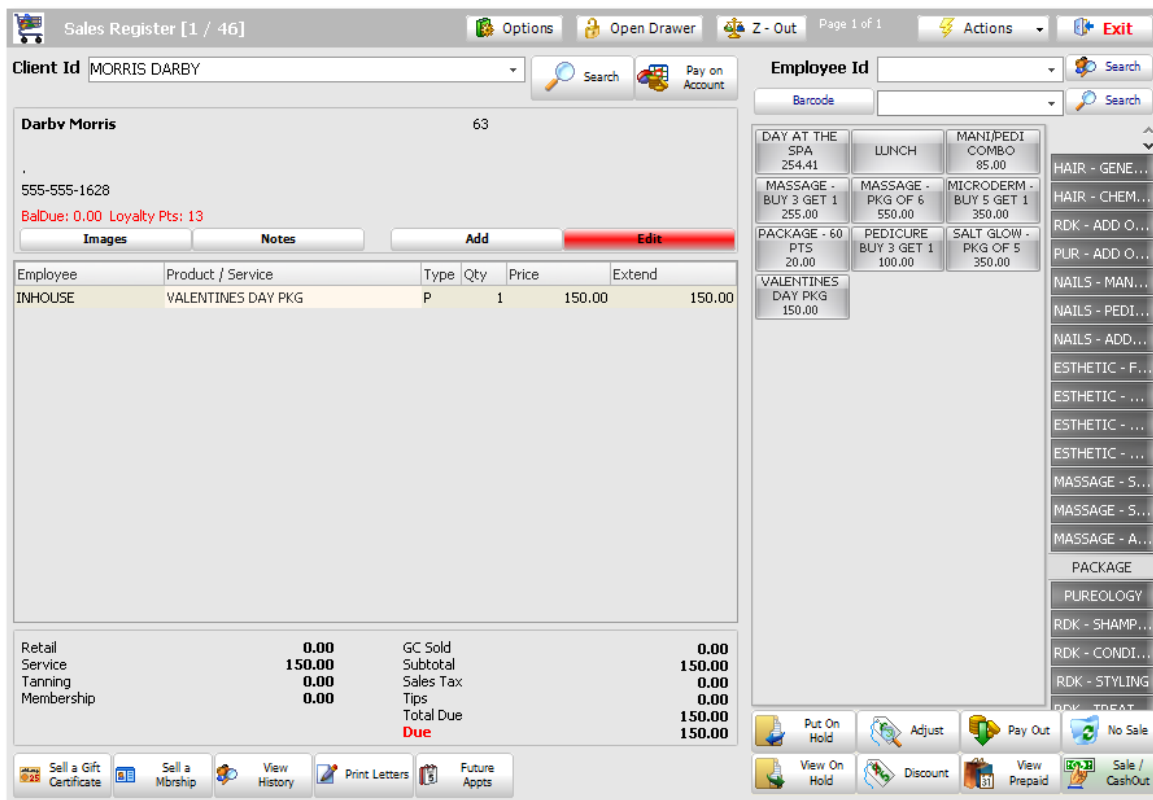
3. Click on the button for the Package item being sold.



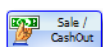
4. Select the "Inhouse" employee or the employee that is selling the package.



5. Add additional items to the ticket if necessary.



6. Click the "Sale / CashOut" button.



7. Select a payment type.

Enter negative (-) amount for credit or Refund

Payment 1 & 2 Payment 3 & 4

VISA Payment 1 **CASH** Payment 2

150.00

Authorize No. Tips Note

Print Ticket Cash Out Return POS

Total Tips Allocated 0.00
 Total Due 150.00
 Change 0.00

8. Click the "Cash Out" button.



Selling a Multiple Service Package as a Gift

If the client that is purchasing the package is going to be giving the package to another client as a gift, you will need to combine two tickets into one if you would like to keep sales history that shows that a different client purchased the package. If you do not need to keep sales history that shows that the package was purchased by a different client, then you can select the client that will actually be using the package items.

If you would like to keep sales history on the actual client that purchased the Package, follow the instructions below:

1. At the top of the Sales Register screen, select the client that is purchasing the package.

Sales Register [1 / 46] Options Open

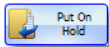
Client Id: GREEN JOHNNY Search

Client Id	Full Name
DUGLE SAMANTHA	DUGLE, SAMANTHA
DUNTS BARBARA	DUNTS, BARBARA
FISHER DONALD	FISHER, DONALD
FISHER ERIKA	FISHER, ERIKA
FORMAN JULIETTE	FORMAN, JULIETTE
FRANKE KARLA	FRANKE, KARLA
GREEK URSULA	GREEK, URSULA
GREEN JOHNNY	GREEN, JOHNNY

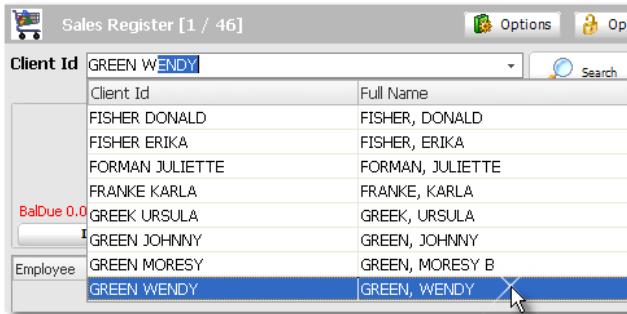
BalDue 0.00

Employee: GREEN JOHNNY

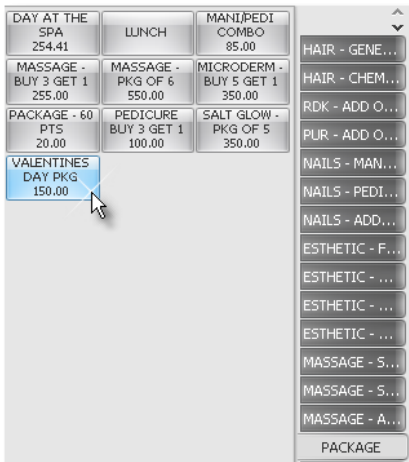
- Click the "Put On Hold" button in the lower right hand corner of the Sales Register.



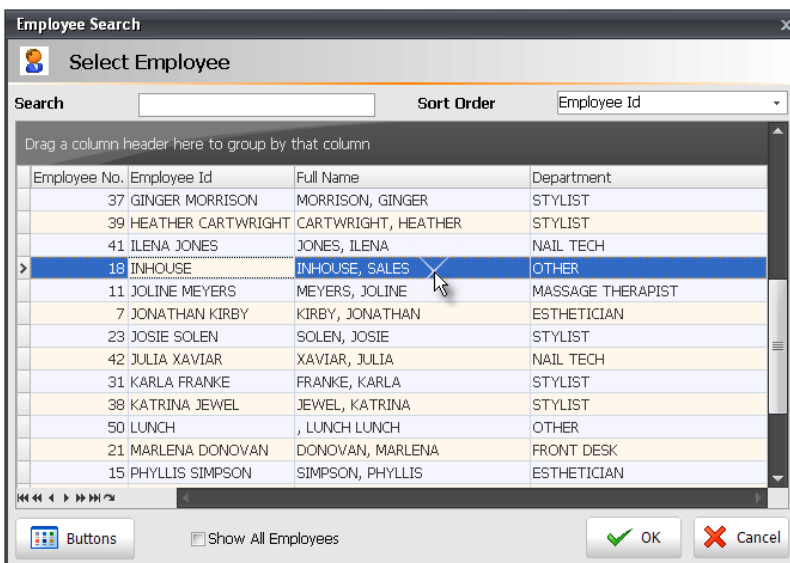
- Select the client that will actually be using the items in the package.



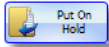
- Click on the button for the Package item being sold.



- Select the "Inhouse" employee or the employee that is selling the package.



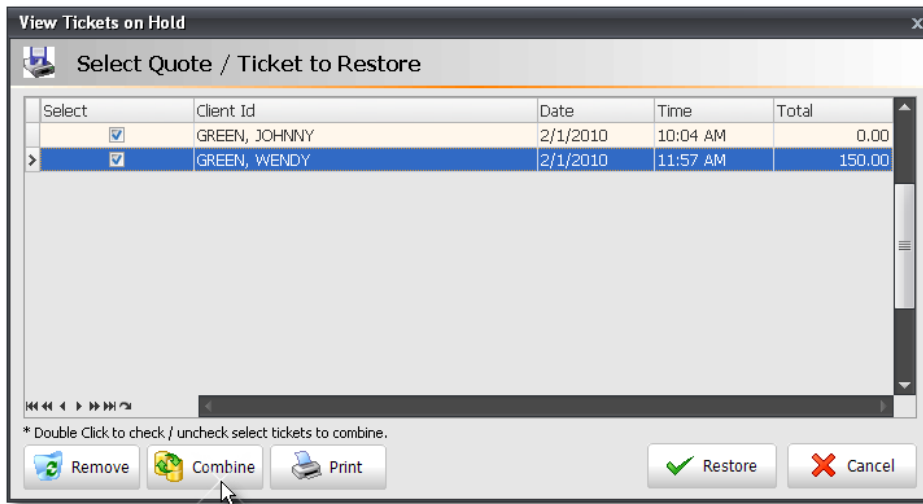
6. Click the "Put On Hold" button again so that the two tickets can be combined.



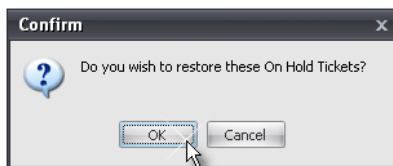
7. Click the "View On Hold" button to open the list of tickets that are currently "On Hold".



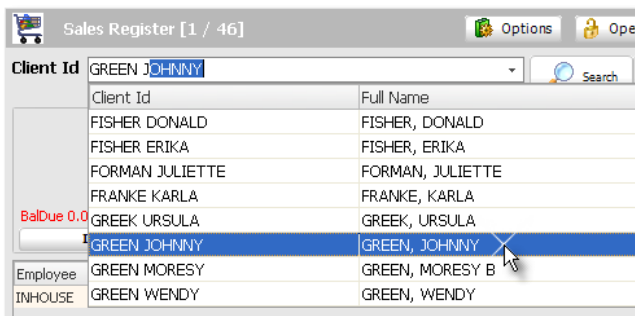
8. The following screen will open. Double click in the "Combine" check boxes next to the two tickets that need to be combined.



9. Click the "Combine" button at the bottom of the screen.



10. At the top of the Sales Register, select the client that is purchasing the package again.



11. Add additional items to the ticket if necessary and click the "Sale / CashOut" button at the bottom of the screen.

Sales Register [1 / 46] Options Open Drawer Z - Out Page 1 of 1 Actions Exit

Client Id GREEN JOHNNY Search Pay on Account

Johnny Green 31

BalDue: 0.00

Images Notes Add Edit

Employee	Product / Service	Type	Qty	Price	Extend
INHOUSE	VALENTINES DAY PKG	P	1	150.00	150.00

Retail 0.00 GC Sold 0.00
 Service 150.00 Subtotal 150.00
 Tanning 0.00 Sales Tax 0.00
 Membership 0.00 Tips 0.00
 Total Due 150.00
 Due 150.00

Put On Hold Adjust Pay Out No Sale
 View On Hold Discount View Prepaid Sale / CashOut

12. Select a payment type and click the "Cash Out" button.

OnAcct 7 8 9
 4 5 6
 1 2 3
 0 . €
 Backspace
 Employee Deduction
 Other 1 Other 2
 Other 3 Other 4 Other 5
 Other 6 Other 7 Other 8

Fast Cash Keys
 \$1 \$5 \$10 \$20 \$50 \$100

Enter neagative (-) amount for credit or Refund

Payment 1 & 2 Payment 3 & 4

VISA Payment 1 Payment 2
 150.00
 Authorize No. Tips Note

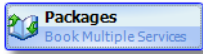
Print Ticket Cash Out Return POS

Total Tips Allocated 0.00
 Total Due 150.00
 Change 0.00

Scheduling a Multiple Service Package

If a client would like to schedule a Multiple Service Package that has not been paid for in advance, you will need to schedule the services as a package in the Calendar so that when you check the client out, the package price will be used for the services scheduled. If each service is scheduled separately, the client will not receive the package price when checked out, unless they have paid for the package in advance. Use the instructions below to schedule a package.

1. Click on the "Calendar" button on the Tool Bar of Envision.
2. Click the "Packages" button on the right side of the Calendar.



3. Select the client at the top of the "Schedule Appointment" screen.

Client Id	Full Name	Home Phone
MARVIN SARAH	MARVIN, SARAH	555-555-7825
MATHIS CHARLENE	MATHIS, CHARLENE	555-555-9826
MECK URSALA	MECK, URSALA	
MEDLON SARAH	MEDLON, SARAH	
MENNON KATIE	MENNON, KATIE	
MEYERS JOLINE	MEYERS, JOLINE	
MISSLIE DONNA	MISSLIE, DONNA	
MITCHELL LOU ANNE	MITCHELL, LOU ANNE	

4. Select the Package from the "Service" field in the "Step 2" area of the screen.

Step 2: Select one or more Services / Packages and Assign Employees

Service: VALENTINES DAY PKG

Description: TANNING PKG - 10, TEEN MAKEUP LESSON, TEST 1, THE ULTIMATE VICHY SHOWER, ULTIMATE SPA MANICURE, ULTIMATE SPA PEDICURE, UPDOS, VALENTINES DAY PKG

5. Each service that is included in the package selected will appear. Select the employees that will be performing each service by clicking in the fields labeled **"First Available"** for each service. A drop down menu of employees qualified to perform each service will appear. You may also leave the employee selection set to "First Available" if you would like the program to find the first available employee for each service.

Schedule Appointment

Step 1 Select a Client MARVIN SARAH

Name: MARVIN, SARAH
 Phone: H: 555-555-7825 M: W:
 Balance Due: 0.00
 GC Outstanding: 0.00

Retention: New Client Salon Client Repeat/Request Referral

Buttons: **Cancel Changes**, **Add Client**, **Edit Client**

Step 2 Select one or more Services / Packages and Assign Employees

Service	Employee	Process
1 HOUR SWEDISH MASSAGE	CONNOR MARLOW	1
FACIAL	ANNE CREW	2
MANICURE	FIRST AVAILABLE	3
PEDICURE	Employee Id	4

Dropdown for MANICURE:

Employee Id	Full Name
FIRST AVAILABLE	Select First Available Employee
CARRIE CONNOR	CONNOR, CARRIE
ILENA JONES	JONES, ILENA
JULIA XAVIAR	XAVIAR, JULIA

6. Select the Starting Date, Times, Number of Days, Maximum Wait Time and Days of Week to search for availabilities.

Step 3 Select Starting Date / Time and number of days to search for an opening

Start Search From: 2/1/2010
 Search From: 09:00 AM
 Search To: 08:00 PM

Enter No. of Days to Search: 1
 Maximum Wait Time in Min between Services: 15

Days of Week: Mon, Tue, Wed, Thu, Fri, Sat, Sun

Limit to Start - Ending Times Selected

Click to Start Scan

7. Click the **"Click to Start Scan"** button.

8. The screen will jump to the next tab, **"Slots Available"** and you will be provided with a listing of availabilities where all services can be scheduled together. Select one of the listed availabilities and click the **"Book"** button in the lower right hand corner. When the client is checked out for these services, they will receive the package pricing.

Schedule Appointment

Step 1 Select a Client MARVIN SARAH

Name: MARVIN, SARAH
 Phone: H: 555-555-7825 M: W:
 Balance Due: 0.00
 GC Outstanding: 0.00

Retention: New Client Salon Client Repeat/Request Referral

Buttons: **Cancel Changes**, **Add Client**, **Edit Client**

Slots Available

List of available appointment times

Time	Service	Employee	Resource	Length	Resource
Monday, February 01, 2010 starting at 09:45 AM					
09:45 AM	1 HOUR SWEDISH MASSAGE	CONNOR MARLOW	MESSAGE BED	60	
11:00 AM	FACIAL	ANNE CREW		75	
12:15 PM	MANICURE	CARRIE CONNOR	MANICURE STATION	45	
01:00 PM	PEDICURE	CARRIE CONNOR	PEDICURE STATION	45	
Monday, February 01, 2010 starting at 10:00 AM					
10:00 AM	1 HOUR SWEDISH MASSAGE	CONNOR MARLOW	MESSAGE BED	60	
11:00 AM	FACIAL	ANNE CREW		75	
12:15 PM	MANICURE	CARRIE CONNOR	MANICURE STATION	45	
01:00 PM	PEDICURE	CARRIE CONNOR	PEDICURE STATION	45	

Select an appointment and press the Book Button =====>

Book

Scheduling a Multiple Service Package - Prepaid (Paid In Advance)

When scheduling an appointment for a client that has prepaid items, it is important to select the correct prepaid item so that when the client is checked out, the correct prepaid item will be deducted from their available prepaid items.

1. On the "Schedule Appointment" screen, select the client in the "Step 1" area.
2. If the client has prepaid items, you will see "Active Prepaids Available" displayed in red text in the client information area at the top of the scheduling screen.

Step 1 Select a Client: MORRIS DARBY

Name: MORRIS, DARBY
 Phone: H: 555-555-1628 M: W:
 Balance Due: 0.00
 GC Outstanding: 0.00

Retention: New Client, Salon Client, Repeat/Request, Referral

Buttons: Cancel Changes, Add Client, Edit Client

Client History: First Visit: 8/17/2004, Last Visit: 2/1/2010 14:48, Birthday

Active Prepaids Available

3. Click the "Available Prepaids" tab.

Schedule Appointment

Step 1 Select a Client: MORRIS DARBY

Name: MORRIS, DARBY
 Phone: H: 555-555-1628 M: W:
 Balance Due: 0.00
 GC Outstanding: 0.00

Retention: New Client, Salon Client, Repeat/Request, Referral

Buttons: Cancel Changes, Add Client, Edit Client

Client History: First Visit: 8/17/2004, Last Visit: 2/1/2010 14:48, Birthday

Active Prepaids Available

Navigation: Details, Book Multiple Services, Slots Available, **Available Prepaids**, Purchases, Appointment List, Cancel / No Shows, eCharts

Step 2 Enter Appointment Details

Appt Date: 2/1/2010, Appt Time: 10:00 AM, Employee Id: JOLINE MEYERS (Prefers: COLLEEN MORRIS)

4. Click the "Add All Prepaid Services" button to schedule appointments for all of the prepaid services.

Schedule Appointment

Step 1 Select a Client: MORRIS DARBY

Name: MORRIS, DARBY
 Phone: H: 555-555-1628 M: W:
 Balance Due: 0.00
 GC Outstanding: 0.00

Retention: New Client, Salon Client, Repeat/Request, Referral

Buttons: Cancel Changes, Add Client, Edit Client

Client History: First Visit: 8/17/2004, Last Visit: 2/1/2010 14:48, Birthday

Active Prepaids Available

Navigation: Details, Book Multiple Services, Slots Available, **Available Prepaids**, Purchases, Appointment List, Cancel / No Shows, eCharts

Buttons: Select Prepaid Service, **Add All Prepaid Services**

Description	Interval	Count	Remaining	Starts On	Ends On	Expires
> 1 HOUR SWEDISH MASSAGE	C	1	1	2/1/2010		2/1/2060
FACIAL	C	1	1	2/1/2010		2/1/2060
MANICURE	C	1	1	2/1/2010		2/1/2060
PEDICURE	C	1	1	2/1/2010		2/1/2060

5. Each service that is included in the package selected will appear under the **"Book Multiple Services"** tab of the scheduling screen. Select the employees that will be performing each service by clicking in the fields labeled **"First Available"** for each service. A drop down menu of employees qualified to perform each service will appear. You may also leave the employee selection set to "First Available" if you would like the program to find the first available employee for each service.

Step 1 Select a Client MORRIS DARBY

Name MORRIS, DARBY First Visit 8/17/2004
 Phone H: 555-555-1628 M: W: Last Visit 2/1/2010 14:48
 Balance Due 0.00
 GC Outstanding 0.00 Active Prepays Available

Retention: New Client Salon Client Repeat/Request Referral

Buttons: Cancel Changes, Add Client, Edit Client

Step 2 Select one or more Services / Packages and Assign Employees

Service	Employee	Process
1 HOUR SWEDISH MASSAGE	CONNOR MARLOW	1
FACIAL	ANNE CREW	2
MANICURE	FIRST AVAILABLE	3
PEDICURE		4

Employee selection dropdown for MANICURE:

Employee Id	Full Name
FIRST AVAILABLE	Select First Available Employee
CARRIE CONNOR	CONNOR, CARRIE
ILENA JONES	JONES, ILENA
JULIA XAVIAR	XAVIAR, JULIA

6. Select the Starting Date, Times, Number of Days, Maximum Wait Time and Days of Week to search for availabilities.

Step 3 Select Starting Date / Time and number of days to search for an opening

Start Search From: 2/1/2010
 Search From: 09:00 AM
 Search To: 08:00 PM

Enter No. of Days to Search: 1
 Maximum Wait Time in Min between Services: 15

Days of Week: Mon, Tue, Wed, Thu, Fri, Sat, Sun

Limit to Start - Ending Times Selected

Click to Start Scan

7. Click the **"Click to Start Scan"** button.

8. The screen will jump to the next tab, **"Slots Available"** and you will be provided with a listing of availabilities where all services can be scheduled together. Select one of the listed availabilities and click the **"Book"** button in the lower right hand corner.

Step 1 Select a Client MORRIS DARBY

Name MORRIS, DARBY First Visit 8/17/2004
 Phone H: 555-555-1628 M: W: Last Visit 2/1/2010 14:48
 Balance Due 0.00
 GC Outstanding 0.00 Active Prepays Available

Retention: New Client Salon Client Repeat/Request Referral

Buttons: Cancel Changes, Add Client, Edit Client

Step 3 Select Starting Date / Time and number of days to search for an opening

Start Search From: 2/1/2010
 Search From: 09:00 AM
 Search To: 08:00 PM

Enter No. of Days to Search: 1
 Maximum Wait Time in Min between Services: 15

Days of Week: Mon, Tue, Wed, Thu, Fri, Sat, Sun

Limit to Start - Ending Times Selected

Click to Start Scan

List of available appointment times

Time	Service	Employee	Resource	Length	Resource
Monday, February 01, 2010					
Monday, February 01, 2010 starting at 09:45 AM					
09:45 AM	1 HOUR SWEDISH MASSAGE	CONNOR MARLOW	MESSAGE BED	60	
11:00 AM	FACIAL	ANNE CREW		75	
12:15 PM	MANICURE	CARRIE CONNOR	MANICURE STATION	45	
01:00 PM	PEDICURE	CARRIE CONNOR	PEDICURE STATION	45	
Monday, February 01, 2010 starting at 10:00 AM					
10:00 AM	1 HOUR SWEDISH MASSAGE	CONNOR MARLOW	MESSAGE BED	60	
11:00 AM	FACIAL	ANNE CREW		75	
12:15 PM	MANICURE	CARRIE CONNOR	MANICURE STATION	45	
01:00 PM	PEDICURE	CARRIE CONNOR	PEDICURE STATION	45	
Monday, February 01, 2010 starting at 10:15 AM					

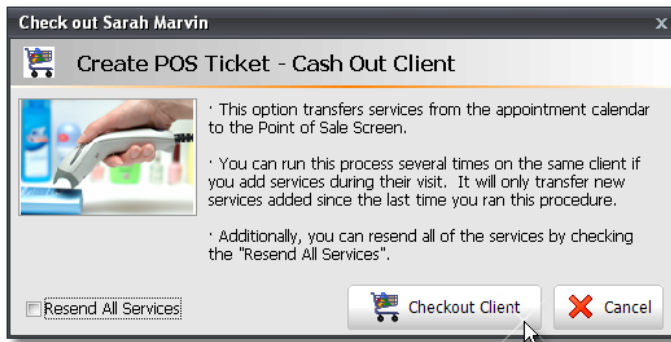
Select an appointment and press the Book Button =====>

Book

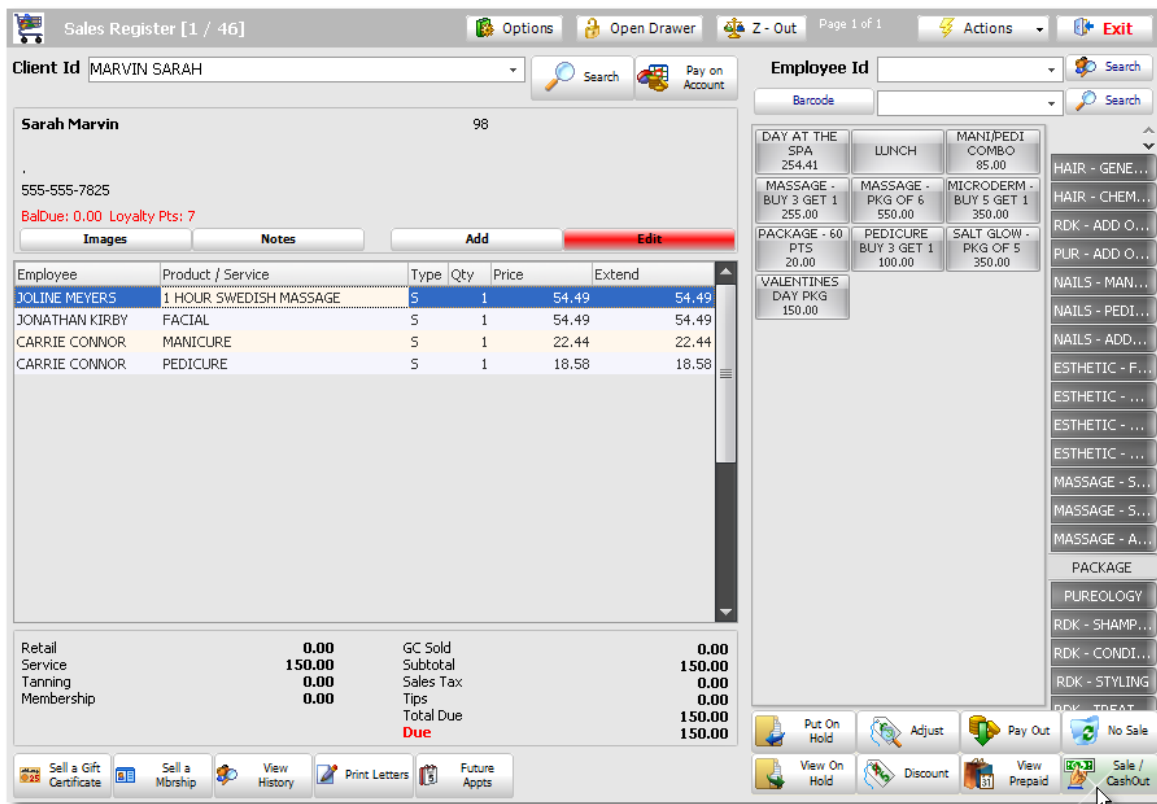
Checking Out a Multiple Service Package

When a client has scheduled a multiple service package, the checkout process is simple. Below are instructions for checking out a client that has scheduled a multiple service package.

1. When the client is ready to be checked out, right click on top of one of the client's appointments and select the **"POS Checkout"** option from the menu.
2. Verify that you are checking out the correct client and click the **"Checkout Client"** button.



3. The services that the client was scheduled for will be moved into the Sales Register with the discounted pricing for the package. Add additional items to the ticket if necessary and click the **"Sale / CashOut"** button.



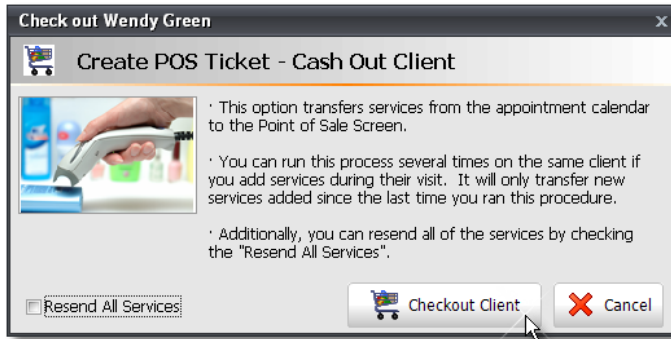
4. Select a payment type and click the **"Cash Out"** button.



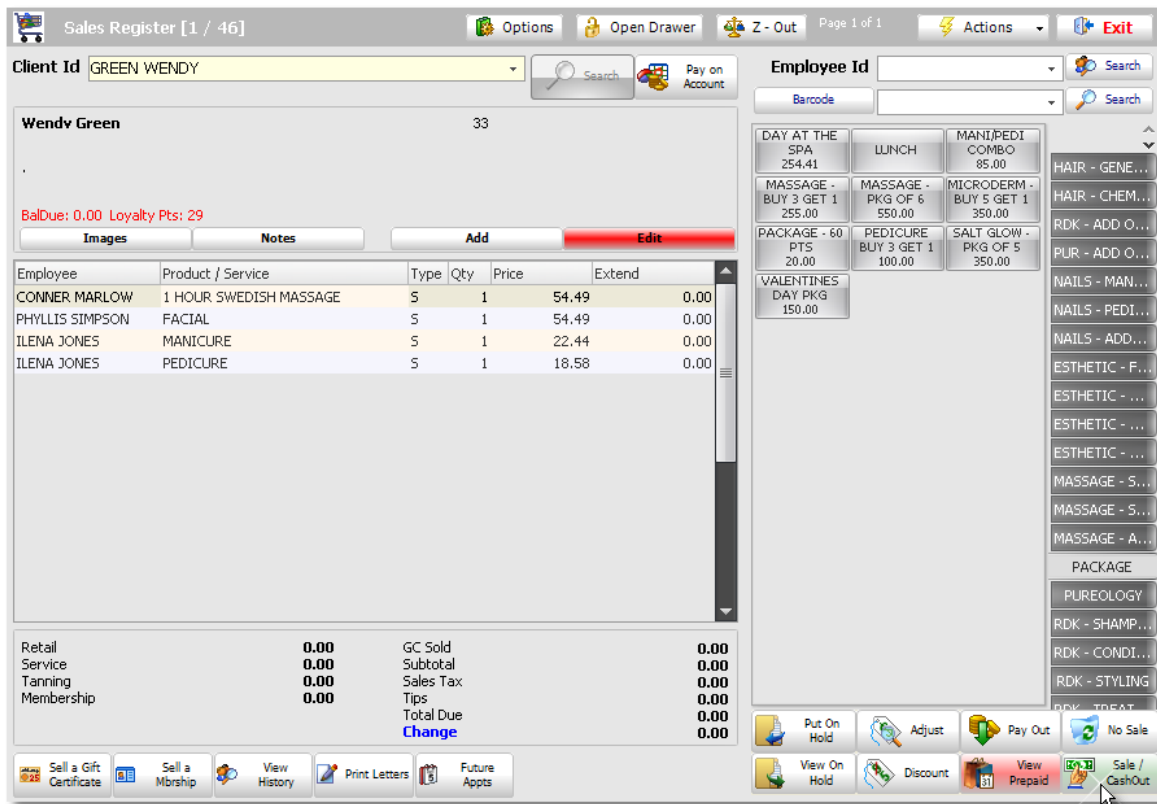
Redeeming a Multiple Service Package - Prepaid (Paid In Advance)

When a client has purchased a Prepaid Package, it is important that the prepaid items are redeemed correctly so that the program can keep track of how many prepaid items the client has left and so that the employee performing the service can receive commission for the service when the service has been completed.

1. When the client is ready to be checked out, right click on top of one of the client's appointments and select the **"POS Checkout"** option from the menu.
2. Verify that you are checking out the correct client and click the **"Checkout Client"** button.



3. The services that the client was scheduled for will be moved into the Sales Register. The prepaid items that the client was scheduled for will be displayed with the package **"Price"** and an **"Extended"** price of **"\$0.00"**. Add additional items to the ticket if necessary and click the **"Sale / Cash Out"** button.



4. Select a payment type if there is an amount due and click the "**Cash Out**" button. If there is not an amount due, just click the "**Cash Out**" button to complete the sale.

Enter negative (-) amount for credit or Refund

Payment 1 & 2 | Payment 3 & 4

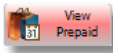
Payment 1 | Payment 2

Tips | Note

Print Ticket | Cash Out | Return POS

Total Tips Allocated 0.00
Total Due 0.00
Change 0.00

5. When the sale has been completed, the prepaid items will be deducted from the amount of prepaid items that the client has available. If the client did not use all of the items in the package, the amount remaining will be printed on the client's receipt and you can also check their available prepaids by selecting the client again at the top of the Sales Register. The "**View Prepaids**" button will turn red if the client has available prepaid items. Click the "**View Prepaids**" button to view the amount of remaining prepaid items.



Prepaid Items						
Prepaid (Series) Items						Wendy Green
Product / Service	Interval	Count	Count Remaining	Start Date	End Date	Expiration Date
PEDICURE	C	1	1	2/1/2010		2/1/2060

Selling and Redeeming a Prepaid Item

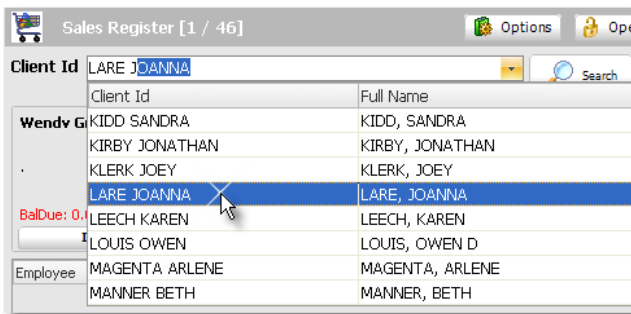
It may be necessary to sell a prepaid item if a client would like to pay for their service or for someone else's service in advance or if your clients purchase package items "À La Carte" (each item is selected separately, instead of in a predetermined package). Below are instructions for selling, scheduling and redeeming prepaid items.

