Instruction Manual
Alpha Salon

TABLE OF CONTENTS

1. GENERAL INFORMATION

1.1. Keys on the keyboard

Function keys are not needed to work in the ***Alpha Salon*** program. The F1, F2, etc. keys have no purpose in the application, and combinations with “Alt” and “Ctrl” are not used either.

Still, you need to be familiar with certain basic keys on the keyboard. The “Tab” key is used to move from one field to another or from one control to another, but it does not activate the command buttons. It is used to read what is written in a field, when leaving the field to move to another field.

To select a command button, you must press the “Enter” key when the button is activated (button surrounded by a square), or use the mouse. In fact, the application is designed to work with a mouse since it is simpler and faster to use and does not require a list of keys to remember to operate the program.

In summary, there is no list of keys to memorize; using the mouse also leaves one hand free to use the keyboard.

1.2. Company management, administrators and users

Before opening ***Alpha Salon***, you must choose a person who will be the main manager for the application and for all the companies that will be created. This manager will be called « **Company Management** » and will have his own password. He will have access to the technical support, and will be able to consult company archives, create new companies and enter the access code to install the program and the different complementary modules.

The manager does not manage each company but rather delegates an administrator for each company. Each company administrator will then delegate users and will specify the rights each user has.

Each action executed by a user (add, modify, delete) will be entered with each record in the databases. Thus, it will be easier to know if users make any errors or if they do not follow working methods proposed by the administrator. This is also for better security, as each action is traceable in the application. Each user has his own password and it is strongly recommended to not reveal it to anyone for security purposes. Someone else could use your name and password to perform actions in the application which could cause serious problems due to lack of knowledge of the application, especially concerning the medical history of clients.

It is recommended to change your password every month for better confidentiality and security.

When opening ***Alpha Salon***, you must select a company in the first dropdown list. In this list, you can choose "**Company Management**" to access other commands that are not available to company administrators and users.

Then, you must select a user. Each company has its own list of users, except for "**Company Management**", which has only one user, also called "**Company Management**". An employee is not automatically a user. You must create a user by choosing an employee in the list and a password to allow the employee to become a user in the application.

Then, you must enter the password. If it is valid, the corresponding buttons will be displayed. You can also choose the working language.

Avoid working under the user name "**Administrator**" even if you are the only user of the company. It is better to create another user name.

In the main menu, click inside the « Alpha Salon » logo to get access to the « About » window.

1.3. Main menu and sub-menus

In the main menu, the buttons appearing at the bottom of the screen are used to: 1. have access to the company records, 2. have access to the configuration options of the company, 3. have access to the printed reports, and 4. have access to the archives.

The other buttons in the centre of the screen (Agenda, Transactions, Resources, Directories, Preferences) will show the corresponding sub-menus on the right.

Press the button in the sub-menu to open a window that corresponds to your selection.

1.4. Windows

When opening a window, a grid will appear showing all the records in the table (a database contains many tables). Certain windows have no data grid or search box when they open. Sometimes the window shows the second part of a record, for example in "Client – Medical History".

You can increase or decrease the width of each column in the data grid by positioning the mouse cursor on the divider line between two fields. The cursor will become a two-pointed arrow, which you can use to increase or decrease the width of a column as you wish. You can mask all the columns you do not wish to see, or increase their width to read all the data in each column.

When closing a window, each user keeps his own parameters as to the width of columns in the data grid. To restore the default column width, click at the top right corner of the grid on the words "default grid".

When opening a window, you are in consultation mode. The current mode is always indicated at the bottom in the centre of the window. In consultation mode, you cannot add, modify or delete any information in the record on display. But you can print or consult the help file.

To perform a specific action on the current record, you must press the corresponding command buttons located on the right side of the window. When you press the "Add" or "Modify" buttons, all other command buttons disappear from the screen, even the "Close" button. For these two modes (add and modify), there are only two ways to exit, using either "Cancel" or "Save". In these two modes, the data grid in the first tab is locked as well as the search, selection and drag tools, all for security purposes.

A red star located next to a data field or a field title in bold letters indicates a mandatory field to fill out to save the current record.

To trace the latest modifications or additions to a record by a user, choose the "**Administrator**" tab and consult the section "Last addition/modification made by". The date and time of the modification or addition are also indicated.

To access the "**Administrator**" tab, you must have the corresponding rights in the user table, which only the company administrator can access.

In the section at the bottom of each window, you will find the name of the current user and the name of the current record. This way, when you move within a particular tab, you can always know which record you are currently consulting (ex.: file # and client name, product # and description, etc.). You can also see the name of the current company and the department.

1.4.1. Selecting a record

You can access a specific record by scrolling the datagrid (using the cursor on the right), then select the desired record by clicking on the left of the record.

You can also scroll through the records (one after the other) by using the record selector located at the bottom in the centre, above the current mode display. You can go to the next or previous record, to the first or the last record in just one click.

The number of the current record and the total number of records in the table are also shown in the centre of the selector.

1.4.2. Selecting several records

There are different methods to select clients, employees and suppliers in the search box.

1. Ex. = All clients: simply check the box “all clients” and press “OK”.

2. Select clients using advertising criteria:

- To send advertising material to clients who wish to receive it, simply check the box “Clients – adv. (yes)” and press “OK”.
- To select clients who do not wish to receive advertising material, simply check “Clients – adv. (no)” and press “OK”.

