



Section V-FRONT DESK..... 3

  Daily Responsibilities..... 3

    Opening Salon ..... 4

    Begin the day..... 5

    Greeting Guests ..... 5

    Telephone System..... 6

    Telephone Etiquette ..... 7

    Scheduling Appointments..... 9

    Customer Care Procedures ..... 9

    Basic Appointment Booking Procedures..... 12

    Change Guests Appointments for Stylist ..... 13

    Authority ..... 17

    Guest Check Out Procedures ..... 17

  Computer Procedures ..... 20

    Open Salon/Register Ring up ..... 20

    Closing - Computer at End of Day & In Salon Procedures..... 20

    Doing the Daily Deposits..... 21

    Reports..... 22

    Scheduling Appointments..... 24

    Entering Pop Up Notes..... 27

    Merging Duplicate Client Information ..... 30

    Point of Sale- Client Check Out ..... 35

    Gift Card Purchase Procedures ..... 39

Employee Point of Sale – Check Out.....	43
Redeeming Coupons and Discounts .....	44
20% Employee Family Discount .....	48
Entering Client Formulas.....	51
Redeeming Points .....	53
Manually Adjusting Points .....	56
Printing Stylist Tickets for the Following Business Day.....	59
Print Appointment Grid for the Following Business Day .....	64
Product Refund Sales .....	<b>Error! Bookmark not defined.</b>
Booking Standing Appointments .....	<b>Error! Bookmark not defined.</b>



## Section V-FRONT DESK

### OPERATIONS MANUAL

Welcome to Cutting Loose! Please keep this manual handy during your first weeks of employment; you will find it helpful to look up procedures, and to make sure nothing is forgotten. It is very important that our guests receive a CONSISTENT, QUALITY EXPERIENCE every time they call or arrive at the salon. Guests are your number one focus! Always use the scripts on the desk. SAY IT THE SAME WAY EVERY TIME. Our verbiage is proven to work, so please, no ad-libbing.

#### Daily Responsibilities

As a reservationist you are, first and foremost, responsible for all of our guest's needs. It is always more important that your energy is put into greeting or speaking with guests (on the phone or in person), helping guests with color robes, salon tour, or Take Home choices, and seeing to guest comfort than any other salon duty. It will be your role to coordinate and delegate duties to other team members, in order for you to focus on the guest's experience.

Here at CL all of our client records, appointments, and retail inventory are maintained in a computer software application named Millenium. Training and manuals are available for the team and it is the responsibility of the salon coordinators to become proficient on the proper use and functions of this software applications. We wow our guests with exceptional customer service, starting with the great welcome with the reservationist, an amazing and relaxing experience in the Lather Lounge, a precision haircut by one of the talented hairstylists, a professional Take Home recommendation and the Wow goodbye.

1. Guest comfort is your number one priority.
2. Answering multi line phone system with a smile
3. Scheduling appointments using computer
4. Coordinate time, skills and teamwork to keep salon flow running smoothly
5. Print and update service tickets & daily agenda.
6. Running accurate daily report
7. Balancing drawer at end of your shift.
8. Checking guests in and out in the computer
9. Salon cleanliness
10. Dusting and fronting retail shelves in the take home area
11. You are the first and last face the guests see
12. Make every guest feel welcome
13. Represent our CL/AH culture
14. Guest experiences must be consistent and excellent
15. All tickets must be totaled out at the end of the day
16. Monitoring the duties of the Assistants and Stylists

## Opening Salon

- Turn off alarm
- Turn on Monitor & sign in to Millennium
- Take phone off of "Night mode"; Make sure all daily tickets that were printed the previous night are in the holder.
- Set Temp to 73 degrees on both controls (near alarm & toolbar),
- Turn on all lights in front/lather lounge/salon area on your way to office and waterfall in lather lounge
- Turn on TV and A/V Center in office (iPod, DVD & set DVD to repeat)
- Turn on Monitor to computer in office

- Get register bag, open & balance register (\$300.00). Place bag under cash drawer within the register.
- Check voice mail for messages in the message center, call immediately
- Make sure candles in salon/bathroom are lit
- Make coffee, cut lemon for water, fill water container with ice.

### Begin the day...

- Greet each guest as they enter with a smile! Welcoming them into your home.
- Check in and seat every guest immediately – Don't forget tours for new guests and color smock for color services!! Seat guest who are having a color treatment in Color Center. Do NOT let guests stay in front, and do NOT tell them to seat themselves.
- Hand all guests a Beverage Menu, Lather Lounge upgrades and show all new guests a client information sheet.
- Notify protégé when any guests arrive within 10 seconds!! If the protégé is with a guest, wait patiently before you politely excuse yourself for interrupting and announce the arrival of their next guest.

### Greeting Guests

#### 3 Steps of E<sup>2</sup> Service

1. A warm and sincere greeting, using guest's first name
2. Anticipation of fulfillment of each guest's needs
3. Wow goodbye! Give warm message.

The first impression a guest receives is the most important one, whether they are a new guest, a walk-in or a long-standing regular. When the door opens, everyone coming through it should see a friendly, welcoming face, and hear in your voice that you are pleased to see them. This is the service expectation all our guests have of Cutting Loose.

Remember that the greeting should happen within in the first ten (10) seconds and it accounts for up to eighty percent (80%) of the overall service

Say, “Welcome to Cutting Loose, do you have a reservation with us today?” to each new arrival. Never assume that a customer has been here before. If they have an appointment, check them in (click “check in/out” by right clicking mouse).

New guests are asked to fill out a client information sheet, inquire of all regular guests if there may have been any changes in their information and update their record. Offer them a beverage.

Make the guest comfortable in the reception area, and let them know they are free to browse, and that you can answer any questions they have about products or additional services. Let the stylist or protégé know their guest is here. After 10 minutes approach the appropriate stylist, wait to break in on their conversation, quietly excuse yourself for interrupting, and say, “Jane is here”. Always use the guest’s name. Don’t say, “Your next appointment” or “your highlight is here”. Let the stylist know if the guest is early, and offer to find a team member to start for them, if necessary. If a stylist is running late, let the guest know and by how much time.

## Telephone System

When the phone is ringing, money is ringing. Money has been spent to make the phone ring.

We have a multi-line phone system. Line 1 and 2 are Cutting Loose and Line 4 is protégé.

The system is equipped with voice mail if all lines are busy and a separate message for closed hours. Check for the blinking light under the message center throughout the day.

To retrieve messages, go to message center, listen, write down messages and respond appropriately or communicate with person who message is for.

If the phone rings and you are with a guest, ask if would be ok to answer the phone, put the call on hold, so that you can further assist them.

**Phone calls are opportunities to win guests and make money. It is not a disruption when the phone rings.**

## Telephone Etiquette

**This is an extremely important part of a reservationist's performance. The first and ongoing impression a guest gains on the phone will stay in their mind.**

**Always answer the phone with a smile in your voice.** Use the standard greeting: "We appreciate your call at Cutting Loose Salon, This is (your name), who do I have the pleasure of speaking with today?" No matter what is discussed, **ALWAYS** end every call by saying, "Is there anything else I can assist you with today? Thank you for calling".

Listen well and ask questions to help understand specifics from the guest. Example:

**Customer:** "I'd like to book an appointment"

**You:** "Have you been with us before?"

"Do you have a particular stylist in mind?"

"Will that be for just a haircut or will that be for a color & cut?"

"Would you like the first available time?"

**Customer:** "I would like to have my hair colored"

**You:** "Would you like a base color or highlighting service?"

"Will you need a haircut with your color?"

"Do you want a blow dry and style or leave it wet?"

"Is there any corrective color?"

**Customer:** “How much are your haircuts?”

**You:** ”All of our stylists are categorized into levels depending upon their years of experience and advanced education.”

“All of our associates are handpicked by Coral and receive extensive training. Once they graduate from the Associate Training program they enter into the Rising Star level”

**Customer:** “Why did your prices go up?”

**You:** “Stylists have the opportunity to move up in our levels with more education, experience and are more in demand. The levels are constant it is the stylist who advances.”

**Customer:** “Tell me a little about your salon?”

**You:** \_\_\_\_\_

#### **To be inserted: Introduction Speeches**

#### **SOME THINGS TO REMEMBER:**

- Always repeat back all scheduling information. EX.” I have you reserved for Sunday, August 6<sup>th</sup> at 4:00pm with Stylist XXX for a base color and cut.”
- Use good grammar and dialog in a professional manner.
- Do not chew gum, eat or drink at the front desk.
- Never give a guest a “dead end”: if you don’t know the answer to a question, ask if you may find out and call them back (do so, as quickly as possible). Say “I will find someone who can better answer your question.”

- When you must put a guest on hold, first ask, “I am attending a guest, may I put you on brief hold for a moment?” Wait for a response; (putting them on hold, if necessary), then return, saying, “thank you for holding, who do I have the pleasure of speaking with today?”
- If you have a complicated situation, or need to put someone on hold for longer than two(2)minutes, ask if you may take their number and return their call within 15 minutes, when you can better assist them.
- If guests are looking for something we don’t offer, or need additional help, refer them to someone else in the salon that may help them, if possible.

## Scheduling Appointments

We book in increments of 15, 30 and 45 minutes. Our software is set up to show you the appointment book in all spaces. Leaving 15 minute gaps in the books adds up to hours of unproductive time, so guide guests to the nearest 15 min.

The software will prompt you through the booking procedure. See “computer training” for more information on booking appointments.

## Customer Care Procedures

### **A GUEST WALKS IN AND YOU ARE ON THE PHONE**

Continue with conversation on phone and motion with a comforting wave and a smile insuring the guest you will be with them. Find a place in the conversation to ask the guest to hold and greeting the guest.

Continue with the phone guest then proceed to check guest in.

### **GUEST WALKS IN AND YOU ARE CHECKING IN ANOTHER GUEST**

Finish greeting the first guest than address the second guest just as the first and proceed through checking in.

**GUEST WALKS IN AND YOU ARE CHECKING OUT ANOTHER GUEST**

Continue with conversation and motion with a comforting wave and a smile insuring the guest you will be with them. After checking out the first guest, proceed with checking in the next guest.

**GUEST WALKS IN AND STYLIST IS RUNNING LATE**

**You:** I do apologize Guest's Name

It seems Stylist is running Fill in the time behind. Will this interfere with another of your commitments? Wait for response if **No**

**You:** Wonderful it shouldn't be that much longer. But if you change your mind please feel free to let me now and we will see what we can do. Offer a beverage and/or magazine.

If **Yes** (Check and see if there is other stylists that can perform the service)

**You:** Name of other Stylist is available; would you like to have The Service with them?

**You:** Wonderful I will tell Stylist you're here.

If **NO**, they refuse another Stylist.

**You:** I am so sorry for the incontinence. Fill in the Name would you like to reschedule?

**GUEST WALKS IN AND APPOINTMENT IS WRONG**

- FIRST CHECK TO SEE IF WE CAN CORRECT APPOINTMENT ERROR WITHOUT GUEST BEING AWARE THAT THERE HAS BEEN A MISTAKE

**You:** Guest's Name I do apologize there must have been a mistake we have you down for a service on date and time.

(Scan to see if another Stylist has an opening)

**You:** Stylist is available for that service right now would you like to shift over to them for your service? If YES, move appointment over

If NO,

**You:** Would you like me to reschedule you with Stylist for the next available time for that service.

And I can also put you on their pending list.

### **GUEST WALKS IN MORE THAN FIFTEEN MINUTES (15) LATE**

Check to see if stylist could still do the service

If NO,

**You:** Stylist Name is fully reserved today and if she/he were to start you now that would put Him\Her behind for the next guest. Can I offer another Stylist or would you like to reschedule

### **GUEST WALKS IN WITH NO APPOINTMENT- NEW GUEST**

**You:** Hello Welcome to Cutting Loose my name is Fill in your name.

**Guest:** I would like to have an appointment today.

**You:** Do you have a stylist you prefer? (If YES, Click on weekly appointment for that Stylist.)

If NO, then proceed.

**You:** Let me tell you a little about our salon. We offer talented Stylist at a variety of price ranges. Our Salon Owner Haircut w/Blow-dry is \$75.00, Master Stylist is \$60.00, the Senior Designer is \$50.00, the Designer Stylists is \$42.00 and our Stylist \$35.00, Rising Star \$25.

Do you have a preference of stylist level? (If YES, find best availability at that level.)

**You:** What type of service would you like today?

(Get all the information for the guest profile)

## Basic Appointment Booking Procedures

1. Answer the Phone in less than 3 rings. Or greet the guest within 10 seconds of walking in.
2. Ask the guest if they've been to the salon before
3. Ask which Stylist they request/prefer and what service they would like to get done.
4. Ask if they prefer morning or afternoon. Early in the week or late in the week. Give them the first available appointment. Try and book them today. Try to sell morning appointments first. Schedule them as close together with other appointments as possible.
5. If the guest wants to book a color, be aware that colors take 30 min. to apply, Then 45 min. to 1 hr. to process, and 30 or 45 min. to finish. The availability for appointments is the processing 45 min. for a haircut and to begin another color application. The 45 min. after the color service is only available for a haircut the day of the service. So as to try and book another color service in the gaps.
6. It is EXTREMELY IMPORTANT to confirm the spelling of the guests name so as not to allow duplicate names in the database. Ask the guest if they ever go by any other name. If you can't find them type in the last four digits of their phone number. All guests with those last four digits will pop up. Making it easier for you to find them.
7. It is also EXTREMELY IMPORTANT to confirm the correct phone numbers and email. We call all first time guests and send promotional materials via email.

### **Reconfirm:**

1. Address the guest by name to make sure you have booked the correct appointment under the correct name.
2. The services which will be performed.
3. The stylist
4. The time
5. The date
6. We do request a 24hr cancellation

7. Ask the guest if there is anything else you can do for them.

**Guest:** Answer

**You:** We look forward to seeing you. Thank you and have a wonderful day.

### **Change Guests Appointments for Stylist**

A stylist should never take a day off if they have appointments on that day. In case of an emergency use this script.

**You:** guest's name, this is your name at Cutting Loose. Stylist name, asked me to call you because they will not be able to be here on date for your appointment. I can reschedule you for another day, or if you need to another stylist is available at the same time (or at time they are available.)

**Guest:** Answer

If this is inconvenient for the guest than your priority is to make the guest happy. Do whatever the guest requests.

**You:** I am so sorry for the inconvenience. Thank you so much for understanding.

### **STYLIST SCHEDULE IS FULL**

**You:** stylist name is fully occupied at that time.

**You:** Is there another day that you can come in with stylist name

**\*You:** Can I put you on a pending list and let you know if there are any cancellations. May I also go ahead and schedule you for another time in case I can't get you in?