Selling a Prepaid Item

1. Click on the "Sales Register" button on the Tool Bar of Envision.



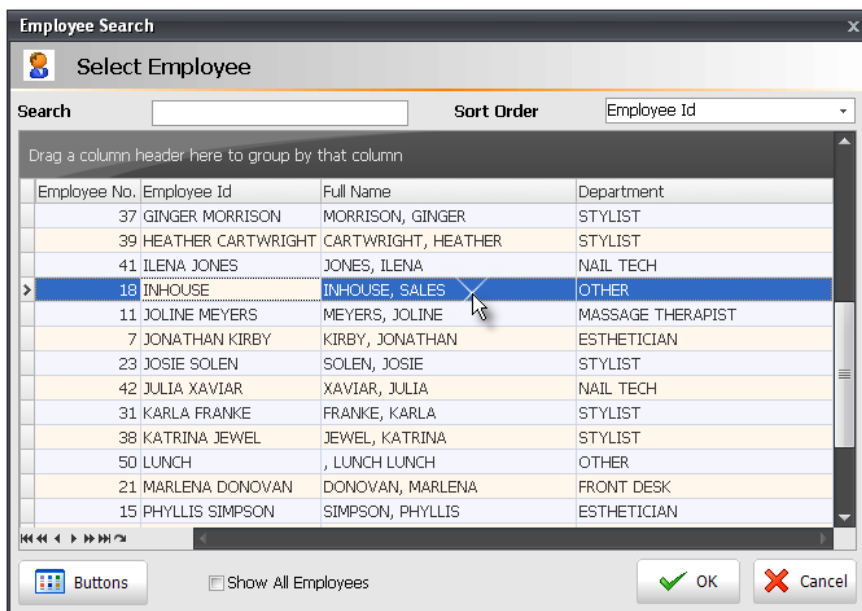
2. At the top of the Sales Register screen, select the client that the prepaid item is being sold to.



3. Click on the button for the item that the client is prepaying for.



4. Select the "Inhouse" employee.



5. Double Click on top of the item after it has been selected to open the "Edit Selected Item" screen.

Edit Selected Item

Employee Id: INHOUSE Price: 75.00

Description: 1 HOUR DEEP TISSUE MASSAGE

Price & Qty | Discount | Loyalty | Coupon / Promo Code | Cost & Commission

Qty: 1 Increase Qty Decrease Qty

Qty Prepaid*: 0

Back Bar Amount: 0.00

Service Type: MESSAGE - SESSION

Assistant:

Prepaid (Series)

Not Taxable

Back Bar (In House Use)

* There are currently 0 prepaid items available.

OK Cancel Delete

6. Increase the quantity of items being purchased, if necessary, and check the "Prepaid (Series)" checkbox.
7. Click the "OK" button.
8. Add additional items to the ticket if necessary and click the "Sale / CashOut" button.

Sales Register [1 / 46] Options Open Drawer Z - Out Page 1 of 1 Actions Exit

Client Id: LARE JOANNA

Employee Id: [Search]

Barcode: [Search]

Joanna Lare 47

BalDue: 0.00

Images Notes Add Edit

Employee	Product / Service	Type	Qty	Price	Extend
INHOUSE	1 HOUR DEEP TISSUE MASSAGE	S	1	75.00	75.00

Retail: 0.00 GC Sold: 0.00

Service: 75.00 Subtotal: 75.00

Tanning: 0.00 Sales Tax: 0.00

Membership: 0.00 Tips: 0.00

Total Due: 75.00

Due: 75.00

Put On Hold Adjust Pay Out No Sale

View On Hold Discount View Prepaid Sale / CashOut

9. Select a payment type and click the "Cash Out" button.

The screenshot shows a POS interface with various payment options and a numeric keypad. The 'Cash Out' button is highlighted with a mouse cursor. Below the keypad, there are 'Fast Cash Keys' for \$1, \$5, \$10, \$20, \$50, and \$100. A red note says 'Enter negative (-) amount for credit or Refund'. There are two payment sections: 'Payment 1 & 2' and 'Payment 3 & 4'. The 'Payment 1' section shows a VISA card with a value of 75.00. Below this are fields for 'Authorize No.', 'Taxes', and 'Note'. At the bottom, there are buttons for 'Print Ticket', 'Cash Out', and 'Return POS'. A summary section shows: 'Total Tips Allocated 0.00', 'Total Due 75.00', and 'Change 0.00'.

Selling a Prepaid Item as a Gift

If the client that is purchasing the prepaid item is going to be giving the package to another client as a gift or if they are paying for another client in advance, you will need to combine two tickets into one if you would like to keep sales history that shows that a different client purchased the prepaid item. If you do not need to keep sales history that shows that the prepaid item was purchased by a different client, then you can select the client that will actually be using the prepaid item.

If you would like to keep sales history on the actual client that purchased the prepaid item, follow the instructions below:

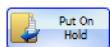
1. At the top of the Sales Register screen, select the client that is purchasing the prepaid item and add additional items to their ticket if they are purchasing products or services.

The screenshot shows the 'Sales Register [1 / 46]' window. At the top, there are 'Options' and 'Open' buttons. Below is a 'Client Id' dropdown menu with 'MOORE COREY' selected. A search icon is next to it. Below the dropdown is a table with columns 'Client Id' and 'Full Name'. The table contains the following data:

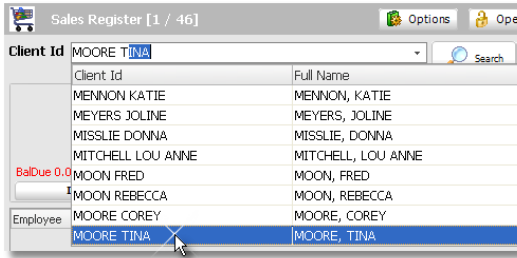
Client Id	Full Name
MEDLON SARAH	MEDLON, SARAH
MENNON KATIE	MENNON, KATIE
MEYERS JOLINE	MEYERS, JOLINE
MISSLIE DONNA	MISSLIE, DONNA
MITCHELL LOU ANNE	MITCHELL, LOU ANNE
MOON FRED	MOON, FRED
MOON REBECCA	MOON, REBECCA
MOORE COREY	MOORE, COREY

The 'MOORE COREY' row is highlighted in blue. There are also labels for 'Corey Mo', 'BalDue: 0', and 'Employee' on the left side of the table.

2. Click the "Put On Hold" button in the lower right hand corner of the Sales Register.



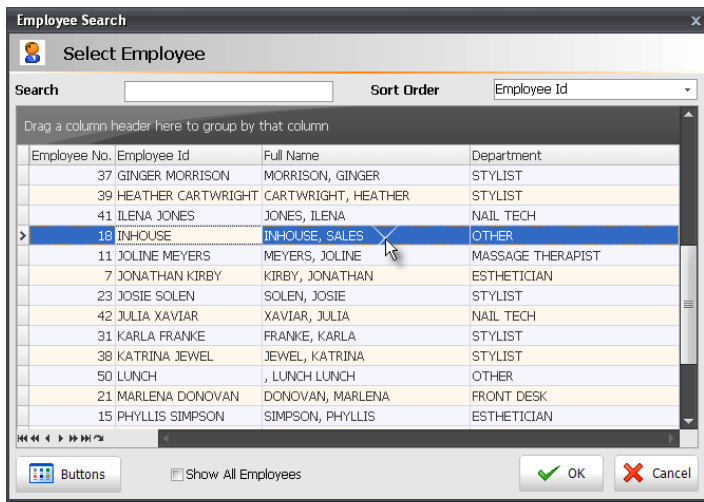
3. Select the client that will actually be using the prepaid item.



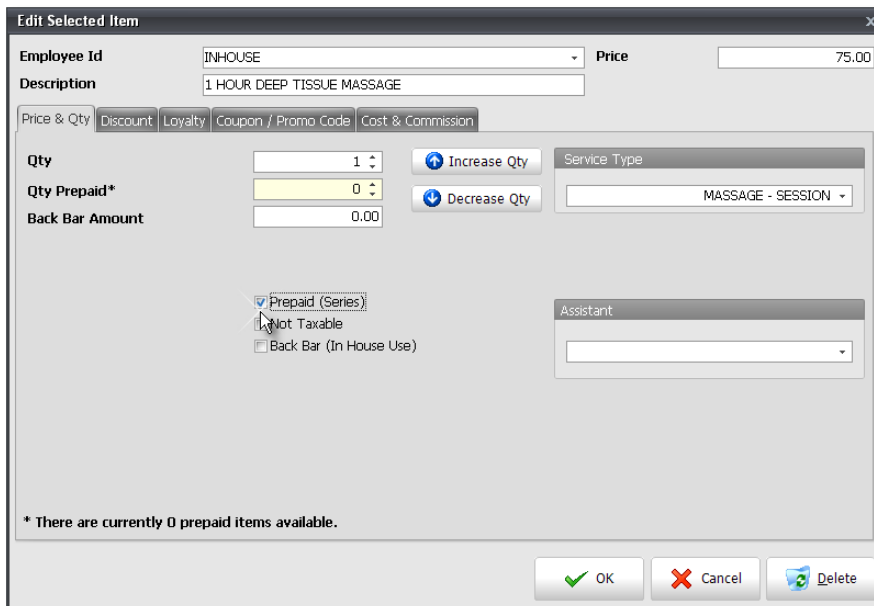
4. Click on the button for the prepaid item being sold.



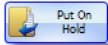
5. Select the "Inhouse" employee.



6. Double Click on top of the item after it has been selected to open the "Edit Selected Item" screen.



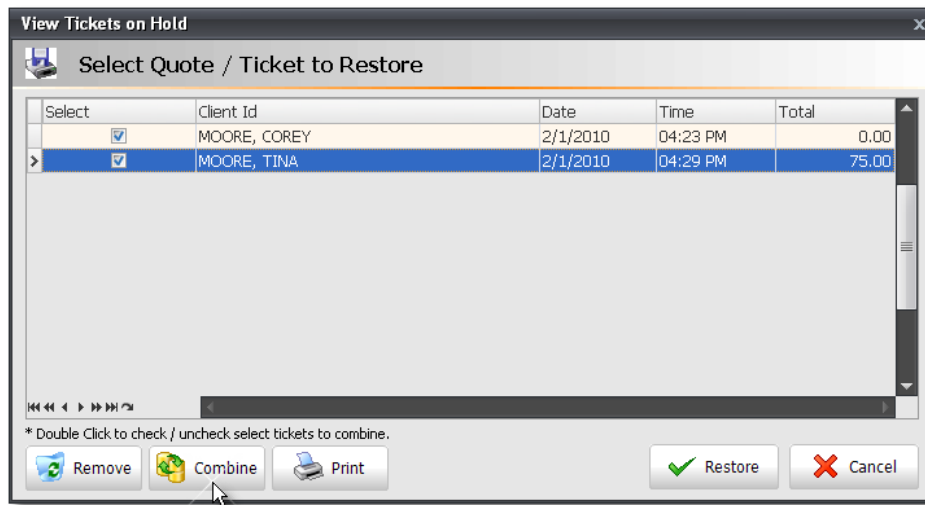
7. Increase the quantity of items being purchased, if necessary, and check the "**Prepaid (Series)**" checkbox.
8. Click the "**Ok**" button.
9. Click the "**Put On Hold**" button again so that the two tickets can be combined.



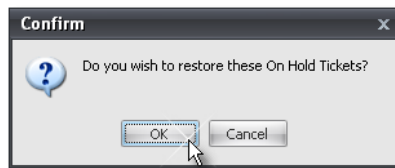
10. Click the "**View On Hold**" button to open the list of tickets that are currently "On Hold".



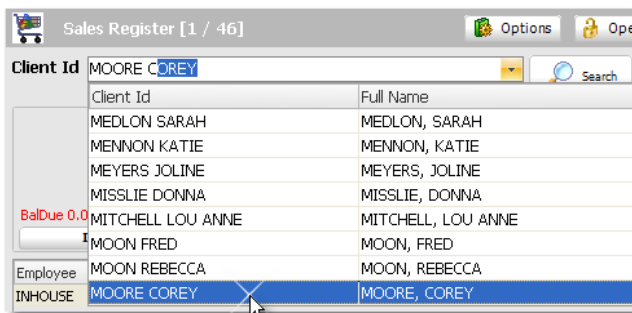
11. The following screen will open. Double click in the "**Combine**" check boxes next to the two tickets that need to be combined.



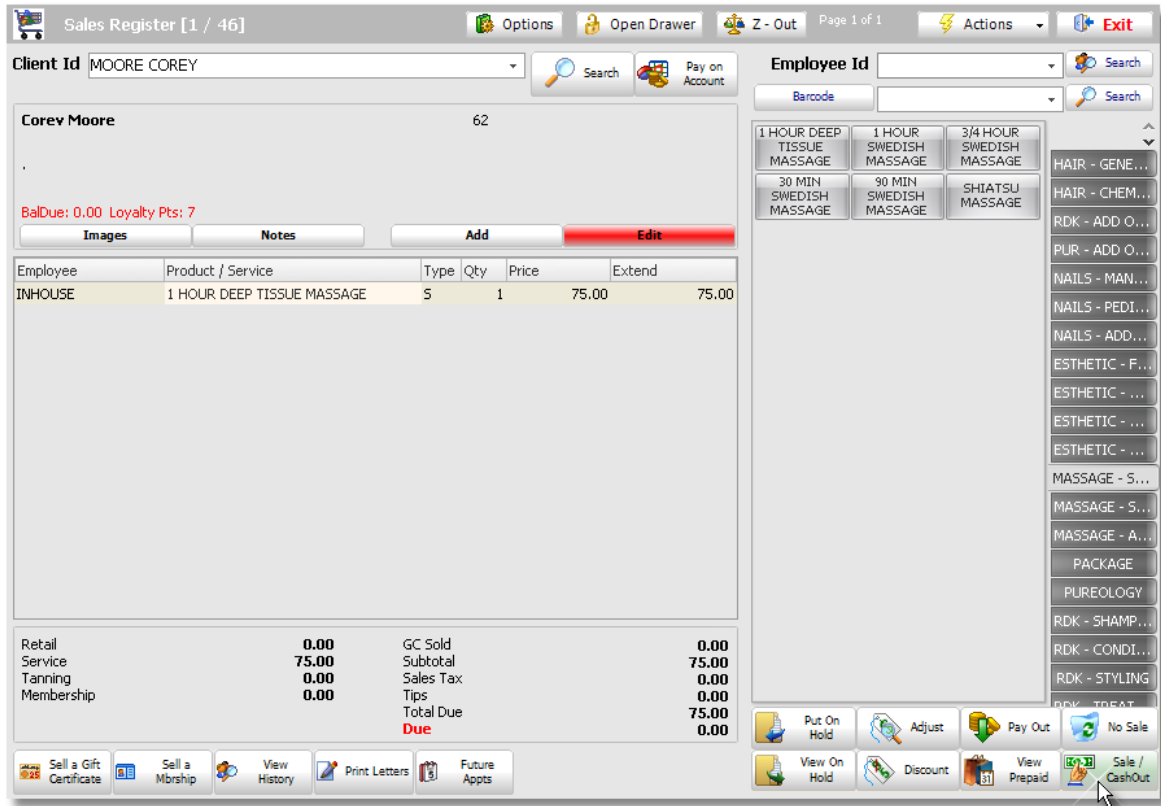
12. Click the "**Combine**" button at the bottom of the screen.



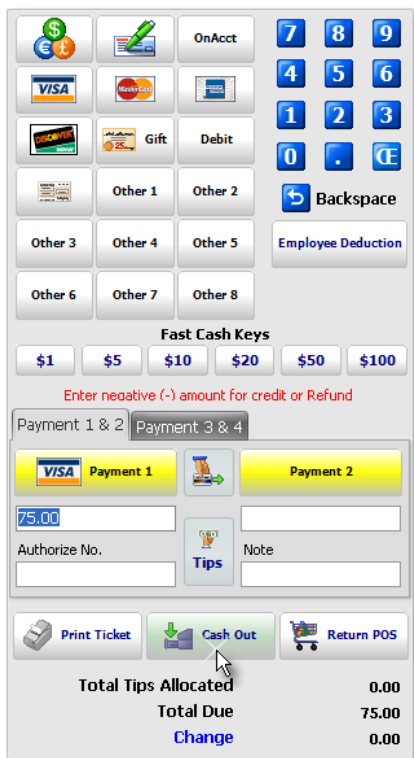
13. At the top of the Sales Register, select the client that is purchasing the prepaid item again.



14. Add additional items to the ticket if necessary and click the "Sale / CashOut" button at the bottom of the screen.



12. Select a payment type and click the "Cash Out" button.



Scheduling a Prepaid Item

When scheduling an appointment for a client that has prepaid items, it is important to select the correct prepaid item so that when the client is checked out, the correct prepaid item will be deducted from their available prepaid items.

1. On the "Schedule Appointment" screen, select the client in the "Step 1" area.
2. If the client has prepaid items, you will see "Active Prepaids Available" displayed in red text in the client information area at the top of the scheduling screen.

3. Click the "Available Prepaids" tab.

4. Click the "Select Prepaid Service" button to schedule an appointment for the prepaid service.

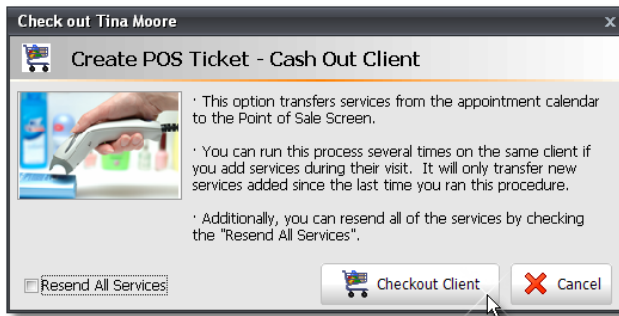
Description	Interval	Count	Remaining	Starts On	Ends On	Expires
> 1 HOUR DEEP TISSUE MASSAGE	C	1	1	2/1/2010	2/1/2060	2/1/2060

5. The prepaid service will be moved over to the "Details" tab of the "Schedule Appointment" screen. Continue scheduling the appointment as you normally would to complete the scheduling of the prepaid service.

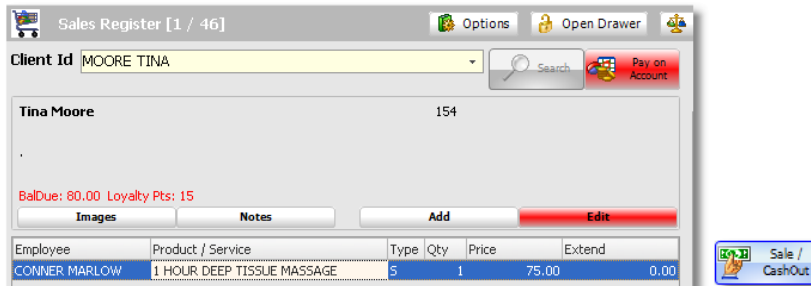
Redeeming a Prepaid Item

When a client has purchased a prepaid item, it is important that the prepaid item is redeemed correctly so that the program can keep track of how many prepaid items the client has left and so that the employee performing the service can receive commission for the service when the service has been completed.

1. When the client is ready to be checked out, right click on top of the client's appointment and select the **"POS Checkout"** option from the menu.
2. Verify that you are checking out the correct client and click the **"Checkout Client"** button.



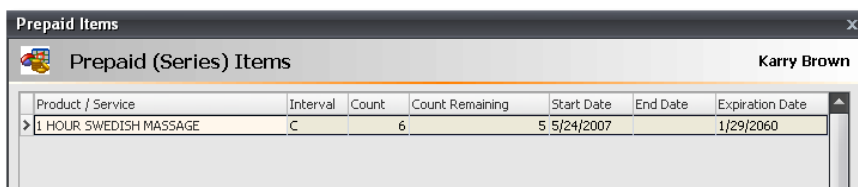
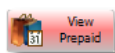
3. The services that the client was scheduled for will be moved into the Sales Register. The prepaid items that client was scheduled for will be displayed with the original **"Price"** and an **"Extended"** price of **"\$0.00"**. Add additional items to the ticket if necessary and click the **"Sale / Cash Out"** button.



4. Select a payment type if there is an amount due and click the **"Cash Out"** button. If there is not an amount due, just click the **"Cash Out"** button to complete the sale.



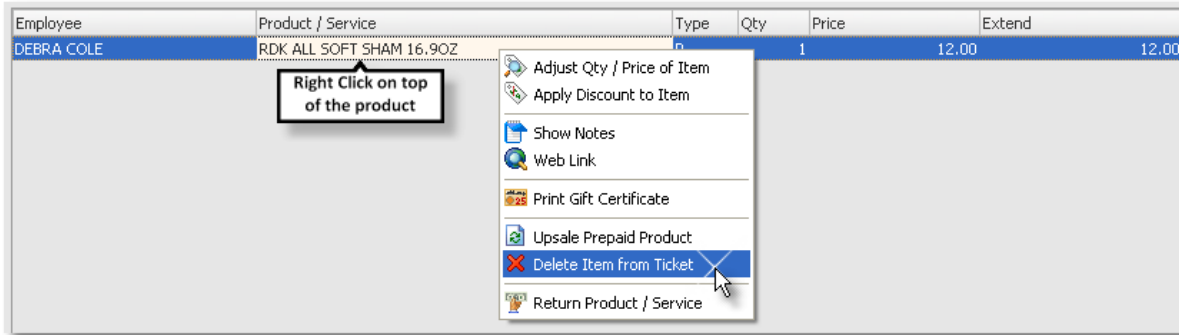
5. When the sale has been completed, the prepaid item will be deducted from the amount of prepaid items that the client has available. The amount remaining will be printed on the client's receipt and you can also check their available prepaids by selecting the client again at the top of the Sales Register. The **"View Prepaids"** button will turn red if the client has available prepaid items. Click the **"View Prepaids"** button to view the amount of remaining prepaid items.



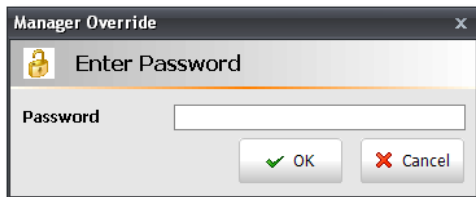
Deleting an Item From a Ticket

It may be necessary to delete an item from a ticket if an incorrect item was selected or if a client changes their mind.

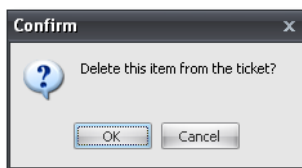
1. Right click on top of the item where it is listed with the employee's name and price in the Sales Register.



2. Select the "Delete Item From Ticket" option from the menu.
3. You may be asked for the Manager Override Password. Enter the Password and click the "OK" button.



4. Click "OK" again when you are asked if you would like to delete the item from the ticket.

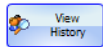


Returns / Refunds

There are three types of Returns in Envision. You may need to do a return for products, services or gift certificates.

Returning a Product / Service:

1. Select the Client that is returning the product / service at the top of the Sales Register.
2. Click the "**View History**" button at the bottom of the screen to find out which employee sold the product / service.



POS Transaction History

Transaction History

MATHIS CHARLENE Selected Ticket History

Show Select Group of Purchases

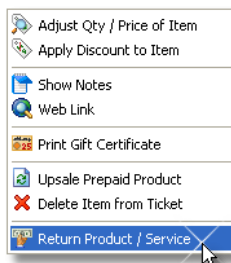
Show All Retail Only Service Only Tanning Only Packages Only

Location	Date	Time	Employee	Item	Qty	Price
MAIN	8/17/2009	15:48:21	CAMILLE SWANSON	UPDOS	1	85
MAIN	8/14/2009	11:51:31	ANNE CREW	MICRODERM - BUY 5 GET 1 FRE	1	350
MAIN	8/14/2009	11:52:05	ANNE CREW	MICRODERMABRASION	1	58.33
MAIN	5/31/2006	10:53:39	CAMILLE SWANSON	FULL HIGHLIGHTS	1	100
MAIN	5/31/2006	10:53:39	CAMILLE SWANSON	HYDRATE COND 8.5 OZ	1	25
MAIN	5/31/2006	10:53:39	CAMILLE SWANSON	HYDRATE SHAM 10.1 OZ	1	25
MAIN	5/31/2006	10:53:39	CAMILLE SWANSON	WOMEN'S HAIRCUT	1	60
MAIN	11/23/2004	09:41:22	BRENDA RIDGES	HYDRATE SHAM 2.0 OZ	1	4
MAIN	11/23/2004	09:41:22	CONNER MARLOW	SALT GLOW	1	65

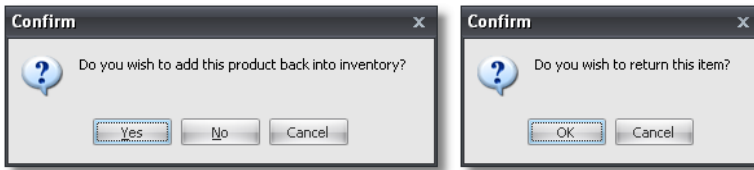
OK

Original Sales Employee: It is necessary to find out who sold the item originally so that when it is returned, this item will come out of the total sales amount.

3. Select the product/service by scanning it in the "**Barcode**" field or clicking on a product button for it on the right.
4. Right click on top of the item in the Sales Register after it has been selected, and select the "**Return Product / Service**" option.



5. If you are returning a product, the program will ask you if you would like to add the product back into Inventory or not. If you are putting the product back on the shelf, click "**Yes**". If you are not putting the product back on the shelf, click "**No**". Click "**OK**" if you are returning a service.



6. The Item will become a negative amount on the ticket and the text will be red. Now you can select a new product or service if the client is exchanging the item or if a new employee did the service over for them, or you can move on to the payment panel to credit the money back to the client. You can also sell the client a gift certificate for the same amount that you would credit back to them, if you do not want to give cash back to the client for returns.

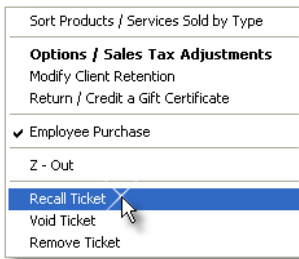
Completing the Return: Make sure you click the "Cash Out" button to complete the return!

Recalling a Ticket

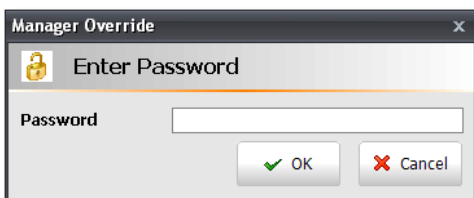
Choose this option if you need to make changes to a transaction that has already been cashed out (completed). You may change any of the employees that are associated with any of the items in the ticket, change the price of the items or discount, and edit tips that have been entered as well as the payment types. The changes that you make to the ticket will not affect the current drawer (Z-Out Drawer), only the drawer that the ticket is in. You must click the "Sale/Cash Out" button and then the "Cash Out" button on the Payment Panel to save your changes. This option does require the Manager Override Password.

Adding Items to a Ticket: If you need to add items to this ticket and the client is paying with a credit/debit card for the additional item, DO NOT RECALL the ticket! You will need to create a brand new ticket (transaction) for this. For example: If a client is purchasing a bottle of shampoo and this item was not included in the original transaction, you should NOT recall the ticket and add the item to the original transaction. If they are paying for everything with a credit card and you process the card again on the recalled ticket, the client will be charged twice! Just create a new separate transaction for the shampoo. You will need to swipe/process the card a second time, however you will only be charging the client for the shampoo.

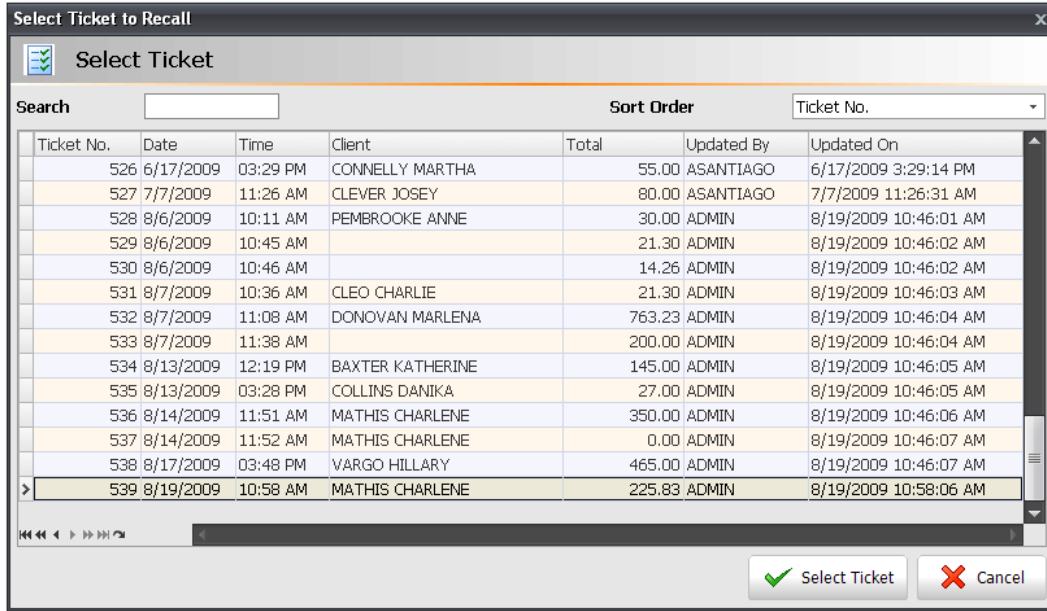
1. In the Sales Register, click the "Actions" button and select the "Recall Ticket" option.



2. A prompt will appear for the Manager Override Password.



3. Enter the password and click the "OK" button. A ticket (transaction) window will appear.



- Select the ticket (transaction) from the list and click the "OK" button.
- The ticket will be opened in the Sales Register so that you can make changes to it. Make any changes necessary and click the "Sale/Cash Out" button.
- When the Payment Panel appears, click the "Cash Out" button to save your changes.

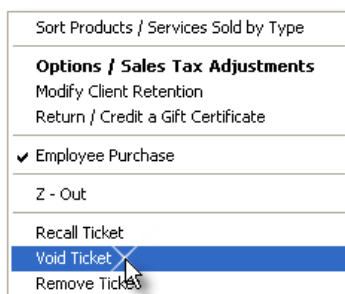
What Not To Do:

- You DO NOT need to click the credit card button to process the transaction again. If the card is swiped and processed a second time, the client will be charged a second time.
- DO NOT change the payment types unless the Payment Type is incorrect and you need to change it! If the Payment Type has been changed, the transaction will show up in reports under a different Payment Type than the type that was originally selected.

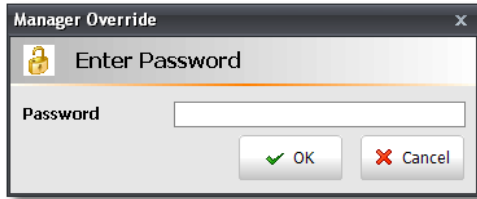
Voiding a Ticket

Voiding a ticket will make the total amount due a negative amount. History of this ticket will remain in the program. This is an option that you may choose if you would like to void (refund) the transaction and credit the total transaction amount back to a client's credit card account. You must enter the Manager Override Password for this selection as well.

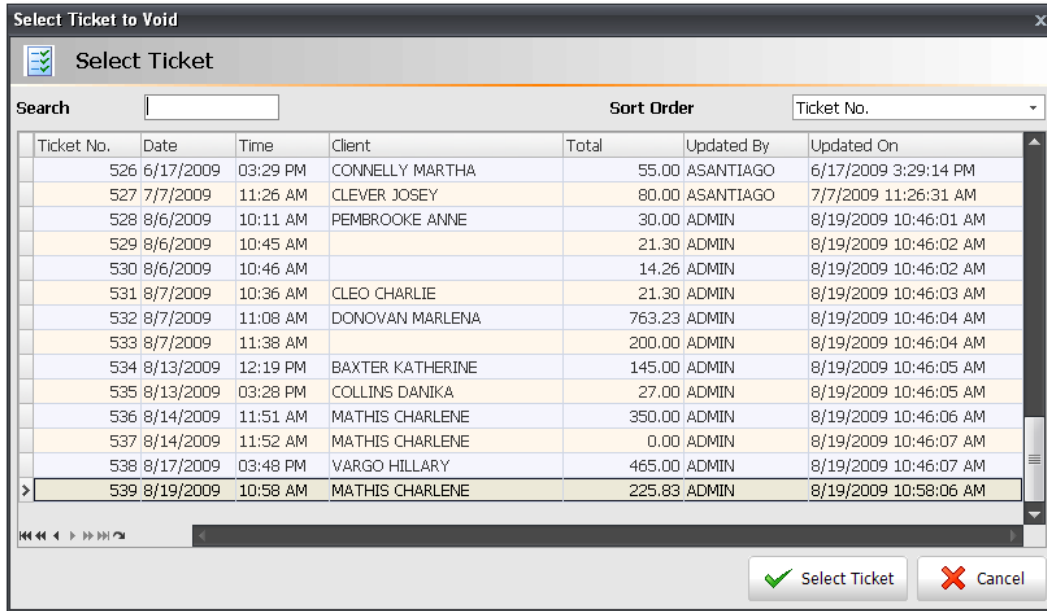
- In the Point of Sale, click the "Actions" button and select the "Void Ticket" option.



2. A prompt will appear for the Manager Override Password.

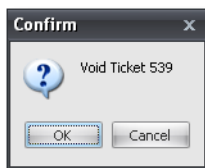


3. Enter the password and click the "OK" button. A ticket (transaction) window will appear.



4. Select the ticket (transaction) from the list and click the "OK" button.

5. The following prompt will appear:



6. After clicking "OK", the transaction will appear in the Point of Sale with negative amounts for all of the items in the transaction.

7. Click the "Sale / Cash Out" button.

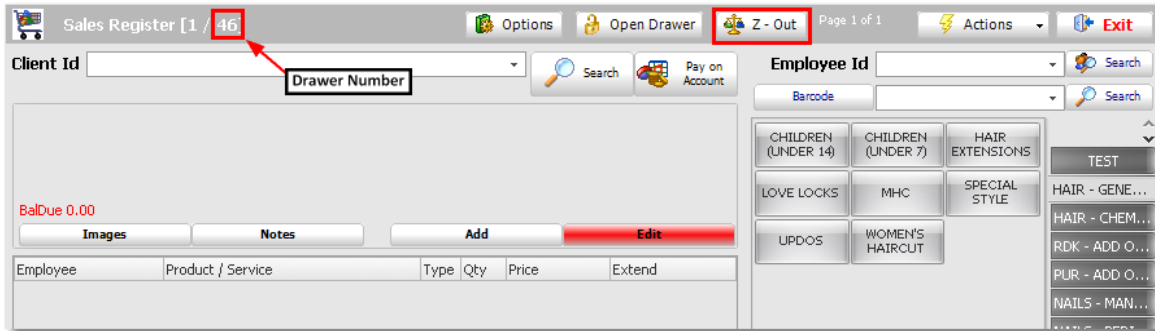
8. The Payment Panel will appear with a negative payment amount. Select the type of payment that you will be using to refund the money to the client.