3. Selecting a certain number of clients using specific criteria:

- To select clients from a specific city, click on the “City” column heading to sort from A to Z. Then to choose all the clients from a specific city, click on the left of the datagrid next to the first client, scroll down the datagrid using the scrolling bar on the right and go down to the last client to be selected. Then hold the “Shift” key down and click on the left of the datagrid next to the last client. All the selected clients will appear with a blue background. Then, check the box “Clients – selection” and press “OK”.
  P.S.: do not forget to check to box “Clients – selection”
- To select a group of clients: click on the left of the first client to select and while holding the “Shift” key down, click on the left of the last client. All the selected clients are one after the other with this method.
  P.S.: do not forget to check the box “Clients – selection”
- To select many clients: click on the left of the first client, and while holding the “Ctrl” key down, click on the left of each client you wish to select. Clients do not necessarily need to be one after the other.
  P.S.: do not forget to check the box “Clients – selection”

You can select clients using each column as a criteria, simply by clicking on the column heading to sort from A to Z, or clicking a second time to sort from Z to A.

1.4.3. Searching for a record

To launch a search, you must choose in which column to search by clicking the column heading in the datagrid. When you click once on a column heading in the datagrid, the column is sorted in ascending order (from A to Z). If you click on the same column heading a second time, then the data is sorted in descending order (from Z to A). In the search box, the left field indicates which column was sorted, and a small symbol to the right of this field (▼ = ascending, ▲ = descending) indicates the sorting order.

A “Character” search means that the characters you enter indicate the first characters of a specific field. When the first characters are not found (no match in the datagrid), then the cursor of the datagrid appears at the top of the grid.

A “Word” search means that you will be searching for a specific word in a field that contains one or many words. Each record that contains the search word will appear with a blue background. This search may work in ascending (A to Z) or descending (Z to A) order. Press the “Unselect” button at the far left to unselect all marked records. This search method is very different from the character search which uses only the first characters.

1.4.4. Dropdown lists

Dropdown lists work by clicking on the button to the left of the selection field and by moving the cursor to the right of the list up and down. Then, simply click on your choice to make it appear in the corresponding field.

Another way to proceed is to activate the list or click with your mouse on the list button, then press a letter on the keyboard to access the first letter of the selected word. Each time you press on the same letter of the keyboard, the words starting with this letter will appear one after the other. When you reach the last word starting with this letter, the selection goes back to the first word starting with this letter.

1.4.5. Search boxes

When you click on the button to the left of the record selection field, a search box will appear. Search boxes are useful to find and select a record using search criteria. The search is performed the same way as in the datagrid.

However to choose a specific record, you must click to the left of the selected record and press “OK”, or click twice to the left of the record. This way, you select the record and close the box at the same time. The selected record will appear at the bottom of the search box.

Sometimes, at the bottom of the datagrid, a check box will appear to choose a list of records according to the type of search and the desired action. Do not forget to check the appropriate box if you choose this option. Do not click twice to the left if you choose this option.

You can also select a certain number of records by keeping the left-click of the mouse down and selecting records on the left of the datagrid and scrolling down to the desired record. You can sort records before making a selection.

In the “Client, employee or supplier” window, don’t forget to check the box “Client, employee or supplier – Multiple selection” so that the search recognizes this type of selection. Multiple selections are only available in the “Client, employee or supplier” window.

Certain fields are at the far right, but when you click to the left, the grid is repositioned to the left. So to see fields at the far right when you search, you will need to mask certain fields by bringing the mouse cursor at the top of the datagrid on the divider line between two fields. The cursor will change to a two-headed arrow. You can then reduce or widen columns at will, to mask all the columns you do not wish to see and widen others to see all the date in those fields.

1.4.6. Calendar

The calendar box is accessible by pressing on the button at the right of fields that require a date. You cannot enter a date manually using the keyboard in a “Date” field, to ensure input safety and compatibility with the country and date format selected in the configuration panel.

When you open the calendar box, the cursor automatically appears on the current date.

To select another date in the current year, click on the small arrows at the top of the calendar, to the left of right as needed. Each click shifts the calendar to another one-month period.

To select another year, simply choose a year in the list at the top of the calendar, on enter the year directly in the appropriate field, then choose the month and the date in the calendar.

You can choose the check box “No date” to leave a “Date” field empty.

Press the “OK” button to accept the selected date (shown on the top right corner of the calendar), or press the “Cancel” button to leave the “Date” field unchanged.

When there are two date fields in a window (ex: starting date and ending date), you must choose the two dates separately, meaning you must follow the procedure described above for each field.

1.4.7. Printing

When you press the “Print” button in a window, you gain access to all the printing options for the selected window. You can also access the printing options in the main menu by pressing the “Reports” button at the bottom of the window.

To the right of each printing option, various selection criteria appear at the bottom of the printing window depending on the selected printing option.

Dates are not mandatory. If no date is entered, printing will take place with no date criteria. If you only enter a starting date, the report will only contain data for one date. If you only enter an ending date, the printed report will not have date criteria.

It is also possible to select the option “All” to select all records.

Once you have selected the different criteria as needed, you can press the “Preview” button to view the report on screen without printing. In the preview, you can export the report in *Adobe Acrobat* (*.pdf), *Microsoft Word* (*.doc), *Microsoft Excel* (*.xls), or in *Rich Text Format* (*.rtf) format, or print it directly using a printer. Other options are available in the “Preview”, namely searching for a word or a string of words in the report, “Zoom” to different scales. The number of pages in the report is shown at the bottom of the preview. To browse from one page to the other, use the corresponding buttons at the top left corner.

If you press the “Print” button in the printing options screen, the report will be printed directly on the default printer or according to the application configuration. However, this method does not indicate the number of pages in a report. Use this function wisely to avoid needlessly printing a report of several pages.