**\*You:** Can I take your name and number and check with stylist name and see if they can find a space for you or second stylist is available and they are at the same level as (first stylist).

**\*Only do this in extreme cases**

**STYLIST IS NO LONGER EMPLOYED AT CUTTING LOOSE**

**You:** stylist name unfortunately is no longer employed here. However stylist name is servicing some of their guests and we are offering a 50% discount for booking with them for the inconvenience. We also have all your formula information on file.

**PERSONAL CALL FOR STYLIST**

Guest calls ask for someone other than you.

**You:** stylist name is busy at the moment would you like to set up an appointment?

Guest says it is personal

**You:** Would you like to leave a message?

**WHERE ARE YOU LOCATED?**

**You:** Where are you coming from?

Guest answers from I-75 or Tamiami Trail (US 41)

**You:** Give guest directions.

- Mapquest our location for yourself in order to familiarize yourself with the directions.

**RECALLS OR FOLLOW UP CALLS FOR FIRST TIME GUESTS**

- ARE MADE 2 DAYS FOLLOWING THEIR APPOINTMENT.

**RECALLS-LEFT ON ANSWERING MACHINE**

**You:** Hi this is your name from Cutting Loose. I was just calling to see how you enjoyed your service on date with stylist name. And how the product is working for you? Please call us at

941-358-6000 if there are any questions and we are looking forward to seeing you in/on (6 weeks if not booked or the date if they are.) Thank you and have a wonderful day. (Leave message on answering machine)

### **RECALLS -GUEST ANSWERS CALL**

**You:** Hi this is your name at Cutting Loose. I was just calling to see how you are enjoying your \_\_\_\_\_ - (services).

**Guest:** Answer is positive

**You:** I am glad you had a great experience. I want to thank you for giving us the opportunity to serve you. May I reserve your time for your next visit in \_\_\_\_\_ weeks?

Thank you and we are looking forward to seeing you.

**Guest:** Answer is challenging

**You:** I am sorry you are not completely satisfied with your service. May we have the opportunity to correct this for you? I will be happy to have you come in to the salon as soon as possible.

(Always book with original stylist, if the guest refuses, then book with another stylist.)

Thank you and we are looking forward to seeing you.

### **STYLIST IS RUNNING MORE THAN 30 MINUTES LATE AND YOU CALL THE GUEST**

**You:** guest name, this is your name from Cutting Loose. Stylist name asked me to call you to let you know they running (minutes) late so you would not have to wait. Is that Okay with your schedule?

**Guest:** Yes

**You:** Okay, Thank you, we will see you at state time

**Guest:** No

**You:** I am so sorry, would you like to reschedule for a different time? Or I can see if someone else is available.

### **GUEST CANCELS A FUTURE APPOINTMENT**

**You:** Would you like to reschedule your appointment?

**Guest:** Answer

**You:** What day would be good for you? (Reschedule appointment and continue) Thank you so much for calling ahead we really appreciate your consideration.

### **GUEST CANCELS APPOINTMENT ON SAME DAY**

**You:** Would you like to reschedule your appointment?

**You:** Thank you for calling and letting us know that you won't be able to make your appointment. If possible in the future would you please notify us at least 24hrs ahead, so we can offer that appointment to another guest? Thank you and have a nice day.

### **GUEST DID NOT SHOW FOR APPOINTMENT (ANSWERING MACHINE)**

**You:** Hello guest name, this is your name from Cutting Loose. We had you down for a state time appointment with stylist name for service. It's state time about now. We were just worried and were hoping everything is Okay. If you would like to reschedule please give us a call at 941-358-6000. Thank you.

### **GUEST DID NOT SHOW FOR APPOINTMENT (ANSWERS)**

**You:** Hello guest name, this is your name from Cutting Loose. We had you down for a state time appointment with stylist name for service. We were just hoping everything is okay?

**Guest:** I forgot (if this is a first time find out if they were confirmed and let it slide)

**You:** Rebook appointment.

Check history to see if it is a 3-time occurrence; fill a request form to management. We will send out a letter. No Show letter (See Appendix).

## Authority

**You have the authority to make our guests happy.** If you encounter an angry or dissatisfied guest, you have the ok to do what it takes to make the situation right. The preferred steps are:

1. Listen to the guest until they have explained the situation to their satisfaction
2. Don't interrupt or make judgments or excuses
3. Treat them with respect, understanding and empathy. Say, "I'm sorry this happened".
4. Ask if we can redo the service, with the same or different stylist, or offer them reconditioning, free product or a gift certificate for a different service.
5. If they absolutely do not want another service or product from us, Ask if they would prefer to speak to an owner or manager
6. Thank them for sharing their concerns and apologize for their experience.
7. Report the incident to a leader for follow-up with adjustment forms.
8. If payment is to be refunded, we must check how payment was made.
  - if paid by credit card-refund by credit card
  - if paid by check, we must wait 10days to clear bank before refunding
  - if paid in cash- we will issue a check refund

## Guest Check Out Procedures

- DO NOT CHECK THE GUEST OUT UNLESS YOU HAVE A GUEST TICKET. 
1. Confirm the guest in front of you is the guest name on the guest ticket.
  2. Confirm the correct spelling, the correct address, and the correct phone numbers are all in the computer.
  3. "How was your service today?"
  4. "What products did your stylist recommend today?"

5. Check purchase history to familiarize yourself with the guest's history.
6. Confirm the services that are listed on the computer are the same, services that were performed.
7. Give the guest the total so they can figure out their payment amount.
8. "May I book your next appointment for you now?"
9. Rebook their next appointment.

(Rebook Script: **You:** Stylist would like to see you in # of weeks that will be Date which will be day of the week. Would you like about the same time?

10. Give the guest an appointment card with their appointment on it
11. "Is there anything else I can do for you today? Thank you and have a great (day/evening)"

### **REFERRALS**

Our guests receive an email offering 500pts towards retail when they refer a new guest to us.

We also offer, "Refer a Friend". We offer 50% off for the new guest and also for the guest that did the referral. The stylist tracks these offers in the client's formula section of information card.

### **COUPONS**

To accelerate our new stylist growth on the floor we offer "Free Hairdressing". To be used 1 per new guest. It is necessary for the guest to have the coupon in hand in order to receive the % off.

### **SELLING EXTRA SERVICES**

One of the expectations of front desk coordinators is to fill our appointment books as efficiently and completely as possible. One way to do this is to look for extra openings and offer additional services to guests on the phone. Look all the way across the books to see what other services you can offer, i.e. color, deep conditioners, PM shines.

### **GUEST PRODUCT RETURN/EXCHANGE**

Our 100% guarantee allows guests to return any product within 30 days. Encourage an exchange, but refunding is a last resort. If the return is because of an ingredient challenge or allergic reaction, a return form must be filled out. These are located under the desk. Products will be returned to distributor.

### **TEAM MEMBER PERSONAL SERVICE**

They are to be performed on your time off or when no guests are booked. A fee of 20% will be charged for products used with any chemical service. This is to be paid before service is provided. Hair must be finished to be behind the desk. Refer to benefits section in manual.

## Computer Procedures

### Open Salon/Register Ring up

1. TURN COMPUTER MONITOR ON
  2. DOUBLE CLICK ON MILLENNIUM ICON. ENTER ID & PASSWORD
  3. OPEN SALON, COUNT STARTING CASH
  4. RIGHT CLICK ON GUEST'S NAME, SELECT RING-UP/CHECK-OUT OPTION
  5. CHECK REGISTER TO GUEST/STYLIST TICKET AND MAKE SURE ALL SERVICES ARE ENTERED AND ALL PRICES ARE CORRECT. DOUBLE CHECK ALL STYLISTS NAME, SERVICES & PRICES.
  6. IF COUPON IS PRESENTED— HIGHLIGHT ITEM FOR DISCOUNT, CLICK ON DISCOUNT BUTTON, THEN COUPON, FIND COUPON, CLICK ADD TO DISCOUNT LIST, ENTER INFO & SAVE
  7. IF PURCHASING GIFT CERTIFICATE -CLICK ON GIFT CERTIFICATE BUTTON AND ENTER ALL INFO, ENTER LAST 4 # OF FRONT GIFT CARD & SAVE. ON CREDIT CARD MACHINE, ENTER ALL #S ON THE BACK OF GIFT CARDS
  8. IF GUEST HAS A REFUND—CLICK REFUND BUTTON—THEN PRODUCT, SERVICE & ENTER ALL INFO & SAVE.
  9. CLICK –SALE
  10. ENTER THE TYPE OF PAYMENT RECEIVED FROM GUEST
  11. ENTER THE AMOUNT RECEIVED-CLICK OK
  12. GIVE CHANGE DUE TO GUEST-CLICK OK
  13. RECEIPT PRINTS OUT—STAPLE TO GUEST/STYLIST TICKET WITH COUPON, GIFT CERTIFICATE, PROMO FLYER, ETC.
- PLACE TICKETS WITH RECEIPT ATTACHED IN HOLDER AS SOON AS POSSIBLE

### Closing - Computer at End of Day & In Salon Procedures

1. PRINT GUEST TICKETS AND DAILY EMPLOYEE PLANNER FOR THE FOLLOWING DAY ALONG WITH APPOINTMENT BOOK DAILY GRID.

\*CLOSE CASH DRAWER AND PRINT REGISTER RECEIPT, PLACE IN INDIVIDUAL DEPOSIT BAGS. (IF GUESTS ARE IN SALON, COUNT DRAWER QUIETLY SO THEY DO NOT FEEL RUSHED)

\*PLACE CASH DRAWER BAGS WITH DEPOSIT BAG IN THE SAFE AND LOCK IT.

\*EXIT OUT OF MILLINIUM AND TURN OFF ALL COMPUTERS

2. TURN AND FACE ALL STYLING CHAIRS TO MIRROR, SHUT OFF ALL SURGE PROTECTORS
3. LOCK FRONT DOOR AND TURN SIGN TO CLOSED
4. THROW AWAY NEWSPAPER
5. MAKE SURE ALL PRODUCTS ARE FRONTED.
6. ON SATURDAYS THROW AWAY AND CLEAN ALL FLOWER VASES
7. DO A WALK THROUGH THE SALON AND MAKE SURE EVERYTING IS CLEANED AND IN ITS PLACE. WE WILL HAVE PEOPLE LOOKING IN THE WINDOWS AND WANT TO PROTRAY A PROFEESIONAL IMAGE AT ALL TIMES
8. TURN LIGHTS OFF WITH BREAKER
9. CLOCK OUT AND EXIT MILLINIUM
10. SET ALARM AND LOCK DOORS

## Doing the Daily Deposits

1. GETTING STARTED PRINT "REGISTER REPORTS" "MR080" MOVE ALL AND PRINT
2. MAKE SURE REGISTER DEPOSIT SLIPS MATCH WITH WHAT is PAPER CLIPPED.
3. STAPLE ALL REGISTER DEPOSITS SLIP & PAY OUT RECEIPTS TO REGISTER SUMMARY
4. SEPERATE THE ENTIRE VISA, MASTERCARD, DISCOVER, AMEX, OTHER, CHECKS AND CASH.
5. USING THE "DEPOSIT ONLY" STAMP THE BACK OF EACH CHECK
6. ON OUR BANK DEPOSIT SLIP:
  - \*WRITE THE DATE OF THE DEPOSIT
  - \*ADD UP ALL YOUR CASH & WRITE THAT AMOUNT ON THE SLIP
  - \*ADD UP ALL YOUR CHECKS USING THE ADDING MACHINE & PAPER CLIP THE MACHINE PAPER WITH THE CHECKS &WRITE THE AMOUNT ON THE SLIP
  - \*ADD UP TOTAL CASH & CHECKS AND WRITE THE AMOUNT ON THE SLIP
7. BANK DEPOSIT TICKETS (BANK BOOK)
  - \*WRITE THE DATE OF THE DEPOSIT
  - \*WRITE DOLLAR & CENT AMOUNT BY "TOTAL CURRENCY"

\*WRITE CHECK AMOUNT BY "TOTAL CHECK"

\*WRITE TOTAL (CASH & CHECKS) IN "GRAND TOTAL"

\*TURN BOOK ON ITS SIDE & AGAIN WRITE THE TOTAL AMOUNT

\*TEAR OFF WHITE COPY (LEVE YELLOW ATTACHED) & PLACE IN ENVELOPE \*ALONG WITH THE CASH AND CHECKS IN DEPOSIT BAG.

8. ON REGISTER SUMMARY SHEET WRITE ON THE BOTTOM THE DEPOSIT OF CASH AND CHECKS

9. KEEP THE REGISTER SUMMARY SHEET IN FRONT OF YOU WHILE YOU ADD TOGETHER THE CREDIT CARD SLIPS

\*ADD THE VISA, MASTERCARD, DISCOVER, AMEX & OTHER. AS YOU ARE DONE WITH EACH ONE LOOK ON THE REGISTER SHEET TO CHECK IF THE NUMBERS MATCH. IF THEY DO, CHECK IT OFF

\*ONCE YOU ARE FINISHED, SKIP A FEW LINES UNDER "OTHER" & WRITE THAT AMOUNT OF ALL CHARGES ADDED TOGETHER

10. ONCE YOU HAVE THE TOTAL CHARGES AMOUNT, WRITE ON OUR BANK DEPOSIT SLIP THAT AMOUNT AND PUT IN THE SAFE

## Reports

PULLING UP 1<sup>ST</sup> TIME GUEST CALL BACK SHEET:

1. FROM MILLENNIUM (APPOINTMENT BOOK SCREEN) CLICK ON "APPOINTMENTS"
2. CLICK ON "APPOINTMENT REPORTS"
3. CHANGE REPORT CATEFORY TO "REFERRALS"
4. CLICK ON "DR020 (REFERRAL DETAIL)"
5. CHANGE TO THE CORRECT DATES
6. CLICK "PREVIEW"
7. CLICK "MOVE ALL" & THEN "OK"
8. PRINT

PULLING UP THE MONTH'S GUEST RETENTION SHEET:

1. FROM MILLENNIUM (APPOINTMENT BOOK SCREEN) CLICK ON "APPOINTMENTS"
2. CLICK ON "APPOINTMENT REPORTS"
3. CHANGE REPORT CATEGORY TO "ANALYTICAL"
4. CLICK ON "MA040 (GUEST RETENTION SUMMARY)"
5. CLICK "PREVIEW"
6. CHANGE THE MONTH TO 6 MONTHS AGO. EX: IF WE'RE IN THE 1<sup>ST</sup> WEEK OF SEPTEMBER CLICK ON THE MONTH OF FEBRUARY. THE DATES TO CHECK ARE FEB 1<sup>ST</sup> TO AUG 31<sup>ST</sup>.
7. MAKE SURE THE YEAR IS CORRECT.