9. Click the "Cash Out" button.

Z-Out Procedures

Below are instructions for closing your drawer at the end of the day or at the end of a shift.

1. Click the "Z-Out" Button at the top of the Sales Register. Once you click on the Z Out button a new window will open. This is where you can enter in what you have received for the day (Cash, Visa, MC, Discover, Checks, Gift Certificates, On Account transactions, etc). The amounts under the "Stated" column are the transaction amounts for each payment type recorded by the system, based on the sales transactions that were cashed out under the current open Z-Out Drawer. The "Actual" column provides open fields so that you can type in the actual amounts that you have counted during the Z-Out process and these fields can also be filled in automatically for you when you use the "Cash Counts" and "Payment Checklist" tabs on the right.



Z-Out Cash Drawer: 46

End of Day Cash Drawer Reconciliation

	ACTUAL	STATED
Starting Balance		200.00
Cash	0.00	242.60
Tips Paid / Collected	0.00	43.20
Checks	0.00	100.00
On Account	0.00	80.00
Visa	0.00	589.00
Master Card	0.00	220.20
American Express	0.00	47.20
Discover	0.00	0.00
Gift Cert. Redeemed	0.00	0.00
Debit	0.00	0.00
Employee Deduct	0.00	0.00
Travel Checks	0.00	0.00
Other 1	0.00	0.00
Other 2	0.00	0.00
Other 3	0.00	0.00
Other 4	0.00	0.00
Other 5	0.00	0.00
Other 6	0.00	0.00
Other 7	0.00	0.00
Other 8	0.00	0.00
Folio Charges	0.00	0.00
Subtotal	0.00	1522.20
Paid Out / Paid In		0.00
Ending Balance	0.00	1522.20
Difference	-1522.20	

Payment Summary

Cash Counts

Payment Checklist

Sales

Notes

Return to POS

Print

Open Drawer

Review Z-Out History

Close Out Drawer

Z-Out Cash Drawer: 46

End of Day Cash Drawer Reconciliation

Counts

100's	1	=	100.00
50's	3	=	150.00
20's	6	=	120.00
10's	9	=	90.00
5's	5	=	25.00
2's	0	=	0.00
1's	0	=	0.00

Count Coins

2.00	0	=	0.00
1.00	0	=	0.00
0.50	0	=	0.00
0.25	2	=	0.50
0.20	0	=	0.00
0.10	2	=	0.20
0.05	2	=	0.10
0.01	0	=	0.00
Change	0.80	Calculated	

Total 485.80

Payment Summary

Cash Counts

Payment Checklist

Sales

Notes

Return to POS

Print

Open Drawer

Review Z-Out History

Close Out Drawer

2. Click on the "Cash Counts" tab on the right to enter the quantity of every type of bill and coin that you have in your drawer. You do not need to enter the total dollar amount into these fields. Enter the total number of each bill/coin you have instead. Example: You have 1 \$50, 5 \$20's, 3 \$10's and miscellaneous change in the drawer. You would enter "1" into the \$50 field, "5" in the \$20 field, "3" in the \$10's field and so on for each bill type and coin type. When you enter the quantity, the dollar amount will be calculated automatically and this will determine the "Actual" cash amount on the "Payment Summary" tab.

Z-Out Cash Drawer: 46

End of Day Cash Drawer Reconciliation

Select Pay Types

Check Debit Other 5
 On Account Employee Deduction Other 6
 Visa Travelers Cheque Other 7
 Master Card Other 1 Other 8
 Am Express Other 2 Micros Follo
 Discover Other 3
 Gift Certificate Other 4

Verified	Ticket #	Amount	Note
✓	578	80.00	
✓	579	84.00	
?	580	45.00	
?	581	50.00	
?	584	100.00	
?	585	90.00	
?	586	55.00	
?	587	85.00	

Payment Summary

Cash Counts

Payment Checklist

Sales

Notes

Return to POS

Print

Open Drawer

Review Z-Out History

Close Out Drawer

3. Click on the "Payment Checklist" tab on the right. This screen is where you can cross-reference the ticket number with the type of payment received. When a payment type is selected, the transactions will be displayed in the section at the bottom. Look through all of your receipts and all of your checks to verify that you have a receipt or check for each transaction listed.

4. Click the "Sales" tab if you would like to review the Sales Totals for the day. The Sales tab will list the number of tickets, retail sales, gift certificates sold and service sales totals (all totals are minus tips entered). The Total on this screen should match the total on the drawer screen, minus tips and starting cash balance.

The screenshot shows the 'End of Day Cash Drawer Reconciliation' window for 'Z-Out Cash Drawer: 46'. The window is divided into two main sections. On the left, under 'Drawer Sales Information', there is a table with the following data:

Category	Value
Num of Tickets	18
Retail Sales	0.00
Service Sales	1179.00
Tanning Sales	0.00
Gift Certificate Sales	100.00
Membership Sales	0.00
Tax	0.00
Total	1279.00

On the right side of the window, there is a vertical stack of buttons: 'Payment Summary', 'Cash Counts', 'Payment Checklist', 'Sales', and 'Notes'. Below these are several action buttons with icons: 'Return to POS', 'Print', 'Open Drawer', 'Review Z-Out History', and 'Close Out Drawer'.

5. Click the "Notes" tab to enter notes about this drawer. These notes will be printed on the Z-Out Report.

The screenshot shows the same 'End of Day Cash Drawer Reconciliation' window, but with the 'Notes' tab selected. The left section now contains a text area with the note: 'Drawer was closed by DM'. The right section remains the same, with the 'Notes' button highlighted and the other buttons ('Payment Summary', 'Cash Counts', 'Payment Checklist', 'Sales', 'Return to POS', 'Print', 'Open Drawer', 'Review Z-Out History', 'Close Out Drawer') visible below it.

6. Click back on the "**Payment Summary**" tab to review the information. Totals will automatically be entered into the "**Actual**" fields if you have used the "**Cash Counts**" tab and the "**Payment Checklist**" tab. All of the "**Actual**" fields from "**Checks**" to "**Folio Charges**" should match the "**Stated**" fields from "**Checks**" to "**Folio Charges**". If they do not match then you will need to go through the Payment Checklist again to make sure that all of the transactions are accounted for.

Z-Out Cash Drawer: 46

End of Day Cash Drawer Reconciliation

	ACTUAL	STATED
Starting Balance		200.00
Cash	485.80	242.60
Tips Paid / Collected	0.00	43.20
Checks	100.00	100.00
On Account	80.00	80.00
Visa	589.00	589.00
Master Card	220.20	220.20
American Express	47.20	47.20
Discover	0.00	0.00
Gift Cert. Redeemed	0.00	0.00
Debit	0.00	0.00
Employee Deduct	0.00	0.00
Travel Checks	0.00	0.00
Other 1	0.00	0.00
Other 2	0.00	0.00
Other 3	0.00	0.00
Other 4	0.00	0.00
Other 5	0.00	0.00
Other 6	0.00	0.00
Other 7	0.00	0.00
Other 8	0.00	0.00
Folio Charges	0.00	0.00
Subtotal	1522.20	1522.20
Paid Out / Paid In		0.00
Ending Balance	1522.20	1522.20
Difference	0.00	

Payment Summary

Cash Counts

Payment Checklist

Sales

Notes

Return to POS

Print

Open Drawer

Review Z-Out History

Close Out Drawer

7. If you are recording tips (using the Tips button) and are removing tips from the drawer every day, you will need to enter the total amount of tips removed into the "**Tips Paid / Collected**" field.

8. The "**Difference**" (in red text) at the bottom should be as close to zero as possible for the drawer to be perfectly balanced. If the amount is not zero, and all of the "**Actual**" fields are matching the "**Stated**" fields from "**Checks**" to "**Folio Charges**", then the drawer is off by cash.

Reasons For Cash Differences: There are a few reasons that the drawer is off by cash. This could be because a "Pay Out" was not done if money was removed from the drawer, or if Tips or Cash was not handed out correctly. Another reason for the drawer not being balanced is if the Starting Balance was not entered correctly at the beginning of the day.

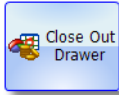
Deposit Amount: As long as there are no discrepancies in the drawer (Difference is \$0.00) the Cash amount that you would take out of the drawer for the daily deposit would be what is listed in the Cash Stated column. If there is a difference, you would subtract the Starting Balance "Stated" amount from the Cash Actual amount to determine the deposit amount.

9. Click the "**Print**" button if you would like to print a Z-Out receipt.



Printing the Z-Out Report From the Z-Out Screen: The Z-Out report will need to be printed BEFORE the drawer is closed if printed from the Z-Out screen.

10. Click the **"Close Out Drawer"** button when you are satisfied with the difference. This will close this drawer so that a new drawer can be opened for the next day or for the next shift. Once you click the **"Close Out Drawer"** button and click **"OK"** on the Close Cash Drawer confirmation window, this will close the drawer for the day and you will not be able to add any new transactions to that drawer. Once the drawer is closed, the system will automatically open a new drawer. Any new transactions completed will be under a different drawer/Z Out report!



Making Changes After A Drawer Has Been Closed: Once a Z Out has been completed, if there is an error on a specific ticket (employee name or client name) you can recall the ticket, make the necessary changes and then click the "Sale/Cash Out" button and the "Cash Out" button to save the changes made to the ticket. Changes to the employees/clients/sales totals/payment types will be made but will not have any affect on the current drawer that is open. You can Review Z Out history and modify totals if needed. Example: Drawer closed out but wrong amount entered for Visa. You would click on the "Review Z out history" button, select the drawer and make the necessary changes. You can also run the Z Out report to view the Z Out information for that drawer.

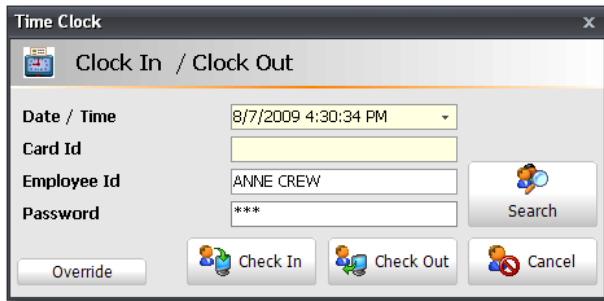
Drawer Number and Date: Each time a drawer is closed, a new drawer will open and the drawer number will change to the next available drawer number. The date on the drawer will be the date that the drawer was opened, until the drawer is closed. When the drawer is closed, the date on the drawer will become the date that the drawer was closed on. When running reports or reviewing Z-Out History for a specific drawer number, the date displayed next to the drawer number will be the date that the drawer was closed on.

Employee Features

Employee Time Clock

The Employee Time Clock can be used to keep track of hours worked and can also be used to calculate an hourly wage for your hourly employees, based on the amount of hours worked. Below are instructions for using the Employee Time Clock.

1. Click on "**Employee**" on the Menu Bar of Envision.
2. Select the "**Employee Time Clock**" from the menu.



Accessing the Employee Time Clock: You can also press the F2 key on your keyboard to open the Employee Time Clock.

Clocking In / Clock Out Via Employee Id and Password:

3. Type your name or Id into the "**Employee Id**" field. You can also click the "**Search**" button to the right and double click on your name in the list.
4. Click the "**Check In**" button to clock in or click the "**Check Out**" button to clock out.

Clocking In / Clock Out Via Employee Id Cards

3. Click in the "**Card Id**" field and swipe or scan the employee Id card.
4. Click either the "**Check In**" button to clock in or the "**Check Out**" button to clock out.

Check In / Check Out Buttons: It is extremely important to use these buttons when clocking in and clocking out. If an employee does not click one of these buttons and just presses the "Enter" key on their keyboard, a time card record will not be created for the employee.

Clocking In/Out for Lunches and Breaks: If lunches and/or breaks will not be included in an employee's pay, they will need to clock out for lunch or for a break, and then they will need to clock back in when their lunch or break is over.

Manage Time Cards

The Manage Time Cards screen enables you to view and change the times that each employee has clocked in and clocked out at. The listing is sorted by the most recent dates first. Notice that if there was a "Manager Override" used when the employee was using the Time Clock, there will be a check mark in the right hand box. Below are instructions for adding Time Cards, Editing Time Cards and Removing Time Cards

Adding Time Card Records

It may be necessary to add a Time Card record if an employee has forgotten to Clock In or Clock Out. Below are instructions for adding a Time Card record.

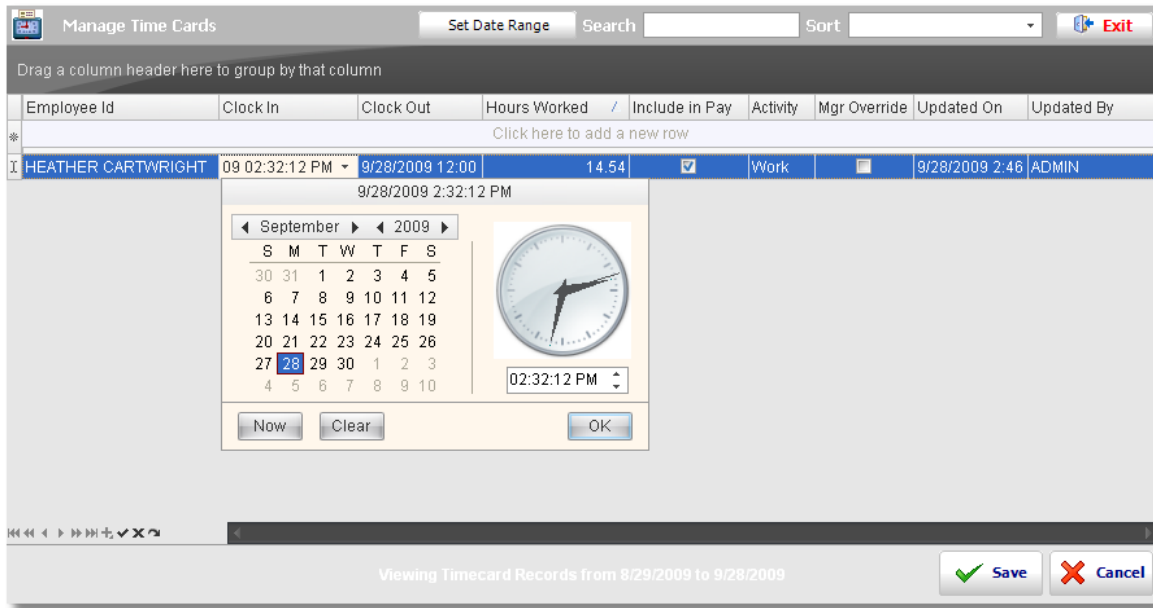
1. Click on "**Employee**" on the Menu Bar of Envision.
2. Select "**Manage Time Cards**" from the menu.

3. Click in the field labeled "**Click here to add a new row**" to add a Time Card record to the list..
4. A blank field will appear with a drop down arrow so that you may select the employee that the Time Card record is for. Click on the drop down arrow and select the correct employee.
5. Click in the "**Clock In**" field to the right of the employee's name. Select the correct date and time for the "**Clock In**" portion of the Time Card record.
6. Click in the "**Clock Out**" field to the right of the "**Clock In**" field. Select the correct date and time for the "**Clock Out**" portion of the Time Card record.
7. Click the "**Save**" button in the lower right hand corner of the screen. The "**Hours Worked**" will be calculated automatically after clicking the "**Save**" button.

Editing Time Card Records

It may be necessary to edit a Time Card record if an employee has forgotten to clock in or clock out. Below are instructions for editing a Time Card record.

1. Click on "**Employee**" on the Menu Bar of Envision.
2. Select "**Manage Time Cards**" from the menu.



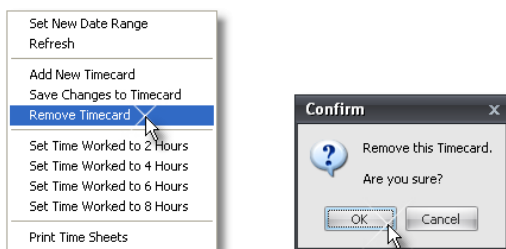
3. Click on the drop down arrow in the "**Clock In**" or "**Clock Out**" field to edit the date and time of a Time Card record. You can also click in the "**Hours Worked**" field to edit the amount of hours worked, or you can choose whether or not to include a time card record in the payroll calculation by placing a check mark or removing a check mark from the "**Include in Pay**" check box.

4. Click the "**Save**" button in the lower right hand corner of the screen if you have finished editing Time Card records.

Removing Time Card Records

It may be necessary to remove a Time Card record if an employee has clocked in or clocked out more times than necessary. Below are instructions for removing a Time Card record.

1. On the Manager Time Cards screen, right click on top of the Time Card record that you would like to remove.



2. Select "**Remove Timecard**" from the menu.
3. Click the "**OK**" button when the prompt appears.

Employee Teams

Employee Teams allow you to create groupings, separate from your employee departments, for reports and scheduling purposes. Employee Departments are normally used to specify whether the employee is a Stylist, Nail Tech, Massage Therapist or Esthetician. A team can be a mixture of these types of employees or a team can be a group of people in one level or a group of people that are working together to accomplish certain goals for a team. Below are instructions for creating Employee Teams.

1. Click on "**Employee**" on the Menu Bar of Envision.
2. Select "**Employee Teams**" from the menu.
3. Click on the "**New**" button at the top of the list to create an Employee Team. The following screen will appear without any information filled in.

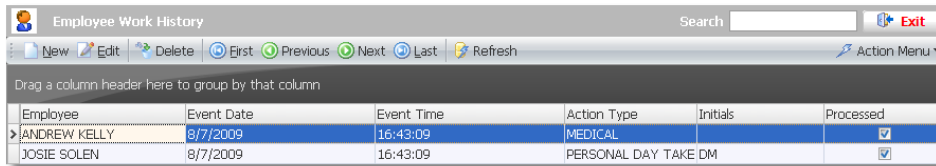
The screenshot shows the 'Employee Teams' window. The 'Team Description' field contains 'SUPPORT STAFF'. The 'Team Leader' dropdown is set to 'DONNA MARTIN'. The 'Show on Schedule' checkbox is checked. The 'Select Employees' list contains 20 employees. The 'Team Members' list contains three employees: DONNA MARTIN, MARLENA DONOVAN, and SALINA MURPHY. The right sidebar contains buttons for 'Save', 'Save & New', 'Cancel', 'Next', and 'Previous'.

4. Type a description or name of the team into the "**Team Description**" field.
5. Click on the drop down arrow in the "**Team Leader**" field to select a leader for the Team from your Employee List.
6. In the "**Select Employees**" section on the left, left click on top of an employee that you would like to place in the team you are creating.
7. Click the blue arrow button that is pointing to the "**Team Members**" section to move the selected employee into the list of "**Team Members**".
8. Continue to move employees into the "Team Members" list, that will be included in the team you are creating.
9. Click the "**Save**" button to save the new Team you have created or click the "**Save & New**" button to save the Team you have created and create a new Team.

Employee Work History

The Employee Work History feature allows you to keep records of your employees' work history. This can be used to keep track of Employee Evaluations, Bonuses, when an employee is late or sick, etc. Below are instructions for adding employee work history.

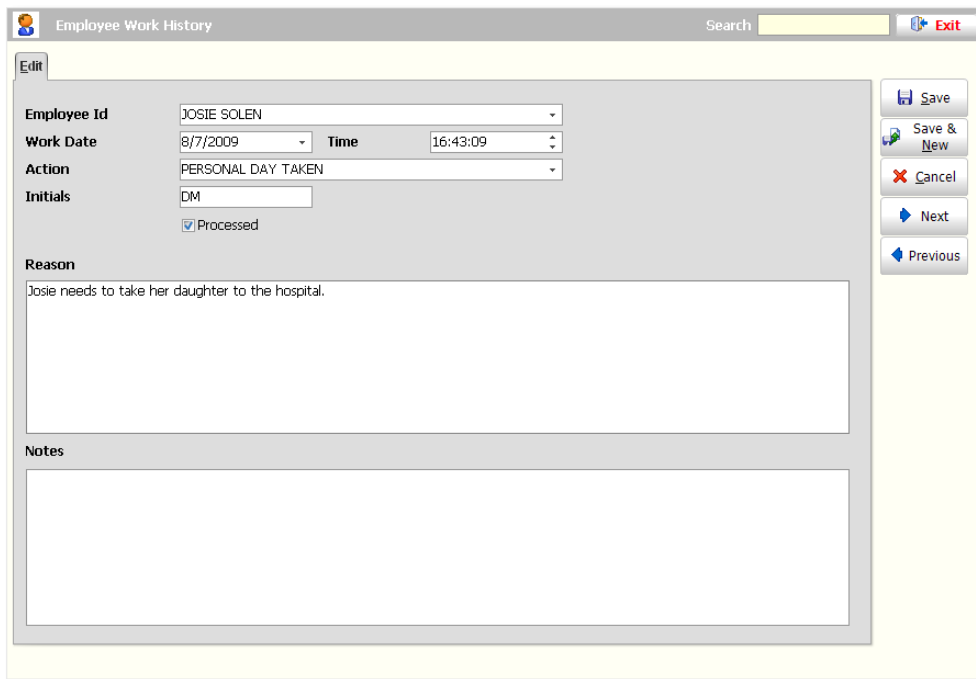
1. Click on "**Employee**" on the Menu Bar of Envision.
2. Select "**Employee Work History**" from the menu.



The screenshot shows a window titled "Employee Work History" with a search bar and an "Exit" button. Below the search bar is a toolbar with buttons for "New", "Edit", "Delete", "First", "Previous", "Next", "Last", and "Refresh". A message says "Drag a column header here to group by that column". The main area contains a table with the following data:

Employee	Event Date	Event Time	Action Type	Initials	Processed
ANDREW KELLY	8/7/2009	16:43:09	MEDICAL		<input checked="" type="checkbox"/>
JOSIE SOLEN	8/7/2009	16:43:09	PERSONAL DAY TAKE DM		<input checked="" type="checkbox"/>

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



The screenshot shows the "Employee Work History" window with the "New" form open. The form has the following fields and controls:

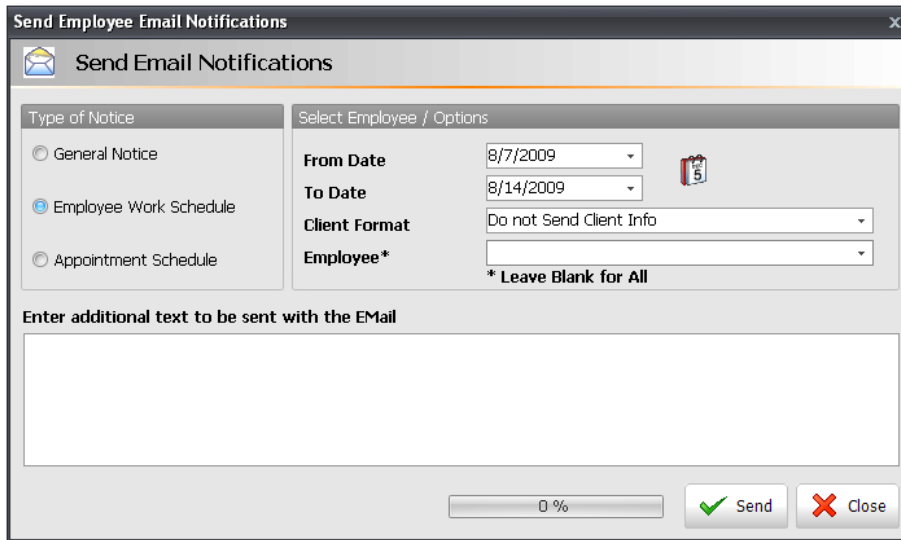
- Employee Id:** A dropdown menu currently showing "JOSIE SOLEN".
- Work Date:** A dropdown menu showing "8/7/2009".
- Time:** A time selection field showing "16:43:09".
- Action:** A dropdown menu showing "PERSONAL DAY TAKEN".
- Initials:** A text input field containing "DM".
- Processed:** A checkbox that is checked.
- Reason:** A large text area containing the text "Josie needs to take her daughter to the hospital."
- Notes:** A large empty text area.
- Buttons:** On the right side, there are buttons for "Save", "Save & New", "Cancel", "Next", and "Previous".

4. Click on the drop down arrow in the "**Employee Id**" field and select the employee that you are entering work history for.
5. Click on the drop down arrow in the "**Work Date**" field and select the date for the work history.
6. Click in the "**Time**" field and enter the time for the work history.
7. Click on the drop down arrow in the "**Action**" field and select the type of work history being entered.
8. Click in the "**Initials**" field and enter your initials (the initials of the person entering the work history).
9. Type a "**Reason**" and a "**Note**" into the large fields provided.
10. Click the "**Save**" button to save the work history you are entering or click the "**Save & New**" button to save the work history you are entering and enter different work history for the same employee or for a different employee.

Email Employee Schedules / Notices

Envision provides an email feature for your employees that allows you to email each employee a general notice, their work schedule and their appointment schedule. This will allow your employees to check their work schedule and appointment schedule at home or from their phone and you can also send them notices about meetings or classes or any type of message that you would like sent to your employees. Below are instructions for using the Employee Email Notifications

1. Click on "**Employee**" on the Menu Bar of Envision.
2. Select "**Email Employee Schedule / Notices**" from the menu.



3. Select the "**Type of Notice**" that you would like to send to one or all of your employees.
4. Select the "**From Date**" and "**To Date**" by clicking on the drop down arrows in each field. The dates will determine which dates will be used for the "**Employee Work Schedule**" option and the "**Appointment Schedule**" option. If you are selecting the "Employee Work Schedule" option, the work hours sent to each employee will be for the amount of days selected. If you are selecting the "Appointment Schedule" option, the appointments sent to each employee will be the appointments that have been scheduled for that employee between the date range selected.
5. Select the type of client information that you would like sent to your employees by clicking on the drop down arrow in the "**Client Format**" field. This option is used when selecting the "**Appointment Schedule**" type of notice.
6. If you would like to send an email notification to just one employee, select the employee in the "**Employee**" field. If the notification is being sent to all employees, leave the "**Employee**" field blank.
7. Click in the "**Enter Additional Text**" field and type a message if you are sending a "General Notice" or if you would like to send an additional message with the employees' work schedules or appointment schedules.
8. Click the "**Send**" button when you are ready to send the email notifications.

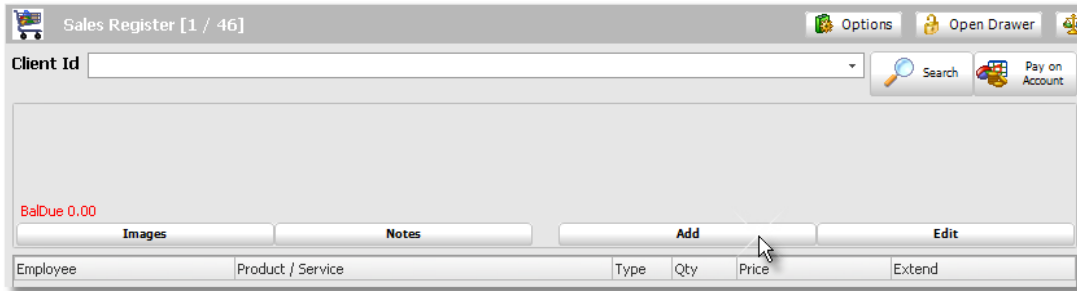
Client Features

Adding a Client

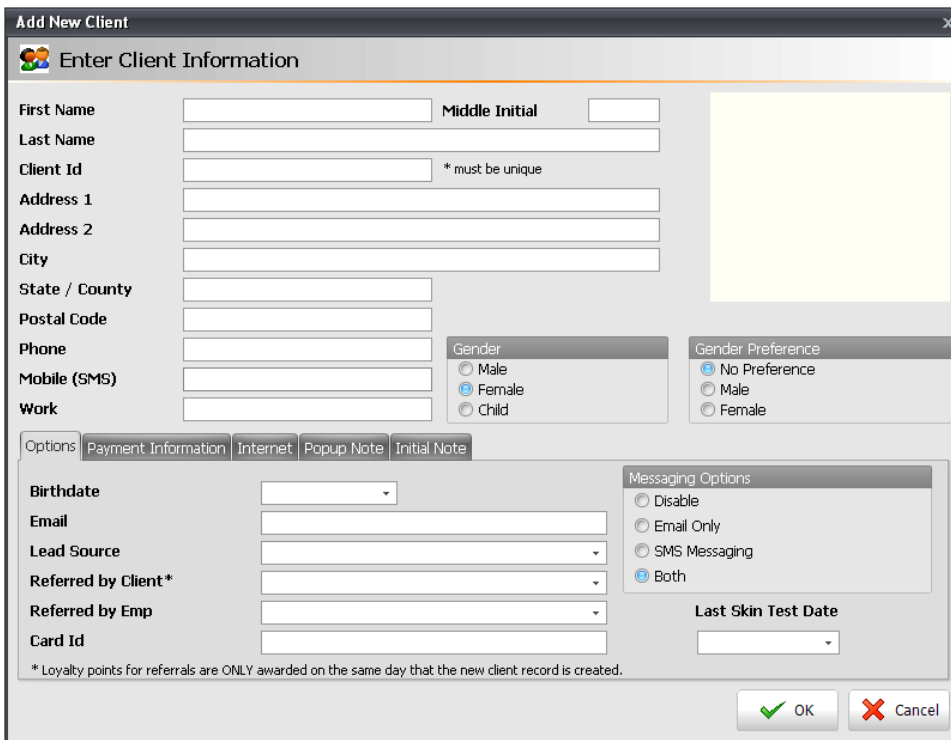
There are a multiple of ways of adding a client in Envision. The easiest method for adding a client is by clicking the "Add" button at the top of the Sales Register or by clicking the "Add Client" button when scheduling an appointment for a client. Below are instructions for the different methods of adding a client.

Adding a Client at the Sales Register

1. Click the "Add" button at the top of the Sales Register in the client information area.



2. Type the client's first name and last name into the fields provided. When you click in another field or when you press your "Tab" key on your keyboard, the "Client Id" field will be filled in automatically for you.



First Name / Last Name: It is extremely important to capture both the First Name and the Last of the client. If you only have one of these names, it may be difficult to select this client in the future. It is also important to capitalize the first initial of the First Name and Last Name so that if you choose to print Mailing Labels for your clients, the name will be in the correct format.

Client Id Format: When adding a Client outside of your Client List, the Client Id can be automatically entered for you. The system is defaulted to enter the first initial and last name of the client, however there is an option in your Program

Preferences that will allow you to change the format of the Client Id that is automatically entered. 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. To edit the Client Id Format, click on "Company" on the Menu Bar of Envision and select "Setup Program Preferences" from the menu. Click on the "General Options" button on the left and click on the drop down arrow in the "New Client Id Format" field to select one of the formats mentioned above.

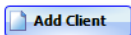
3. Continue to enter the client's information into the fields provided. It would be best to capture as much information on this screen as possible. All of the information entered for a client can be used later for marketing purposes. For example, if you capture a client's birthdate and email address, you will be able to send them a promotional email for their birthday.

Mobile (SMS): If you will be using Envision's SMS (Text) Messaging feature or if you think that you might use the SMS (Text) Messaging feature, it is very important to enter the full Mobile phone number, including the Area Code. If the full number is not captured, you will still be charged for a text message being sent to the client even though the message will not reach the client.

5. Click the "Ok" button after entering all of the client's information.

Adding a Client When Scheduling an Appointment

1. Click on the "Add Client" button on the right side of the "Schedule Appointment" screen.



2. Type the client's first name and last name into the fields provided. When you click in another field or when you press your "Tab" key on your keyboard, the "Client id" field will be filled in automatically for you.

First Name / Last Name: It is extremely important to capture both the First Name and the Last of the client. If you only have one of these names, it may be difficult to select this client in the future. It is also important to capitalize the first initial of the First Name and Last Name so that if you choose to print Mailing Labels for your clients, the name will be in the correct format.

Client Id Format: When adding a Client outside of your Client List, the Client Id can be automatically entered for you. The system is defaulted to enter the first initial and last name of the client, however there is an option in your Program Preferences that will allow you to change the format of the Client Id that is automatically entered. 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. To edit the Client Id Format, click on "Company" on the Menu Bar of Envision and select "Setup Program Preferences" from the menu. Click on the "General Options" button on the left and click on the drop down arrow in the "New Client Id Format" field to select one of the formats mentioned above.

3. Continue to enter the client's information into the fields provided. It would be best to capture as much information on this screen as possible. All of the information entered for a client can be used later for marketing purposes. For example, if you capture a client's birthdate and email address, you will be able to send them a promotional email for their birthday.

Mobile (SMS): If you will be using Envision's SMS (Text) Messaging feature or if you think that you might use the SMS (Text) Messaging feature, it is very important to enter the full Mobile phone number, including the Area Code. If the full number is not captured, you will still be charged for a text message being sent to the client even though the message will not reach the client.

4. Click the "Ok" button after entering all of the client's information.

Adding a Client In The Client List

1. Click on the "Clients" button on the Tool Bar at the top of Envision.



2. Click the "New" button at the top of the Client List.

3. Type the client's First Name and Last Name into the "Client Id" field. It is very important to use a Full Name format for the Client Id. The recommended formats for the "Client Id" are "Last Name (Space) First Name", "First Name (Space) Last Name", Last Name/First Name and First Name/Last Name. After entering all of the client's information, click the "Save" or "Save & New" button on the right.

Adding a Client Formula

Client Formulas can be stored in Envision for future use or for your client records. Formulas will be printed on Work Tickets and can also be viewed when scheduling or editing an appointment in the Envision Calendar. Below are instructions for entering Client Formulas.