1.4.8. Help

When you press on the help button in any window, the corresponding help file opens.

When the help file is open, you can consult the current file or choose another in the list on the left.

When you read a help file, you can read another file related to this file by clicking on blue underscored words throughout the text. To return to a previous file, simply click on the corresponding button in the list of buttons on the top left.

To search for a specific word in the help files, you can use the various tabs provided on the left.

To change the language (French, English, Spanish…), the Alpha Salon software has to be closed and reopened again by selecting the language at the bottom of the screen on the home page. Consequently, the help files language will be in the same language as the one selected at the beginning

1.5. Messages

When you work with ***Alpha Salon***, various messages may appear, either to indicate a successful operation (ex.: "Save was successful"), the necessity to enter data in certain mandatory fields, to confirm record deletion, to inform you of the inability to connect to the database, or any other message concerning the application.

Some of these messages are automatically designed to appear for a number of seconds, defined in the "Messages" tab of the Configuration box. This means that confirmation and deletion messages will appear for a certain number of seconds, then disappear completely. To set the number of seconds, go to the application configuration ("Config" button at the bottom in main menu and choose the "Messages" tab.

Some messages indicate when an error has occurred in the application. In the latter case, contact the technical support people by e-mail, to inform them of this error message. To do so, go on the home page, select « Company management » and the keyword and press on the « Support » button. By opening the page, you are directly in a page to send an e-mail to inform us of the error messages that occurred or to send us any comments in order to make useful improvements in the software. Do not forget to press on the « Send to technical support » button at the bottom of the form.

2. OPERATIONS

2.1. Configuration

In the main menu, press the "Config" button to go to the window of options concerning the ***Alpha Salon*** application. This is the first thing you should do when you first open the application. The configuration applies to each company. If you create a new company, you will have to modify its configuration

In the "Messages / E-mail" tab, you can determine the number of seconds during which the confirmation and deletion messages will appear before automatically disappearing. Avoid ticking « no message » because if there are important suppressions, it will be safer to display a message before deleting. You can also determine the start-up language when you open the ***Alpha Salon*** application. You will also have to indicate in this tab, the sender's e-mail (your e-mail address) as well as the name of the e-mail server of your internet provider (SMTP). For this last detail, you will have to ask the e-mail server's name to your Internet provider.

In the "Printers/Terminal" tab, you can choose the printers available for your workstation. As for your terminal (your computer), this is where you can change the name of your terminal and the access to a network database.

In the "Invoicing" tab, you can choose to print invoices after saving them, or to allow cash refunds on debit and credit cards. You can also add a message that will appear at the bottom of each invoice.

In the "Schedule" tab, you can determine a basic schedule for all new employees. This is used to speed up the creation of a new employee work schedule. You can also decide if you wish to activate employee work schedules, meaning if you wish to activate employee payroll management.

In the "Schedule - salon" tab, you can determine your salon opening hours. If your salon is closed a certain day, then leave those fields empty. Do not forget to choose the type of time block for the agenda. We recommend using 15-minute time blocks, and avoid changing the period continuously, because certain appointments might not fit with the starting or ending time of other appointments.

In summary, you should consult this window before working with the ***Alpha Salon*** application.

2.2. Creating a company

Only the main manager can create companies. To do so, simply click on the "Cies" button in the first window when opening ***Alpha Salon***, by choosing in the first dropdown list of companies “**Company Management”**, then choosing the user “**Company Management”** and entering the correct password.

When you open the window to create a company, you see in the centre, the directory where all created companies are stored. In the second tab, you can see the name of the selected company, the name of its directory and the default directory for all companies.

You can add a new company, change the name of an existing company (this is the only way to change the name of a company), delete a company and its entire directory, or copy a company. You can also “Recover” a company archive either to create a new company or to replace an existing company.

When a company is created, it already contains tables filled with default records (ex.: preferences, products, etc.).

You can create as many companies as you wish, there is no maximum.

2.3. Company management

When starting with ***Alpha Salon***, you must choose a company in the first dropdown list. Press the “Enter” button to manage the selected company according to the user you have selected.

Once you press the “Enter” button, a window opens, showing the name of the selected company in the centre of the screen. This company name will appear in the heading of all printed reports.

To change the name of a company, you must go to the Company Creation page (only the main manager has that right, in “**Company Management**”).

In the second tab “Ledger”, you can enter different ledger account numbers for those of you who use *F1000-Acomba* accounting software, the name of the directory where the software is located for export purposes. This file can also be used for various accounting operations of your choice.

In the “Taxes” tab, you can manage up to three taxes. If taxes are already included in the price of your products and services, do not enter tax rates and names in this tab.

You can choose the default language, from a selection of three languages. The first language is always the default language.

In the "**<u>Administrator</u>**" tab, you can see the amount of taxes collected monthly and annually for each previously created tax.

You can also decide the starting month of your fiscal year.

2.4. <u>Preferences</u>

The Preferences windows are used only to fill the different dropdown lists in certain windows (ex. : « Client category » in the form 'Clients', « Product category » in the form 'Products', etc…).

In "Client Category" preferences windows in the "**<u>Administrator</u>**" tab, you can grant discounts on products and services. You can also consult monthly and annual sales per product and service and cumulative sales for previous months.

In the "Product Category" and "Service Category" preferences, in the "**<u>Administrator</u>**" tab, you can enter a ledger account number for those of you who use *Acomba – Fortune 1000* software. You can also consult monthly and annual sales and cumulative sales for previous months.