8. MAKE SURE THE NUMBERS OF MONTHS TO CHECK FOR RETURN VISIT IS 6
9. CLICK "OK"
10. MOVE OVER ONLY THE STYLISTS.
11. CLICK "OK" & "PRINT"

#### PULLING UP THE MONTH'S RETAIL REPORT FOR BONUSES:

1. CLICK ON "REGISTER"
2. CLICK ON "REGISTER REPORTS"
3. CLICK ON "MR040 (EMPLOYEE SALES-WEEKLY)"
4. CHANGE DATES SO THAT THE REPORT COMES UP FOR THE ENTIRE MONTH
5. MOVE OVER ONLY THE STYLISTS
6. CLICK "OK" & "PRINT"

#### PULLING UP THE SHEET TO CHECK EMPLOYEE TICKETS

1. CLICK ON "REGISTER"
2. CLICK ON "REGISTER REPORTS"
3. CLICK ON "MR045 (EMPLOYEE SALES-SUMMARY)"
4. CHANGE THE DATE & TIME (ALWAYS 7 AM- 9 PM)
5. CLICK ON "PREVIEW"
6. MOVE ALL (EXCEPT EMPLOYEE PURCHASES)
7. PRINT

## Scheduling Appointments

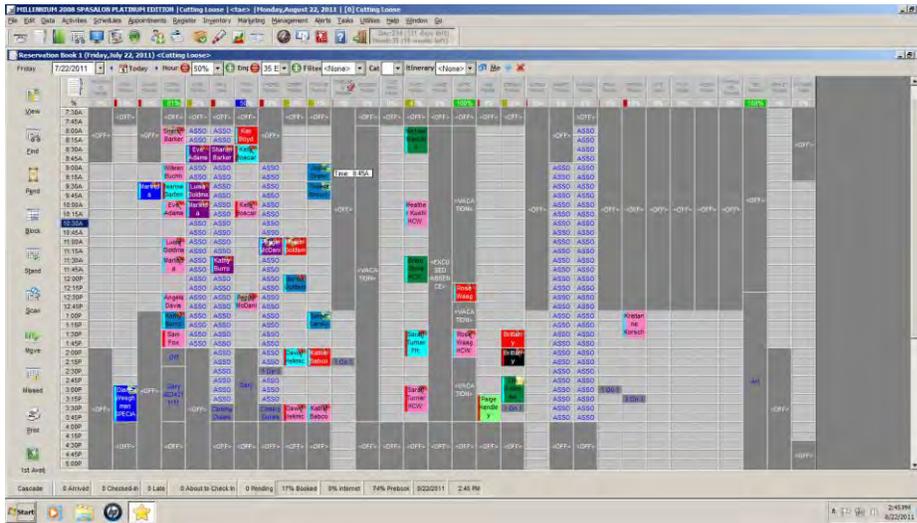


Image 1-01

Locate the desired time to be scheduled in the appropriate stylist column of the appointment book.

Double Click on the appointment time.

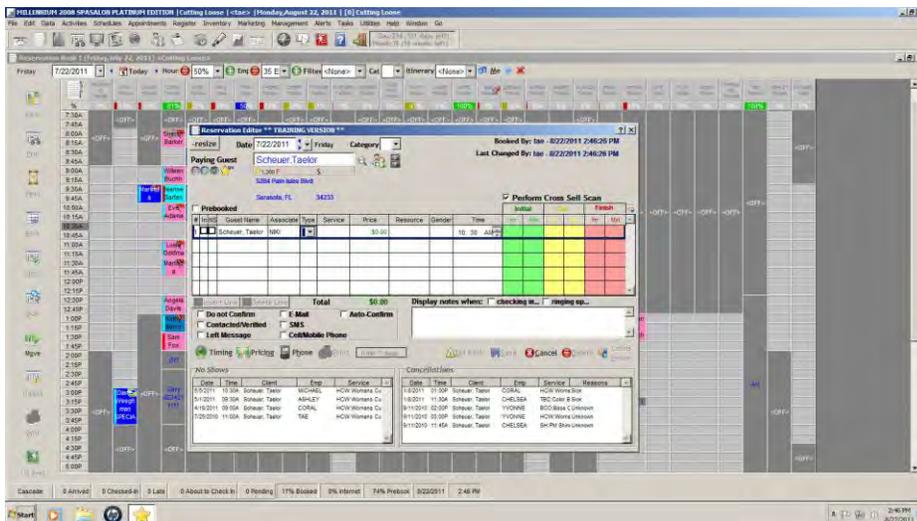


Image 1-02

Appointment Editor Screen will open.

Enter paying client name, last name, then first, separated by a comma. Or enter partial last and partial first name separated by a comma.

Click Enter.

If more than one client matches the criteria, a list will appear, select the correct client name.

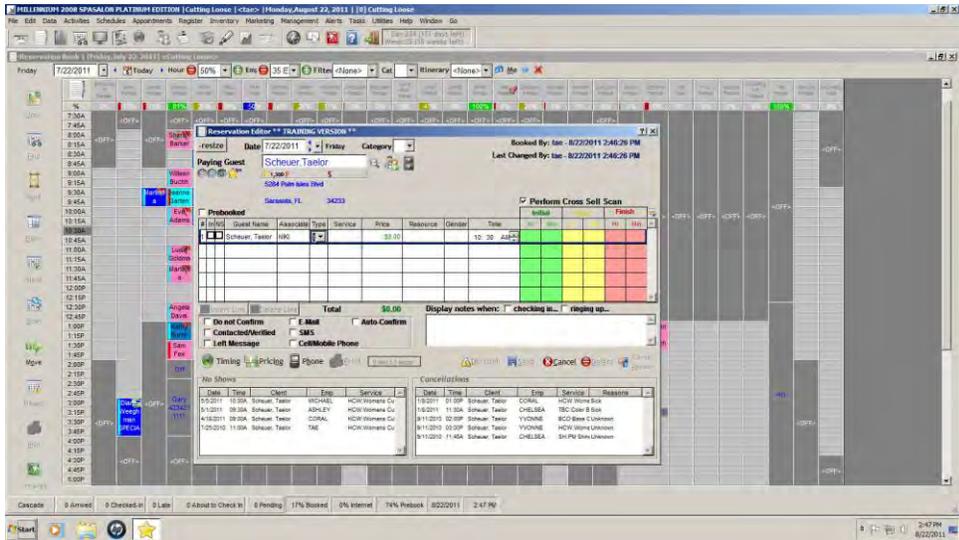


Image 1-03

Select a type of client from the drop down list.

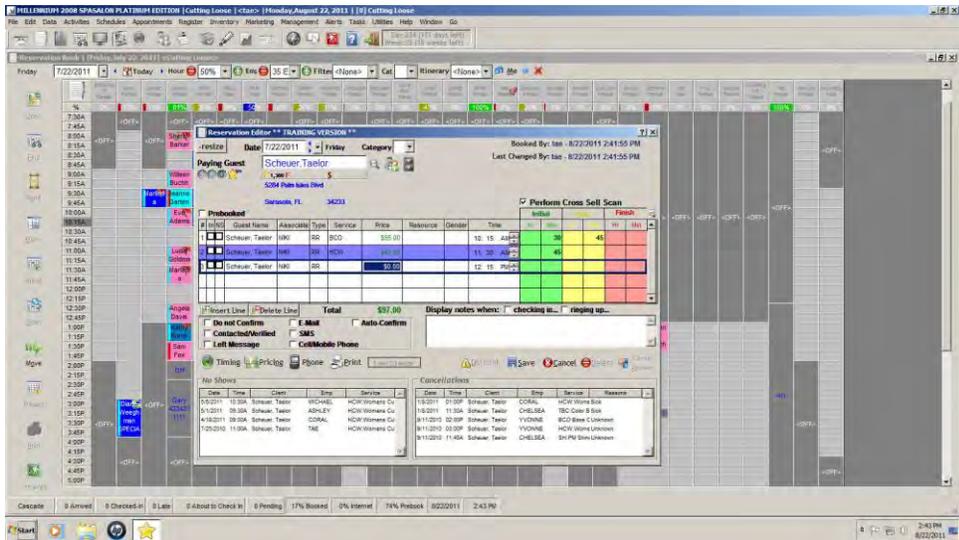


Image 1-04

Enter a Service

The initial and Gap time will pop up automatically.



### Entering Pop Up Notes

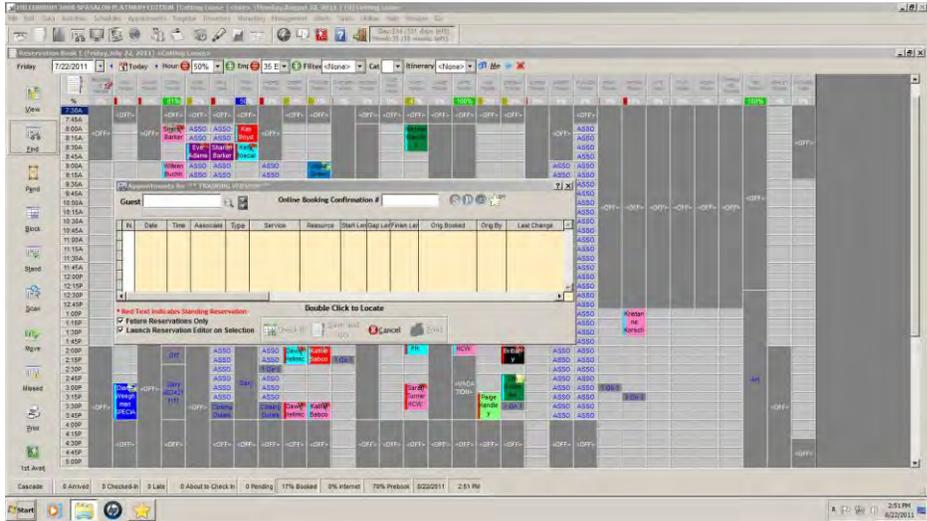


Image 2-01

Click "Find" in upper left side of the screen. Last, first name of client.

Right click on client name and go down to View/Edit Notes.



Image 2-02

Click on Edit Notes

Check both boxes: Display Notes in Register and Display Notes in Appointment Book.

Write any notes that will help the stylist with this client and any information that would “wow” the client.

Click Save.

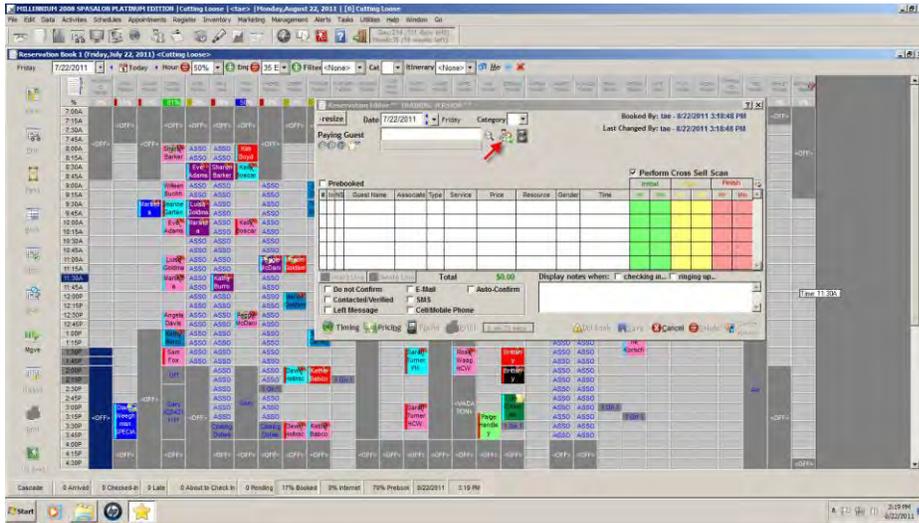


Image 3-02

Click on the folder with the plus sign (+).

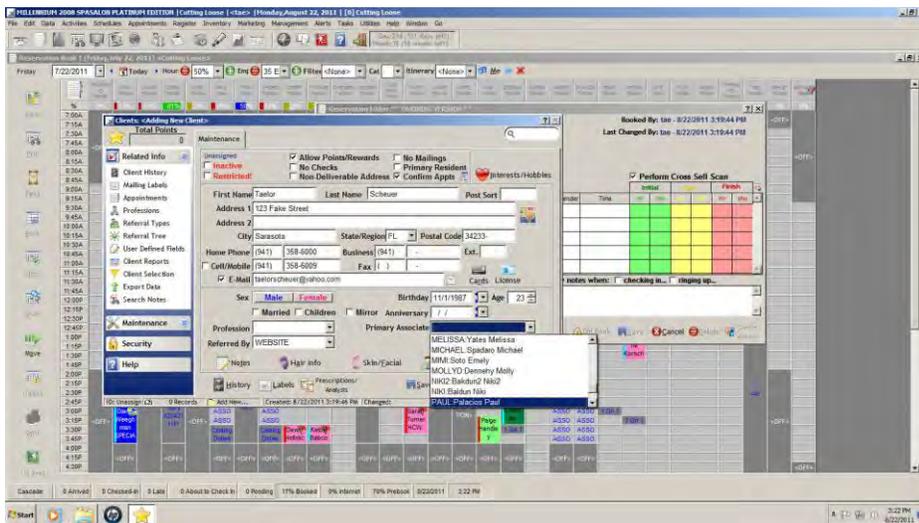


Image 3-03

Enter First and Last Name, Address, Phone Number, Gender, and Birthday. Choose from the drop down how the client was referred to the salon and choose from the drop down a Primary Employee.

Save.