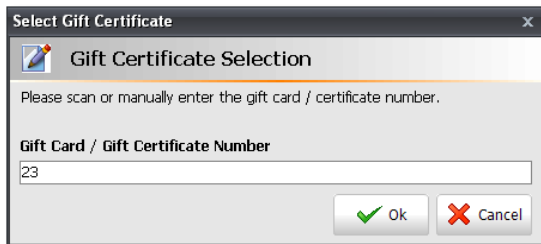
1. Click on "**Client**" on the Menu Bar of Envision.
2. Select "**Formula List**" from the menu.
3. Click the "**New**" button at the top of the list. The following screen will open without any information filled in.

4. Click in the "**Description**" field and enter a description or name for the formula. For example, if you are entering a formula for a color or highlight, it would be best to enter the name of the service and the name of the color for the formula in the "Description" field so that when you are viewing a list of one client's formulas, you will be able to determine which formula to click on by the description. An example of this would be "Color - Auburn".
5. Click on the drop down arrow in the "**Client Id**" field and select the client that the formula is being entered for.
6. Click on the drop down arrow in the "**Service Id**" field and select the service that the formula is being entered for.
7. Click on the drop down arrow in the "**Employee Id**" field and select the employee that created formula.
8. The "**Date**" will be set to the current date. If this is not correct, select the correct date by click on the drop down arrow.
9. Click in the "**Formula Specifics**" field to enter the formula.
10. If there were products used for the formula, select the products in the "**Professional Product**" section at the bottom. This option is only available in Envision's Pro and MedSpa versions.

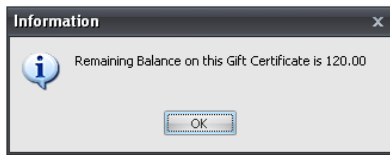
Checking a Client's Gift Certificate Balance

Below are instructions for looking up a client's gift certificate balance. This may be necessary to do if they call and ask what their balance is or if they ask what their balance is before being checked out.

1. Click on "**Client**" on the Menu Bar of Envision and select "**Check Gift Certificate Balance**" or click on the "**Balance**" button on the Tool Bar at the top of Envision.



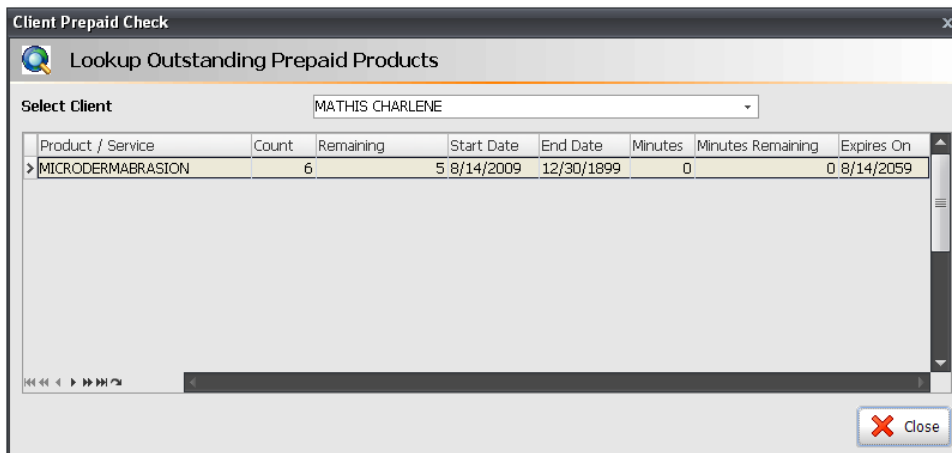
2. Click in the "**Gift Card / Gift Certificate Number**" field and type the number of the Gift Card / Gift Certificate. You can also swipe a Gift Card with a magstripe reader or you can scan the barcode on a Gift Card with a barcode scanner.
3. Click the "**Ok**" button after reviewing the Remaining Balance.



Checking a Client's Prepaid Balance

Below are instructions for looking up a client's outstanding prepaid balance. This may be necessary to do if they call and ask what their balance is or if they ask what their balance is before being checked out.

1. Click on "**Client**" on the Menu Bar of Envision and select "**Check Outstanding Prepaid Balance**" or click on the "**Lookup**" button on the Tool Bar at the top of Envision.



2. Click on the drop down arrow in the "**Select Client**" field and select the correct client.
3. A listing of their prepaid items with the remaining amount will be displayed after selecting the client. Click the "**Close**" button in the lower right hand corner after reviewing this information.

Checking a Client's Sales History

There are multiple ways of viewing client sales history in Envision. Below are instructions for the most commonly used methods for viewing client sales history.

Purchase History - Scheduling an Appointment

1. Click on the "Calendar" button on the Tool Bar at the top of Envision.
2. Double click on an empty timeslot to schedule an appointment.
3. On the "Schedule Appointment" screen, click on the "Purchases" tab.

Location	Date	Time	Employee	Product / Service	Qty	Price	Description	Tan Used
MAIN	8/19/2009	10:58 AM	ANNE CREW	EYEBROW WAX	1	8.00		0
MAIN	8/19/2009	10:58 AM	CAMILLE SWANSON	HYDRATE SHAM 10.1 OZ	1	25.00		0
MAIN	8/19/2009	10:58 AM	ANNE CREW	LIP WAX	1	8.00		0
MAIN	8/19/2009	10:58 AM	CAMILLE SWANSON	PARTIAL HIGHLIGHTS	1	90.00		0
MAIN	8/19/2009	10:58 AM	CAMILLE SWANSON	WOMEN'S HAIRCUT	1	60.00		0
MAIN	8/17/2009	03:48 PM	CAMILLE SWANSON	UPDOS	1	85.00		0
MAIN	8/14/2009	11:51 AM	ANNE CREW	MICRODERM - BUY 5 GET 1	1	350.00		0
MAIN	8/14/2009	11:52 AM	ANNE CREW	MICRODERMABRASION	1	58.33		0

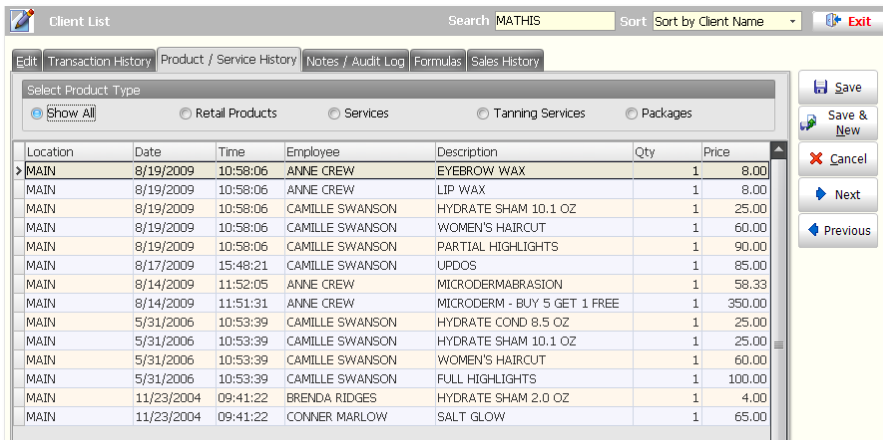
View History - Sales Register

1. Click on the "Sales Register" button on the Tool Bar at the top of Envision.
2. Select the client at the top of the Sales Register.
3. Click the "View History" button at the bottom of the Sales Register.

Location	Date	Time	Employee	Item	Qty	Price
MAIN	8/17/2009	15:48:21	CAMILLE SWANSON	UPDOS	1	85
MAIN	8/14/2009	11:51:31	ANNE CREW	MICRODERM - BUY 5 GET 1 FRE	1	350
MAIN	8/14/2009	11:52:05	ANNE CREW	MICRODERMABRASION	1	58.33
MAIN	5/31/2006	10:53:39	CAMILLE SWANSON	FULL HIGHLIGHTS	1	100
MAIN	5/31/2006	10:53:39	CAMILLE SWANSON	HYDRATE COND 8.5 OZ	1	25
MAIN	5/31/2006	10:53:39	CAMILLE SWANSON	HYDRATE SHAM 10.1 OZ	1	25
MAIN	5/31/2006	10:53:39	CAMILLE SWANSON	WOMEN'S HAIRCUT	1	60
MAIN	11/23/2004	09:41:22	BRENDA RIDGES	HYDRATE SHAM 2.0 OZ	1	4
MAIN	11/23/2004	09:41:22	CONNER MARLOW	SALT GLOW	1	65

Purchase History - Client List

1. Click on the "Clients" button on the Tool Bar at the top of Envision.
2. Double click on top of the client in the Client List to open their client record.
3. Click on the "Product / Service History" tab.



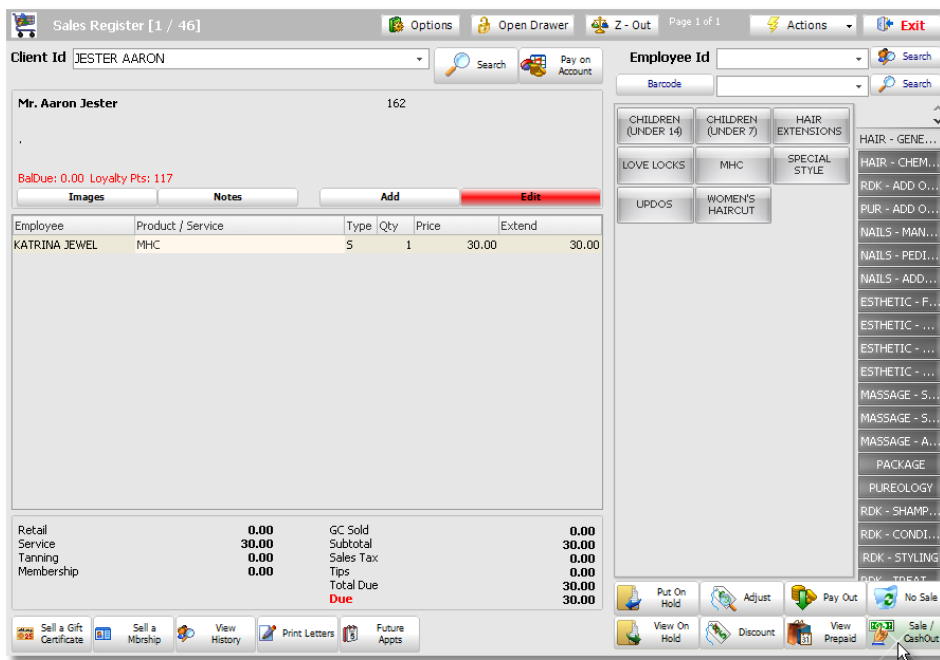
On Account Payments

On Account payments allow you to place the amount due for a sales transaction on a client's account so that they can make payments to it at a later time. This feature is only available in Pro and MedSpa versions of Envision. Below are instructions for placing the payment "On Account", making payments, placing a "Credit On Account" and using a "Credit On Account".

Placing a Payment On Account

Follow the instructions below for placing the amount due for a sales transaction "On Account".

1. Create the client's ticket in the Sales Register, by using the "POS Checkout" option from the Calendar or by selecting the client at the top of the Sales Register and selecting the items that the client will be paying for.



- Click the "Sale / CashOut" button in the lower right hand corner of the screen.

Payment 1 & 2 | Payment 3 & 4

OnAcct Payment 1 | Payment 2

30.00 |

Note | Tips | Note

Print Ticket | Cash Out | Return POS

Total Tips Allocated	0.00
Total Due	30.00
Change	0.00

- Click the "On Acct" payment type button.
- Click the "Cash Out" button to complete the sale.



Making On Account Payments

Below are instructions for making payments to a client's On Account balance.

- Click on the "Sales Register" button on the Tool Bar at the top of Envision.



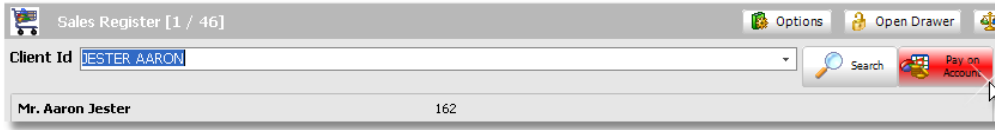
- Select the client at the top of the Sales Register.

Sales Register [1 / 46]

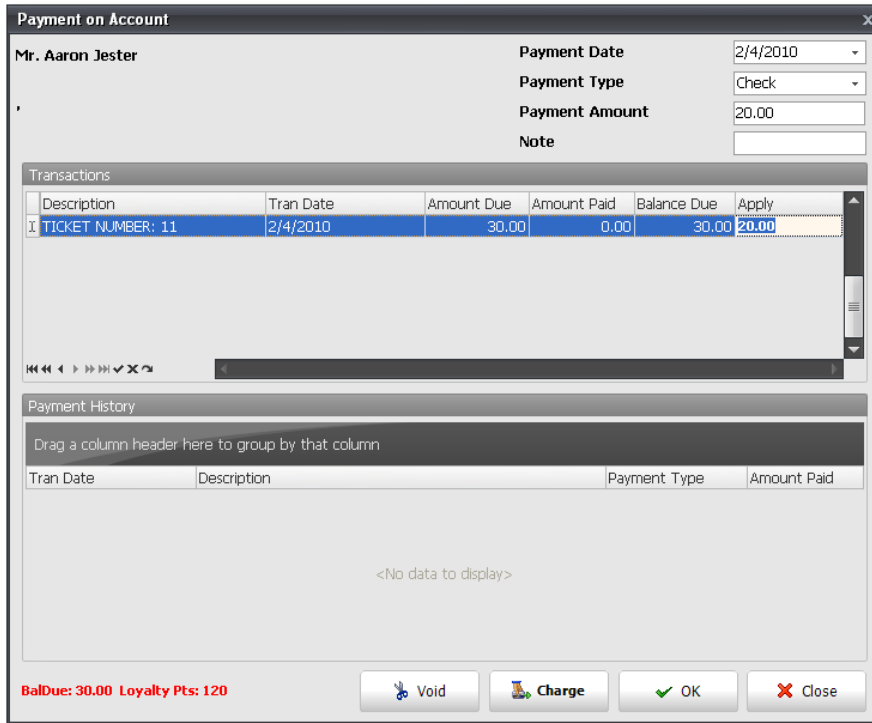
Client Id: JESTER AARON

Client Id	Full Name	Home Phone
Mr. Aaron GREEN WENDY	GREEN, WENDY	
HATCHER MARGARET	HATCHER, MARGARET	
HAWTHORNE STACEY	HAWTHORNE, STACEY	
HAWVER JANICE	HAWVER, JANICE	
HIGHTS HEATHER	HIGHTS, HEATHER	
HORNBY KAREN	HORNBY, KAREN	
HUNTER PIPER	HUNTER, PIPER	
JESTER AARON	JESTER, AARON	

3. The **"Pay On Account"** button will be red when the client has a balance. Click the **"Pay On Account"** button to make a payment.



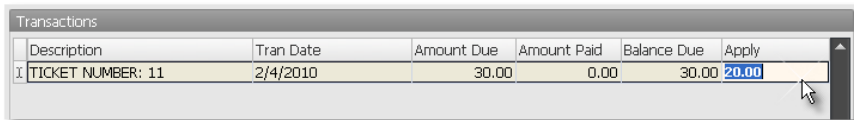
4. Click on the drop down arrow in the **"Payment Type"** field and select the type of payment that the client will be using.



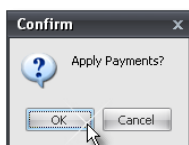
5. Click in the **"Payment Amount"** field and enter the amount that the client is applying to their balance.

6. Enter a **"Note"**, if necessary.

7. Click in the **"Apply"** field to the right of the **"Balance Due"** column for the transaction that the client is applying an amount to. Enter the amount that the client is applying to the listed transaction. If there are multiple transactions listed, the **"Payment Amount"** entered at the top of the screen can be split between the transactions listed or the entire **"Payment Amount"** can be applied to just one transaction.



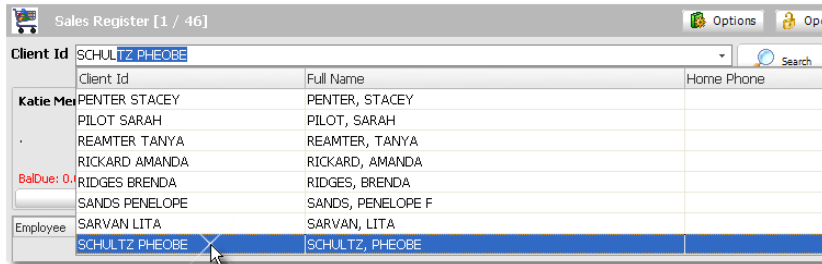
8. Click **"OK"** at the bottom of the screen to apply the payment amount. Click **"OK"** again when the follow prompt appears.



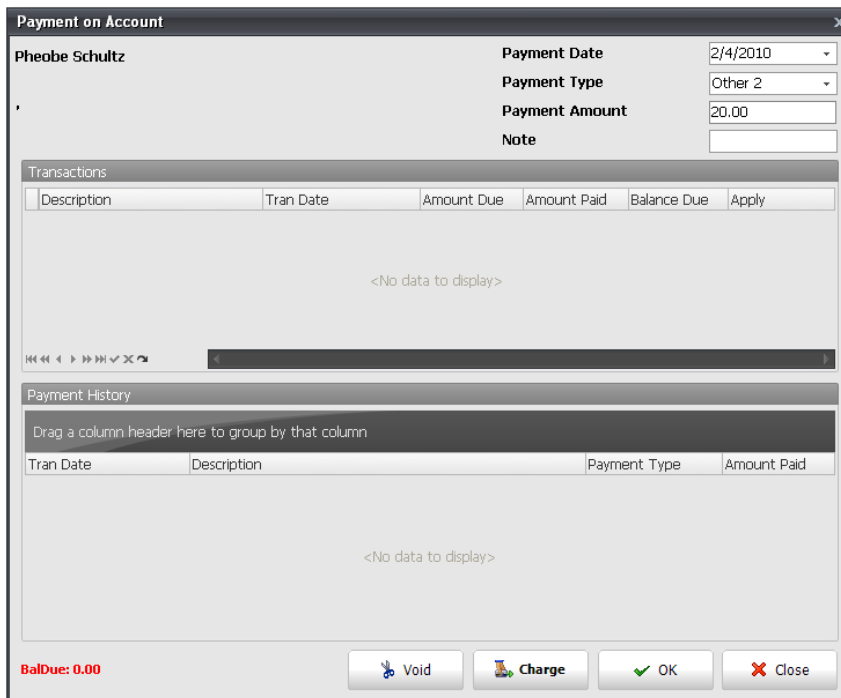
Placing a Credit On Account

A credit can be placed on a client's account if you need a client to have an "In-store" credit. This can be used if the client is returning a product or a service or for any reason that you might need to give a client "In-store" credit. Below are instructions for placing a credit on the client's account.

1. Select the client at the top of the Sales Register.



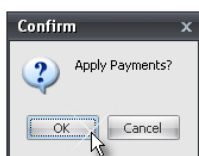
3. Click on the "Pay On Account" button.



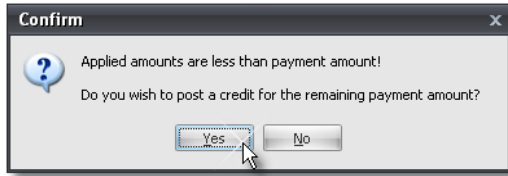
4. Click on the drop down arrow in the "Payment Type" field and select one of the "Other" payment types so that the amount of credit you are placing on the client's account does not affect the cash, credit or check totals when you balance your drawer at the end of the day.

5. Click in the "Payment Amount" field and enter the amount that you would like to post as a credit.

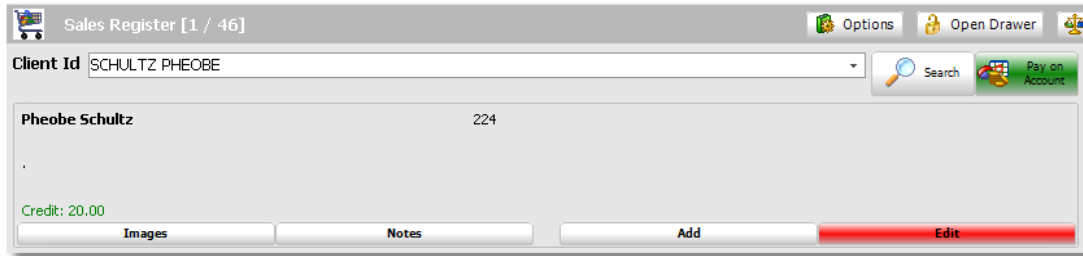
6. Click the "Ok" button after entering the payment amount and click "Ok" again when the following prompt appears.



7. Click the "Yes" button when you are asked if you would like to post a credit.



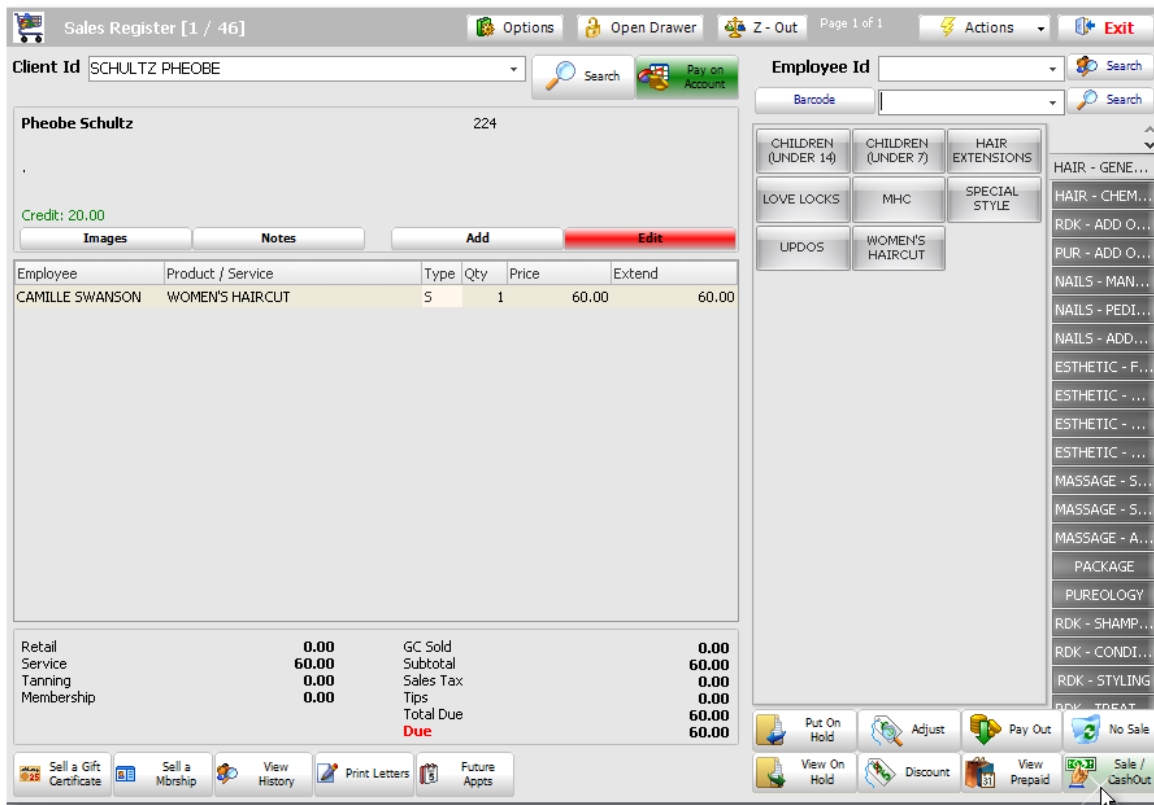
8. The "Pay On Account" button will be green when the client has a credit on their account and the amount of credit will be displayed above the "Images" button at the top of the Sales Register.



Using a Credit On Account

Below are instructions for using a client's "Credit On Account".

1. Create the client's ticket in the Sales Register, by using the "POS Checkout" option from the Calendar or by selecting the client at the top of the Sales Register and selecting the items that the client will be paying for.

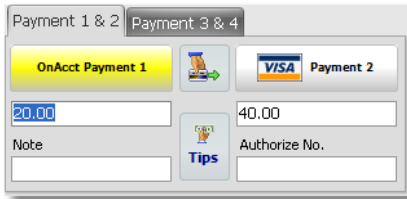


2. Click the "Sale / CashOut" button in the lower right hand corner of the Sales Register.

3. Select the "OnAcct" payment type.



4. Click in the field below the "OnAcct Payment 1" button and enter the amount of credit that the client would like to use. It is very important that they do not use more than the amount of credit they have for the "OnAcct" payment type. If more than their credit is used, the remaining amount will be posted as a balance on their account.



5. If the client owes more than the amount of their credit, click on the "Payment 2" button and select the type of payment that they will be using to pay for the remaining amount due.
6. Click the "Cash Out" button when you are ready to complete the transaction.



Inventory Control

Purchase Orders

Purchase Orders (PO's) are a key element for maintaining inventory. Purchase orders work in conjunction with the "Receiving Inventory" screen, which closes out the Purchase Orders. Below are instructions for creating a Purchase Order.

1. Click on "**Inventory**" on the Menu Bar of Envision.
2. Select "**Purchase Orders**" from the menu.
3. Click on the "**New**" button at the top of the list. The following screen will appear without any information filled in.

Purchase Order Details

PO: []
 PO Date: 6/9/2009
 Vendor: MID-CITY BEAUTY SUPPLY
 Ship to Location: MAIN
 Ship To: ENNOVIEW, 123 Sunny St., Sunnyville, FL 32xxx, 555-555-1212
 Ship Via: []
 Terms: []
 Expected On: []
 Status: Open

Drag a column header here to group by that column

Product Id	Vender SKU	Ordered	Cost	Taxable	Total
Click here to add a new item					
FUS 10AB ASH/BLUE	050286591	1	4.65	<input checked="" type="checkbox"/>	4.65
HYDRATE COND 8.5 OZ	P0011701	3	12.50	<input type="checkbox"/>	37.50
RDK ALL SOFT COND 8.5OZ OP	050011213	4	4.50	<input type="checkbox"/>	18.00
RDK RK MENS CLEANSING BAR	050515043	1	3.50	<input type="checkbox"/>	3.50

Purchase Order Summary

Manually Edit Tax:

Subtotal: 63.65
 Freight: 0.00
 Tax: 0.30
 Total: 63.95

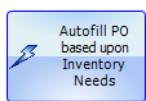
Buttons: Add, Remove, Scan Barcode, Autofill PO based upon Inventory Needs, Save, Cancel

4. Click on the drop down arrow in the "**Vendor**" field and select the Vendor that you will be purchasing from.

Purchase Order Details

PO: 1
 PO Date: 2/4/2010
 Vendor: MID-CITY BEAUTY SUPPLY
 Ship to Location: MAIN

5. Click the "**Autofill PO based upon Inventory Needs**" button at the bottom of the Purchase Order screen.



6. Select the **"Reorder Option"** that you would like to use. If you select the **"Order based upon number of products sold during a specified timeframe"** option, you will also need to select the Sales History Dates. Click on the drop down arrow in the **"From Date"** field and **"To Date"** field or click the **"Calendar"** button to do this.

The screenshot shows a 'Purchase Order' dialog box with the following sections:

- Select Reorder Option:**
 - Order based upon standard Min Qty, Max Qty and Reorder Point
 - Order based upon number of products sold during a specified timeframe
- Enter Sales History Dates:**
 - From Date: [Dropdown]
 - To Date: [Dropdown]
 - Calendar: [Calendar Icon]
- Product Type Selection:**
 - Reorder All Products
 - Only Reorder Professional (Backbar) Products
 - Only Reorder Retail Products

Buttons: [Ok] [Cancel]

Below are descriptions of each option on this screen:

Autofill Option	Description
Order based upon standard Min Qty, Max Qty and Reorder Point	Click this option to automatically load all the items from this Vendor that have met the "Reorder At" level you set when you added the items to inventory. Clicking this button will also enter the order quantity for each item that you have entered an order level for.
Order based upon number of products sold during a specified timeframe	Select this option if you would like to "Autofill" the Purchase Order based upon the number of products sold between the dates specified in the "Enter Sales History Dates" section.
Enter Sales History dates	Select a "From Date" and "To Date" if you have selected the "Order based upon number of products sold during a specified timeframe" option.
Product Type Selection	Select the type of products that you would like to reorder - All Products, only Professional (BackBar) Products, or only Retail Products.

7. Select the type of products that you would like to reorder in the **"Product Type Selection"** area.
8. Click the **"Ok"** button.
9. All of the products that need to be reordered for the selected vendor will be automatically added to the Purchase Order, based on the reorder option selected. Review the listed products and click the **"Add"** button or **"Scan Barcode"** button in the lower left hand corner of the Purchase Order screen if you need to add additional items to the order.
10. Click the **"Save"** button at the bottom of the Purchase Order screen if you are satisfied with the order created.
11. Click on the **"Actions"** button in the upper right hand corner of the Purchase Orders list and select either **"Email PO to Vendor"** or **"Print Purchase Order"** if you would like to email the Purchase Order to your vendor or if you would like to print the order to hand or fax to your vendor.

Receiving Inventory

Once an order arrives, you will need to receive the order in Envision so that the "On Hand" quantities can be updated for the products received. Below are instructions for using the Receiving Inventory feature.

1. Click on "**Inventory**" on the Menu Bar of Envision.
2. Select "**Receiving Inventory**" from the menu.
3. Double click on top of the order you are working with to open it for editing. You can also left click on the order in the list and click the "**Edit**" button at the top of the Receiving Inventory list.

Receiving Inventory

Vendor Information: Vendor MID-CITY BEAUTY SUPPLY, Mid-City Beauty Supply

Ship To Location: Location MAIN, ENNOVIEW, 123 Sunny St., Sunnyville, FL 32xxx, 555-555-1212

Purchase Order Details: PO 64, PO Date 6/9/2009, Status Open, Ship Via, Terms, Expected On

Product Id	Vender SKU	Ordered	Cost	Qty To Date	On Backorder	Received	Cost	Taxable	Total
> FUS 10AB ASH/BLUE	050286591	1	4.65	0	0	0	0.00	<input checked="" type="checkbox"/>	0.00
HYDRATE CONDITIONER 8.5 OZ	P0011701	3	12.50	0	0	0	0.00	<input type="checkbox"/>	0.00
RDK ALL SOFT COND 8.5OZ OP	050011213	4	4.50	0	0	0	0.00	<input type="checkbox"/>	0.00
RDK RK MENS CLEANSING BAR	050515043	1	3.50	0	0	0	0.00	<input type="checkbox"/>	0.00

Labels, Scan Barcode, Receive All, Save, Manually Edit Tax, Subtotal 0.00, Freight 0.00, Tax 0.00, Total 0.00

Remove, Cancel Remaining, Cancel, Tax Rate 1 6.500, Tax Rate 2 0.000

4. Click in the "**Received**" column (column with a red zero) for each product listed and enter the amount received. You can also click the "Scan Barcode" button in the lower left hand corner of the Receiving Inventory screen if you would like to enter the quantity received by scanning the products.

5. If you did not receive all items and there are items "**On Backorder**", click the "**Cancel Remaining**" button at the bottom of the Receiving Inventory screen if your vendor waits for you to order the backordered items again. If your vendor does not wait for you to reorder the backordered items and they send those items to you in a separate order, it is not necessary to click the "**Cancel Remaining**" button. The order's "**Status**" will display "**Partial**" and you can edit the order again when the rest of the items are received. When all of the items have been received, the "**Status**" will be change to "**Closed**".

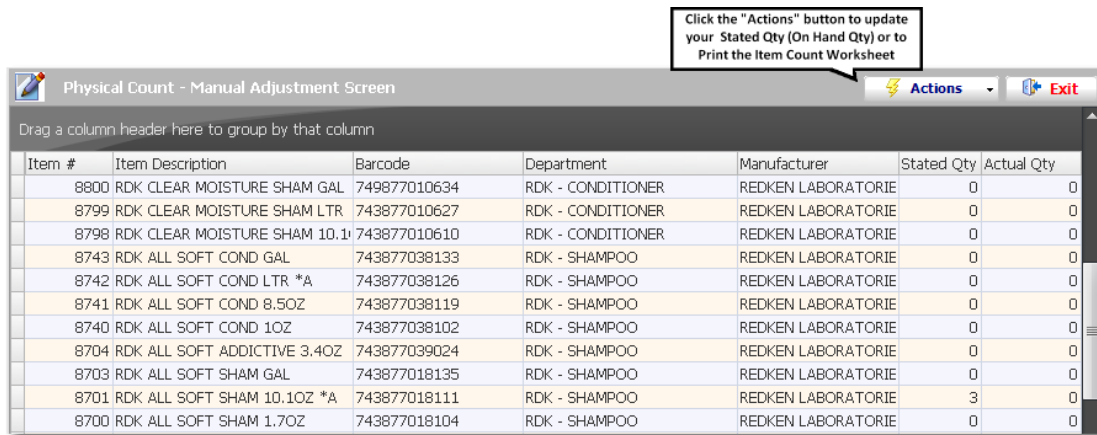
6. Click the "**Labels**" button if you would like to print labels for the products in this order.

7. Click the "**Save**" button when the "**Received**" quantities are correct and after printing labels. Once you click the "**Save**" button, all of the "**On Hand**" quantities for your products will be updated.

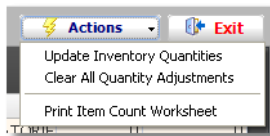
Physical Counts

The Physical Counts feature should be used when you do a physical count of your products. It provides a fast way to update the count of products in the program. Large variances between the Physical Count and the value Envision has displayed, should be a warning. Below are instructions for performing a Physical Count.

1. Click on "**Inventory**" on the Menu Bar of Envision.
2. Select "**Physical Count - Manual Adjustment Screen**" from the menu.



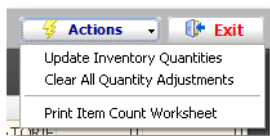
3. Click on the "**Actions**" button in the upper right hand corner of the Physical Count screen and select "**Print Item Count Worksheet**" to print out your list of retail products. This worksheet has a "Count" line next to each product so that you can write down how many products there on the shelf as you walk around with the worksheet.



4. After counting your products, you will need to come back to the "**Physical Count - Manual Adjustment Screen**" in Envision to enter the actual quantities. Click in the "**Actual Qty**" field for each product that needs to be edited and enter the new quantity that you counted. If the quantity displayed in the "**Stated Qty**" field is the same quantity you counted, leave the "**Actual Qty**" set to zero and move on to the next item.