In the "Product Sub-Category", "Service Sub-Category", "Mode of Payment", "Type of Service" and "Department" preferences, in the "**<u>Administrator</u>"** tab, you can only consult monthly and annual sales and cumulative sales for previous months.

You can add, modify or delete preferences as you wish. You can also print the latter.

2.5. <u>Department</u>

Departments are used to define employee groups. When opening Alpha Salon, when you select a department, only the selected employees of this department will appear on the employee form, on the invoice, to create a user or others.

Only the administrator can see all employees in the employee form, regardless of the selected department.

Departments can also be used to view sales of products and services per department for a selected period of time.

Departments can be created in the "Preferences" menu.

2.6. Terminal

The notion of "Terminal" is essentially used for the register close out. The terminal is the computer where the Alpha Salon software is installed. Whether it be a local computer or on a network, you must enter a terminal number and name for each computer in the "Configuration" file in Alpha Salon when it is registered.

Network terminals can be consulted via "**Company Management**" by pressing the "support" button, then "terminal". You can then see which terminals are connected to Alpha Salon.

2.7. Invoicing

When you open the invoicing window, you can consult all previous invoices using the various search or selection modes by « Department » or by dates.

Once you have selected a client to create a new invoice, you can consult his "Sales History" per product and service in the corresponding tab.

To add an invoice, press the "add" button. The default client is the "Cash" client. You can change the client by pressing the button to the left of the client name.

You can then change the employee who prepares the invoice (to the right of the client).

Then, to enter an item, press the "P" button to choose a product, the "S" button to choose a service, or the "R" button to choose a package of products and/or services. A search box opens to allow you to make a selection. Remember that you can click twice on the left of a product, a service or a package to select it and automatically close the search box.

After choosing an item, you must enter the quantity. Note that the default quantity is one (1). You can then choose the employee who performed the service, and choose a body area if the type of service is "Electrolysis". By default, the electrolysis area is « Other ».

When your record is complete, press the button at the top far left of the data line (button with a checkmark « √ ») to add this record to the datagrid at the bottom. No data entry or modification is allowed in the datagrid for management and safety purposes.

To modify a record (data entry), click to the left of the desired line in the datagrid. The line will appear at the top of the screen, allowing you to make the necessary changes. Press the checkmark button again to accept the modifications.

To delete a record, click to the left of the desired line in the datagrid. The line will appear at the top of the screen, then press the leftmost button (with an X). The line will be deleted from the datagrid. You can also quickly click twice on the line to delete in the datagrid. A message will appear, asking if you wish to delete this record.

All these operations are performed only before adding a new invoice. A previously registered invoice cannot be modified or deleted. In fact, the corresponding buttons are not available when you consult previous invoices.

Before registering an invoice, you must enter one or many modes of payment on the bottom left. The field “Amount due” must be equal to or greater than zero to save the invoice. You can select up to three modes of payment for a single invoice. Do not forget to add your modes of payment if they do not appear in the list of available modes of payment. This is where you can select a mode of payment by gift certificate or discount coupon.

Moreover, note that “Cash” and “Debit card” are the only modes of payment that accept amounts greater than the total amount of the invoice. You can also do cash remittance if you check the corresponding option in the configuration form in the « Invoice » tab. You will notice, in this case, that the amount in “Change given” will be greater than zero. This means you must give this amount back to the client according to your choices for this mode of payment.

The presence of a red star next to the name of a client indicates that this client is entitled to a discount on the total amount of the invoice. If the price of a product or a service appears in red, then it is a special price.

When you select a client, a “client order” button may appear to the right of the form. This means that this client has client orders, i.e. “open invoices” that are not capitalized. When you click on the button, a new window will appear with the list of client orders for this client. Orders appear in the top list, while the bottom list shows items in the selected client order. To consult a client sub-order, click once to the left of the order in the top list.

To select one or more client orders, simply double-click to the left of each client order you wish to add to the invoice, then press “OK”. Please note that when the invoice is registered, then selected client orders will be destroyed.

To credit an invoice, you can use the “Reversal” button to cancel a previously registered invoice. You cannot cancel or “reverse” an invoice more than once. All products or services and various cumulatives will be adjusted accordingly.

You can add “Notes” for each invoice created in the application. The “Notes” field is different for each invoice, which is not the case for the message that appears at the bottom of each invoice. The message that generally appears on all invoices is located in the configuration menu, in the “Invoice” section. This message may be changed on occasion, either to indicate a message from the company, to publicize discounts on certain products or services, to indicate opening hours during specific periods, etc.

If, in the configuration menu, in the “Invoice” tab, you checked the box “Print invoice automatically after registration”, the invoice will be printed immediately after a successful registration. You can also choose in this tab which printer will print the coupon invoice and the default printer. Only printers connected to your workstation or your server will be listed. If you are using a cash register connected on a coupon printer, the cash drawer will open on its own after automatically printing the invoice.

Note that you can reprint a previously registered invoice again, either on the coupon printer or another printer.

2.8. <u>Register close-out</u>

The register close-out is done in the Print report window, because normally after closing the register, the report is printed when choosing the “Z” register close-out option. This selection resets all cumulative in various databases to zero, for example: taxes collected, monthly income, product categories, etc.

You can also consult the register close-out report on screen without actually closing, by checking the box “Read”. You can also choose a “Summary” or a “Detailed” cash report. The detailed report will include a summary of all invoices generated since the date of the last register close-out, in addition to the summary (accounting entries).

The register close-out report can be printed either on the coupon printer or on 8 ½ x 11 letter paper.