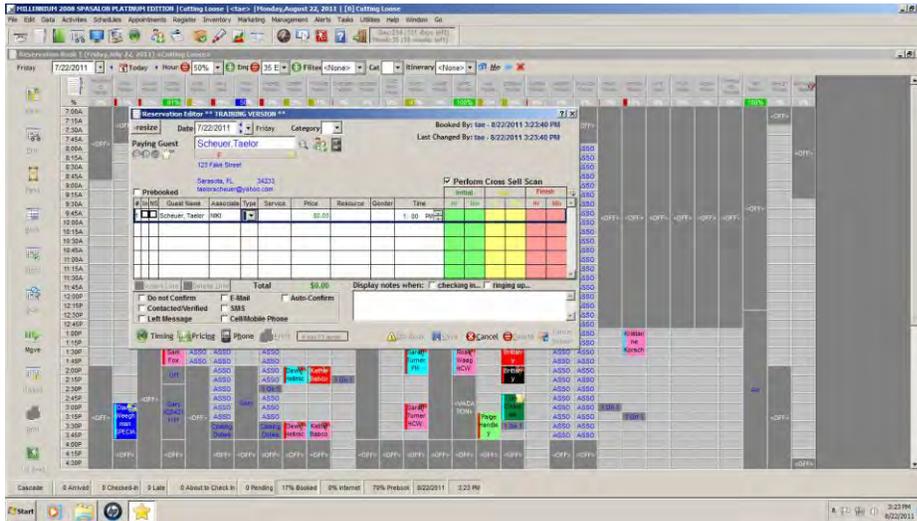


Image 3-04

The New Client will pop up in the Paying Client field, continue scheduling the appointment.

# Merging Duplicate Client Information

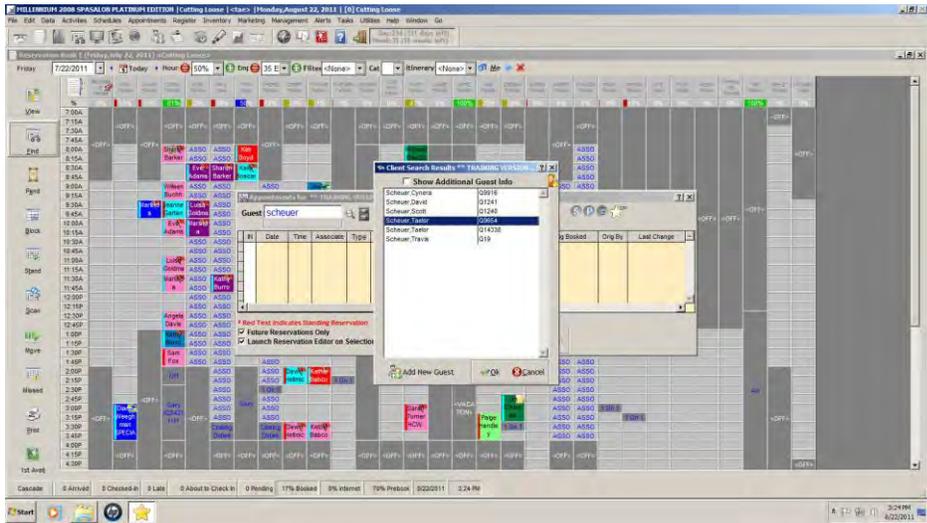


Image 4-01

Duplicate records usually occur because of misspelled names or incomplete information. If you find such a client, check the client’s information to determine which of the records is the most complete. Once you have checked the information on both of the names, choose the most complete record by clicking on the name.

Click OK.

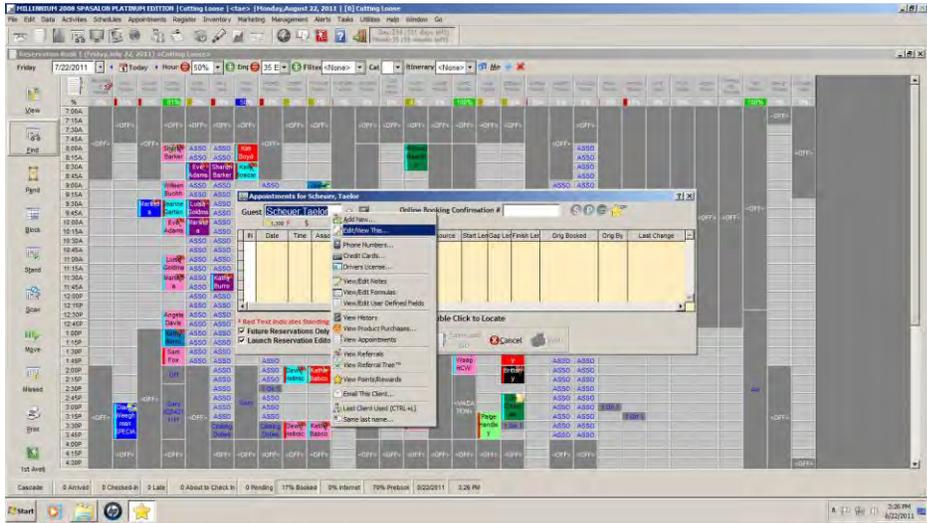


Image 4-02

Right click on the name

Click Edit/View this



Click Merge Duplicate Client.

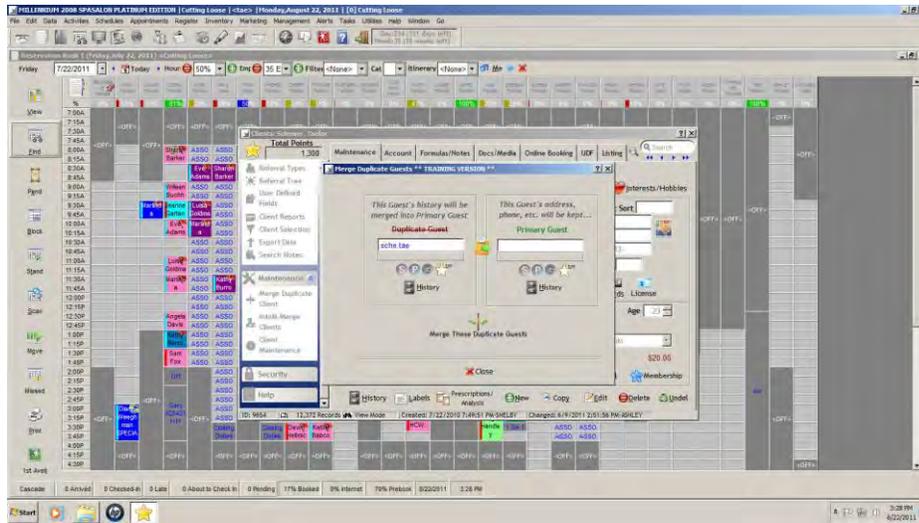


Image 4-05

Enter the duplicate name.

Click Enter.



Image 4-06

The first is the Duplicate Guest. Make sure you select the guest that has the incomplete information.

Click OK.



Image 4-07

Repeat the same for the Primary Guest box but this time pick the other client that has the correct information.

Click OK.

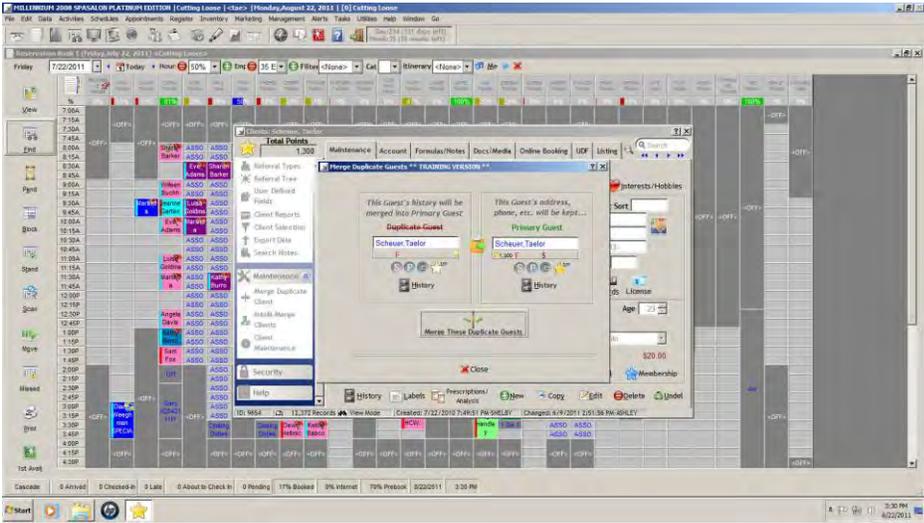


Image 4-08

Click Merge Duplicate Guests.

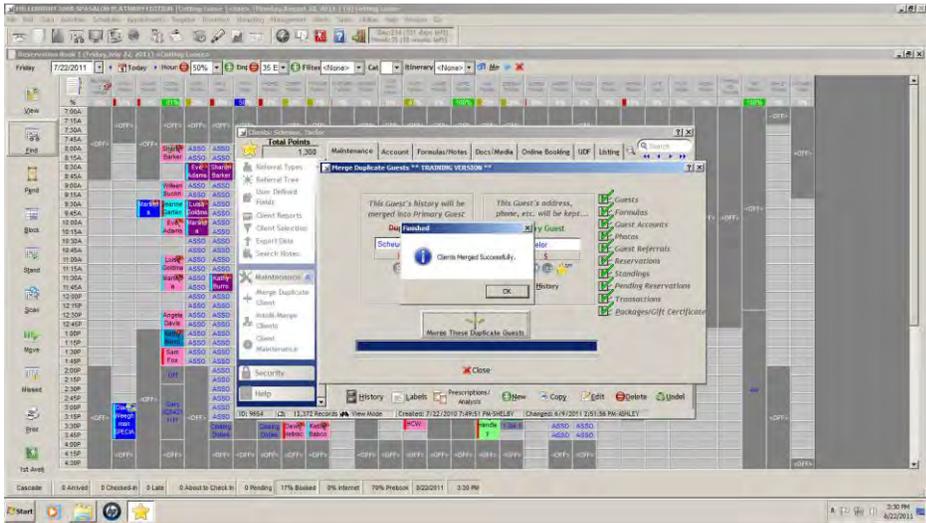


Image 4-09

Click OK.

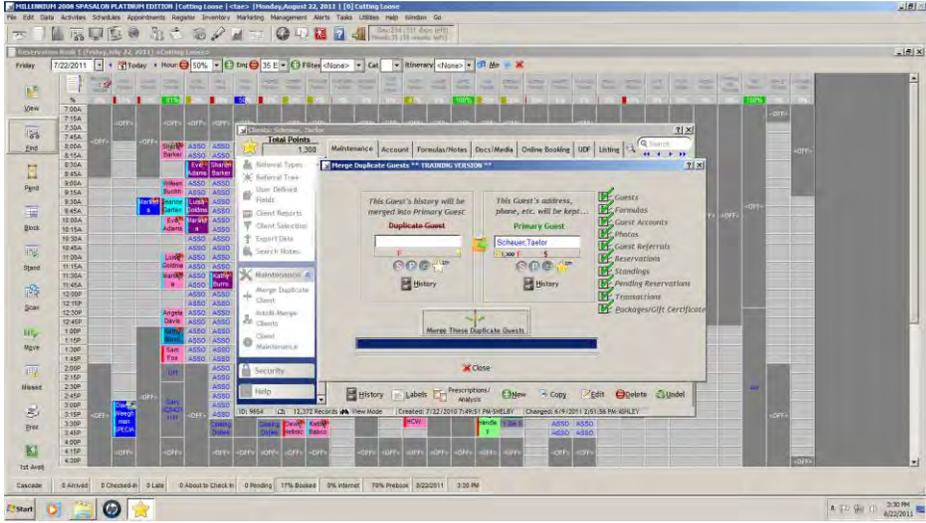


Image 4-10

Click Close.

### Point of Sale- Client Check Out

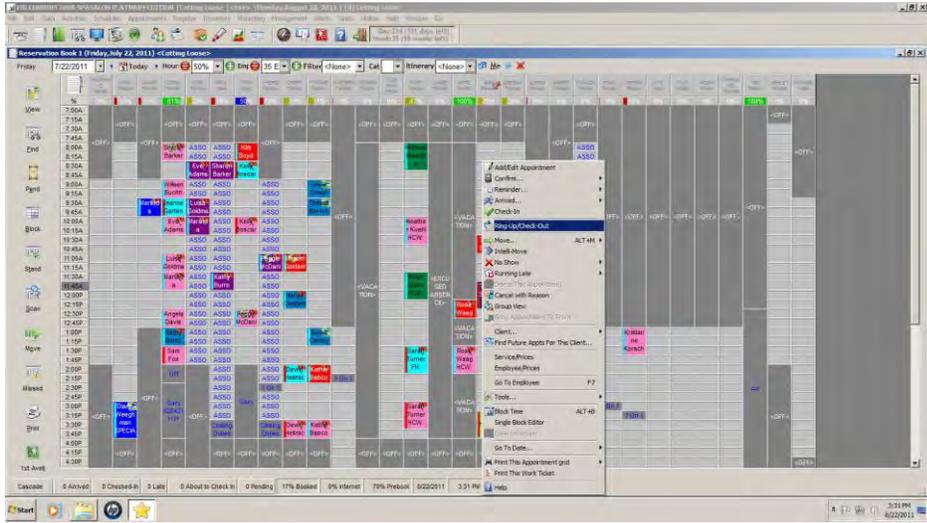


Image 5-01

Click the Guest's name you will be checking out.

Right click on the guest name.

Click on Right up/Check out.

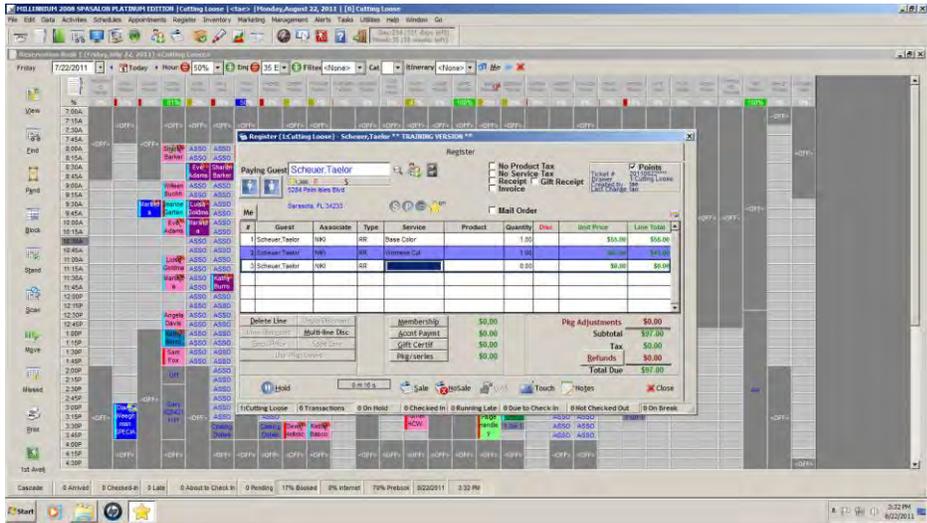


Image 5-02

The Register Transaction screen will open.