Changing the Quantity to Zero: If there is a positive number in the "Stated Qty" field for specific product and during your count you did not find any of that particular product (quantity is zero), you will need to enter a negative amount of the "Stated Qty". For example, if the "Stated Qty" of a product is "5" and the quantity should actually be "0", type "-5" into the "Actual Qty" field. When the quantities are updated, the "Stated Qty" for that particular product will change to "0".

5. After entering the "Actual Qty" for all of the products that needed to be edited, click the "**Actions**" button and select "**Update Inventory Quantities**". All of the positive numbers in the "Actual Qty" column will be moved into the "Stated Qty" column.



Backbar Procedures

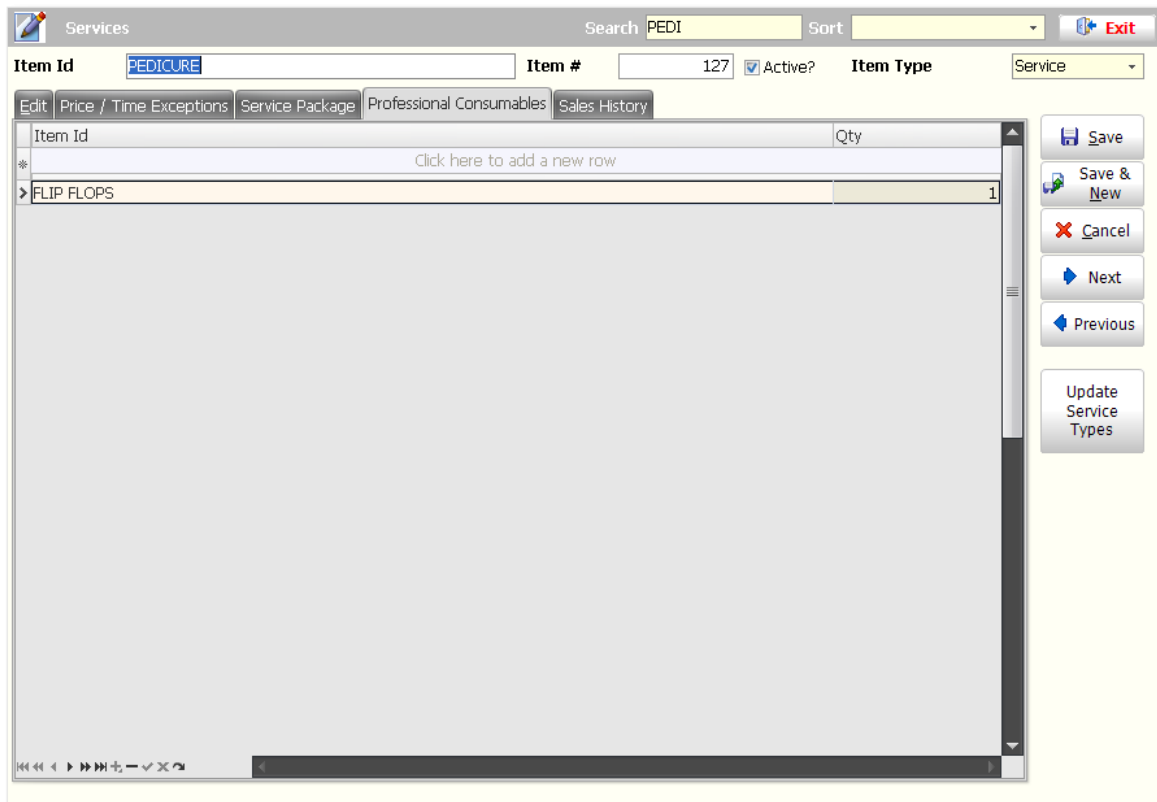
Backbar products, also referred to as "Professional Products", are the products that you use during a service. These products are usually color products, like Redken Color Fusion products, or liter sized bottles of shampoo, conditioner, facial products or massage products. You may also use products that are taken off the shelf, like styling products, to use at a station. In order to keep the "Qty on Hand" correct for ordering and maintaining the correct amount of Backbar products, it is necessary to track these products properly. There are multiple ways of tracking Backbar in Envision. Products can be deducted automatically when a service is sold at the Sales Register or you can sell the Backbar products in the Sales Register, if they cannot be taken out automatically when the service is sold.

Professional Consumables

If you are using the Pro or MedSpa version of Envision, you can have products automatically deducted from inventory when a service is sold. Below are instructions for setting this up.

1. Click on "**Inventory**" on the Menu Bar of Envision.
2. Select "**Services**" from the menu.
3. Double click on top of the service that will need a product automatically deducted from inventory.
4. Click on the "**Professional Consumables**" tab.

The following screen will allow you to choose the Back Bar products that are used for this service. When a client is checked out for this service, the item will be automatically removed from inventory and will show up on your sales reports for Back Bar.



5. To add products 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 product from your list of retail items. If you need to add additional products, click in the blank row directly below the row where the first product is selected. The first product will move to the second row and you will be able to add an additional product by clicking in the field labeled "Click here to add a new row".

- Click in the "Qty" field and type the quantity that is used during the service. This will be the quantity deducted when this service is sold.
- Click the "Save" button on the right.

Manual Backbar Tracking

There are two different ways of selling Backbar products because there are products that are only used for Backbar and there are also products that are sold to clients. Below are instructions for manually tracking both types of Backbar products.

Creating a Backbar Client and Backbar Discount Plan

You will first need to create a "Backbar Client" and a "Backbar Discount Plan".

- Click on the "Clients" button on the Tool Bar at the top of Envision.
- Click the "New" button at the top of the list.
- Click in the "Client Id" field and enter "Backbar Client". Also type "Backbar" into the "First Name" field and "Client" into the "Last Name" field.

The screenshot shows the 'Client List' window with a search bar and several tabs: Edit, Transaction History, Product / Service History, Notes / Audit Log, Formulas, and Sales History. The form fields are as follows:

Client Id	BACKBAR CLIENT
First Name	Backbar
Middle	
Last Name	Client

- Click on "Accounting" on the Menu Bar of Envision and select "Discount Plans" from the menu.

The screenshot shows the 'Discount Plans' window with a toolbar containing Save, Delete, Options, and Exit. The table below shows existing discount plans:

Discount Plan	Retail Discount	Service Discount	Tan Discount
EMPLOYEES	40.00	40.00	0.00
FAMILY	30.00	50.00	0.00
PREFERRED	5.00	5.00	5.00

- Click in the field labeled "Click here to add a new Discount Plan" and enter a name for the plan into the "Discount Plan" field.

The screenshot shows the 'Discount Plans' window with the same toolbar. A new discount plan has been added to the table:

Discount Plan	Retail Discount	Service Discount	Tan Discount
BACKBAR DISCOUNT	100.00	0.00	0.00
EMPLOYEES	40.00	40.00	0.00
FAMILY	30.00	50.00	0.00
PREFERRED	5.00	5.00	5.00

- Click in the "Retail Discount" field and enter "100".
- Click the "Save" button at the top of the Discount Plans list.

Backbar Discount Plan: This Discount Plan will only be used for the Backbar/Retail Products (products that can be used for backbar AND sold to clients). When a product is marked "Back Bar Item (In-House Use)", it will always have a price of "\$0.00" in the Point of Sale. If a product is NOT marked "Back Bar Item (In-House Use)", you will need to discount it. It is much easier to assign a Discount Plan to the Backbar Client so that the discount is automatically applied.

9. Click on "**Client List**" in the "**Screens**" box on the left hand side of Envision. This will bring you back to the "**Backbar Client**" record that you are creating.



10. Click on the "**Options**" tab at the bottom of the client record.

 A screenshot of a form with several tabs: 'Information', 'Options', 'Preferred Service Provider', 'Popup Note', and 'User'. The 'Options' tab is active, showing several dropdown menus: 'Lead Source', 'Client Type', 'User Type', 'Occupation', 'Discount Level' (with 'BACKBAR DISCOUNT' selected), and 'Loyalty Program'.

11. Click on the drop down arrow in the "**Discount Level**" field and select the Discount Plan that was just created.

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

Tracking Backbar Products

To track Backbar products (products that are only used In-House, not sold to clients), the product must be added to the Retail List and marked as a "Backbar Item (In-house Use)" product.

When a Backbar product is used, most salons and spas will toss the used product into a bin or basket. These products can then be sold in the Sales Register at the end of the day or at the end of the week.

1. Click on the "**Sales Register**" button on the Tool Bar at the top of Envision.



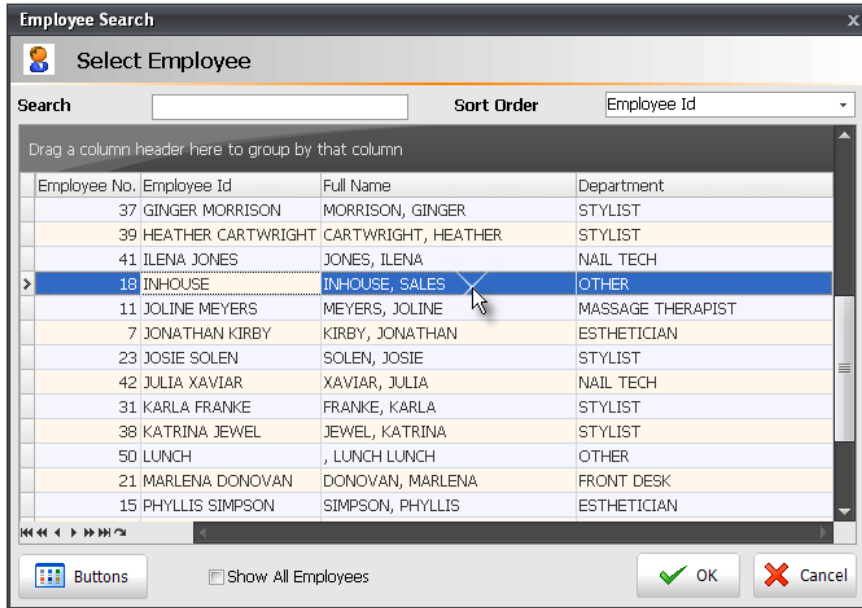
2. Select the "**Backbar Client**" at the top of the Sales Register.

 A screenshot of the 'Sales Register' window. At the top, it says 'Sales Register [1 / 46]'. Below that is a search bar with 'Client Id' selected. A list of clients is shown with columns for 'Client Id' and 'Full Name'. The 'BACKBAR CLIENT' row is highlighted.

Client Id	Full Name
ARNOLD DEBBIE	ARNOLD, DEBBIE
BACKBAR CLIENT	CLIENT, BACKBAR
BAXTER KATHERINE	BAXTER, KATHERINE
BLOOM GEORGIA	BLOOM, GEORGIA
BOONE FRANCINE	BOONE, FRANCINE
BROWN JOHN	BROWN, JOHN
BROWN JULIE	BROWN, JULIE
BROWN KARRY	BROWN, KARRY

4. Select or scan the backbar product that was used.

5. Select the employee that used the product or select an **"Inhouse Employee"**.



6. After selecting or scanning all of the products that have been used, click the **"Sale/CashOut"** button and then click the **"Cash Out"** button to complete the transaction.

Tracking Backbar/Retail Products

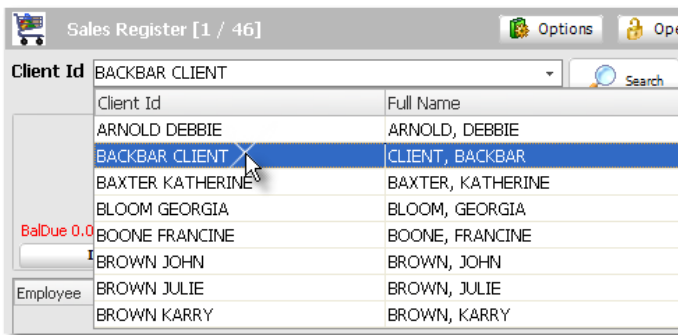
The products that can be used as backbar and also sold to clients do not need to be marked as "Back Bar Item (In-House Use)" products in the Retail List.

When a product is taken off the shelf to use at a station, it best to create a sales transaction for the product at that time so that no one forgets about tracking it as a backbar item.

1. Click on the **"Sales Register"** button on the Tool Bar at the top of Envision.

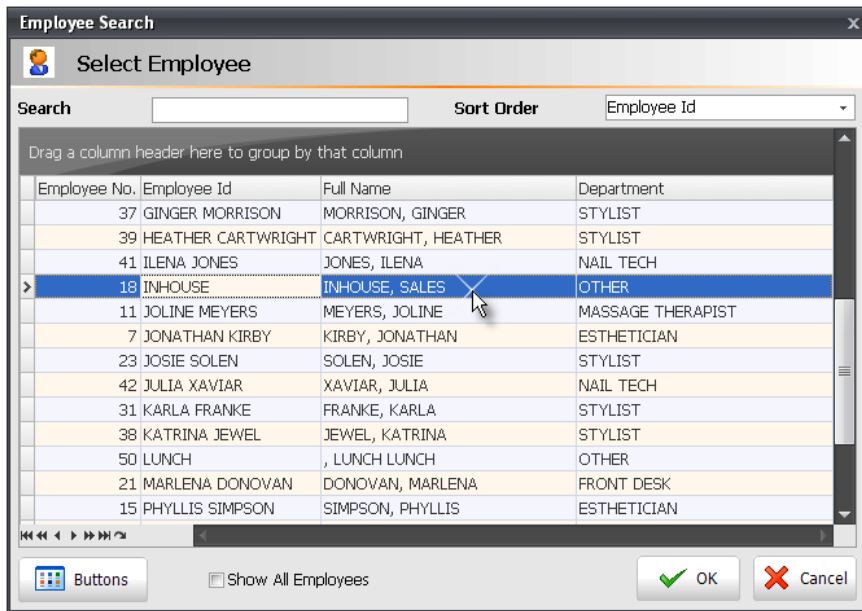


2. Select the **"Backbar Client"** at the top of the Sales Register.

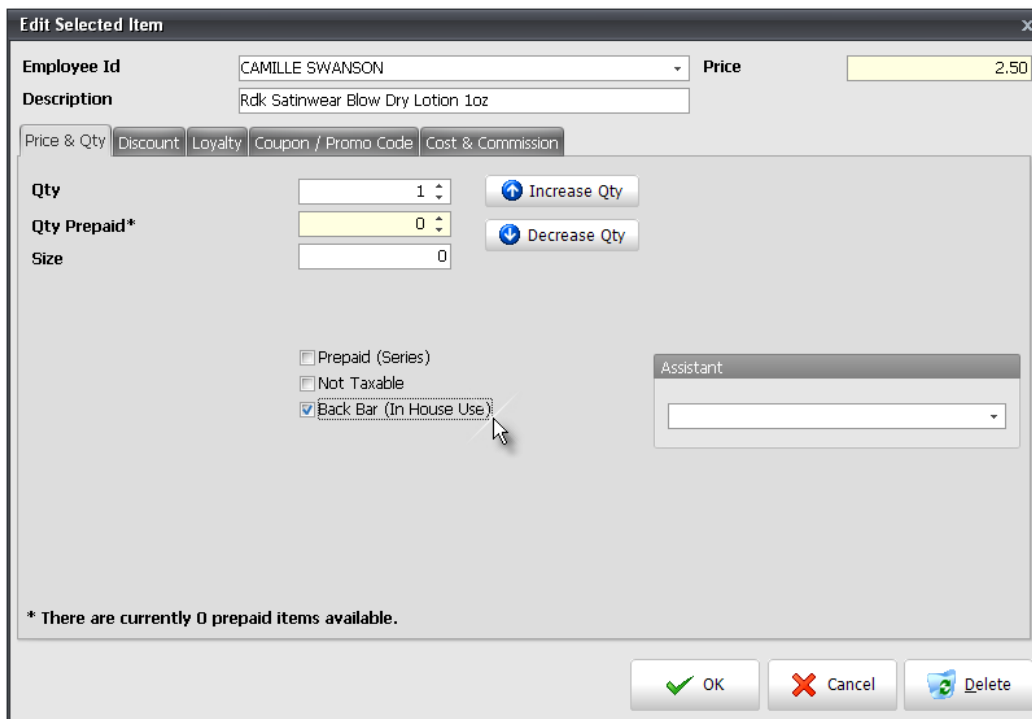


4. Select or scan the product that is being taken off the shelf.

5. Select the employee that used the product or select an **"Inhouse Employee"**.



6. Double-click on top of the product or click the **"Adjust"** button to edit the product selected.



5. Check the **"Back Bar (In House Use)"** checkbox.

6. After selecting or scanning all of the products that are being taken of the shelf and checking the **"Back Bar (In House Use)"** checkbox for each item, click the **"Sale/CashOut"** button and then click the **"Cash Out"** button to complete the transaction.

Backbar Reports

All of the "Sales By" reports at the top of the Report Menu have a "Back Bar Only" checkbox under the "Choose Item Types Included on Report" section.

The screenshot shows the 'Envision Report - Sales' window with the following configuration:

- Select Report Type:** Detailed (selected), Summary, Compare
- Select Product / Service Return Option:** Include Returns (selected), Exclude Returns
- Primary Date Range:** Begin Date: 2/4/2010, End Date: 2/4/2010
- Summary Chart:** Show Bar Chart, Show Pie Chart, Show Total Sales, Show Cost, Show Qty Sold, Show Profit
- First Additional Sort:** Client
- Choose Item Types Included on Report:** Service, Retail, Tanning, Package, Membership, Gift Certificate, **Back Bar Only** (checked)
- Second Additional Sort:** < No Selection >
- Additional Report Options:** Display cost and profit figures on the report (checked), Only Display Sales from Walk-In Clients, Do Not Include Back Bar Sales, Only Show Comp'd Items on Report, Display Commission Totals Instead of Actual Totals, Do not include service packages in service totals
- Select Range:** Include All (selected), Single, Range
- Summary Sort Options:** Sort Report By: < No Selection >

Ordering Backbar Products

Backbar products can be purchased separately or together with retail products when creating a Purchase Order.

1. Click the "Autofill PO Based Upon Inventory Needs" button at the bottom of the Purchase Order screen.

The screenshot shows the 'Purchase Order' window with the following configuration:

- Select Reorder Option:** Order based upon standard Min Qty, Max Qty and Reorder Point (selected), Order based upon number of products sold during a specified timeframe
- Enter Sales History Dates:** From Date, To Date, Calendar
- Product Type Selection:** Reorder All Products, **Only Reorder Professional (Backbar) Products** (selected), Only Reorder Retail Products

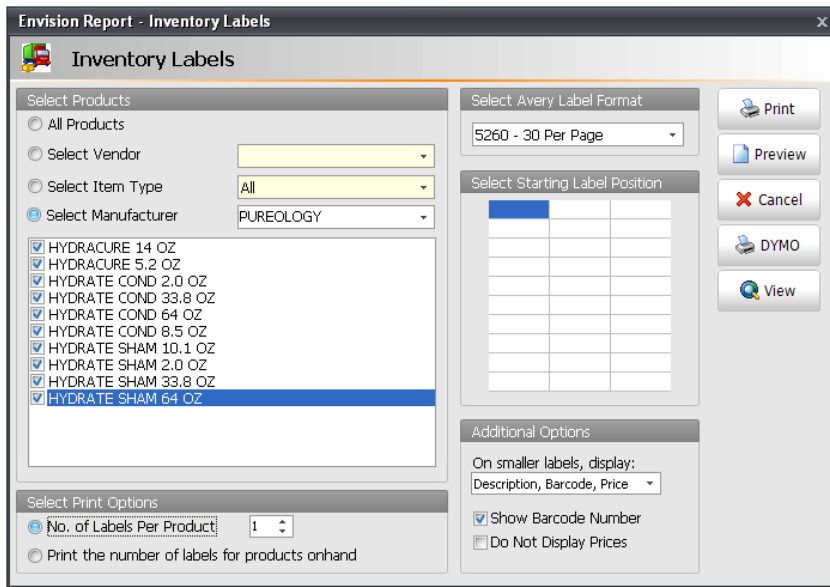
2. Select the Reorder Option first and then select either "Reorder All Products" or "Only Reorder Professional (Backbar) Products".

Printing Inventory Labels

Envision provides the ability to print labels for your products if you sell products that do not have barcodes on them and you use a barcode scanner to select your products. You may also choose to print labels for your products if you would like a price label on your products. Below are instructions for printing labels from the Inventory Menu and printing labels from the Receiving Inventory screen.

Printing Labels from the Inventory Menu

1. Click on "Inventory" on the Menu Bar of Envision and select "Inventory Labels" from the menu.



2. You may select the products that you would like to print labels for by the Vendor, Item Type, or Manufacturer. After selecting one of these options, check the boxes to the left of the products that you would like to print labels for. Barcodes will only be printed for items that have a barcode number.

Entering Barcode Numbers: To enter a barcode number, click on "Inventory" on the Menu Bar of Envision and select "Retail Products" from the menu. Double click on top of the product that you would like to enter a barcode for to open up the product record. Click in the barcode field and scan the barcode of the product or type in your own barcode number. We recommend entering a barcode number that is between 4 and 9 characters long.

3. Select the number of labels to print for the products that have been selected.

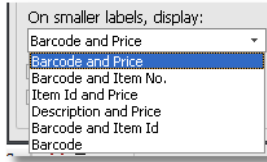
- **No. Of Labels Per Product:** This option allows you to print the number of labels specified to the right for each product selected.
- **Print the number of labels for products onhand:** This option will print the quantity "On Hand" for each product selected.

4. Click the drop down arrow in the "Select Avery Label Format" field to select the type of label that you will be using. The options available are standard label formats. These labels can be purchased at any office supply store. If you have chosen the Avery Label 5267 or Avery Label L7646 Labels, you may choose what to display on the label.

5. Select a "Starting Label Position". This feature can be very useful if you have used only a portion of a sheet of labels. Instead of throwing away the entire sheet of labels, you can pick the position that you left off at the last time you printed labels.

6. Select additional options if necessary.

- **On Smaller Labels, Display:** Select the information that you would like displayed on your labels. If you do not have a barcode on your products and you would like to use a barcode scanner to select them in the Sales Register, you will need to select an option that will print the barcode. If you already have barcodes on your products but would like to print labels to display the price, select an option that display the name and price.



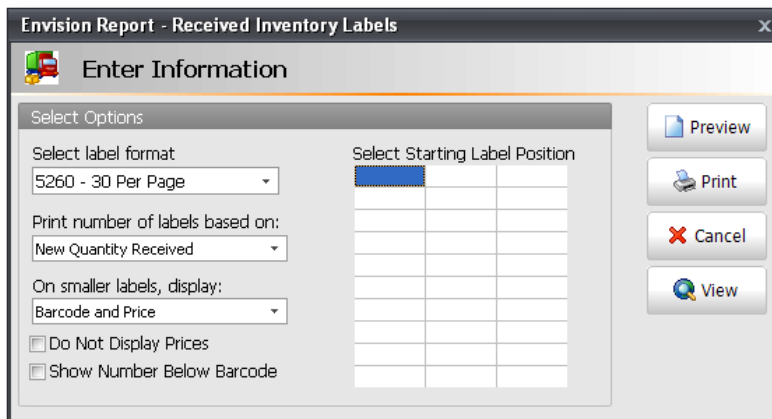
- **Show Barcode Number:** Check this box if you would like the barcode number printed below the barcode.
- **Do Not Display Prices:** Check this box if you do not want the price printed on any of your labels. This option is only available for Avery Label 5260, Avery Label L7654 and Avery Label J8651.

7. Click the **"Preview"** button if you would like to preview the labels before printing and then click the **"Print"** button when you are ready to print the labels.

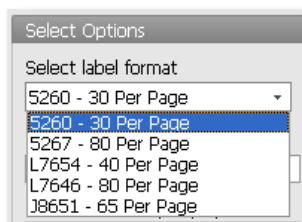
Printing Received Inventory Labels

It is best to print your labels from the Receiving Inventory screen because you can print labels for all of the items received, instead of having to specify how many labels you would like to print for each item. This can be done each time you receive an order. Click on the drop down arrow under "Print Number of Labels Based On" to select how many labels you wish to print depending on the quantities in the order.

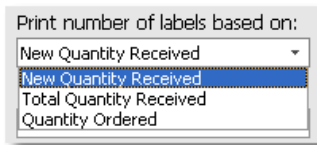
1. Click the **"Labels"** button in the lower left hand corner of the **"Receiving Inventory"** screen.



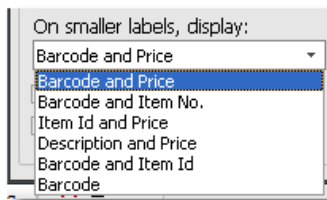
2. Click on the drop down arrow in the "Select Label Format" field to select the type of label that you will be using. The options available are standard label formats. These labels can be purchased at any office supply store.



3. Select one of the "**Print Number of Labels Based On**" options. The "**New Quantity Received**" option will print labels for the new items received. The "**Total Quantity Received**" option will print the entire quantity received to date and the "**Quantity Ordered**" will print labels for all of the items ordered, whether they have been received or not.



4. If you are using smaller labels, select one of the "**On Smaller Labels, Display**" options to select the information that you would like displayed on your labels. If you do not have a barcode on your products and you would like to use a barcode scanner to select them in the Sales Register, you will need to select an option that will print the barcode. If you already have barcodes on your products but would like to print labels to display the price, select an option that display the name and price.



5. Select additional options if necessary.

- **Do Not Display Prices:** Check this box if you do not want the price printed on any of your labels. This option is only available for Avery Label 5260, Avery Label L7654 and Avery Label J8651.
- **Show Number Below Barcode:** Check this box if you would like the barcode number printed below the barcode.
- **Select Starting Label Position:** This feature can be very useful if you have used only a portion of a sheet of labels. Instead of throwing away the entire sheet of labels, you can pick the position that you left off at the last time you printed labels.

Payroll

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.

Service Commission | Retail Commission | Retail to Service Bonus | Manager Commission

Commission Plan Description: 50% SERVICE / 10% RETAIL PLAN

Service Commission Options

Plan Type: Straight Scale Commission

Service Deductions:

- Subtract Before Commission Calculation
- Subtract After Commission Calculation

No Commission Overrides Allowed
 Exclude Inv Overhead Deductions
 Exclude Inv Labor Deductions
 Exclude Inv New Account Deductions

Add a Flat Charge per Item:
 Add a Flat Charge per Ticket:
 Set all Overhead deductions to this percentage:

Service Commission Plan

Enter Low values first and increase the range / percentages to the right

	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7	Level 8
From Sales	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
To Sales	<input type="text" value="99999999"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Percent %	<input type="text" value="50.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

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.

Retail Commission Options

Plan Type: Straight Scale Commission

No Commission Overrides Allowed
 Exclude Service Deductions from RTS%
 Exclude Tanning Sales
 Exclude Gift Certificate Sales

Minimum Service Sales Required: 0
 Maximum RTS Commission %: 0
 Minimum RTS % Required: 0

Retail Commission Plan

Select From / To Scale:

- Total Retail Sales
- Total Retail Profit
- Total Service Sales

Calculate Commission %:

- On Retail Sales
- On Retail Profit
- On Service Sales

Enter Low values first and increase the range / percentages to the right

	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7	Level 8
From Sales	0	0	0	0	0	0	0	0
To Sales	99999999	0	0	0	0	0	0	0
Percent %	10.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

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.

The screenshot shows the 'Commission Plan Description' window for a 'SLIDING SCALE COMMISSION PLAN'. The 'Service Commission Options' section includes a 'Plan Type' dropdown set to 'Sliding Scale Commission', several unchecked checkboxes for 'No Commission Overrides Allowed', 'Exclude Inv Overhead Deductions', 'Exclude Inv Labor Deductions', and 'Exclude Inv New Account Deductions', and three input fields for 'Add a Flat Charge per Item', 'Add a Flat Charge per Ticket', and 'Set all Overhead deductions to this percentage', all set to 0. The 'Service Deductions' section has two radio buttons: 'Subtract Before Commission Calculation' (selected) and 'Subtract After Commission Calculation'. The 'Service Commission Plan' section contains a table with columns for Level 1 through Level 8 and rows for 'From Sales', 'To Sales', and 'Percent %'. The table data is as follows:

	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7	Level 8
From Sales	0	1000	2000	0	0	0	0	0
To Sales	1000	2000	9999999	0	0	0	0	0
Percent %	50.00	52.00	53.00	0.00	0.00	0.00	0.00	0.00

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.

Retail Commission Options

Plan Type:

No Commission Overrides Allowed
 Exclude Service Deductions from RTS%
 Exclude Tanning Sales
 Exclude Gift Certificate Sales

Minimum Service Sales Required:
 Maximum RTS Commission %:
 Minimum RTS % Required:

Retail Commission Plan

Select From / To Scale:

- Total Retail Sales
- Total Retail Profit
- Total Service Sales

Calculate Commission %:

- On Retail Sales
- On Retail Profit
- On Service Sales

Enter Low values first and increase the range / percentages to the right

	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7	Level 8
From Sales	<input type="text" value="0"/>	<input type="text" value="500"/>	<input type="text" value="1000"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
To Sales	<input type="text" value="500"/>	<input type="text" value="1000"/>	<input type="text" value="99999999"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Percent %	<input type="text" value="10.00"/>	<input type="text" value="15.00"/>	<input type="text" value="17.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

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.

Service Commission | Retail Commission | Retail to Service Bonus | Manager Commission

Commission Plan Description INVENTORY DEPT COMMISSION PLAN

Service Commission Options

Plan Type Inventory Department Commission

No Commission Overrides Allowed
 Exclude Inv Overhead Deductions
 Exclude Inv Labor Deductions
 Exclude Inv New Account Deductions

Service Deductions

Subtract Before Commission Calculation
 Subtract After Commission Calculation

Add a Flat Charge per Item 0
Add a Flat Charge per Ticket 0
Set all Overhead deductions to this percentage 0

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.

Inventory Department	Display Order	Display on POS Tabs	Commission %
Click here to add a new Inventory Department			
ESTHETIC - ADDL SERVICE	12	<input checked="" type="checkbox"/>	60.00
ESTHETIC - FACIAL	9	<input checked="" type="checkbox"/>	60.00
ESTHETIC - MAKEUP	11	<input checked="" type="checkbox"/>	65.00
ESTHETIC - WAXES	10	<input checked="" type="checkbox"/>	60.00

Employee Payroll Settings

Before running payroll, you will need to setup each employee's Payroll settings. The following screen allows you to setup the employee's payroll information. Use this screen to enter all of the payroll information available for the employee you are adding to the list. A Commission Plan can only be selected after you have set up your Commission Plan List.

1. Click on "**Employee**" on the Menu Bar of Envision.
2. Select the "**Employee List**" from the menu.
3. Double click on top of an employee's name to open their record.

4. Enter an "**Hourly Wage**" if the employee has an hourly rate or a minimum hourly rate. This field works along with the "Pay Type" option on the right. If the employee has an hourly wage you will also need to set the "Pay Type" to "Hourly".

5. Enter a "**Yearly Salary**" if the employee is paid a salary. The amount you would enter is the amount that they will be paid for the entire year. When you run payroll, Envision will calculate how much the amount will be for that payroll period. This field also works along with the "Pay Type" option on the right. If the employee has a salary you will also need to set the "Pay Type" to "Salary".

6. Select a "**Commission Plan**" here after one has been created in the Commission Plans list. The commission plan is where the commission percent and settings are stored for the commission plan that the selected employee will be under.

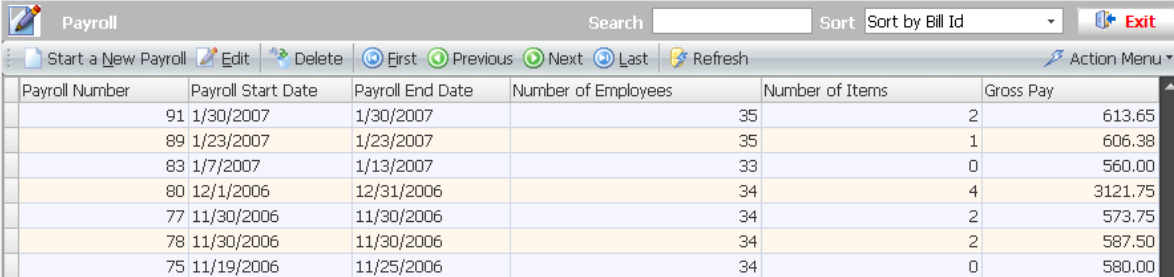
7. Enter a "**Daily Booth Rental Fee**" here if the employee is self employed and you charge a rental fee. This fee will be used when you use the Booth Renter Billing System and on the "Booth Renter / Self Employed Billing Report". The amount entered in this field should be the amount that they would pay each day. If your rent is for the week or for the month, you will need to determine how much the rent is per day based on the amount that you charge per week or per month.

8. Enter a **"POS Emp Ded Allow"** if necessary. The amount entered here is the amount that you would like to allow your employees to charge at the Sales Register. If they are purchasing products you can have this come out of their paycheck by using the "Employee Deduction" option in the Sales Register. Setting an allowance here will limit them from charging anything more than the amount entered here.
9. Select a **"Bill To Client"** if necessary. If you will be using the Booth Renter / Self Employed Billing System, you will need to select the client (also the employee) that will be billed for Booth Rental / Self Employed fees. The employee must be added into your Clients list before selecting the client here.
10. Select a **"Pay Type"** if necessary. If the employee is hourly or salary, you will need to select a "Pay Type" here. You will need to select a Pay Type If there is any kind of hourly or salary calculation for the employee. It is necessary to set the Pay Type even if the employee is paid on Hourly OR Commission depending on which is greater.
11. Select an **"Employment Status"**. Select the type of status for this employee. Select from either Full Time or Part Time.
12. Select the **"Payroll Period"**. Select the type of payroll period for this employee.
13. Check **"Pay Greater of Wages or Commission"** if necessary. Check this box if this employee is setup with an hourly wage as well as a commission plan and you would like the employee to be paid with the pay type that is greater during a payroll period. For example, if this employee has made more with commissions than they have with the hourly wage for the specified payroll period, they will be paid the amount they made with commissions. If there is a payroll period that their hourly wage is greater, they will be paid the hourly wage instead of the commissions.
14. Check **"Self Employed / Independent Contractor"** if necessary. Check this box if you will be using the Booth Renter / Self Employed Billing System for this employee. When this box is checked, the employee's sales will not appear on your sales report.

