Salon Connection 1.0
Getting Started Guide

If you are a small salon or spa looking to automate and just getting started or an established salon or spa looking to improve operations and client satisfaction, Salon Connection has a solution for you. Salon Connection is feature-rich, affordable, easy to use salon management software solution. Salon Connection allows you to quickly schedule and track appointments and manage your resources. You will be amazed at how much Salon Connection can improve your salon's efficiency, giving you more time to do what you do best.

Thank you for requesting this special demonstration version of Salon Connection, the most affordable, feature-rich salon management software on the market today. This demo will allow unlimited access for a period of thirty days. Should you decide to purchase the software, we can give you a registration code right over the phone that will unlock the demo, leaving all of your work intact.

Note: A full user’s guide is available on the CD in both Microsoft Word and Adobe Acrobat format. You can view it by double-clicking ‘My Computer,’ right-click the CD-ROM drive (you should see the palm tree icon) and select ‘Explore.’ From that window, double-click the Extras folder, and then double click the Manuals folder.

Installation: To install the software, simply place the CD-ROM in the drive and the installation will start automatically after about ten seconds. If the installation doesn’t start automatically, double-click ‘My Computer,’ right-click the CD-ROM drive (you should see the palm tree icon) and select ‘Explore.’ From that window, double-click the SCSetup.exe file. If you downloaded the demo from the Internet, double-click the SCSetup.exe file that you downloaded. Follow the prompts by clicking the ‘next’ button to complete the installation.

Starting the program: The installation placed a Salon Connection 1.0 icon on your system’s desktop. Either double-click it or click on Start, Programs, Salon Connection, Salon Connection 1.0.

Salon Connection will now prompt you for whether you want to demo the standard version or the lite version. The standard version is the full version of the software, while the lite version does not have inventory and vendor features. Make your selection and click ‘Ok.’

Once the program starts, you will be presented with the Salon Connection setup guide. This guide will assist you with inputting certain data pertinent to your business as it pertains to the software. You will be unable to start Salon Connection unless all of the required fields are populated. All of the information entered will be able to be modified once you enter the main part of Salon Connection. We will now walk you through each of the tabs in this section… so let’s get started with the **Salon Connection setup guide!**

Salon Connection Setup Guide tabs:

Introduction: This tab explains the purpose of the setup guide. To continue, click the ‘Next’ button.

Company: On the company tab, you are required to enter your company information and shop hours. The company information will print out on all of your reports, and the shop hours will allow you to setup your schedules properly. Enter this information and click the ‘Next’ button. The information will be saved at the end of the setup guide.

Employees: Salon Connection requires at least one employee for scheduling purposes. To add an employee, click the ‘New’ button and enter an employee. That employee’s access rights will then be able to be set from inside Salon Connection. The User ID, password, first name, and last name are required fields. When the information is entered, click ‘Save.’ To add another employee, click ‘New’ again. When you’ve finished entering employees, click the ‘Next’ button.

Resource Types: A resource type is the type of apparatus used to perform your service, such as ‘tanning room’ or ‘manicure station.’ The resource types will be assigned to specific resources on the next tab. Click the ‘New’ button and enter a resource type. **Note:** The ‘Link’ field signifies that this resource type needs a resource and employee linkage and ‘Link’ set to ‘Employee->Resource’ will show up on the ‘Employee -> Resource Map’ tab. When completed, click the ‘Save’ button. To add a new resource type, click ‘New’ again. When you’ve finished entering your resource types, click the ‘Next’ button.

Resources: A resource is the actual apparatus used to perform your service, such as ‘tanning room 1’ or ‘manicure station3.’ The resources will be tracked by Salon Connection for scheduling and to prevent overbooking. To add a resource, click the ‘New’ button and enter a resource. When completed, click the ‘Save’ button. To add a new resource , click ‘New’ again. When you’ve finished entering your resources, click the ‘Next’ button.

Employee-Resource Map: Salon Connection now needs to know what employees will be assigned to what resources. This, in turn, will simplify scheduling duties. This will also allow Salon Connection to track what employees are available for scheduling resources. **Note:** If you do not see any resources listed on this screen, you did not set the link to ‘Employee->Resource’ on the ‘Resource Types’ tab. Please return to the Resource Types tab and edit at least one of your resource types to have the ‘Employee->Resource’ link. To add a resource/employee mapping, click the previously entered resources on the left side of the screen and place a checkmark in the box next to each employee’s name on the right that will be staffing that resource. Click ‘Save’ when complete. Repeat this procedure for each of your resources. This information can be modified once the setup guide is completed and Salon Connection is started. When you’ve finished entering your resource/employee mappings, click the ‘Next’ button.