Make sure you are checking out the correct guest.

Check that all the prices are correct and match the stylist ticket for that guest. Make any adjustments or corrections. Also make sure if an assistant is doing any services for the stylist, that the associate in the register screen doesn't have a balance (services totaled to 0). All charges have to be attached to a stylist.

Once you have verified everything is correct, Click Sale.

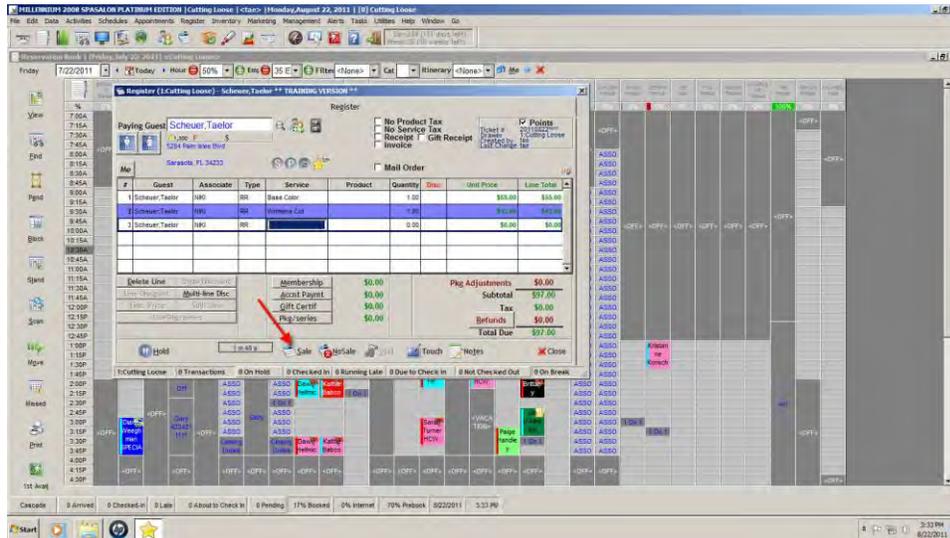


Image 5-03

Choose from the list, the correct payment method.

Enter the amount received.

Click OK.

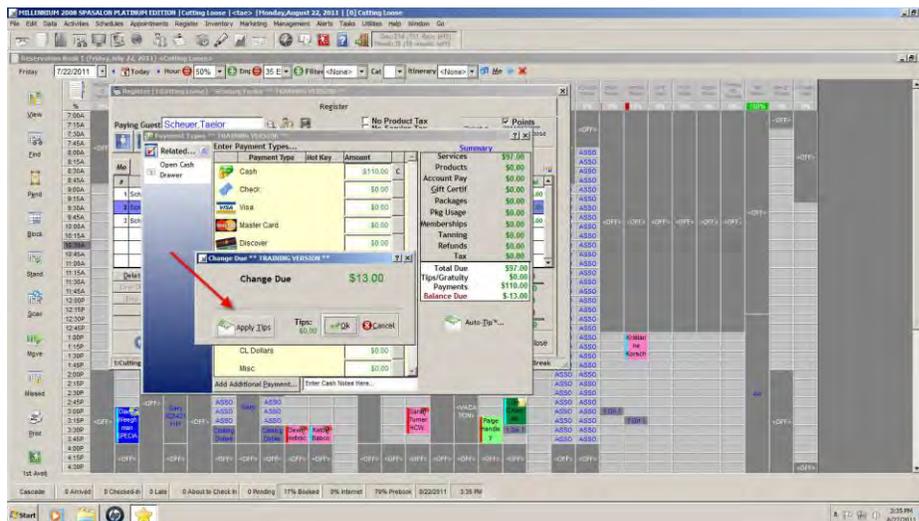


Image 5-04

If change is due, screen will appear with the amount due to client.

If client wants to leave the change as a tip, Click Apply Tips.

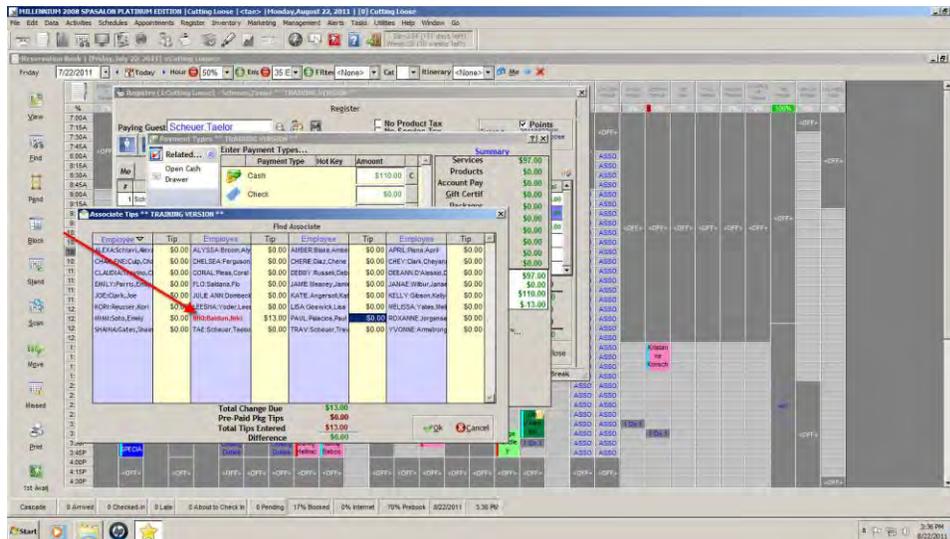


Image 5-05

Enter tip next to the appropriate stylist.

Click Enter.

Click OK.

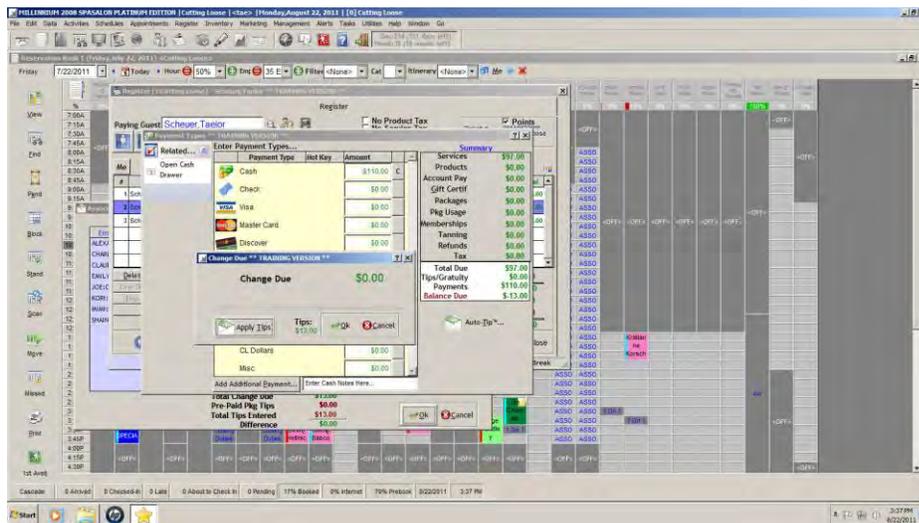


Image 5-06

Click OK to complete transaction.

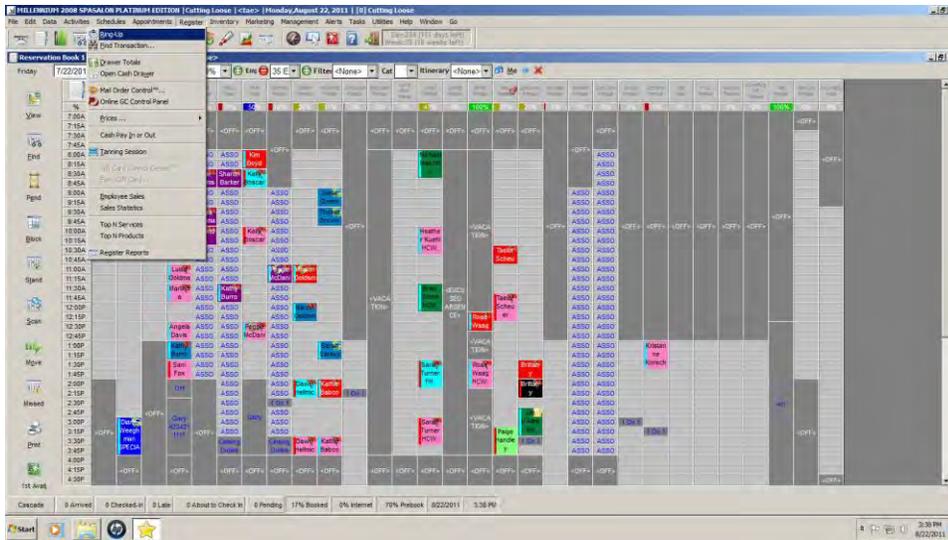


Image 5-07

If there is a walk-in guest.

Go to top of screen, Choose Register.

Ring up.

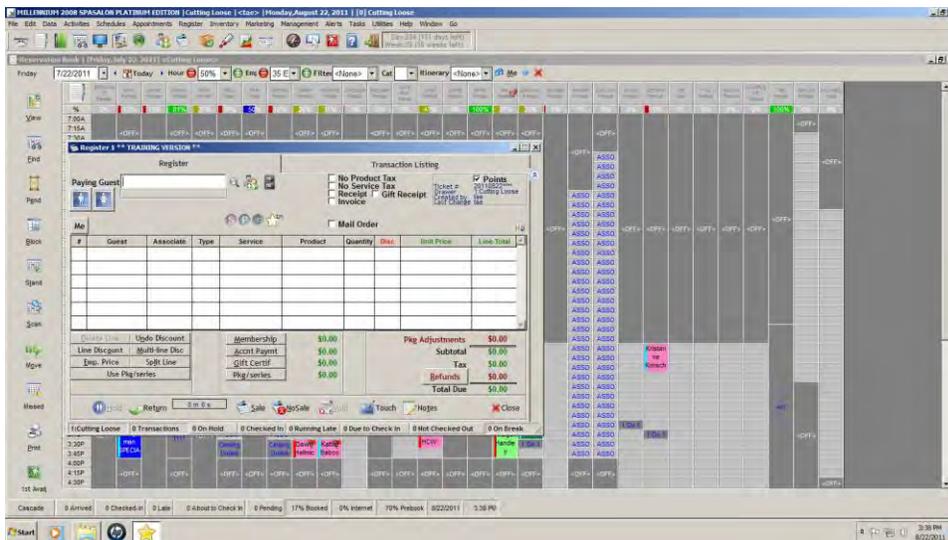


Image 5-08

Enter Paying Client's name and continue with Point of Sale transaction.

## Gift Card Purchase Procedures

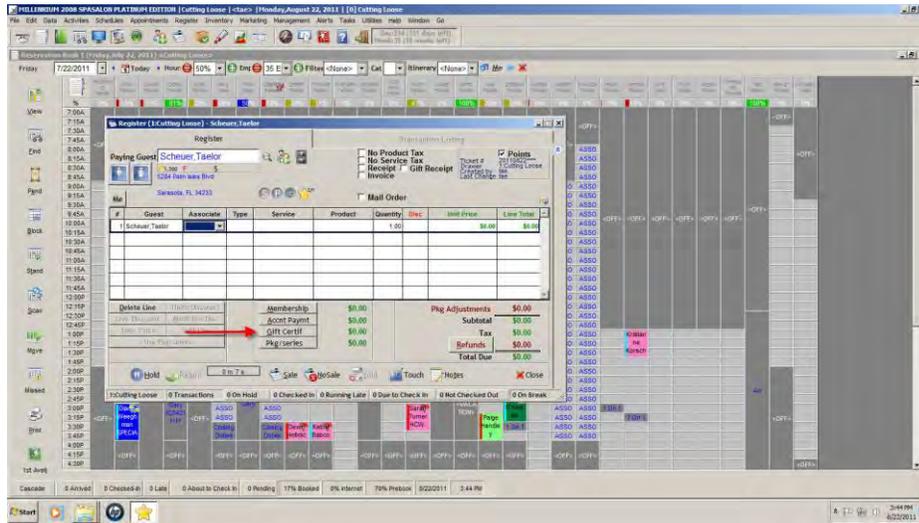


Image 6-01

Get to Register screen.

Last, First name of guest purchasing the Gift Card.

Click Gift Certificate.

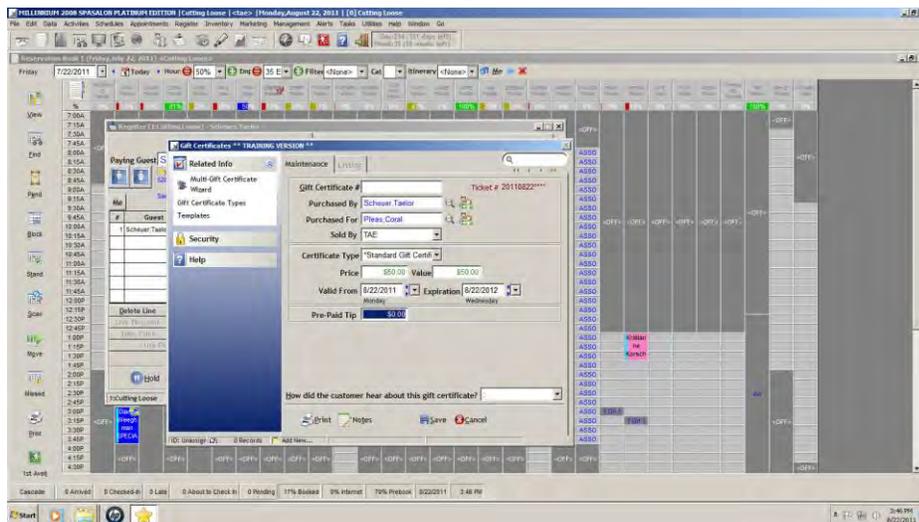


Image 6-02

Keep Purchased by the guest who is buying the Gift Certificate.

Change "Purchased for" to the guest they are buying it for.

Sold by: put the employee's name that is doing the transaction.

Certificate Type: Standard (unless it is for a Donation or Complimentary)

Type in the amount the Gift Certificate.

Expiration date is ONE YEAR from the date of purchase.

Click SAVE.