Running Payroll

The Payroll feature of Envision is a very easy feature to use. Employee sales are all tracked in the program and as long as the employee payroll settings are correct, you will only need to choose a date range for the payroll and choose what items you would like to include in the payroll calculation. Below are instructions for running payroll.

1. Click on **"Accounting"** on the Menu Bar.
2. Select **"Payroll"** from the drop down menu.



The screenshot shows the 'Payroll' application window. At the top, there is a search bar and a 'Sort' dropdown menu set to 'Sort by Bill Id'. Below the search bar is a toolbar with buttons for 'Start a New Payroll', 'Edit', 'Delete', 'First', 'Previous', 'Next', 'Last', and 'Refresh'. An 'Action Menu' dropdown is also visible. The main area contains a table with the following data:

Payroll Number	Payroll Start Date	Payroll End Date	Number of Employees	Number of Items	Gross Pay
91	1/30/2007	1/30/2007	35	2	613.65
89	1/23/2007	1/23/2007	35	1	606.38
83	1/7/2007	1/13/2007	33	0	560.00
80	12/1/2006	12/31/2006	34	4	3121.75
77	11/30/2006	11/30/2006	34	2	573.75
78	11/30/2006	11/30/2006	34	2	587.50
75	11/19/2006	11/25/2006	34	0	580.00

- Click on the **"Start a New Payroll"** button in the upper left hand corner of the payroll listing.

- Select the **"Starting Payroll Date"** and **"Ending Payroll Date"**. You may click on the drop down arrows for calendars or you may click on the small calendar button to select both the starting and ending date.
- The **"Payroll Frequency"** should already be set to your default setting for this, so you will only need to select the option that you would like to include in the Payroll Scan. In most cases you will choose **"Include All Service / Retail Sales"** if you usually run payroll for both service and retail commission. If you calculate the retail commission once a month, you will need to create a second payroll at the end of the month that has a date range for the entire month and you will choose the **"Include Only Retail Sales"** option.
- Check or uncheck the **"Additional Options"** if necessary.
- Be sure to click the **"Add Tips to Net Pay (Used if you hold tips and include them in their payroll check)"** check box if do not take tips out of the drawer every night and pay the tips in your employees' paychecks.
- Click the **"Continue"** button when you are ready for the payroll to be calculated.

9. A listing of all employees for this pay period will be displayed. To get detailed information about an employee, double click on top of that employee's name or highlight their name and click the "Employee Details" tab.

The screenshot shows the 'Payroll' window with the 'Employee Details' tab selected. The main area displays a table of employees with columns for Employee, Taxable Wages, Total Taxes, and Net Pay. The following table represents the data shown in the screenshot:

Employee	Taxable Wages	Total Taxes	Net Pay
CARRIE CONNOR	32.48	0.00	32.48
COLLEEN MORRIS	442.93	0.00	442.93
CONNER MARLOW	40.00	0.00	40.00
ERIKA FISHER	490.43	0.00	490.43
GINGER MORRISON	378.35	0.00	378.35
JOLINE MEYERS	431.70	0.00	431.70
JONATHAN KIRBY	500.00	0.00	500.00
KATRINA JEWEL	414.15	0.00	414.15

Navigation buttons on the right include Save, Save & New, Cancel, Next, Previous, and Change Payroll Options.

10. Review the details of their information to make sure that everything has been calculated correctly.

The screenshot shows the 'Payroll' window with the 'Employee Details' tab selected for employee ANNE CREW. The 'Commission' sub-tab is active, showing a breakdown of wages, taxes, and commissions. The following table represents the data shown in the screenshot:

Category	Amount
Reg Hrs	0.00
OT Hrs	0.00
# Days	7
H Rate	8.00
Y Salary	0.00
Other Pay	0.00
Wages / OT Due	0.00
+ Std Commissions	650.00
+ Commission Overrides	0.00
- OH / Labor Comm Deduction	0.00
+ Payroll Adjustments	100.00
+ Other Pay = Gross Pay	750.00
- Post Tax Pay Adjustments	0.00
+ Tips Received	3.20
+ Tips Reported Manually	0.00
= Taxable Wages	753.20
- Employee POS Chgs	0.00
- Rental Chg	0.00
= Net Paid	750.00

The 'Commission Sales' section shows:

Category	Amount
Service	1000.00
Retail	250.00
Tanning	0.00
Gift Certificates	0.00
Total Commission Sales	1250.00
Total Salon Commission Sales	965.00
Service Sales (- Deductions)	1000.00
Retail Sales / Profit	250.00
Retail to Service %	25.00
Inventory Incentives	0.00
Service Commission	600.00
Retail Commission	50.00
Retail Bonus Commission	0.00
Manager Commission	0.00
Total Std Commissions	650.00

Navigation buttons on the right include Save, Save & New, Cancel, Next, Previous, Recalculate, Rescan, and Summary.

11. Click the "Save" button on the right if you are satisfied with the payroll calculations. You will not be able to run Payroll Reports for the calculated payroll until the payroll has been saved.

Payroll Reports

The following reports are the most commonly used reports for payroll. The Payroll Detail report is a report that you can print and give to whoever you outsource your payroll to for tax calculations. The Payroll Commission report can be used to review the items included in the payroll calculation and the Employee Payroll Sheets can be given to each employee with their paycheck.

Payroll Detail Report

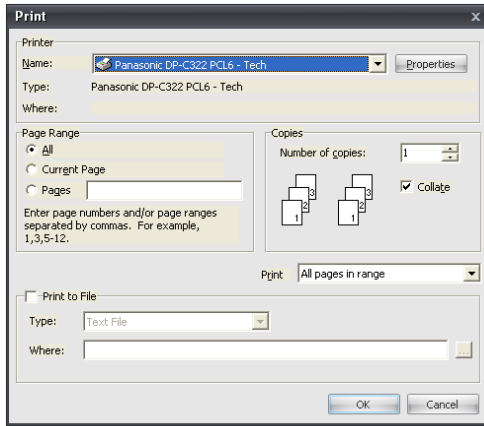
1. Select the **"Payroll Detail Report"** from the Payroll Report Menu. The following option screen will appear:

2. Click on the drop down arrow in the **"Select Payroll"** field to select the Payroll that you would like to print this report for.
3. Click the **"Preview"** button to view the report before you print it. Click the **"Close"** button at the top to close out of the preview.

The following image is a sample of the preview:

Pay No.	Employee ID	Hours	No. Days	Wages Due	Std. Comm.	Comm. Overrides	OH/Labor Deduct.	Tips	Gross Pay	Adjust	Taxable Wages	Fed/ST Taxes	Emp POS Charges	Rental Charge	Net Paid
	CARRIE CONNOR	0.00	5	0.00	12.48	0.00	0.00	0.00	12.48	20.00	32.48	0.00	0.00	0.00	32.48
	COLLEEN MORRIS	0.00	5	0.00	442.93	0.00	2.25	0.00	442.93	0.00	442.93	0.00	0.00	0.00	442.93
	CONNOR MARLOW	0.00	5	0.00	0.00	0.00	0.00	0.00	0.00	40.00	40.00	0.00	0.00	0.00	40.00
	ERIKA FISHER	0.00	5	0.00	490.43	0.00	2.25	0.00	490.43	0.00	490.43	0.00	0.00	0.00	490.43
	GINGER MORRISON	0.00	5	0.00	378.35	0.00	4.50	0.00	378.35	0.00	378.35	0.00	0.00	0.00	378.35
	JOLINE MEYERS	0.00	5	0.00	431.70	0.00	0.00	0.00	431.70	0.00	431.70	0.00	0.00	0.00	431.70
	JONATHAN KIRBY	0.00	5	0.00	0.00	0.00	0.00	0.00	0.00	500.00	500.00	0.00	0.00	0.00	500.00
	KATRINA JEWEL	0.00	5	0.00	414.15	0.00	0.00	0.00	414.15	0.00	414.15	0.00	0.00	0.00	414.15
	Totals:	0.00	40	0.00	2170.04	0.00	9.00	0.00	2170.04	560.00	2730.04	0.00	0.00	0.00	2730.04

4. On the "**Payroll Detail**" options screen, click the "**Print**" button if you would like to print the report or export the report to a file.

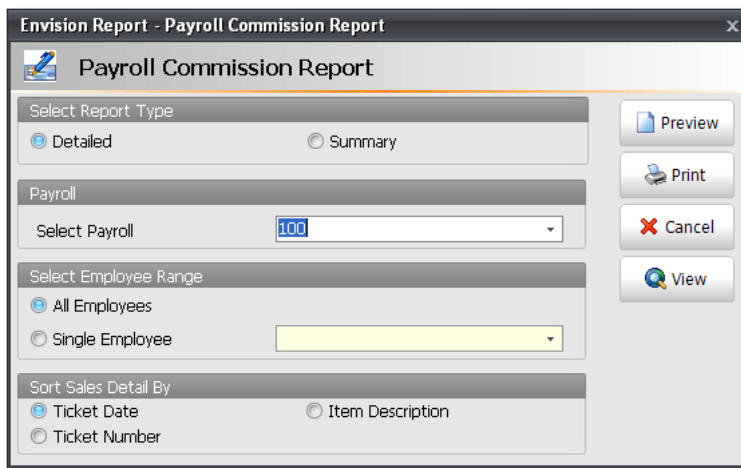


TO EXPORT THE REPORT:

1. Check the "**Print to File**" check box.
2. Use the drop down arrow on the "**Type**" field to select the type of file that you would like to export this report as.
3. Click on the small button with the three dots in the "**Where**" field to specify the location that you would like to save this report.

Payroll Commission Report

1. Select the "**Payroll Commission Report**" from the Payroll Report Menu. The following option screen will appear:



2. Click on the drop down arrow in the "**Select Payroll**" field to select the Payroll that you would like to print this report for.
3. Click on the "**Single Employee**" circle and use the drop down arrow to select an employee if you would like to run this report for just one employee.
4. Click the "**Preview**" button to view the report before you print it. Click the "**Close**" button at the top to close out of the preview.

The following image is a sample of the preview:

Print Preview

Payroll Commission Report (Detail)

Date Range: 2/5/2010 through 2/5/2010

ENNNOVIEW
Location: Main

CAMILLE SWANSON

Total Commission Sales	200.00	Inventory Incentives	0.00	Total Std. Commissions	83.88
Retail Sales	50.00	Service Commission	73.88	Override Commission	0.00
Service Sales (- Ded)	147.75	Retail Commission	10.00	- OH / Labor Deductions	0.00
Retail To Service %	33.80 %	Retail Bonus Commission	0.00	= Commission Due	83.88
		Total Std. Commissions	83.88		

SERVICE COMMISSIONS						
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6
From Sales	0	0	0	0	0	0
To Sales	99999999	0	0	0	0	0
Percent %	50.00	0.00	0.00	0.00	0.00	0.00
Commission Paid	74.00	0.00	0.00	0.00	0.00	0.00

Type	Date	Description	Ticket Number	Commission Sales	Sales Overrides	Commission Overrides	Incentive	New Acct Deductions	Overhead Before	Overhead After	Labor Before	Labor After
Retail	2/5/2010	Hydrate Skampoo 10.1 Oz	13	25.00	0.00	0.00	0.00					
Retail	2/5/2010	Parelog; Hydrate Co additive 8	13	25.00	0.00	0.00	0.00					
				50.00	0.00	0.00	0.00					
Service	2/5/2010	All Over Color	13	90.00	0.00	0.00		0.00	2.25	0.00	0.00	0.00
Service	2/5/2010	Women's Haircut	13	60.00	0.00	0.00		0.00	0.00	0.00	0.00	0.00
				150.00	0.00	0.00	0.00	0.00	2.25	0.00	0.00	0.00

Tips		
Date	Ticket No.	Amount
2/5/2010	13	30.00
		30.00

Page 5 of 31

5. On the "Payroll Commission Report" options screen, click the "Print" button if you would like to print the report or export the report to a file.

Print

Printer: Panasonic DP-C322 PCL6 - Tech

Name: Panasonic DP-C322 PCL6 - Tech

Type: Panasonic DP-C322 PCL6 - Tech

Where:

Page Range: All Current Page Pages

Enter page numbers and/or page ranges separated by commas. For example, 1,3,5-12.

Copies: Number of copies: 1 Collate

Print: All pages in range

Print to File

Type: Text File

Where:

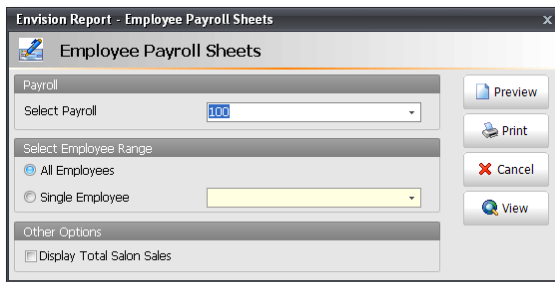
OK Cancel

TO EXPORT THE REPORT:

1. Check the "Print to File" check box
2. Use the drop down arrow on the "Type" field to select the type of file that you would like to export this report as.
3. Click on the small button with the three dots in the "Where" field to specify the location that you would like to save this report.

Employee Payroll Sheets

1. Select "Employee Payroll Sheets" from the Payroll Report Menu. The following option screen will appear:



2. Click on the drop down arrow in the "Select Payroll" field to select the Payroll that you would like to print this report for.
3. Click the "Preview" button to view the report before you print it. Click the "Close" button at the top to close out of the preview.

Employee Payroll Sheets
Date Range: 5/27/2007 through 6/2/2007
ENNOVIEW

MEYERS, JOLINE

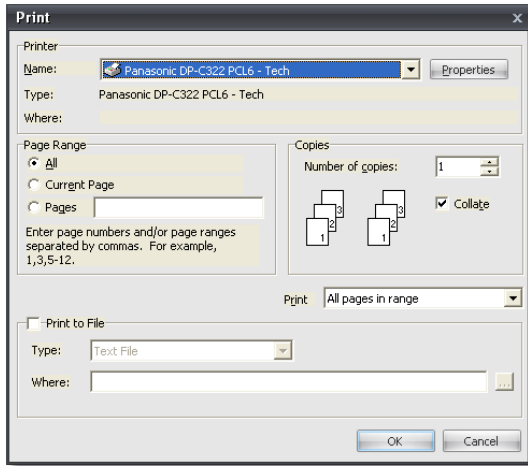
Payroll Summary		Inventory Commission Overrides	
Reg. Hours	0.00	No. of Days	5
OT. Hours	0.00	Hourly Rate	0.00
		Yearly salary	0.00
Wages / OT Due	0.00	Commission	Sales
+ Other Pay	0.00	Retail	0.00
+ Std Commissions	431.70	Service	0.00
+ Commission Overrides	0.00	Tanning	0.00
- Overhead / Labor Deduction	0.00	Packages	0.00
+ Tips Received	0.00	Total	0.00
+ Tips Reported Manually	0.00		1205.00
= Gross Pay			
+ Payroll Adjustments	0.00	Commission Deductions	
- Post Tax Adjustments	0.00	Total New Acct Deductions	0.00
= Taxable Wages	431.70	No. Services Items Provided	11
- Federal / State Taxes	0.00	Total Per Item Charges	0.00
- Employee POS Chgs	0.00	Num of Total Tickets	11
- Rental Chg	0.00	Total Per Ticket Charges	0.00
= Net Paid	431.70	Daily Booth Rental Fee	0.00
		Subtract BEFORE Commission % Calculation	Subtract AFTER Commission % Calculation
		Overhead	0.00
		Labor	0.00
		Totals	0.00
		Deduction from Services Sales	0.00
		Deduction from Commissions	0.00

Commission Sales		Federal and State Taxes	
Service	715.00	Fed. Allowances	0
Retail	263.75	ST. Allowances	0
Tanning	0.00	Extra Withholding	0.00
Gift Certificates	0.00	Payroll Period	Weekly
Total Commission Sales	978.75	Filing Status	Single
Service Sales (- Deductions)	715.00	SS Tax	0.00
Retail Sales	263.75	Med Tax	0.00
Retail to Service %	36.90%	State WT	0.00
Inventory Incentives	0.00	State Other 1	0.00
Service Commission	378.95	State Other 2	0.00
Retail Commission	52.75	Fed WT	0.00
Retail Bonus Commission	0.00	Total Taxes	0.00
Manager Commission	0.00		
Totals Std. Commissions	431.70		

2/5/2010 3:01:11 PM Page 1 of 1

Page 6 of 8

- On the **"Employee Payroll Sheets"** options screen, click the **"Print"** button if you would like to print the report or export the report to a file.

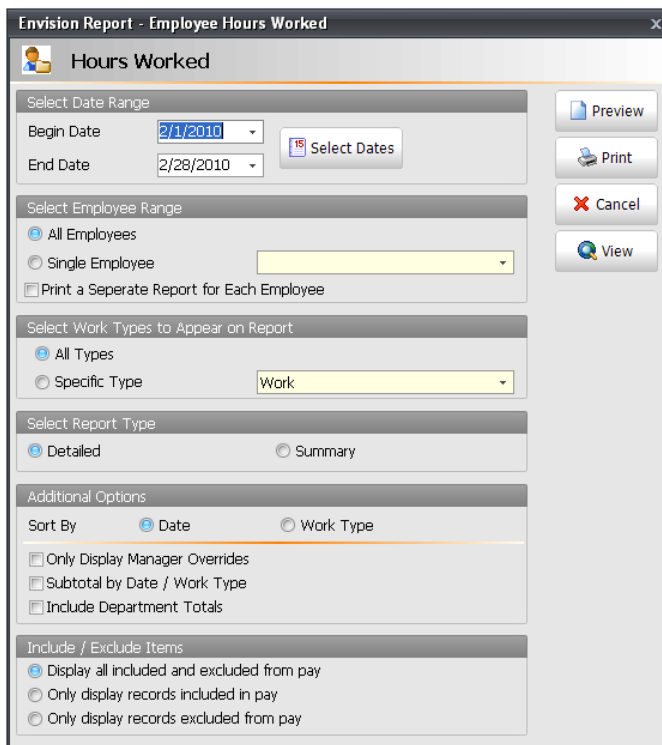


TO EXPORT THE REPORT:

- Check the **"Print to File"** check box
- Use the drop down arrow on the **"Type"** field to select the type of file that you would like to export this report as.
- Click on the small button with the three dots in the **"Where"** field to specify the location that you would like to save this report.

Employee Hours Worked Report

- Select the **"Employee Hours Worked"** report from the Payroll Report Menu. The following option screen will appear:

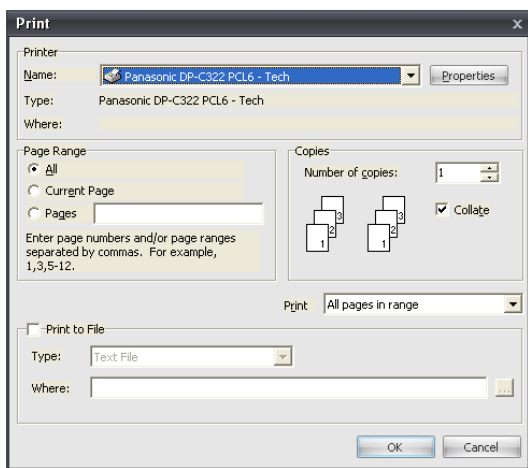


2. Click on the drop down arrows in the **"Begin Date"** and **"End Date"** fields to select the date for this report.
3. Click on the **"Single Employee"** circle and use the drop down arrow to select an employee if you would like to run this report for just one employee. Select any other options necessary.
4. Click the **"Preview"** button to view the report before you print it. Click the **"Close"** button at the top to close out of the preview.

The following image is a sample of the preview:

Employee ID	Work Type	Clock In	Clock Out	Inc. In Payroll	Override	Time Clocked	Hours Inc In Payroll	Overtime Total
JOLINE HEIERS	Work	1/18/2009 9:00:51 AM	1/18/2009 8:00:00 PM	Yes	No	10.99		
Week Total:						10.99	10.99	0.00
JOLINE HEIERS	Work	1/19/2009 9:00:27 AM	1/19/2009 8:00:00 PM	Yes	No	10.99		
JOLINE HEIERS	Work	1/20/2009 9:00:07 AM	1/20/2009 8:00:00 PM	Yes	No	11.00		
JOLINE HEIERS	Work	1/21/2009 9:00:41 AM	1/21/2009 8:00:00 PM	Yes	No	10.99		
JOLINE HEIERS	Work	1/22/2009 9:00:47 AM	1/22/2009 8:00:00 PM	Yes	No	10.99		
JOLINE HEIERS	Work	1/23/2009 9:00:05 AM	1/23/2009 8:00:00 PM	Yes	No	11.00		
Week Total:						54.97	54.97	14.97
Employee Total:						55.96	55.96	14.97
Grand Total of Hours:						55.96	55.96	14.97

5. On the **"Employee Hours Worked"** options screen, click the **"Print"** button if you would like to print the report or export the report to a file.



TO EXPORT THE REPORT:

1. Check the **"Print to File"** check box
2. Use the drop down arrow on the **"Type"** field to select the type of file that you would like to export this report as.
3. Click on the small button with the three dots in the **"Where"** field to specify the location that you would like to save this report.

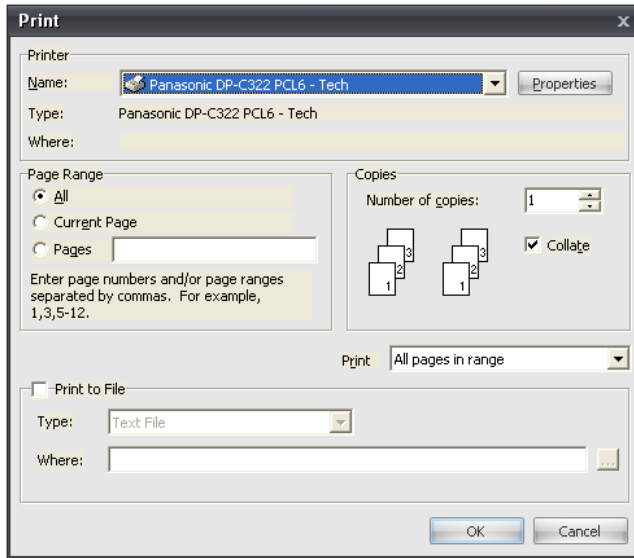
Employee Tips Report

1. Select the "**Employee Tips**" report from the Payroll Report Menu. The following options screen will appear:

2. Select either "**Detailed**" or "**Summary**". "**Detailed**" will give you a listing of every transaction and the tip that was applied for every transaction.
3. Click on the "**Single Employee**" circle and use the drop down arrow to select an employee if you would like to run this report for just one employee.
4. Click the "**Preview**" button to view the report before you print it. Click the "**Close**" button at the top to close out of the preview.

Employee ID	Employee	Date	Client	Ticket No.	Tips
ANNE CREW	CREW, ANNE	3/20/2009	Katherine Baxter	512	20.00
ANNE CREW	CREW, ANNE	8/19/2009	Charlene Mathis	539	3.20
					23.20
BARBARA DUNTS	DUNTS, BARBARA	8/6/2009	Doreen Walker	530	10.00
					10.00
CAMILLESWANSON	SWANSON, CAMILLE	8/19/2009	Charlene Mathis	539	30.00
CAMILLESWANSON	SWANSON, CAMILLE	2/5/2010	Sandy Morris	13	30.00
					60.00
DANIKA COLLINS	COLLINS, DANIKA	12/10/2009	Doreen Walker	589	10.80
					10.80
DEBRA COLE	COLE, DEBRA	12/10/2009	Christine Miller	591	9.90
					9.90
ERIKA FISHER	FISHER, ERIKA	12/10/2009	Piper Hunter	592	15.30
ERIKA FISHER	FISHER, ERIKA	12/10/2009	Justine Morris	593	7.20
					22.50
Grand Total of Tips:					136.40

5. On the "**Employee Tips**" options screen, click the "**Print**" button if you would like to print the report or export the report to a file.



TO EXPORT THE REPORT:

1. Check the "**Print to File**" check box.
2. Use the drop down arrow on the "**Type**" field to select the type of file that you would like to export this report as.
3. Click on the small button with the three dots in the "**Where**" field to specify the location that you would like to save this report.

Marketing

Creating a Marketing Template

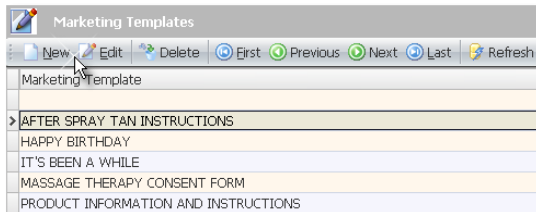
The following Step by Step instructions will teach you how to create a template just like the one displayed below. You can of course use your own images and text, but the format of the template will be the same. Just follow the instructions below the following image.



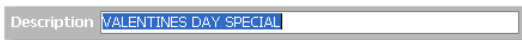
1. Click on the **"Marketing"** button on the Tool Bar of Envision or click on **"Marketing"** on the Menu Bar of Envision and select **"Marketing Templates"** from the menu.



2. Click on the **"New"** button at the top of your Marketing Templates list.



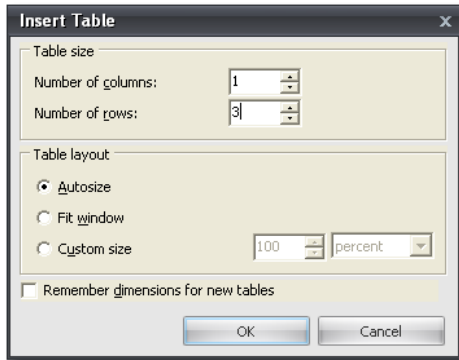
3. Enter a description for the template you are creating in the **"Description"** field at the top of the screen.



4. Click the **"Insert Table"** button.



5. On the "Insert Table" screen, enter "1" into the "Number of columns" and "3" into the "Number of rows". Click the "OK" button.



6. The table will appear with three small rows. When you rest your mouse arrow on the inner borders of the table, a double sided arrow will appear. When you see this double sided arrow, hold down your left click and drag your mouse arrow down to make these rows larger. This will allow you to insert images and text into the blank rows.

Table Example Before Editing The Size:

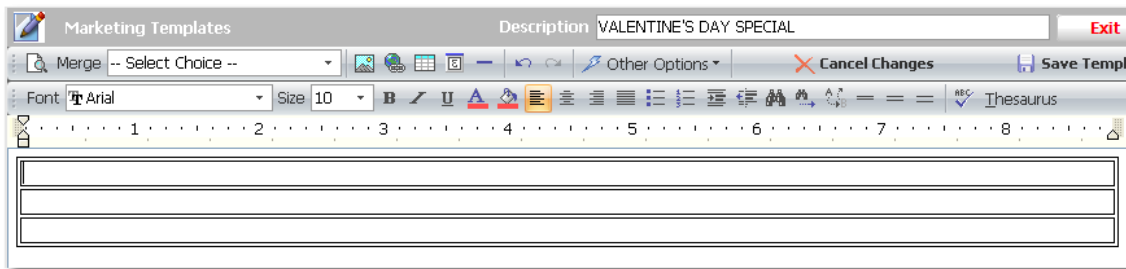
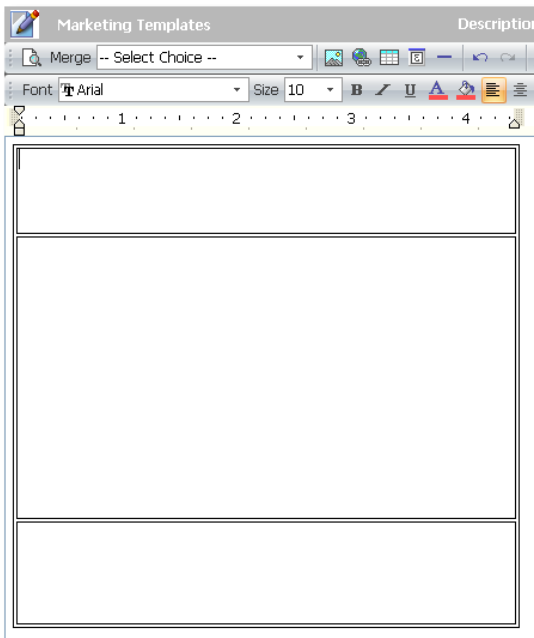
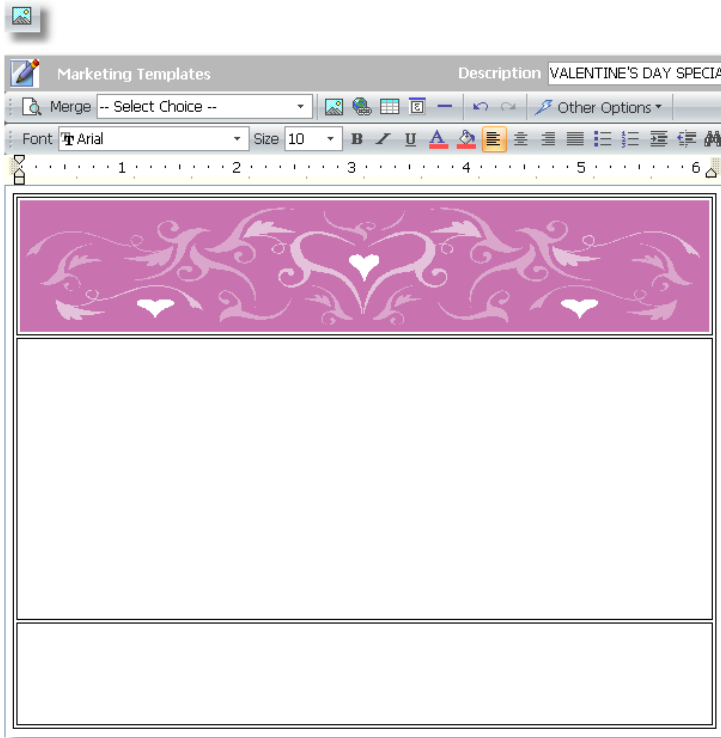


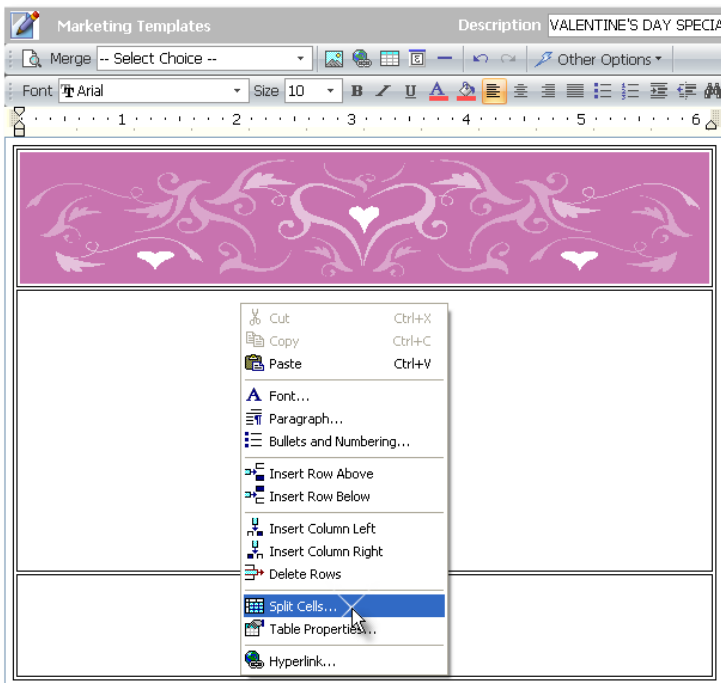
Table Example After Editing The Size:



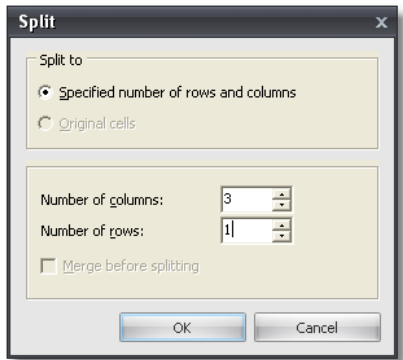
7. Click in the first row at the top (so that your cursor is blinking in the first row) to enter a banner or business logo. Click the **"Insert Picture"** button to select an image from a location on your computer.



8. Click in the second row to split this row into three separate sections. Right click in the open space and select **"Split Cells"** from the menu.



9. Change the "Number of columns" to "3" and the "Number of rows" to "1". Click the "Ok" button. You can separate this section into as many cells as you wish, just enter the correct number into the "Number of columns" field.