You can also consult the list of previous register close-outs in chronological order. To consult old register close-out reports, go in the company form under the « Register close-out » tab. Press on the right button. A dialog box to search for a register close-out file opens. Select a file in the list and press on « Open ». If you want to print it, press on the « Print this register close-out report » button located at the bottom of the form.

Each time you perform a “Z” register close-out, a file is generated in the “Register close-out” directory in ***Alpha Salon*** for each company for the archives. These files can be viewed in *WordPad* or *NotePad*, and can also be printed again.

Another file is also generated if “Yes” was selected in the “Export - ledger” field in the Company form, “Ledger” tab. This file is compatible with the *F1000-Acomba* accounting software in the directory specified in the next field to the right. When you open the accounting software, you can “import” this or these files in the ledger accounts. This file can also be used for various accounting purposes.

2.9. Tax reports

To prepare a report of collected taxes, consult the print report “**Administrator”** depending on the rights you have in the user window.

You can choose the report of taxes per day and sales per day. You can also choose to print a report for one month or for a specific period (indicate the starting date and the ending date).

2.10. Supplier purchases

The supplier purchases window is used to specify all purchases according to the fields “Quantity on hand” and “Minimum quantity” in the “Products” table.

Purchases are automatically recorded when you press the “Add” button. The dropdown list at the top indicates the suppliers where you want to order (purchase) products according to your inventory. Each time you select a supplier in the top list, products to be ordered (purchased) appear in the datagrid at the bottom. This list of products to order (purchase) may be modified at will. For example, you could choose to remove products to order (purchase) and add others, modify the quantities to order (purchase), etc. Messages may appear, indicating if the product is already on order (purchase) in another order (purchase), if the product can no longer be ordered (purchased), etc.

To add a product, press the “P” button to choose a product. The search box opens to select a product. Remember that you can click twice to the left of a product to choose the product and automatically close the search box.

Once an item has been selected, you can enter the quantity to order (purchase). Note that the default quantity corresponds to the quantity to order (purchase) specified in the products window, but may be modified at will.

When your record is complete, press the button at the top left of the data entry line (button with a checkmark “√”) to add the record to the datagrid on the bottom. No data entry or modification is allowed in the datagrid for management and safety purposes.

To modify a record (data line), click to the left of the desired line in the datagrid. The line will appear at the top of the screen, allowing you to make changes. Press the button with a checkmark to accept the modifications.

To delete a line, click to the left of the desired line in the datagrid. Then press the leftmost button (with an X) when the line appears at the top of the screen. The line will be deleted from the grid. You can also double-click on the line to be deleted in the datagrid. A message will appear, asking if you wish to delete this record.

An order (purchase) not yet received can be modified. But make sure that the order (purchase) has not yet been sent to the supplier.

Any received order (purchase) cannot be modified.

When entering the ordered products, click on the « Purchase List » and then, click on « not received » in the box « Purchase ». Select the purchase that was not received in the datagrid. A button will appear on the right called « Reception ». Press on this button to receive a purchase. Enter the number of received products and press on the « OK » button. This has the purpose of updating your products inventory and to put this purchase as « received » and cannot be modified

2.11. Client orders

A client order is in fact an “open invoice”. This means that you can add or delete items, since the order is not integrated in the accounting system. It is a “buffer invoice” that is deleted once it is added to the real invoice, or that can be deleted at will.

There are 2 ways to create a client order. The first consists in going to the main menu and selecting “Transactions/Client Order”, then add products, services or packages and save the client order.

In the second method, a client order is automatically created when an appointment is scheduled. The client order is created with the selected service. You can then add other services or products or packages that can be reserved until the client arrives for his/her appointment.

When you are consulting a client order, you can press the “Invoice” button to open an invoice with the client order added to it. You can also add other services or products or packages.

You can also do the opposite, i.e. open an invoice and choose a client that has client orders. To determine if a client has client orders, choose a client at the top of the invoice and look on the right to see if the “client order” button appears. If it does, click to open a window showing only this client’s client orders. Choose one or more orders you wish to add to the invoice. Note that when you register the invoice with client orders, the latter will be deleted.

2.12. Medical History

To view a client’s medical history, go to the “Clients” window and choose a client in the datagrid in the first tab of the window, by clicking to the left in the datagrid or using other available selection methods (selector or search).

Then, once you have selected a client, press the “Medical” button at the right of the “Clients” window.

When the medical history of the selected client appears, you can choose the type of service to be performed in the dropdown list at the top left (tanning, hairdressing, electrolysis, aesthetics, massage therapy).

If there is no medical history file for this client, the “Add” button on the right will be available, but not the “Modify” or “Delete” buttons.

If the medical history file for this client has already been created however, then only the “Modify” and “Delete” buttons will be available. You can add medical information in the top part and in the “Notes” field above if the specific condition does not appear in the list (check boxes) or to add a comment or a specific information for a medical condition such as “Allergies”.

In the tabs located at the bottom, various options are available according to the type of service selected in the top left list.

You can also choose to enter only treatments if you wish without entering medical data or other data.

You can consult the list of invoices for the selected client in the “History” tab.

If you press the “Delete” button, all the client’s medical history, the various other options and the treatments will be deleted. Invoices (“History”) are never deleted and can be consulted at any time even if the client has no medical history file.

In the “Electrolysis” service, you must enter a body area in the list in the left centre of the window to enter data in the various tabs. This also applies for the client’s history and treatments.