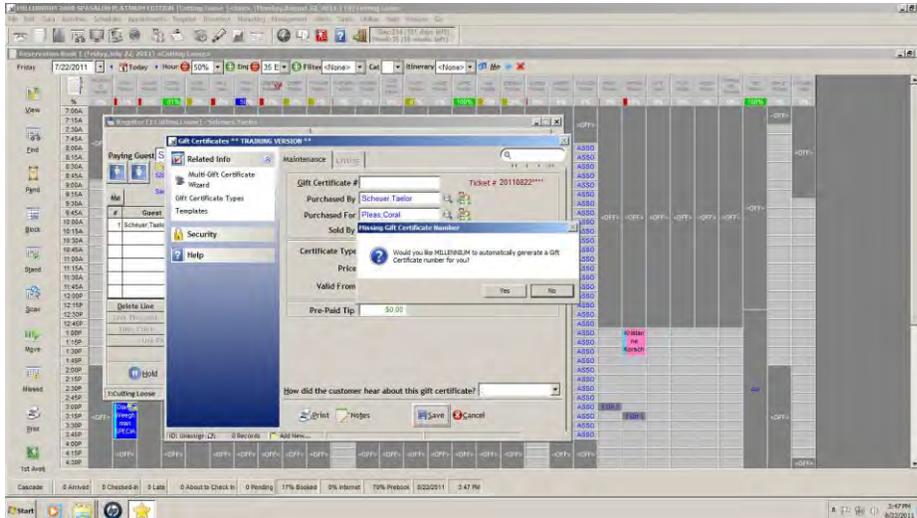


Image 6-03

Click YES.

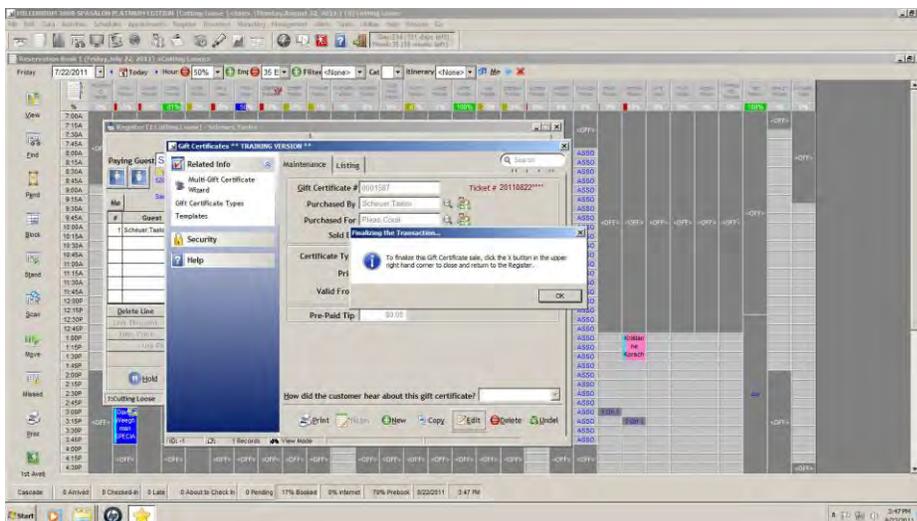


Image 6-04

Record (write) the GC number on the Gift Certificate that you give to the guest.

Click OK.

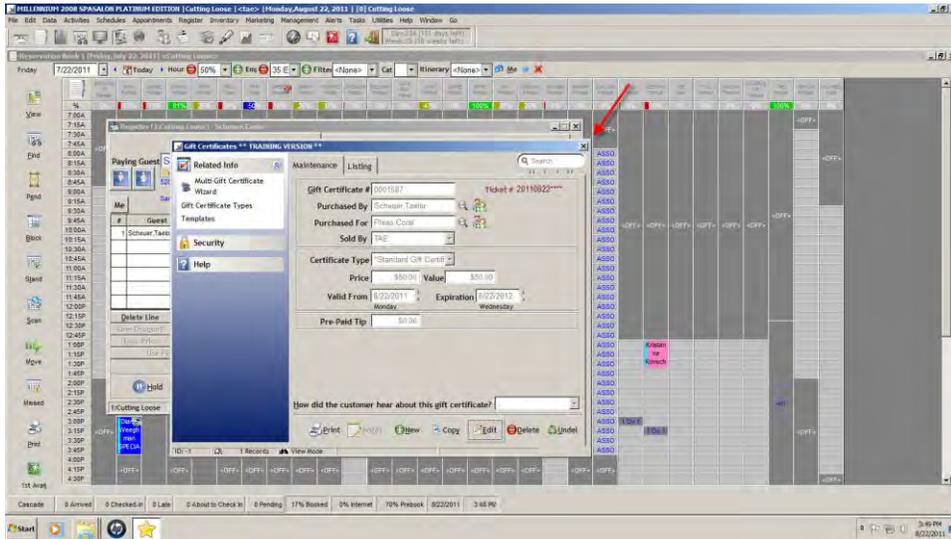


Image 6-05

Click the X button.

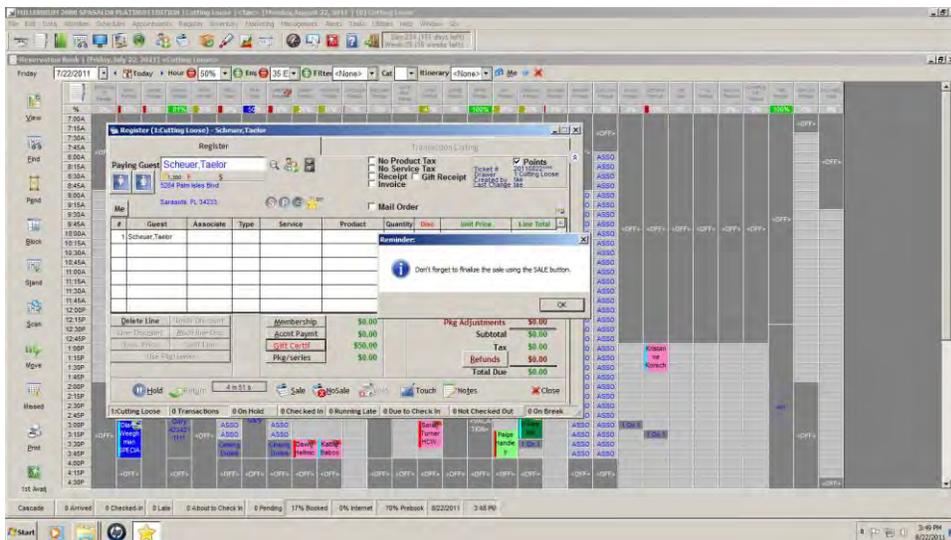


Image 6-06

Click OK.

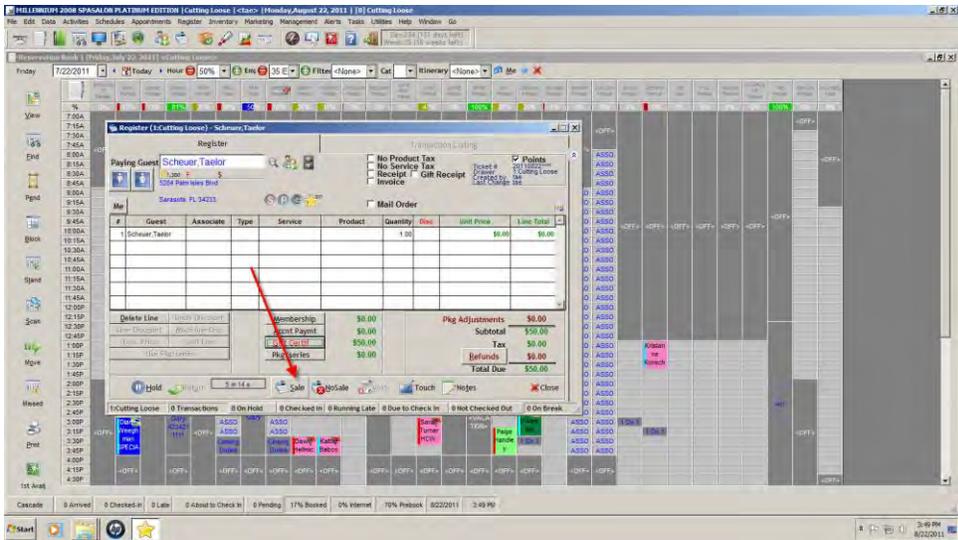


Image 6-07

Click Sale.

Continue with the Check Out procedure.

## Employee Point of Sale – Check Out

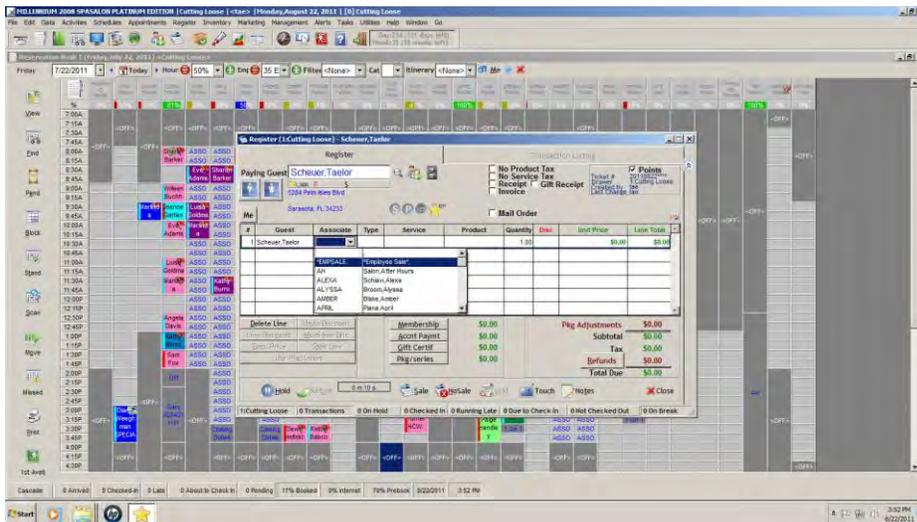


Image 7-01

Enter employee's name

Associate drop down to EMPLOYEE SALE.

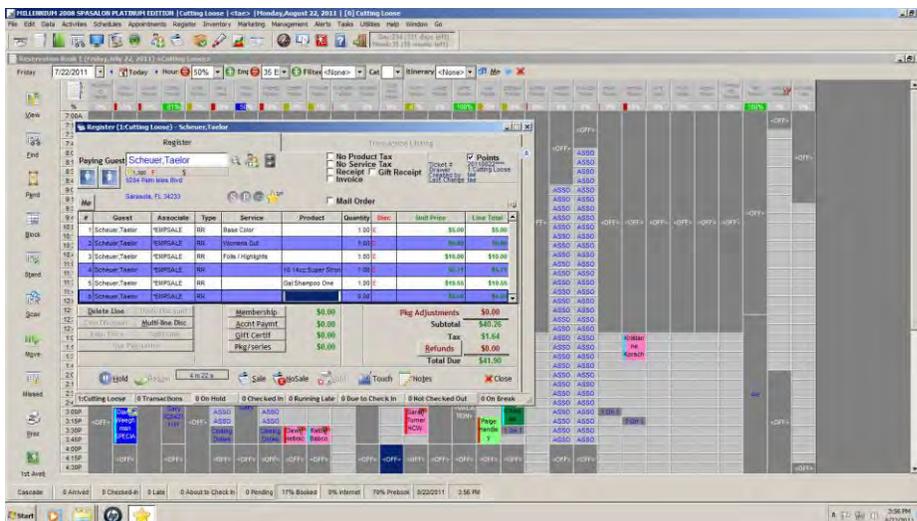


Image 7-02

Complete the sale in the usual manner.

As long as the Associate is EMPLOYEE SALE, all the prices that will appear are at the employee discount price.

Click Sale.

# Redeeming Coupons and Discounts

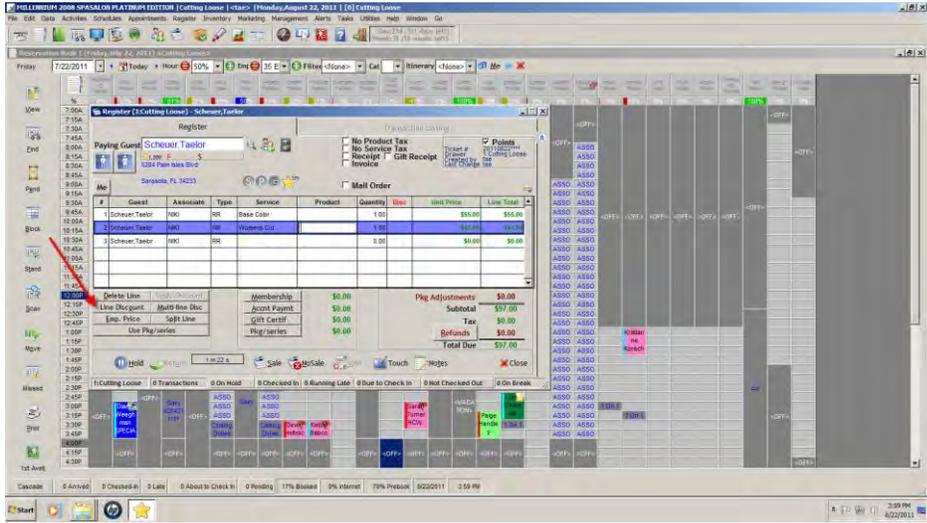


Image 8-01

Click the line you would like to discount.

Click Discount.

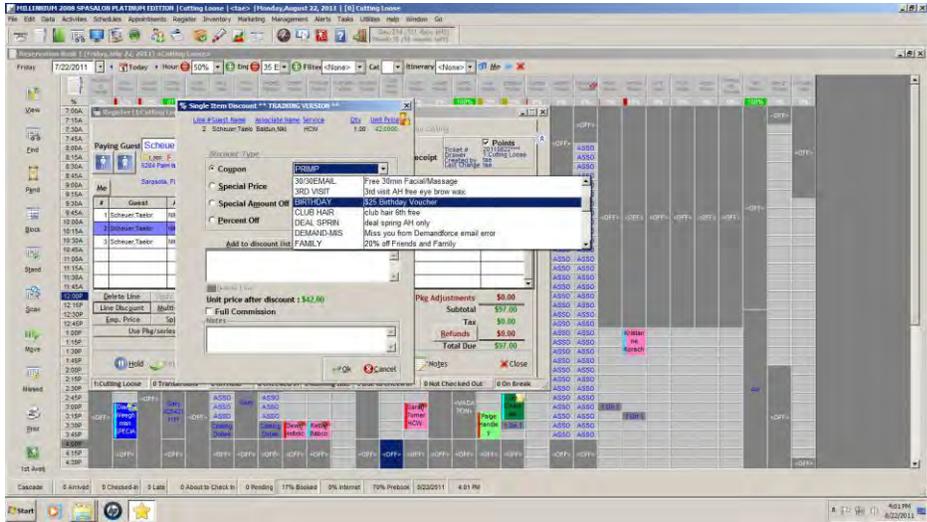


Image 8-02

Click Coupon.