10. Use the double sided arrows again to adjust the size of the cells.

Table Example Before Editing The Size of Cells:

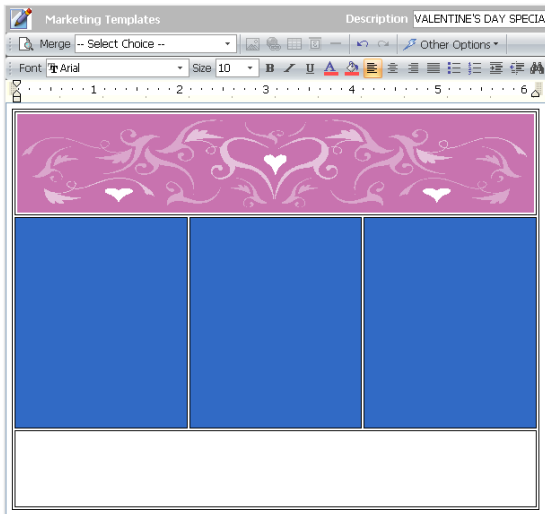
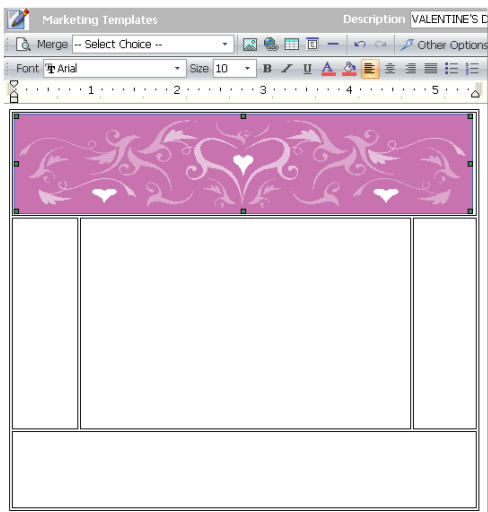
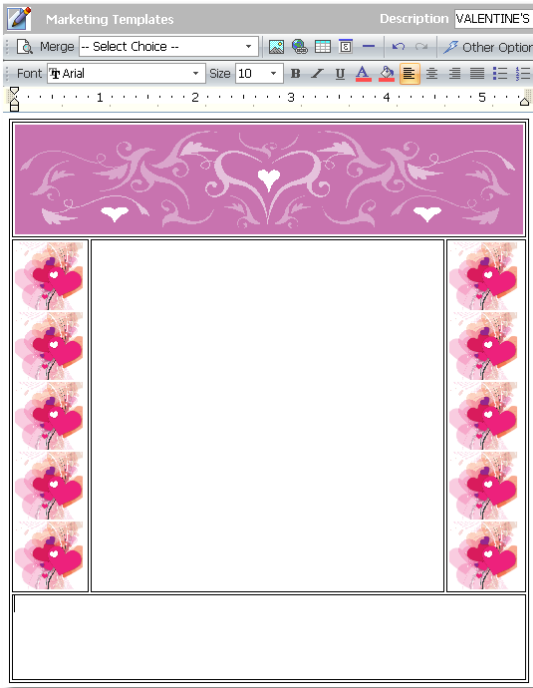


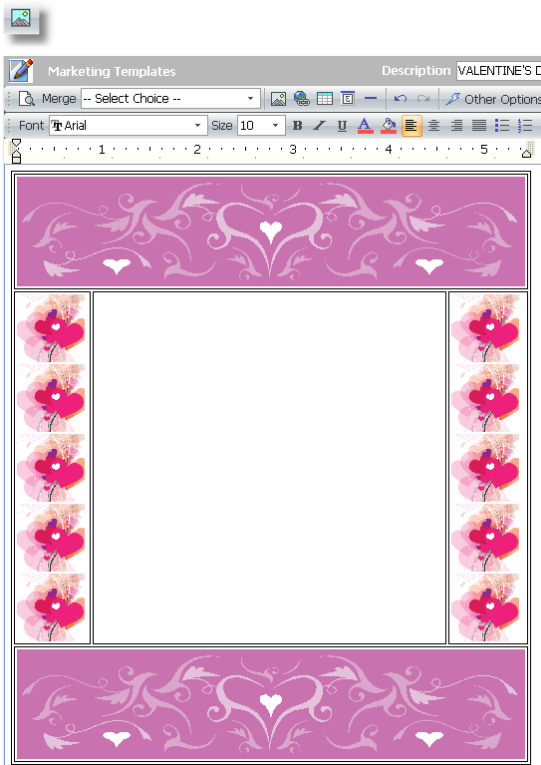
Table Example After Editing The Size of Cells:



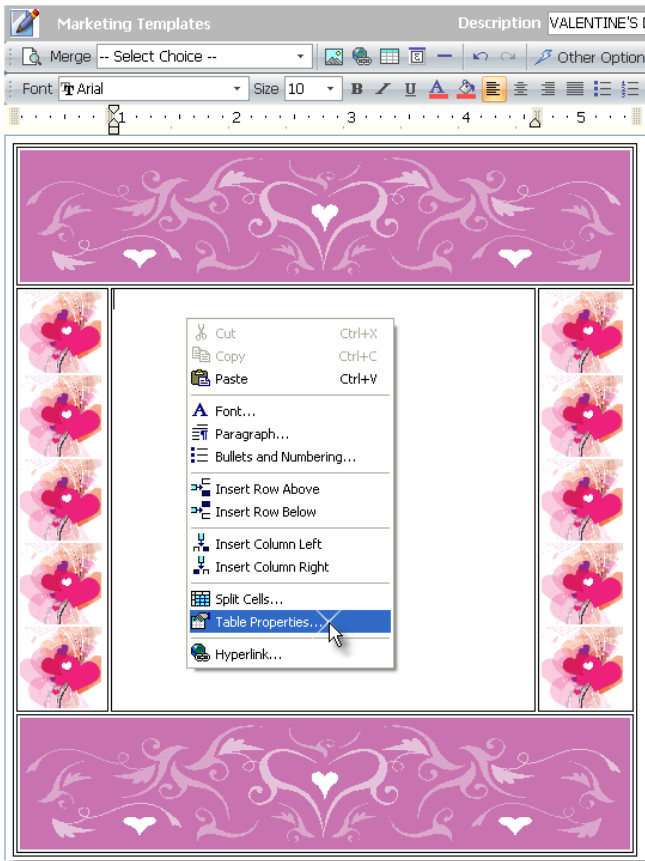
11. Click in the first column on the left in the middle section and insert an image or multiple images and then do the same in the third column on the right in the middle section. You can also enter text into these areas if you wish.



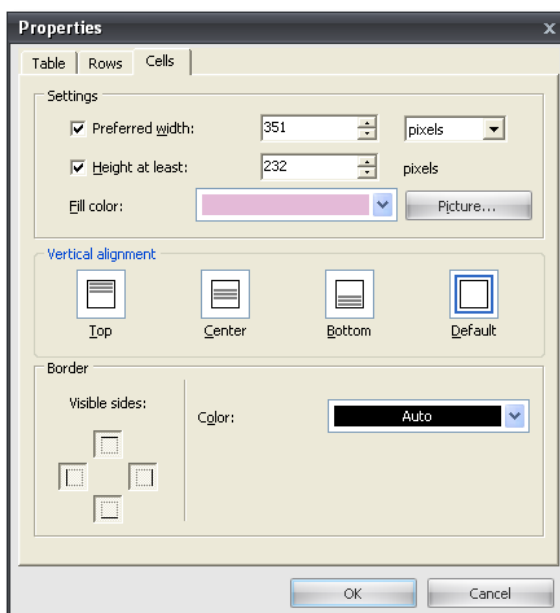
12. Click in the last row at the bottom (so that your cursor is blinking in the last row) to enter a banner or business logo. Click the "Insert Picture" button to select an image from a location on your computer. You can also enter text into this area if you wish.



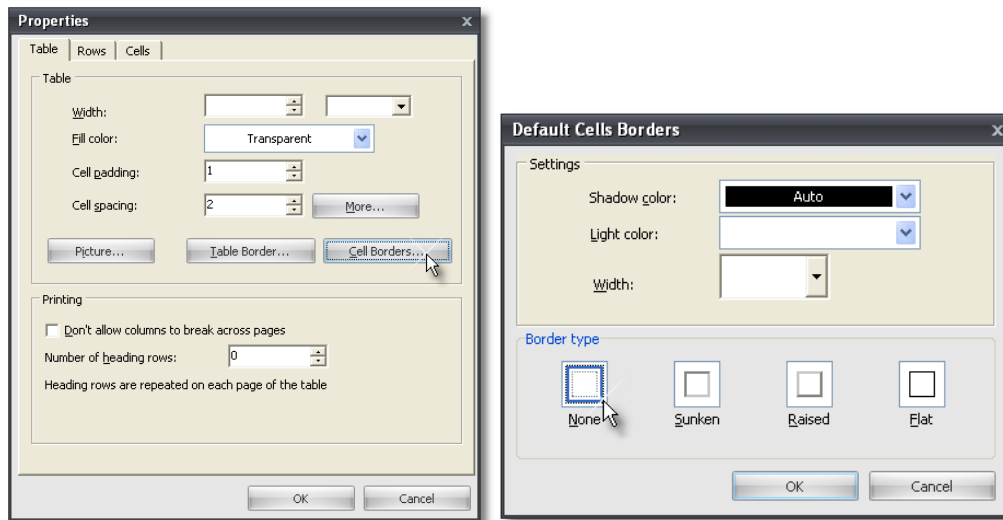
13. Click in the second column in the middle row (the only blank area) to enter your text and set a background color. You can also enter images into this area if you wish. To set a background color, right click in this area and select **"Table Properties"** from the menu.



14. Click on the **"Cells"** tab at the top of the Table Properties screen and change the **"Fill Color"** to the color that you would like to set as the background color. Click the **"Ok"** button.

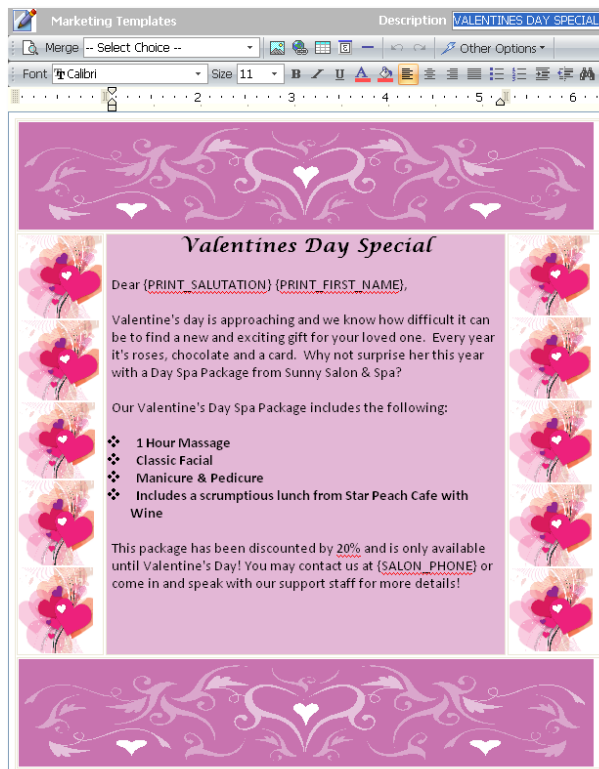


15. If you would like to remove the border lines in the template, click on the "Table" tab on the "Table Properties" screen and click on the "Cell Borders" button. Change the "Border Type" to "None". You can also change the color and width of borders on this screen.

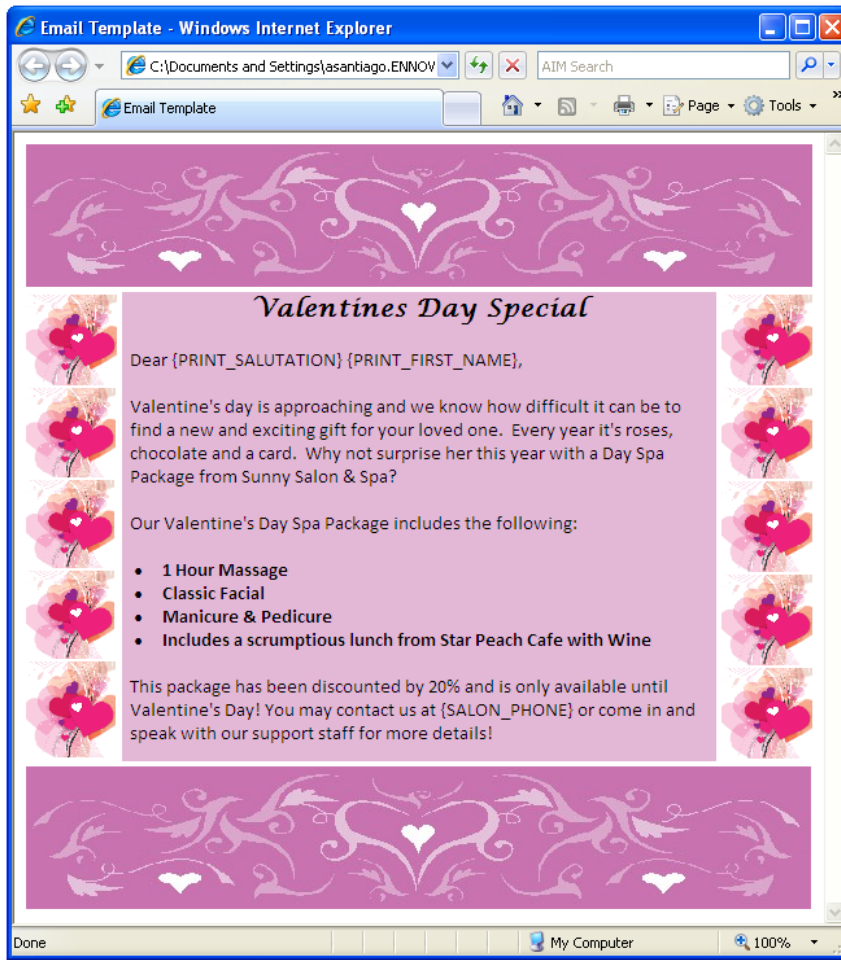


16. You are now ready to enter your text into the template.

17. Use the "Merge" menu at the top of this screen to select merge fields. The Merge fields will automatically insert information from your data into a personalized letter, email or SMS message for each client. For example, if you would like the client's first name printed in each letter, email or SMS message, select the "First Name" merge field from the menu. The Merge field will appear where your cursor is blinking. The Merge field will say "{PRINT_FIRST_NAME}". When you select a template to print, email or send as an SMS message, the client's name will be filled into this area. This allows you to make personalized messages without having to manually edit every single message before it is sent.



18. Click the **"Other Options"** button and select **"Preview Email Document"** to see a preview of the email. The merge fields will not be filled in until you have created a filter and select **"Print Marketing"**, **"Email Marketing"** or **"SMS Marketing"** from the **"Marketing"** menu on the Menu Bar of Envision.



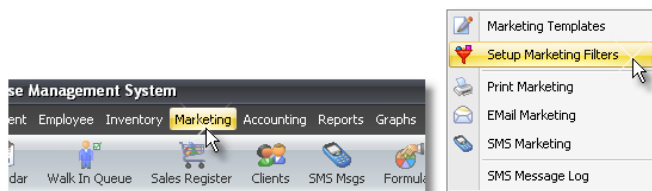
19. Click the **"Save Template"** button when you have finished editing the template.



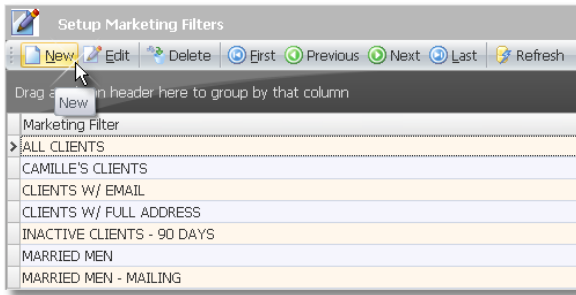
Creating Marketing Filters

Marketing filters allow you to send emails, letters and SMS (text) messages to specific clients. Targeting specific clients is an effective method for reaching clients that will be interested in the information that you are sending and they will be more likely to respond to your marketing attempts. In order to use the Marketing features of Envision, you will need to create a filter first. The information provided here will give descriptions of the different types of filters that can be activated.

To access the Marketing Filters list, click on **"Marketing"** on the Menu Bar of Envision and select **"Setup Marketing Filters"** from the menu.



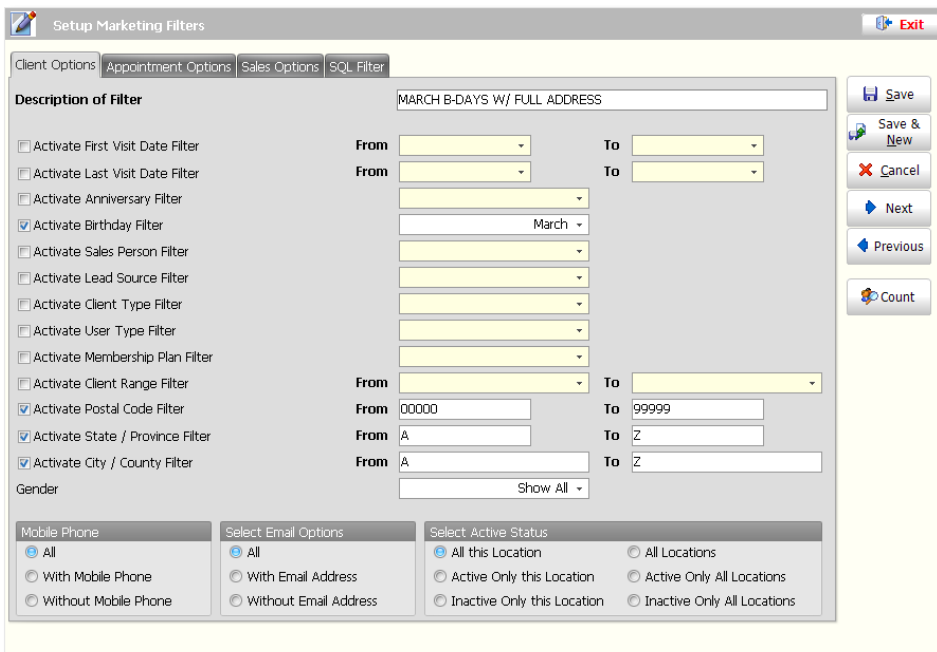
The following screens will be available when you click on the "New" or "Edit" button on the List Tool Bar at the top of the Marketing Filters list.



Activating Filters: Please keep in mind that activating multiple filters within a Marketing Filter will make the list of filtered clients smaller because the program is trying to find clients that meet the requirements for all of the filters activated.

Client Options Tab

The Client Options tab will allow you to filter out clients by information that is stored in the client's record under their record's Information tab and Options tab and Statistics tab.



Description of Filter

Enter a name for the filter you are creating in this field. It is best to enter a very specific description of the filter so that when you choose to use this filter again, it will be easy to determine what options are activated within the filter. You will not be able to save a filter without entering a description first.

Activate First Visit Date Filter

The First Visit Date Filter will allow you to filter out clients by the date of their first sale in Envision. This filter can be used to find new clients. Check the "Activate First Visit Date Filter" check box and select a date range to the right of this filter option if you would like to use this option.

Activate Last Visit Date Filter

The Last Visit Date Filter will allow you to filter out clients by the date of their last sale in Envision. The filter can be used to find clients that have not visited the business in a while. Check the "Activate Last Visit Date

Filter" check box and select a date range to the right of this filter option if you would like to use this option.

Activate Anniversary Filter

The Anniversary Filter can be used to filter out clients by their Anniversary date. All clients that have an anniversary date in the month selected will be filtered out with this option. Check the "Activate Anniversary Filter" check box and select a month from the drop down menu to the right.

Anniversary Date: This date is normally used to specify the anniversary date of the client's wedding, but it can be used for other types of anniversary dates. This filter should only be used if you use the anniversary date for one type of anniversary. If the anniversary date is used for multiple types of anniversary dates, and you are sending an email that was designed to target clients by their wedding anniversary date, all clients that have the anniversary date set will receive the email even if their anniversary date is not for their wedding date.

Activate Birthday Filter

The Birthday Filter can be used to filter out clients by their Birthday. All clients that have a birthday in the month selected will be filtered out with this option. Check the "Activate Birthday Filter" check box and select a month from the drop down menu to the right.

Activate Sales Person Filter

The Sales Person Filter will allow you to filter out clients by their Sales Person. Check the "Activate Sales Person Filter" check box and select an employee from the drop down menu to the right.

Sales Person: The "Sales Person" can be set in the Client List. Click on the "Clients" button on the Tool Bar of Envision or click on "Client" on the Menu Bar of Envision and select "Client List" from the menu. Double click on top of a client's record to edit it and click on the "Options" tab at the bottom. Select an employee by clicking on the drop down arrow in the "Sales Person" field.

Activate Lead Source Filter

The Lead Source Filter allows you to filter out clients by their Lead Source. The Lead Source is how the client heard of your business. This filter can be used to target clients that learned about you through promotions, advertising or even referrals. Check the "Activate Lead Source Filter" check box and select a Lead Source from the drop down menu to the right.

Activate Client Type / User Type Filter

The Client Type Filter and User Type Filter can be used for anything that you would like to use it for. A Client Type or User Type is normally setup to specify which type of client they are, for example you may create a Client Type or User Type for Hair Clients or Esthetic Clients. The Client Type and User Type are both provided so that you can specify two different types for a client and these types can be anything that you would like them to be. Check the "Activate Client Type Filter" or the "Activate User Type Filter" check box and select a Client Type or User Type from the drop down menus to the right.

Client Type and User Type: The Client Type and User Type can be created by clicking on "Client" on the Menu Bar of Envision and selecting either "Client Type List" or "User Type List" from the menu. The Client Type and User Type can be selected for a specific client by clicking on the "Clients" button on the Tool Bar of Envision or click on "Client" on the Menu Bar of Envision and select "Client List" from the menu. Double click on top of a client's record to edit it and click on the "Options" tab at the bottom. Select a "Client Type" or "User Type" by clicking on the drop down arrows in the fields provided.

Activate Membership Plan Filter

The Membership Plan Filter is available to use if you would like to filter out clients by the Membership Plan that they have purchased. If there are new features or new products or services available with the selected Membership Plan, you can send this information to clients with the selected Membership Plan. Check the "Activate Membership Plan Filter" check box and select the Membership Plan to the right.

Membership Plans: Membership Plans are only available with Envision's Plus Pack. For more information on Envision's Plus Pack, please contact our Sales Department at 1-800-231-9445.

Activate Client Range Filter

The Client Range Filter can be used to filter out a range of clients or a specific client. Click on the drop down arrow in the "From" field to select the first client and then click on the drop down arrow in the "To" field to select the last client. This allows you to filter out clients within an alphabetical range. If you would like to filter out just one client, select the client in the "From" field and select the same client in the "To" field. Check the "Activate Client Range Filter" check box and select the range in the "From" and "To" fields to the right.

Activate Postal Code Filter

The Postal Code Filter allows you to filter out clients within a range of postal (zip) codes or from a specific postal (zip) code. Check the "Activate Postal Code Filter" check box and enter the range in the "From" and "To" fields to the right. If you would like to filter out clients from a specific postal (zip) code, enter the postal (zip) code in the "From" field as well as the "To" field.

Full Address Filter: This can also be used to find all clients with a full address if you will be printing mailing labels and mailing letters to clients. You will activate this field along with the State / Province Filter and the City / County Filter. Type "00000" into the "From" field and "99999" into the "To" field.

Activate State / Province Filter

The State / Province Filter allows you to filter out clients within an alphabetical range of states / provinces or from a specific state / province. Check the "Activate State / Province Filter" check box and enter the range in the "From" and "To" fields to the right. If you would like to filter out clients from a specific state, enter the name of the state in the "From" field as well as the "To" field.

Full Address Filter: This can also be used to find all clients with a full address if you will be printing mailing labels and mailing letters to clients. You will activate this field along with the Postal Code Filter and City / County Filter. Type an "A" into the "From" field and a "Z" into the "To" field.

Activate City / County Filter

The City / County Filter allows you to filter out clients within an alphabetical range of Cities or from a specific city. Check the "Activate City / County Filter" check box and enter the range in the "From" and "To" fields to the right. If you would like to filter out clients from a specific city, enter the name of the city in the "From" field as well as the "To" field.

Full Address Filter: This can also be used to find all clients with a full address if you will be printing mailing labels and mailing letters to clients. You will activate this field along with the Postal Code Filter and State / Province Filter. Type an "A" into the "From" field and a "Z" into the "To" field.

Gender

The Gender Filter allows you to filter out clients by their gender. For example, if you are sending a promotion for a Women's Haircut or women's services and products, you want to send an email to only your female clients. Select the correct gender from the drop down menu.

Mobile Phone

The Mobile Phone filter can be used to send an email to clients either with a mobile phone number or without a mobile phone number. This can be used to provide them with information about SMS (text) messaging services that your business provides.

Select Email Options

The Email Options can be used to send a letter to clients that do not have an email address if you select the "Without Email Address" option or the "With Email Address" option can be used to get a count of the clients with email address. Just click the "Count" button on the right after selecting this option.

Select Active Status

The Active Status options allow you to reach only your active clients, only your inactive clients, or both. The

Location options are used if you are using Envision at multiple locations. You can choose to filter out clients if they are from the location that you are at or if they are from any of your locations.

Appointment Options Tab

Activate Appointment Filter

The Appointment Filter allows you to filter clients out if they have had an appointment between a specific date range or with a specific employee. You can select only a specific date range or only an Employee Id. If you are trying to filter out clients that have had an appointment within a specific date range AND with a specific employee, you can use the date range selection and the employee selection together. Check the "Activate Appointment Filter" check box and select either the "From" and "To" dates, the "With Emp Id", or both.

Activate No Appointment Filter

The No Appointment Filter allows you to filter clients if they have not had an appointment between a specific date range or with a specific employee. You can select only a specific date range or only an Employee Id. If you are trying to filter out client have not had an appointment within a specific date range AND with a specific employee, you can use the date range selection and the employee selection together. Check the "Activate No Appointment Filter" check box and select either the "From" and "To" dates, the "With Emp Id" , or both.

Activate Short Notice Filter

The Short Notice Filter allows you to let your clients know about last minute appointment openings. This filter allows you to select a specific service provider's clients so that you can send them an email or a text message to let them know about the availabilities on your calendar and any discounts that you are offering to fill these appointments. You can also filter out clients that already have a future appointment or ones that have been in recently so that these people do not receive the short notice email or message.

- **No Visit in Last x Days / No Visit in Next x Days (Required)**

Use these field to find the clients that have not recently had an appointment or to find the clients that do not have a future appointment scheduled.

Sales Options Tab

Activate No Activity in n Days

The No Activity Filter can be used to filter out the clients that have not had a sale in the amount of days entered. This allows you to send information to these clients or a promotion to bring them back to your business. This is a great filter to use to increase client retention. Check the "Activate No Activity in n Days" check box and enter the amount of days to the right.

Activate Top n Most Active Sales Filter

The Top Most Active Sales Filter allows you to filter out the clients that spend the most money. This allows you to send thank you messages or provide promotions or rewards for referring new clients or for trying new services or products.

Activate Product Sold Filter

The Product Sold Filter can be used to filter out clients that have had a sale between a specific date range, with a specific employee or if they have purchased one or all of the items selected. You can also choose to use this filter to find the clients that have purchased or have not purchased within the date range selected, from the employee selected or any one of the items selected. You can use all of the selections alone or together, depending on the type of clients you are trying to filter out

Product Filter Selections: All of the selections available can be used for retail items or services.

- **Product Sold Date Range**

Select a date range here if you would like to filter out clients that have had a sale or have not had a sale between the date range selected.

- **Sold By Emp Id**

Select an employee if you would like to filter out clients that have had a sale or have not had a sale with the employee selected. This is the best way to filter out a list of a service provider's clients.

- **Product Selections**

Select items here if you would like to filter out clients that have purchased or have not purchased any of the items selected. This is a great way to send them information about the items selected or to introduce your clients to new services or products.

- **Select Products / Services Purchased**

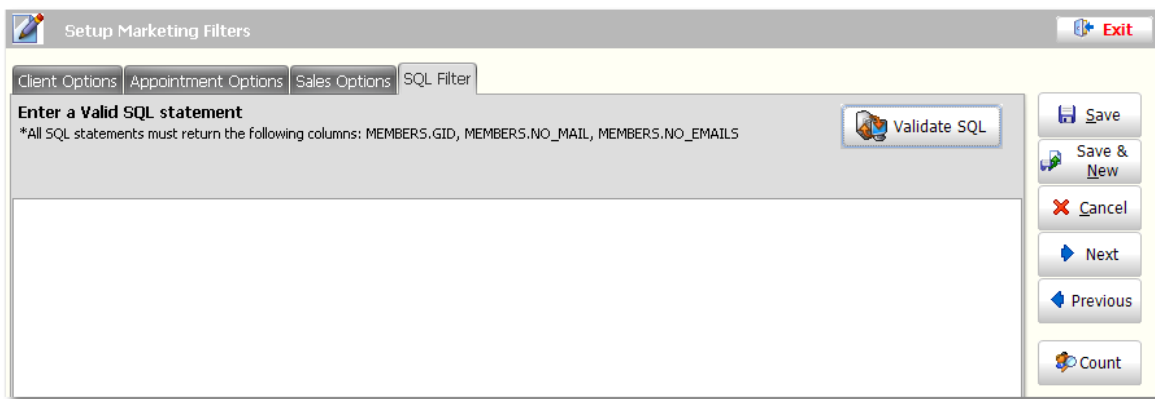
Select this option if you would like to filter out clients that have had a sale based on the selections above.

- **Select Products / Services Not Purchased**

Select this option if you would like to filter out clients that have not had a sale based on the selections above.

SQL Filter Tab

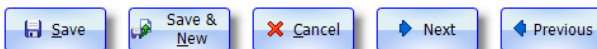
The SQL Filter tab can be used if you are an advanced database user and are familiar with SQL.



Filter Buttons

The following buttons are available on the right side of the filter screens. Below is a description of each button

Save / Save & New / Cancel / Next / Previous



Click the "Save" button to save the filter you are creating and return to the list. Click the "Save & New" button to save the filter you are creating and open a new window so that you may to add another filter to the list. The "Cancel" button will save the filter you have created, close the window that you are using, and will return you to the list of filters. The "Previous" and "Next" buttons will take you to the previous or next filter in the list.

Count



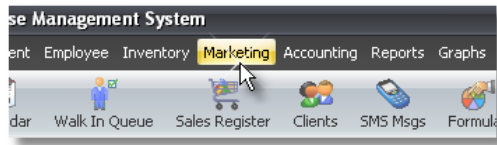
The Count button can be used to find out how many clients will be filtered out with the filters that you have activated in the current Marketing Filter.

Marketing Filter Examples

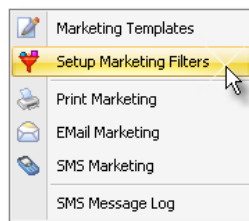
Welcome Filter

The Welcome Filter can be used to welcome new clients to your business. This allows you to send a personalized email or message to thank them for their visit and will help increase your client retention.

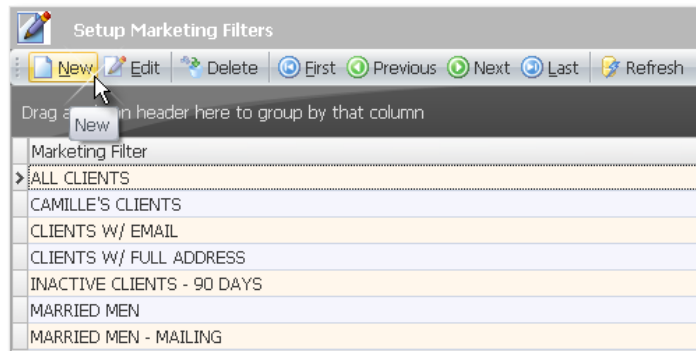
1. Click on "**Marketing**" on the Menu Bar of Envision.



2. Select "**Setup Marketing Filters**" from the menu.



3. Click on the "**New**" button on the List Tool Bar at the top of the Marketing Filters list to create a new filter. If you would like to edit a Marketing Filter, highlight the filter in the list and click the "Edit" button on the List Tool Bar at the top of the Marketing Filters list.



4. Enter a Description for the filter you are creating in the "**Description**" field at the top of the Client Options screen.



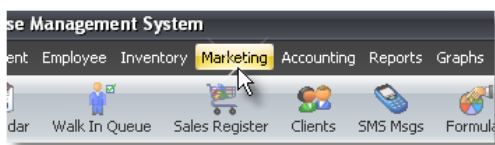
5. Check the **"Activate First Visit Date Filter"** check box and select the range of dates that new client would have had their first sale in.

6. Click the **"Save"** button on the right to save the filter. If you would like to find out how many clients would be filtered out, click the **"Count"** button on the right.

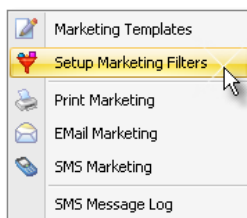
Inactive Clients Filter

The Inactive Clients filter can be used to filter out clients that have not visited or had a sale in a certain amount of days. This will allow you to send an email to these clients that will encourage them to come back in. You can offer a discount for booking an appointment or you can provide them with promotional information about the specials that you may have at the time.

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

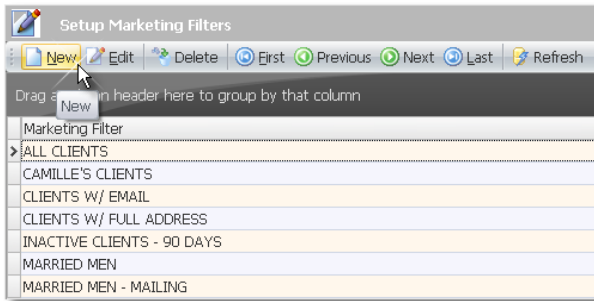


2. Select **"Setup Marketing Filters"** from the menu.



3. Click on the **"New"** button on the List Tool Bar at the top of the Marketing Filters list to create a new filter. If

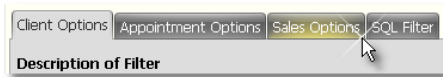
you would like to edit a Marketing Filter, highlight the filter in the list and click the "Edit" button on the List Tool Bar at the top of the Marketing Filters list.



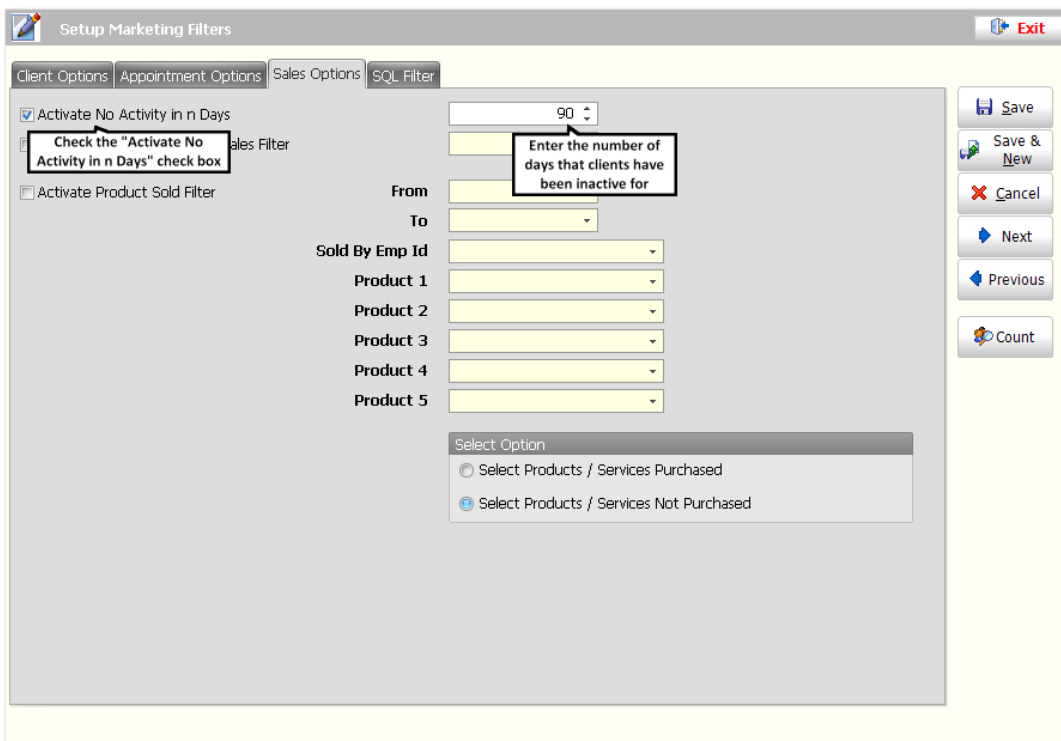
4. Enter a Description for the filter you are creating in the "Description" field at the top of the Client Options screen.