2.13. Equipment

Equipment refers to all aesthetics and electrolysis devices in use in your salon. In the equipment form via the main menu “Resources”, you must enter an equipment no., a model no. and a description and abbreviation for each equipment.

The abbreviation is very important, as it is used in various forms in the agenda, for example in the appointment description and the heading of the datagrid in the “Availability” tab. This is why it is very important to enter a very explicit abbreviation to distinguish each equipment and workstation.

Also, in the “Administrator” tab, the price of the equipment is shown as well as the time of use based on invoicing data. The time of use is determined in the form “Service”, “Info” tab, “Equipment used” field and the standard duration. If an appointment is not invoiced, then the time of use will not be calculated. The time of use is based solely on the starting time and the ending time of the appointment.

2.14. Workstation

A workstation refers to all treatment cabins in your salon. In the workstation form via the main menu “Resources”, you must enter a station no. as well as a description and abbreviation for each workstation.

The abbreviation is very important since it is used in many different parts of the agenda, for example in the appointment description and the heading of the datagrid in the “Availability” tab. This is why it is very important to enter a very explicit abbreviation for each workstation and equipment.

Also, in the “Administrator” tab, the time of use is shown based on invoicing data. If an appointment is not invoiced, then the time of use will not be calculated. The time of use is based solely on the starting time and the ending time of the appointment.

2.15. Packages

The package form in the main menu “Resources” is used to group products and/or services together to form a “package”. You can add as many products or services as you wish.

To display the products and services included in a package on the invoice, check the box “printable” or leave the box unchecked to display only the total price of the package. When you add a product or a service, you can change the unit price to create a “package” at a special price, as you wish.

A package contains a bar code, like any product or service. On the invoice, it is represented by the button showing the letter “R”, next to the “P” button for products and the “S” button for services.

In the “Administrator” tab, you can grant a discount on the sale or allow commissions on the sale as you wish. Moreover, you can see quantities sold and the total amount of sales.

2.16. Appointment book

When you open the appointment book, you go to the “List of appointments” tab for today. You can choose a date by clicking on the date in the calendar at the top. If nothing appears in the datagrid and the following message appears: “The salon is closed today”, this means you cannot take appointments on that date.

To change the salon’s opening hours, you must go in the software configuration (main menu –‘config’ button at the bottom) in the “Working hours - salon” tab. There, you can choose the period for the appointment book; the recommended and default period is 15 minutes. Then you can enter opening and closing time for each day of the week. If your salon is closed on a certain day, then leave the fields empty. Also, note that the minimum opening time is 6h00 and the maximum closing time is 23h00, according to a 24h00 format.

Please note that if you have selected a 15-minute period, then after a certain time you decide to change to a 10-minute period, certain appointments will not indicate the true ending time for these appointments. This is why it is important to choose one period format for the agenda and maintain it. We recommend using a 15-minute period.

In the list of appointments, when you wish to schedule an appointment, simply click on the starting time for the appointment and the column for the selected employee. If many employees appear in the datagrid, you can reduce the number of employees by choosing at the top of the datagrid one of the following options: All, TA = tanning, HA = hairdressing, EL = electrolysis, ES = aesthetics, MA = massage therapy or by “Departement”. This will work only if you have categorized your employees by type of service offered (see section entitled "Employee – Schedule" tab above). These options are very convenient especially when you have many employees.

Note in the left lower corner of the window the small calendar icon marked or not with a red "X". This allows you to mask or display the calendar at the top as you wish.

A star "*" in the appointment book indicates that the employee is not available. If a client wants an appointment with a specific employee but this employee has stars "*" at the selected time, you can still schedule the appointment, but do not forget to advise your employee to change his/her availability for this appointment.

On the right side of the form, there are no "add", "modify", or "delete" buttons. This is because appointments are scheduled in another form (see below) that appears when you click once in the appointment datagrid.

In the "History" tab, you can see all the appointments for a day appear in a line in the datagrid. You can choose a date by selecting in the calendar at the top, or choose several days by choosing a "starting date" and an "ending date". You can choose one or many employees in the dropdown list in the left centre of the form. If you wish to see a specific appointment, double-click to the left of a line in the datagrid. You can widen or reduce columns in the datagrid and set their width back to default by clicking on the words "default grid".

In the tab "Availability", you will see the use of equipment and workstations by employee or for all employees depending on the selection in the dropdown list (in the datagrid heading). You can choose a date by selecting it in the calendar at the top of the form. It is important to choose very explicit abbreviations for equipment and workstations. If you choose only one employee, you can see the appointment numbers at the left of the datagrid. Note in the lower left corner of the form the small calendar icon marked or not with a red "X". It is used to mask or display the calendar at the top at will.

The "Administrator" tab is empty for the time being. This tab is reserved for future use.

Appointment descriptions in the "List of appointments" tab contain the following items: the first name is the client name, the second line is the client phone number, the third line is the service and the fourth line is the abbreviation of the workstation and equipment, as needed. Each line starts with the appointment no. If the appointment is very short, you may not see all the information. You can also consult appointments in the "History" tab.

2.17. Scheduling appointments

Appointments may be scheduled by clicking in a cell in the datagrid of the appointment book. When the form opens, you can see the date of the appointment (cannot be modified), as well as the starting time of the appointment (cannot be modified), and the "maximum" time for this appointment given the availability of the employee performing the service. You can also see at the top the name of the employee (cannot be modified). These fields cannot be modified only when the appointment is initially scheduled. If you come back to the appointment at a later time, then you will be able to modify all these fields, except for the client name, by pressing the "modify" button. You can also "delete" by appointment by pressing the corresponding button.