Go down to Complimentary LL EXP w/ Second Visit.

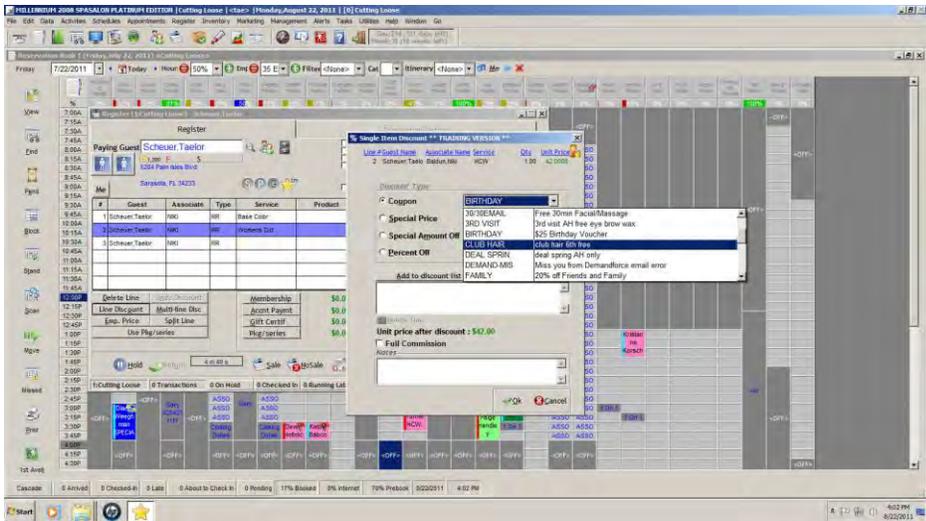


Image 8-03

Click ADD to discount list.

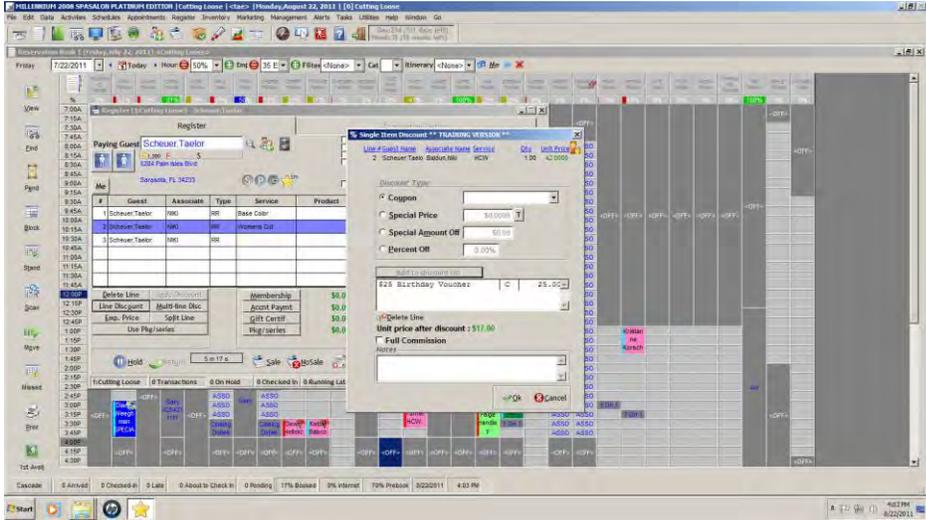


Image 8-04

Click OK.

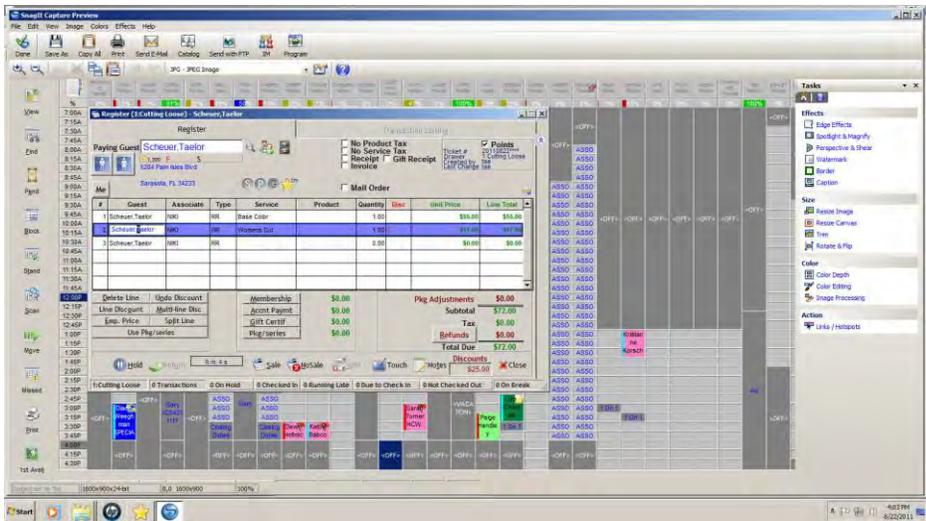


Image 8-05

Click the line you would like to discount.

Click Discount.

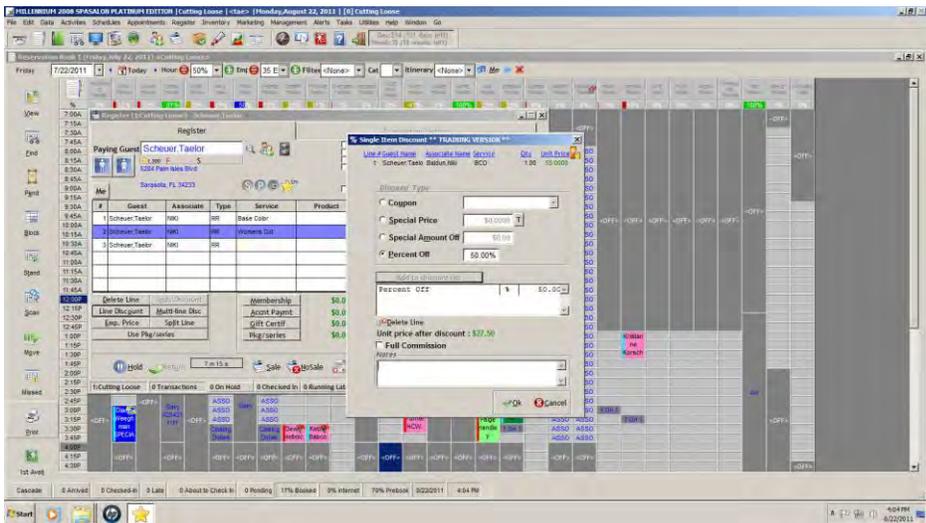


Image 8-06

Click Percent Off

Type in the percent you would like to discount the service at.

Click ADD to discount line.



Image 8-07

Click OK.

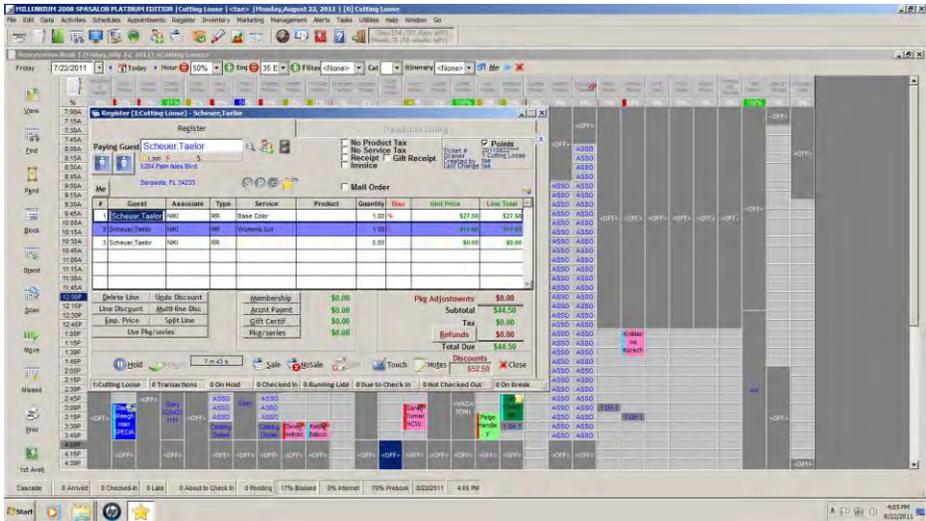


Image 8-08

Continue with Point of Sale.

# 20% Employee Family Discount

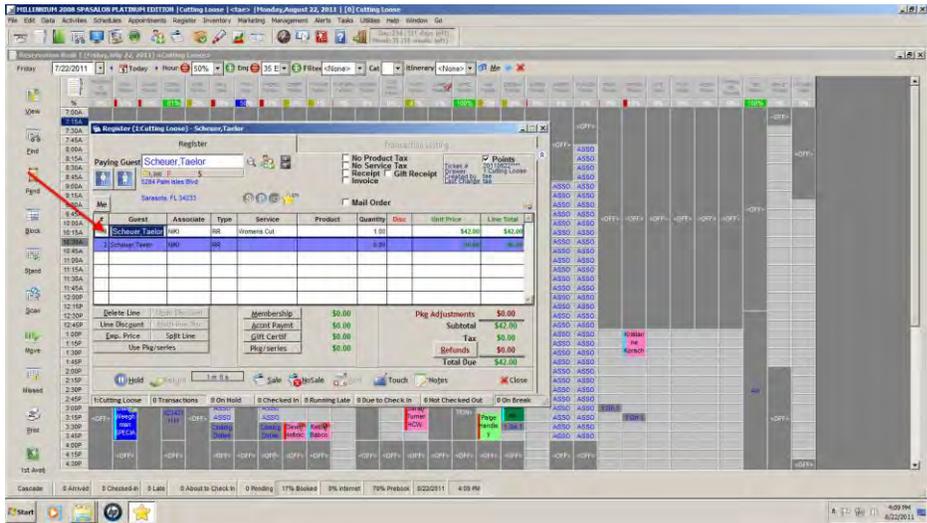


Image 9-01

Continue with regular check out procedure.

Click on the line you would like to discount.

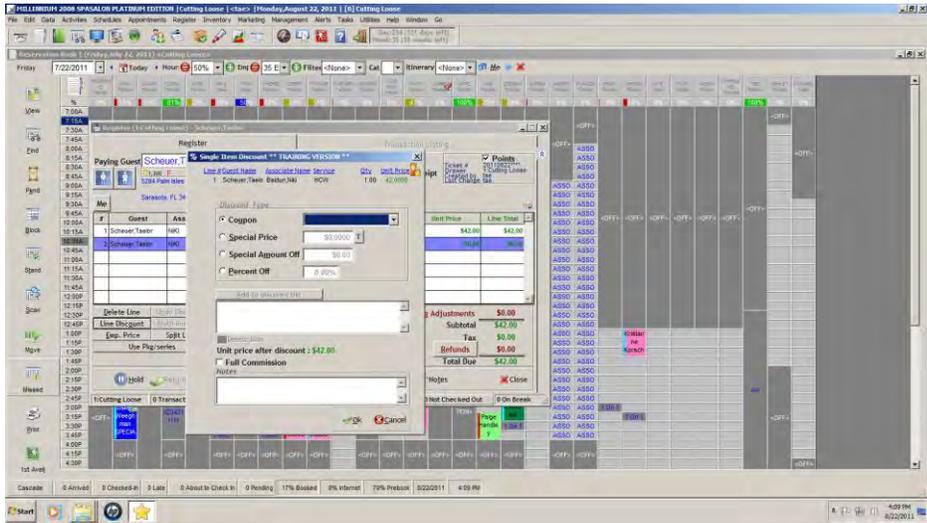


Image 9-02

Click the Discount Button.

Click Coupon.

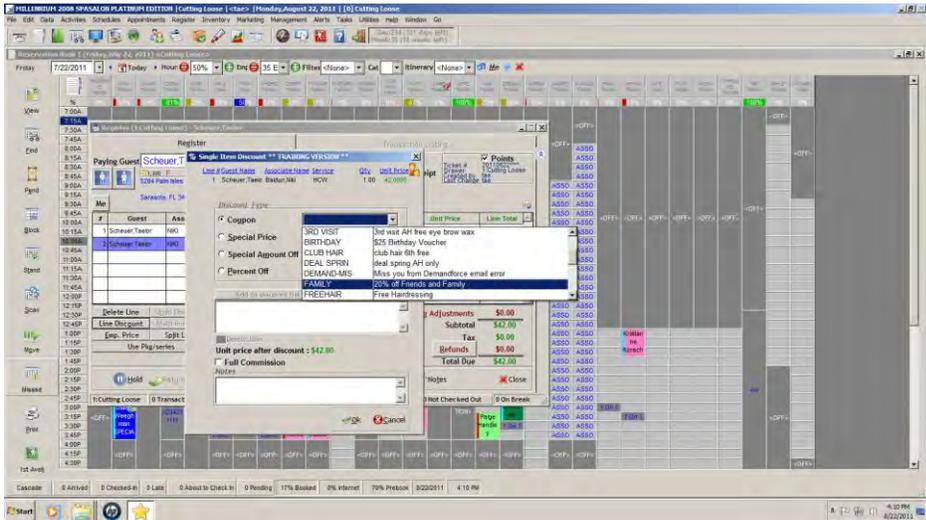


Image 9-03

Scroll down to 50% Friends and Family. Click it.

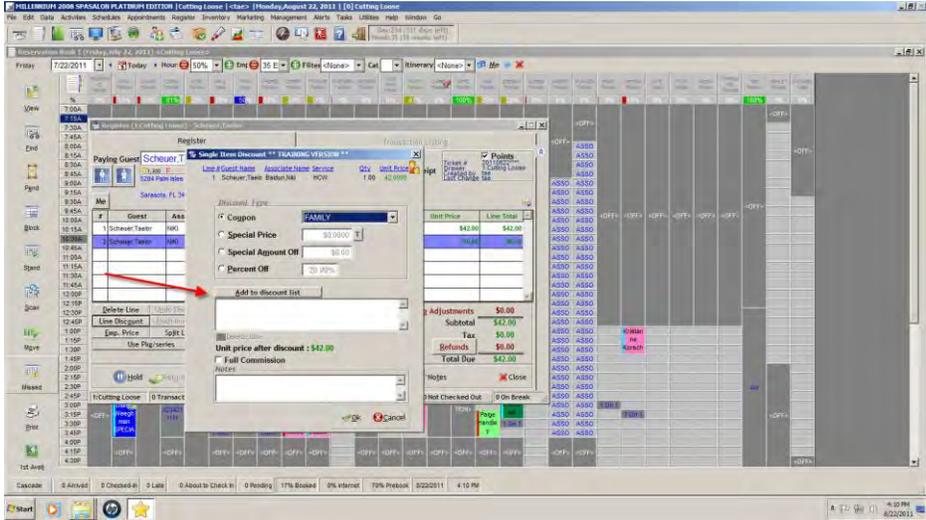


Image 9-04

Click Add to Discount list.