Services: Enter all of the services that you provide, such as manicure, pedicure, waxing, etc. This will allow Salon Connection to track pricing for you for invoicing once the services are performed. Click ‘New’ to create your first service, and click ‘Save’ when you’re finished. Repeat this procedure for all of your services. This information can be modified once the setup guide is completed and Salon Connection is started. When you’ve finished entering your services, click the ‘Next’ button. **Note:** You have now entered all of the required information and a ‘Finish’ button is now available. If you sell tanning services and wish to enter tanning packages, proceed to the next tab. Otherwise, click the ‘Finish’ button to enter Salon Connection.

Tanning Packages: If you offer tanning packages, Salon Connection will track the tanning minutes used with each visit. To enter tanning packages, click the ‘New’ button. Enter the package name, cost, and total minutes in this package. Click ‘Save’ to save your information. To enter additional tanning packages, repeat this procedure. You have now entered all of the required information and a ‘Finish’ button is now available. Click the ‘Finish’ button to enter Salon Connection.

Congratulations! You’ve now completed the setup guide and Salon Connection is up and running. We will now walk you through creating a client, scheduling that client, checking that client in and out, creating the invoice, and taking a payment. These are the getting started basics of the software. A more in-depth discussion of each of the features of the software, such as point-of-sale, inventory, and employee time keeping and commissions is included in the user’s guide.

Adding a new client record: To add a new client, click the first icon on the toolbar across the top of the screen or click File, New client. This will display a blank client card. The client’s first and last name are required before the card can be saved.

General: All of the information on the main client screen is self-explanatory. The emoticons in the lower right hand corner are to subtly mark the type of client (optional). The icon will show up in the client explorer on the left once the record is saved. This allows you to see the type of client before opening the record.

Photos: The photos tab allows you to display before and after pictures of your client. We have supplied a few photos for demonstration purposes. They can be displayed by clicking the ‘…’ button below each photo space.

Notes: The notes tab contains specific information about your client, such as the details of services performed or information about formulas used. The warning box is used to store warnings about the client such as no shows or temperament or past due balances. Anything typed in this box will display when the client’s record is opened or an appointment is scheduled. The client’s name will also appear in the red in the client explorer.

Invoices, Payments, Appointments: History of each of these items for the client. Information is maintained on each of these screens for each invoice, payment, or appointment that is created for each client.

Credit Card info: You can store and password protect your client's credit card information on this tab for use with our credit card processing feature, or for your own information.

Click 'Ok' when all of your information is entered and the new client will now be listed in the client explorer. To open the client, simply double-click the entry.

Adding the client to the schedule: To add a client to schedule, the easiest way to do so is to open the dayview schedule by clicking the icon that has only a pair of scissors on it, or by clicking Schedule, Dayview schedule from the main menu. You will now see the day's schedule opened to today's date with your employees listed across the top. In the client explorer, click and hold your mouse on the new client's name and drag and drop him on the middle of the schedule. The new appointment screen will open. To create the appointment information, first set the time and date. In the services grid, click in the 'Service' column. This will reveal a dropdown arrow. Click it to display the list of services defined in the setup guide. Click the service requested. In the 'Employee' column, click and choose the employee to perform this service. Choose your 'Resource,' and then set your rate. This service is now ready to be scheduled by clicking the 'Ok' button. If there are any scheduling conflicts, the system will let you know when you click 'Ok.' To add more services to this booking, set them prior to clicking 'Ok.' To modify the booking, locate it on the schedule and double-click it.

Checking the client in and out: Once the client arrives for their appointment, check them in by clicking on the appointment and clicking the magenta checkmark on the toolbar or right click on the appointment and select 'check in.' Perform the same steps to check out the client once the service has been completed.

Creating an invoice: When a client is completed and you check them out, you will be prompted to create an invoice. Click 'Yes' and all of the appointment information and services with their rates will be populated on the invoice. At this point you can change the quantities, descriptions and amounts, and you can even add items. Click 'Print' to print a copy for your client, complete with your company information that you entered in the setup guide, and your logo.

Receiving payment: To take payment on an invoice, with the invoice open, click 'Take payment.' The payment screen will now appear. Place a checkmark in the 'Pay' column in the grid on the line with the invoice, enter the amount paid, and the payment type, and click 'Ok.' The payment has now been entered for this invoice. **Note:** If you are running our credit card processing service, when you select a credit card as a payment type, you will have the opportunity to enter the client's credit card information and process it right through Salon Connection.

Additional information: If you have CallerID service through your local phone company, and your modem supports CallerID, Salon Connection will pop-up the client card of the caller automatically provided they are already in your database. From this screen, you can easily set their appointments. We also offer a link to QuickBooks through our QuickBooks DirectLink module, which allows you to put client, inventory, vendor, invoice, and receipt information directly into QuickBooks without any user intervention. Please contact your sales representative for more information regarding these features.

And that’s all there is to it! Please feel free to explore the many features of Salon Connection by clicking the various menu items and buttons available to you. Most of the features are self-explanatory, and at any time should you have any questions or concerns about any of the features included in the software, please do not hesitate to contact sales and/or support toll free on (888) 486-4343.