You can choose a client by pressing the button below the field "client name". A search box opens allowing you to select a client or create one. Double-click to the left of the client you wish to select, or click once then press "OK". Once the client has been selected, you will see the client's information.

Next, choose a service by pressing the button below the field "service offered". In the search box, you can choose a service but you cannot create a new service. Double-click to the left of the service you wish to select or click once then press "OK". If you choose the service "electrolysis", you must then select a body "area" for this service only.

If the selected service has a "standard duration (min.)", it will automatically be added to the ending time of the appointment. You can nevertheless modify the ending time for this appointment.

You must select an ending time for this appointment that complies with the "maximum" time according to the availability of the employee performing the service, and with the format entered below the field "time". You can exceed the "maximum" time but a warning message will appear.

You can choose a "workstation" and an "equipment" only after you have entered the starting time and the ending time. After the latter have been selected, dropdown lists for workstations and equipments will be activated. You are under no obligation to choose a workstation or an equipment. Note that only available workstations and equipment will appear in the lists. You can consult their availability in the appointment book in the tab "Availability".

The appointment no. will be created only when the appointment is recorded. Once the appointment is scheduled, press "save" to save this appointment or "cancel" to cancel the appointment.

When you go back to consult a previously created appointment, you will see at the bottom of the form an "order" button. This is the client order that was created when you scheduled the appointment. In fact, each time an appointment is created, a client order is also generated. You can view this as an "open invoice" but it is not calculated. You can modify it or delete it using the main menu, the "Transactions" menu, then "Client orders", or by pressing the "Order" button in the appointment planning to add other products and/or services.

As for modifications, only appointments for the same day or following days can be modified. You can modify any field except the client. An appointment can be moved by changing the time and/or the date, but the application will check to avoid scheduling conflicts in terms of employee, workstation and equipment availability. If you modify a field other than "App. took place", the appointment number will be changed as well as the client order. For past appointments, only the field "App. took place" can be modified. If the appointment has taken place and the field is checked "yes", then it cannot be modified.

2.18. Payroll

The payroll is used to prepare each employee's wages according to various modes of payment. When you open the form, you can see a datagrid as in other forms. In the centre, you see the field "week of", allowing you to choose a week in the calendar (by clicking on the calendar button) by clicking on a day in the selected week. This will display employees who have been paid (recorded = checked) or not paid. If you choose a week in which all employees have been paid, you cannot modify these records.

In the tab "Work schedule", you can modify an employee schedule according to his/her working hours for the week. Note the morning, afternoon and evening time blocks. You must stay within the starting and ending times for the three periods, and stay in a 24-hour format.

In the tab "Absence", you can record employee absences and the reason for the absence. Note that when you enter an absence, you will not change the employee schedule as explained above. You must change the schedule to take into account absences. Absences are added in the same many as products or services in an invoice or a client order. You can delete absences only in the current week.

Choose a starting date and an ending date. When you have entered all the info, press the button at the top left of the data entry line (button with a checkmark "√") to add this record to the datagrid at the bottom. No data entry or modifications are allowed in the datagrid for management and safety purposes.

To modify a record (data line), click to the left of the desired line in the datagrid. The line will appear at the top of the screen, allowing you to enter your modifications. Press the checkmark button again to accept the modifications.

To delete a line, click to the left of the desired line the datagrid. Then press the leftmost button (with an X) when the line appears at the top of the screen. The line will be deleted from the datagrid. You can also double-click on the line you wish to delete in the datagrid. A message will appear asking you if you wish to delete this record.

In the tab “Administrator”, you can see the total pay for each employee, according to the hourly wage, basic salary and/or commissions. These salary modes are determined in the form “Employee”. You can also add a positive or negative amount in the field “Adjustment”. When the week is over, you can record it by checking the box “record week” to the left, but the week must be over before you can record it.

For each new week, the application automatically creates a new record for each employee in the payroll. If you do not wish to use the payroll and you do not want the application to create new records each week, go to the software configuration (main menu – button ‘config’) in the tab “Work schedule - employee” and at the bottom of the page, check “no” in the field “Activate employee work schedules”.

2.19. Paying employees

To pay employees, you need to go to the main menu, in the “Transactions” menu and choose the “Payment” sub-menu. Only the administrator has access to these menus.

When the payment window opens, note that there is no datagrid or search box. To see previous payments, press the “Print” button.

To make a payment, select in the list at the top “Pay an employee” or “Pay all employees”, then press the “add” button. In the lower field, the words “All employees” will appear if you choose to pay all employees at the same time, or the name of an employee will appear if you are paying a single employee. To choose an employee, press the button with the binoculars and select an employee in the list.

You must then enter the week of payment, by pressing the “calendar” button at the bottom of the form, and by selecting any day in the week you want to pay. Note that the datagrid only shows the employee or employees for which the week has already been recorded.

2.20. Sending e-mails – Clients / Suppliers

To send an e-mail to a client or supplier or several clients or suppliers, you need to need to go in the main menu and press on the button «Directory » and on the right, press on the button « clients – e-mail » or « suppliers – e-mail ».

When on the form « clients – e-mail » or « suppliers – e-mail », you will notice there are no datagrid at the opening. Instead, you end up on a window « Sending of e-mails ». To send an e-mail, press on the « add » button located on the right, then on the top list, make a selection in « select a choice of e-mail ». Then, depending on the choice, you will need to fill certain fields in the same section to finalize your choice for sending an e-mail.