5. Click on the "Sales Options" tab above the Description field.



6. Check the "Activate No Activity in n days Filter" check box and enter the number of days that a client has not had a sale for them to be considered inactive.

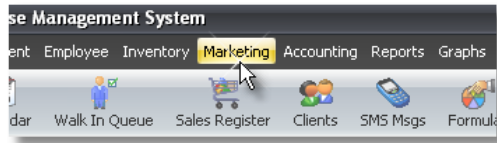


7. Click the "Save" button on the right to save the filter. If you would like to find out how many clients would be filtered out, click the "Count" button on the right.

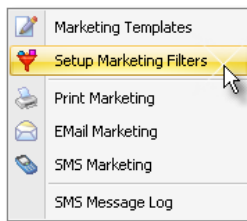
Short Notice Filter

The Short Notice Filter allows you to let your clients know about last minute appointment openings. This filter allows you to select a specific service provider's clients so that you can send them an email or a text message to let them know about the availabilities on your calendar and any discounts that you are offering to fill these appointments. You can also filter out clients that already have a future appointment or ones that have been in recently so that these people do not receive the short notice email or message.

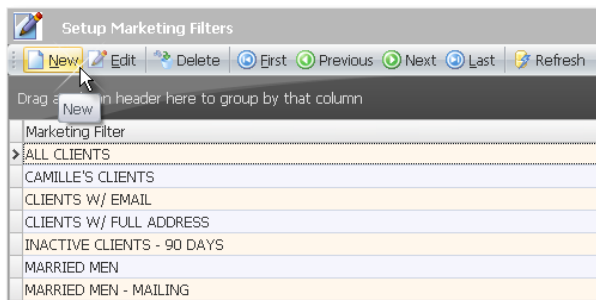
1. Click on **"Marketing"** on the Menu Bar of Envision.



2. Select **"Setup Marketing Filters"** from the menu.



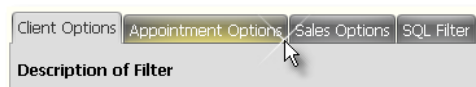
3. Click on the **"New"** button on the List Tool Bar at the top of the Marketing Filters list to create a new filter. If you would like to edit a Marketing Filter, highlight the filter in the list and click the "Edit" button on the List Tool Bar at the top of the Marketing Filters list.



4. Enter a Description for the filter you are creating in the **"Description"** field at the top of the Client Options screen.



5. Click on the **"Appointment Options"** tab above the Description field.



6. Check the "Activate Short Notice Filter" check box.

The screenshot shows the 'Setup Marketing Filters' dialog box with the 'Appointment Options' tab selected. The 'Activate Short Notice Filter' checkbox is checked. A callout box points to the 'No Visit in Last x Days*' field with the text: 'Enter an amount of days into the "No Visit in Last x Days" field to filter out clients that have had an appointment recently'. Another callout box points to the 'No Visit in Next x Days*' field with the text: 'Enter an amount of days into the "No Visit in Next x Days" field to filter out clients that have a future appointment scheduled'. A third callout box points to the 'Activate Short Notice Filter' checkbox with the text: 'Check the "Activate Short Notice Filter" check box'. The 'With Emp Id' field is set to 'CAMILLE SWANSON'. The dialog box also includes buttons for 'Save', 'Save & New', 'Cancel', 'Next', 'Previous', and 'Count'.

7. Enter an amount of days into the "No Visit in Last x Days" field to filter out clients that have had an appointment recently.

No Visit in Last x Days* 60

8. Enter an amount of days into the "No Visit in Next x Days" field to filter out clients that have a future appointment scheduled.

No Visit in Next x Days* 30

9. Select an employee if you are trying to find clients that have had an appointment with a specific employee.

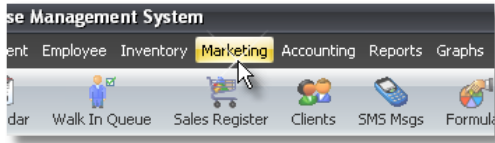
With Emp Id CAMILLE SWANSON

10. Click the "Save" button on the right to save the filter. If you would like to find out how many clients would be filtered out, click the "Count" button on the right.

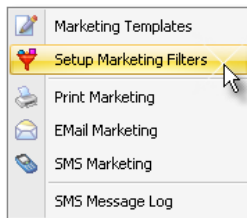
Top Clients Filter

The Top Most Active Sales Filter allows you to filter out the clients that spend the most money. This allows you to send thank you messages or provide promotions or rewards for referring new clients or for trying new services or products.

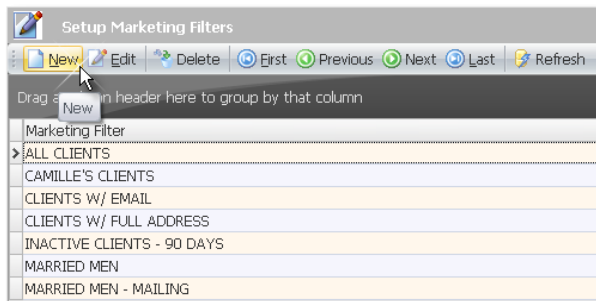
1. Click on "**Marketing**" on the Menu Bar of Envision.



2. Select "**Setup Marketing Filters**" from the menu.



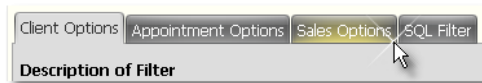
3. Click on the "**New**" button on the List Tool Bar at the top of the Marketing Filters list to create a new filter. If you would like to edit a Marketing Filter, highlight the filter in the list and click the "Edit" button on the List Tool Bar at the top of the Marketing Filters list.



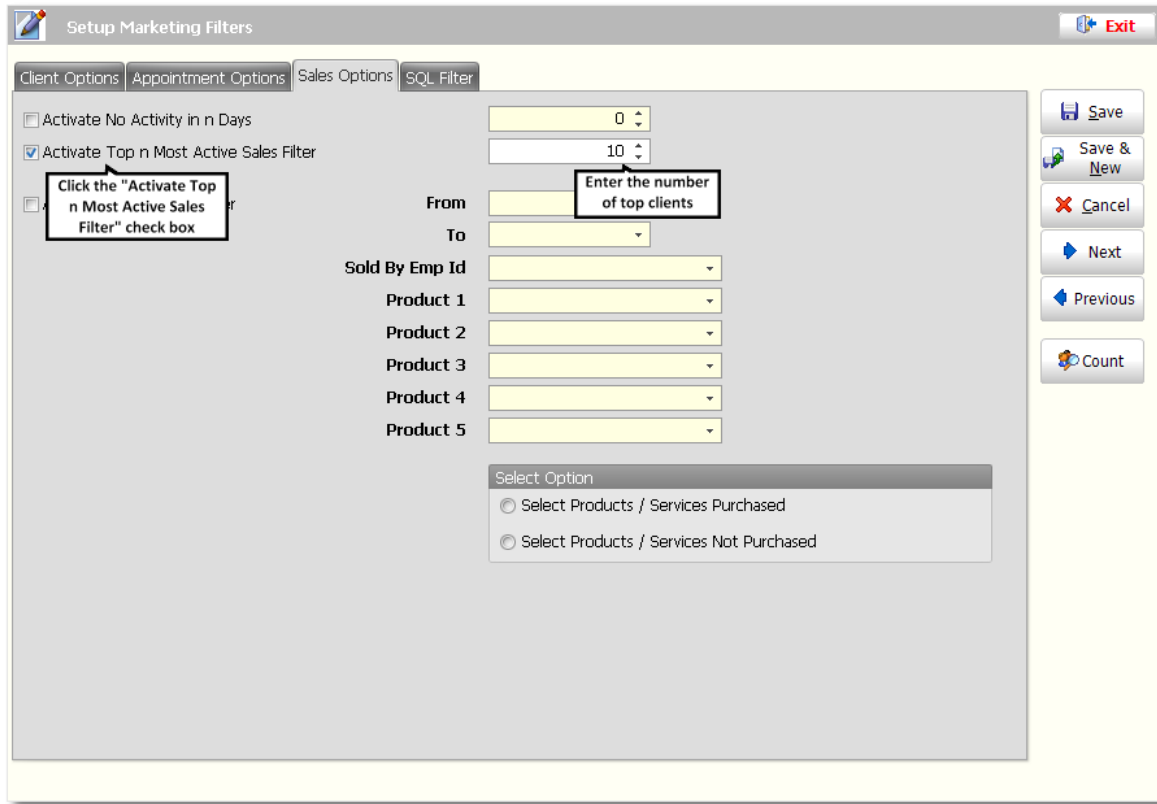
4. Enter a Description for the filter you are creating in the "**Description**" field at the top of the Client Options screen.



5. Click on the "**Sales Options**" tab above the Description field.



6. Check the **"Activate Top n Most Active Sales Filter"** check box and enter the number of top clients in the field to the right.

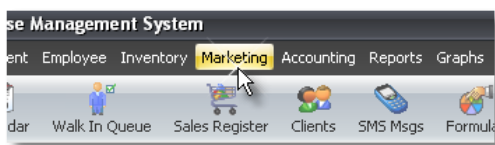


7. Click the **"Save"** button on the right to save the filter. If you would like to find out how many clients would be filtered out, click the **"Count"** button on the right.

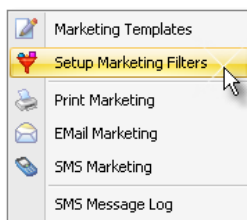
Service Provider's Clients Filter

The Service Provider's Clients Filter allows you to filter out clients that have had a sale with a specific service provider. This is the best way to get a list of their clients. You can then send their clients information about new services that this service provider offers or is qualified to perform or you can offer discounts for booking an appointment with this service provider.

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

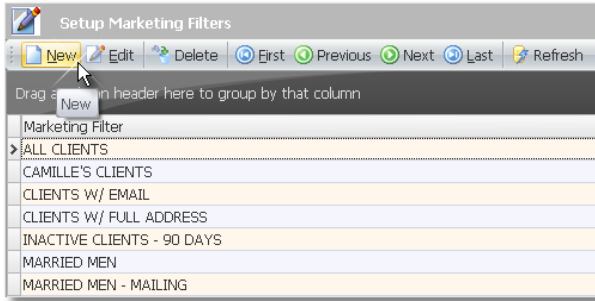


2. Select **"Setup Marketing Filters"** from the menu.



3. Click on the **"New"** button on the List Tool Bar at the top of the Marketing Filters list to create a new filter. If

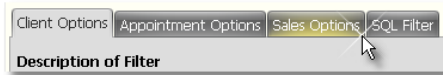
you would like to edit a Marketing Filter, highlight the filter in the list and click the "Edit" button on the List Tool Bar at the top of the Marketing Filters list.



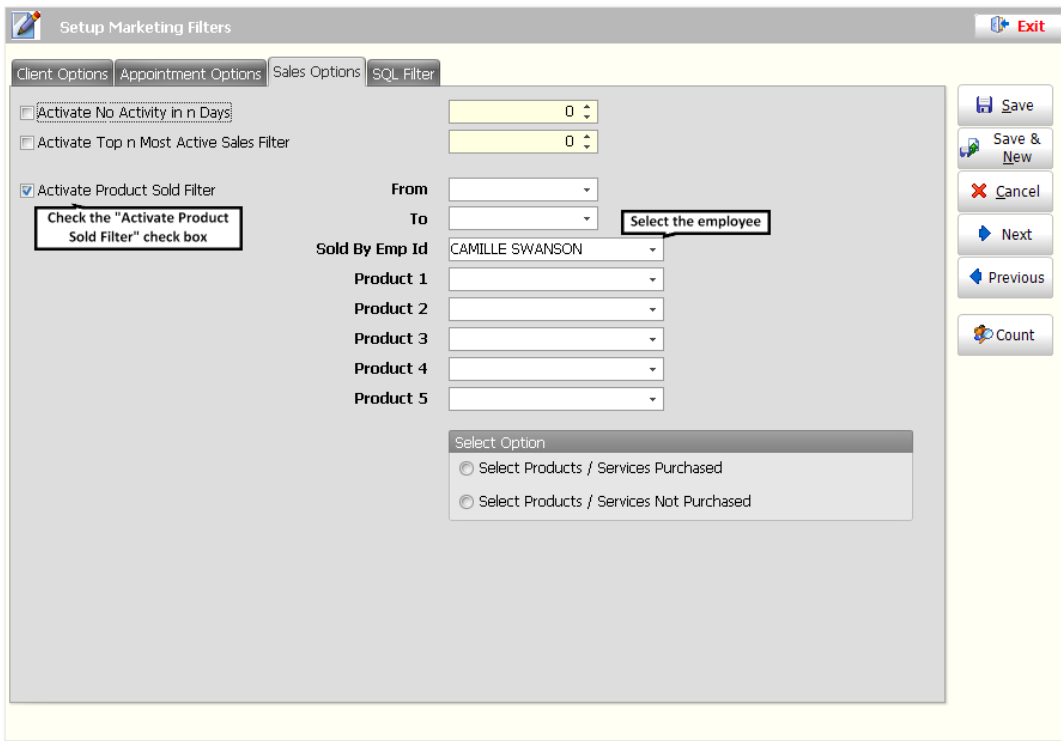
4. Enter a Description for the filter you are creating in the "Description" field at the top of the Client Options screen.



5. Click on the "Sales Options" tab above the Description field.



6. Check the "Activate Product Sold Filter" check box and select the specific service provider in the "Sold by Emp Id" field.

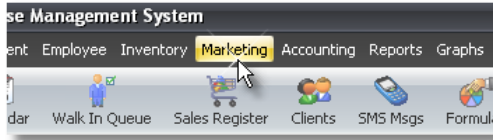


7. Click the "Save" button on the right to save the filter. If you would like to find out how many clients would be filtered out, click the "Count" button on the right.

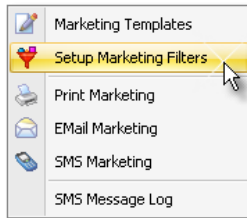
Birthday Filter

The Birthday Filter allows you to filter clients out by their birthdate. You will be able to send an email to your clients that have a birthday in the month that you select.

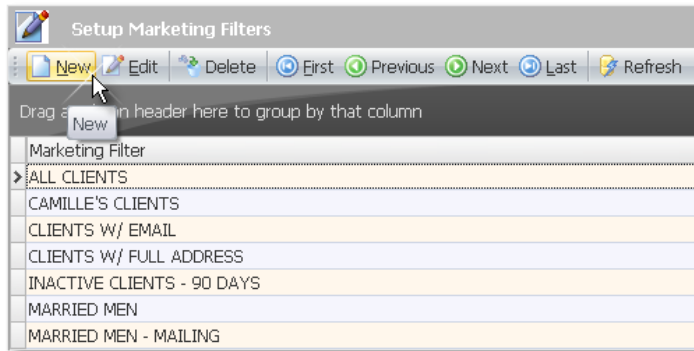
1. Click on "**Marketing**" on the Menu Bar of Envision.



2. Select "**Setup Marketing Filters**" from the menu.



3. Click on the "**New**" button on the List Tool Bar at the top of the Marketing Filters list to create a new filter. If you would like to edit a Marketing Filter, highlight the filter in the list and click the "Edit" button on the List Tool Bar at the top of the Marketing Filters list.



4. Enter a Description for the filter you are creating in the "**Description**" field at the top of the Client Options screen.



5. Check the **"Activate Birthday Filter"** check box and select a month from the drop down menu to the right.

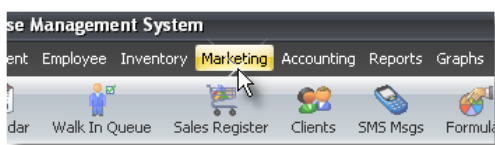
6. Click the **"Save"** button on the right to save the filter. If you would like to find out how many clients would be filtered out, click the **"Count"** button on the right.

Client Type Filter

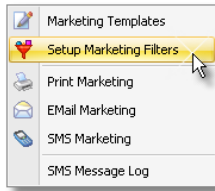
The Client Type Filter and User Type Filter can be used for anything that you would like to use it for. A Client Type or User Type is normally setup to specify which type of client they are, for example you may create a Client Type or User Type for Hair Clients or Esthetic Clients. The Client Type and User Type are both provided so that you can specify two different types for a client and these types can be anything that you would like them to be. Setting up types allows you to send specific information to these types of clients. For example, if you have a skin care product, you will be able to send an email to all of your esthetic clients to let them know about the new skin care product.

Client Type and User Type: The Client Type and User Type can be created by clicking on "Client" on the Menu Bar of Envision and selecting either "Client Type List" or "User Type List" from the menu. The Client Type and User Type can be selected for a specific client by clicking on the "Clients" button on the Tool Bar of Envision or click on "Client" on the Menu Bar of Envision and select "Client List" from the menu. Double click on top of a client's record to edit it and click on the "Options" tab at the bottom. Select a "Client Type" or "User Type" by clicking on the drop down arrows in the fields provided.

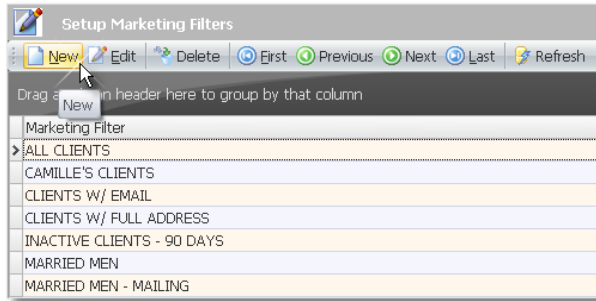
1. Click on **"Marketing"** on the Menu Bar of Envision.



2. Select "Setup Marketing Filters" from the menu.



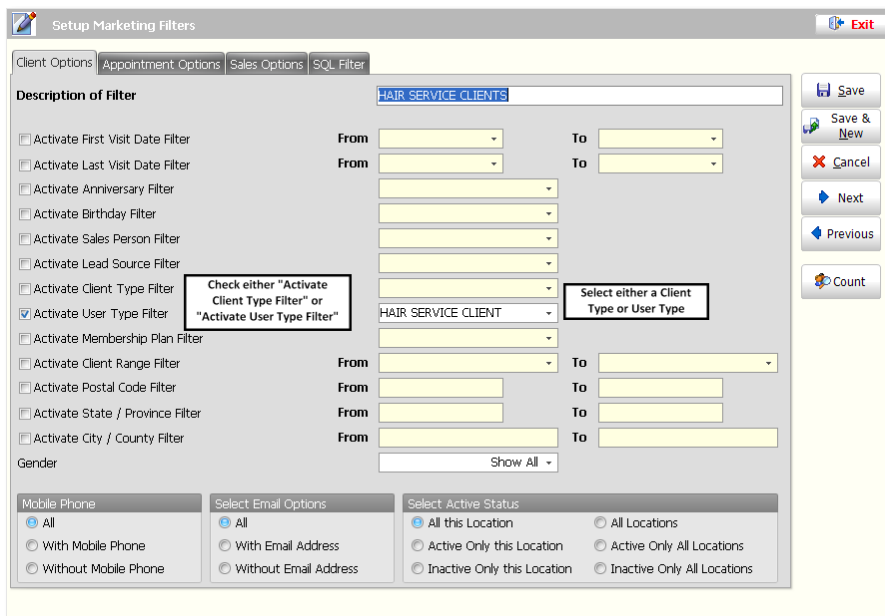
3. Click on the "New" button on the List Tool Bar at the top of the Marketing Filters list to create a new filter. If you would like to edit a Marketing Filter, highlight the filter in the list and click the "Edit" button on the List Tool Bar at the top of the Marketing Filters list.



4. Enter a Description for the filter you are creating in the "Description" field at the top of the Client Options screen.



5. Check the "Activate Client Type Filter" or the "Activate User Type Filter" check box and select a Client Type or User Type from the drop down menus to the right.

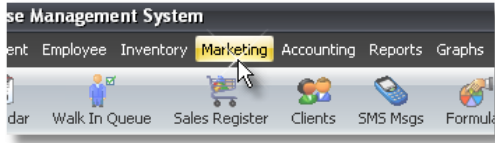


6. Click the "Save" button on the right to save the filter. If you would like to find out how many clients would be filtered out, click the "Count" button on the right.

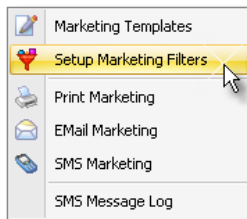
All Clients Filter

If you would like to send an email to all of your clients, you will need to create a filter that does not have any of the filters activated.

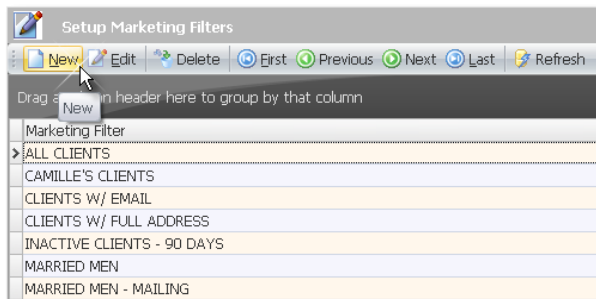
1. Click on "**Marketing**" on the Menu Bar of Envision.



2. Select "**Setup Marketing Filters**" from the menu.



3. Click on the "**New**" button on the List Tool Bar at the top of the Marketing Filters list to create a new filter. If you would like to edit a Marketing Filter, highlight the filter in the list and click the "Edit" button on the List Tool Bar at the top of the Marketing Filters list.



4. Enter a Description for the filter you are creating in the "**Description**" field at the top of the Client Options screen.

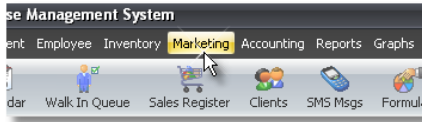


5. There is no need to check any of the options, just click the "**Save**" button on the right to save the filter. If you would like to find out how many clients would be filtered out, click the "**Count**" button on the right.

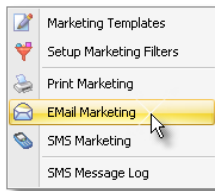
Email Marketing Procedures

Once you have created a Marketing Template and a Marketing Filter, you will then be able to send your emails. Follow the instructions below for using the Email Marketing feature.

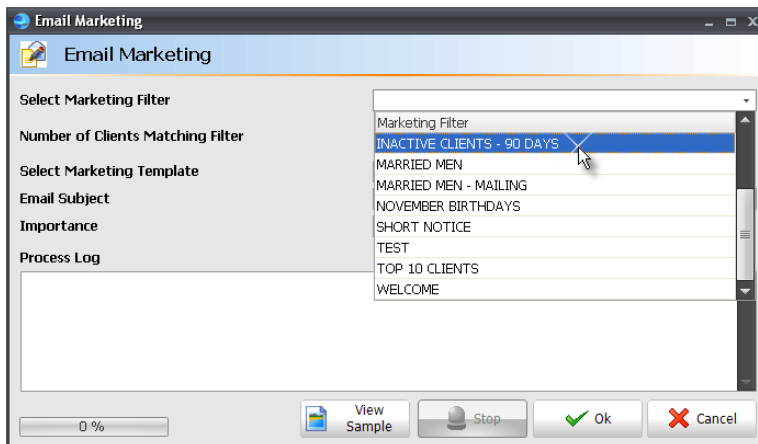
1. Click on **"Marketing"** on the Menu Bar of Envision.



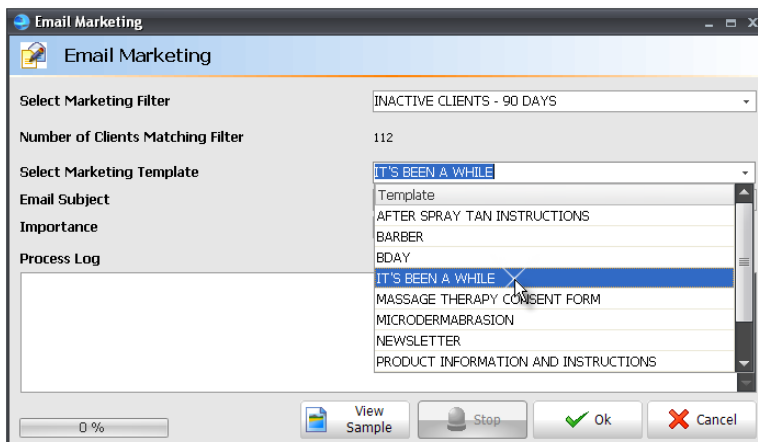
2. Select **"Email Marketing"** from the menu.



3. Select a Marketing Filter from the drop down menu.



4. Select a Marketing Template from the drop down menu.



5. Enter an Email Subject into the **"Email Subject"** field.

Email Subject

6. Select the level of importance for the email that you are sending.

Importance

Process Log

7. Check the **"Request Read Receipt"** check box if you would like to request a read receipt when your clients read the email. This is a good way of keeping track of how many clients read or receive the email. You will receive a message in your inbox for every "Read Receipt".

Request Read Receipt

8. Click the **"View Sample"** button if you would like to view a preview of the email. The email will open in an internet browser window.

9. Click the **"Ok"** button when you are ready to send your emails.

10. A prompt will appear asking you if it is ok to send the emails. Click the **"Yes"** button if you are ready.

Confirm

Send Email Messages?

11. The Process log will display information about the emails being sent and the progress bar will increase as the messages are being sent out. You will receive another popup that states how many message were sent and how many were rejected. Click the **"Ok"** button after reviewing this information.

Email Marketing

Email Marketing

Select Marketing Filter

Number of Clients Matching Filter 112

Select Marketing Template

Email Subject

Importance

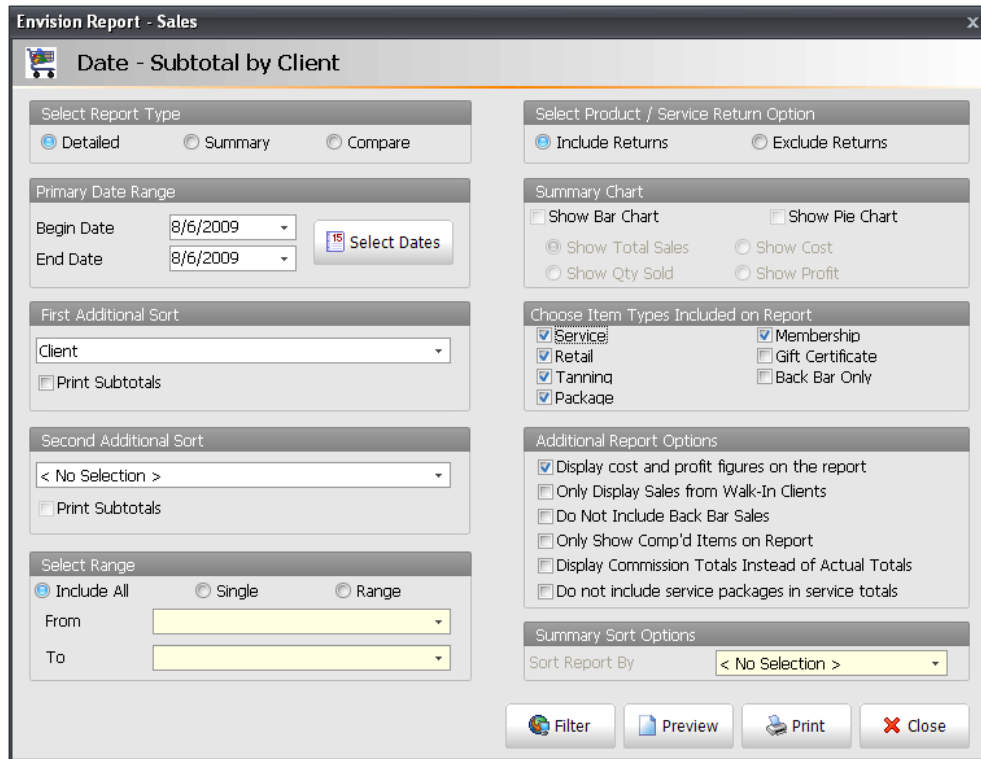
Process Log Request Read Receipt

Processing emails...

26 %

Reports

Envision has powerful reporting capabilities. Each report you select from the "Report" menu, will first ask you to select what data you wish to display on the report. This is done through the use of a Report Query screen. A sample Query screen is shown below. These screens will vary for each report but will have the same layout as this sample. The instructions provided here are for a Sales Report.



1. Select a "Report Type".

When there are variations on a basic report for example, one report called "Sales" and another report called "Sales - Detailed", the report you chose will be checked, but you may select one of the other variations here.

2. Select a Date Range. Click the large "Select Dates" button and you will see a screen with two calendars for setting the Begin and End dates. Using these two fields, enter the range of dates you wish to see data for. You may click the small drop down button in each field to select a date from a calendar. Note, that it's faster to click the "Select Dates" button.

3. Select "Sort" and "Range Options" for the report

Depending upon which report you have selected to print, the items shown in this area of the screen will vary, but how you use them is the same for all reports. The Sort options allow you to specify what type of information you would like to see in the first columns of the report. The Range allows you to view information for all items selected, a specific item, or a range of items. In this sample screen shot, if you select "Include All" the drop down list is not applicable, but if you choose "Single", you would have to select a client from the listing of clients. The options available will vary from report to report depending upon what applies.

4. Select a "Product / Service Return Option" to either include or exclude returns in your report.

5. If you have select a "Summary" Report Type, select either "Show Bar Chart" or "Show Pie Chart" if you would like a graph displayed for the report.

6. Select the **"Item Types"** that you would like to include in the report.
7. Select your **"Additional Report Options"**. Choose whether or not to display cost and profit figures or select **"Only Display Sales from Walk-in Clients"** if you would like to run a report only for information on Walk-in Clients.
8. If you have selected a **"Summary"** Report Type, select the **"Summary Sort Option"** that you would like to use. This determines the order in which information is displayed on the report.
9. Click one of the Report Query Buttons.

Preview: Click this button to display the report on the screen. You may send it to the printer from the preview screen.

Print: Click this button to immediately send the report to the printer. Make sure the printer is on with paper loaded.

Cancel: Click this button to immediately close this screen and discard any settings you have made.

Previewing Reports

Before printing a report, you can Preview it by clicking the **"Preview"** button on the Query screen. This allows you to quickly see if the Query settings you have chosen yield the report you wanted. Click the various areas of the screen shot below to see some of the features of the Preview screen.

Product - Subtotal by Date (Detail)
Date Range: 12/14/2009 through 2/5/2010
ENNOVIEW
Location: Main

Date	Employee	Client	Inv Type	Ticket Number	Qty	Price	Total	Discount Applied	Cost	Profit
Item Id: 1 HOUR DEEP TISSUE MASSAGE Description: 1 HOUR DEEP TISSUE MASSAGE										
2/1/2010	INHOUSE	MOORE TINA	Service	7	1	75.00	75.00	0.00	0.00	75.00
					Product Totals:	1	75.00	0.00	0.00	75.00
Item Id: 1 HOUR SWEDISH MASSAGE Description: 1 HOUR SWEDISH MASSAGE										
2/1/2010	CONNIE MARILOW	GREEN WENDY	Service	6	1	54.49	0.00	0.00	0.00	0.00
2/4/2010	COLLEEN MORRIS	WARREN RICHARD	Service	10	1	63.75	0.00	0.00	0.00	0.00
					Product Totals:	2	0.00	0.00	0.00	0.00
Item Id: 1 TAN SESSION Description: 1 Tan Session										
12/14/2009	CARRIE CONNOR	BLOOM GEORGIA	Tanning	595	20	10.00	10.00	0.00	0.00	10.00
					Product Totals:	20	10.00	0.00	0.00	10.00
Item Id: ALL OVER COLOR Description: All Over Color										
2/5/2010	CAMILLE SWANSON	MORRIS SANDY	Service	13	1	90.00	90.00	0.00	7.25	82.75
					Product Totals:	1	90.00	0.00	7.25	82.75
Item Id: EYEBROW WAX Description: Eyebrow Wax										
12/15/2009	ANNIE CREW	MORRIS DARBY	Service	597	1	8.00	8.00	0.00	0.00	8.00
					Product Totals:	1	8.00	0.00	0.00	8.00
Item Id: FACIAL Description: Facial										
2/1/2010	PHYLLIS SIMPSON	GREEN WENDY	Service	6	1	54.49	0.00	0.00	0.00	0.00
					Product Totals:	1	0.00	0.00	0.00	0.00
Item Id: HYDRATE COND 8.5 OZ Description: Pureology Hydrate Conditioner 8.5 Oz										
2/5/2010	CAMILLE SWANSON	MORRIS SANDY	Retail	13	1	25.00	25.00	0.00	12.50	12.50
					Product Totals:	1	25.00	0.00	12.50	12.50
Item Id: HYDRATE SHAM 10.1 OZ Description: Hydrate Shampoo 10.1 Oz										
2/5/2010	CAMILLE SWANSON	MORRIS SANDY	Retail	13	1	25.00	25.00	0.00	12.50	12.50
					Product Totals:	1	25.00	0.00	12.50	12.50

2/5/2010 4:12:35 PM Page 1 of 3