In « sender's address», select an e-mail address. The sender's address will be filled according to the selected choice at the top of the list. Then, in the field « Object » you can write a short text to indicate a title. In the field « body of the message », you can write a longer and more detailed message. You can also add « attached documents » if you wish.

When all the fields have been filled, press on the « send » button located on the right.

If you send several e-mails, do not be worried if it takes a certain time.

To confirm appointments, in the « No – App. » tab, the list of clients that have no e-mail address in their respective file will appear by date. You will have to call these clients by phone in order to confirm their appointments.

In the « No – Pub » tab, the list of clients who do not have e-mail address in their respective file will appear by date.

In the « send PUB / APP » tab, the list of clients which have received e-mail publicity or which have received an appointment confirmation will appear by date according to the box checked located at the bottom on the right.

In the « Administrator » tab, you can delete e-mails already sent according to different choices in the list until a selected date.

To send e-mails to suppliers is very similar to sending e-mails to clients but only for sending orders or special messages. Also, you can consult the suppliers' list who do not have an e-mail address and this by date. You can delete already sent e-mails in the « Administrator » tab.

2.21. <u>Archives</u>

Archives are used to save your company data for security purposes (back-up). To archive your company data, simply go to the main menu and press the “Archives” button at the bottom of the form.

There are two ways to name archive files, using either the “default” method or the “personalized” method. The “default” archived company will bear the name “Cie” followed by the number of your database directory, followed by the date and time of archiving. Thus, you can archive your company data many times in a day, and always know exactly what time the back-up file was created.

The other method is “personalized”, meaning you can give a name to your company archives (ex: BeautySalon). When you choose a personalized name, the archive will bear the name “Cie” followed by the number of your database directory, followed by an underscore and the personalized name you entered (ex.: Cie02_SalonBeaute.mdb).

These archives are stored in the “Database/Archives” subdirectory in the main ***Alpha Salon*** directory.

Archives can be consulted by pressing the “Archives” button at the bottom of the first window where companies and users are selected. Then choose the archive file you wish to consult in the list that appears on screen. Only the “Company Management” can consult archives.

Archives are only accessible in consultation mode. No additions, modifications or deletions are authorized. But reports can be printed for consultation purposes.

You can also copy archive back-ups on a CD-ROM or on another computer such as a server for example.

A company archive can be recovered by the “Company Management”, either to create a new company or to replace an existing company. It is very important ot pay attention when performing this type of operation, especially when replacing a company.

2.22. Cumulatives

In most application modules (products, services, categories, clients, etc.), you can consult various monthly or annual cumulatives in the section “**Administrator**”. This can help you keep a closer eye on the management of your company. Monthly and annual cumulatives are saved for each year and can be consulted by choosing a year in the dropdown list at the top of the form.

On occasion, cumulatives may appear elsewhere than in the "**Administrator**" section. When performing a "Z" register close out, some of these cumulatives are reset to zero. There may be numerical or monetary cumulatives (ex: quantity of products sold, sales income by product, collected taxes, etc.).

2.23. Importing

Importing data from other versions of Alpha Salon or from the earlier "Estele" software can be don in the import form, in the "Company Management" menu, by pressing the "support" button. Depending on the version you already own or you wish to acquire, you can import your former data yourself into the new Alpha Salon. To do so, simply choose the tap that corresponds to the action you wish to perform.

Note that the "Estele" tab is for the early version in "DOS" format. This version will only export a few tables to Alpha Salon, namely: clients, employees, suppliers, product categories, products, service categories, services, and company.

As for other versions of Alpha Salon into Alpha Salon, all tables are imported without exception.

Schools and adult training centres can use the "Educational" tab to transfer new students into the "Employee" table in Alpha Salon if they use the "Jade-Tosca" software of the Department of Education.

When you import data, it is important to create a new company for security purposes, so as not to compromise your current company. You must select a "source" and a "destination" and choose at the top the desired import version.

2.24. Company Information

The "Information" form contains the contact information for your main company. This main company can own several companies in Alpha Salon. If you wish to modify this information, simply go to "Company Management", next press the "support" button and finally the "information" command at the right of the form. Once inside the form, you can directly enter your modifications in the corresponding fields, then press the "save" button to record your changes.

2.25. Maintenance

Maintenance is used to restructure certain tables in the database for all your companies, concerning terminals and cumulatives. If you encounter problems when saving certain forms, you should consider performing a maintenance operation.

2.26. Alpha Salon demo version

When you use the demo version, certain commands are restricted. You can create up to 50 invoices and 10 clients but no employees. The only available employee is the "**Administrator**" and the « **User** ». All printed reports will show the company name "Alpha Salon demo".

To register the software, when you open the latter, choose in the list of companies "**Company Management**", in the user list "**Company Management**", then enter the password. In the demo version, only one button, "Support", appears on screen. Click on this button to reach the technical support. Then click on the "Access code" button. In the registration code box, choose the desired software version in "Application selection". You can check the box "Service plan", to benefit from certain advantages such as free updates for one year. Note that the service plan is not free of charge.

When all your choices are made, press the "Generate" button so that the application can generate a key so you can register. Then, you will receive a registration key, which you can enter in the field to the right of the generated key. Press the "Save" button to register you ***Alpha Salon*** application.

Note that upper case and lower case letters are very important in registration keys. Also pay attention to zeros (0) versus the upper case "O" letter. The zero is narrower than the upper case "O".

Once your key has been validated, the entire application is unlocked. You can now create a company and enter all your data to start-up (ex: categories, products, services, modes of payment, etc.).

Also note that the registration code box is also used to enter other codes to unlock certain functions or modules in the ***Alpha Salon*** application.