Click OK.

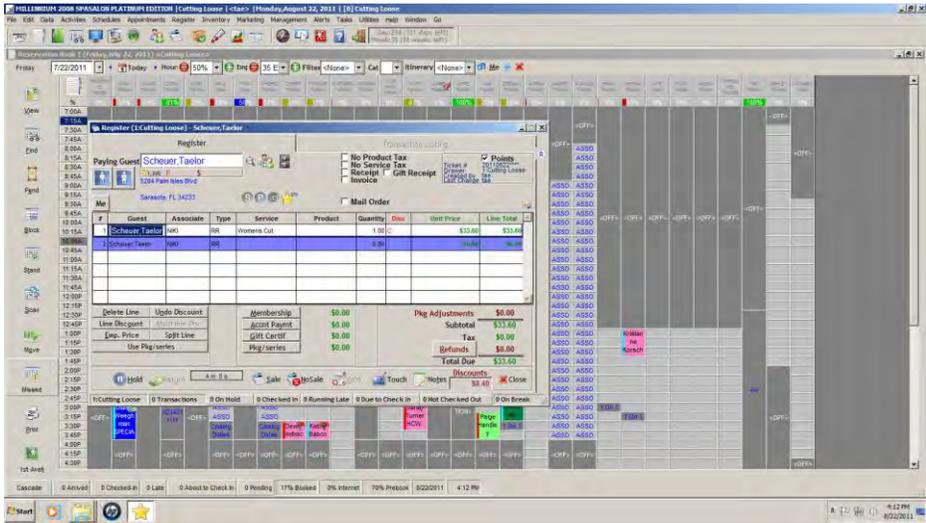


Image 9-05

Notice that the price went down by 20%.

Continue with Sale Procedures.

## Entering Client Formulas

Click the Find button from the left menu.

Enter client's Last, First Name and click Enter.

Name should pop up or a list will appear to choose the



Image 10-1



Image 10-2

Right click on the client's name and go down to View/Edit Formulas.

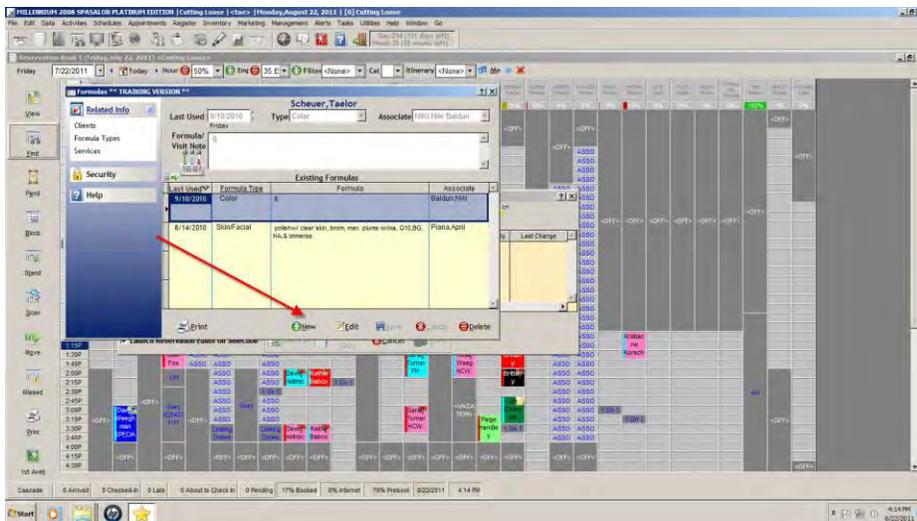


Image 10-3

Click New.

Do Not Delete any previously entered formulas.

(Do not click Edit unless you are making changes on a previously entered formula).

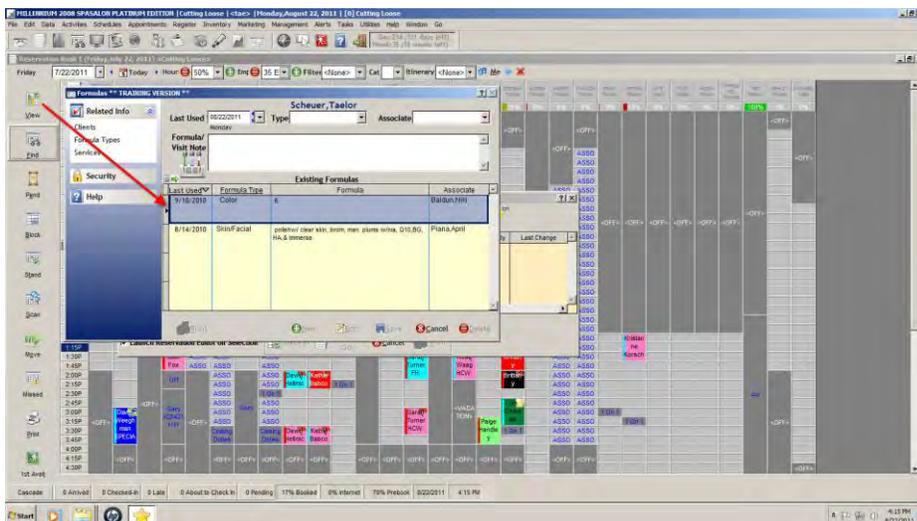


Image 10-4

Under "Type" choose what type of formula you are putting in (facial, color, body wave, etc)

Choose the Associate that the formula is for.

Enter Formula in the top white box.

Click SAVE. Click the X on the top right to get out of the formula screen.

# Redeeming Points

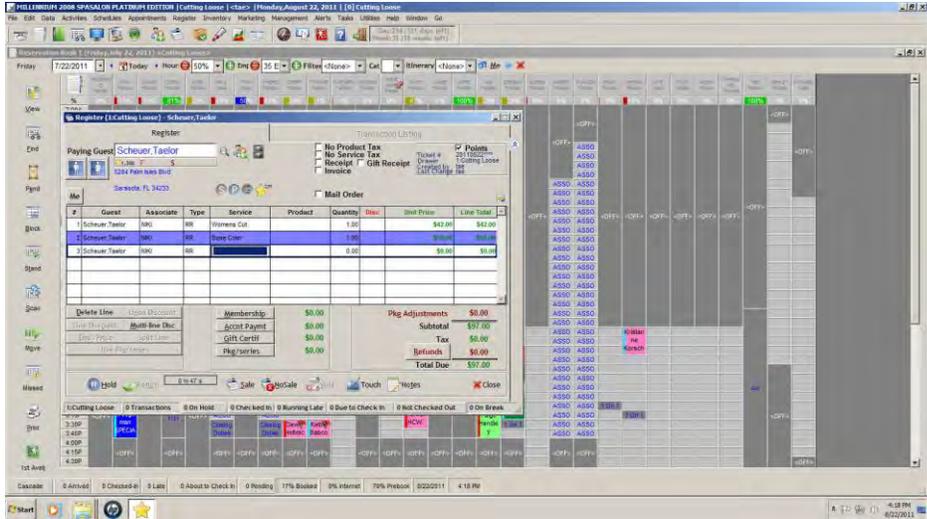


Image 11-1

Make sure you have all the services and Take Home that the guest wants in the Register Screen.

Click Sale.

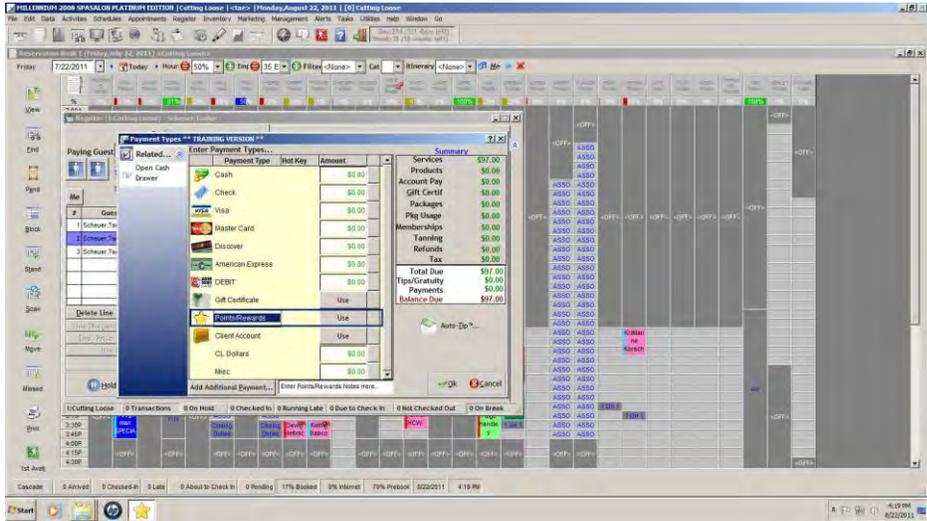


Image 11-2

Click Points/Rewards

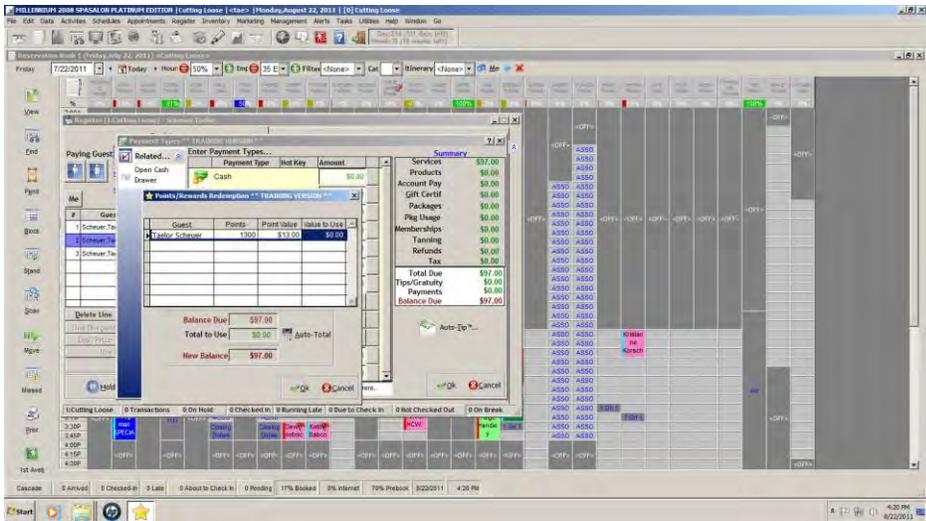


Image 11-3

Type in how many points you are going to use in the Value to Use box.

Remember you can only go 500 points at a time and can use 1.500 maximum in one day.

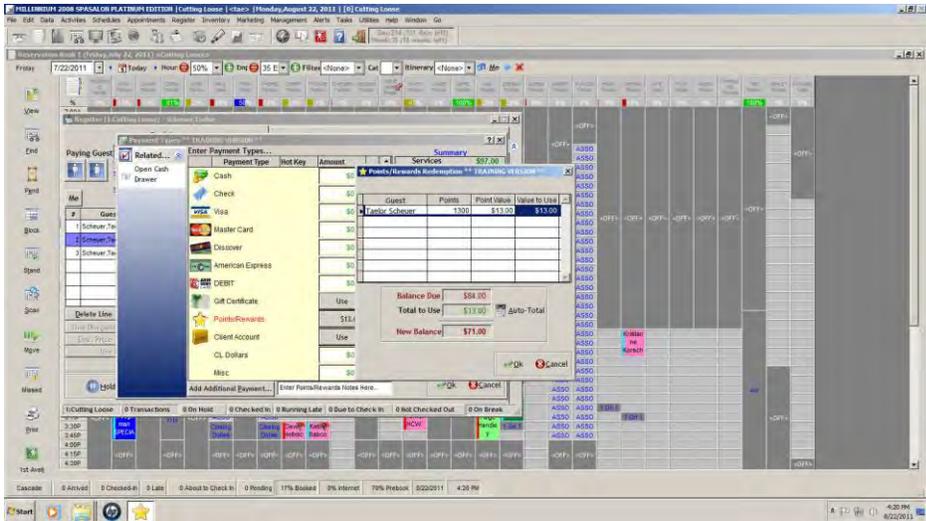


Image 11-4

Click OK.

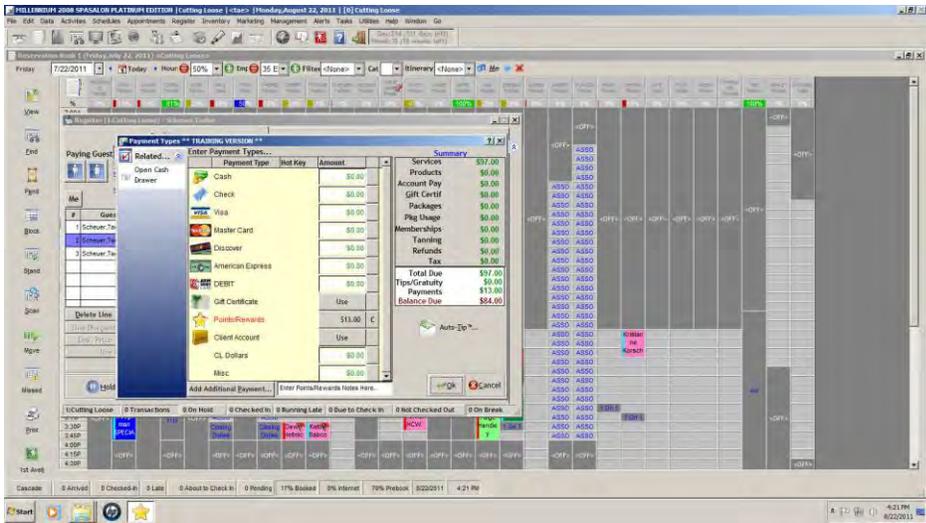


Image 11-5

Continue with Check Out.

# Manually Adjusting Points

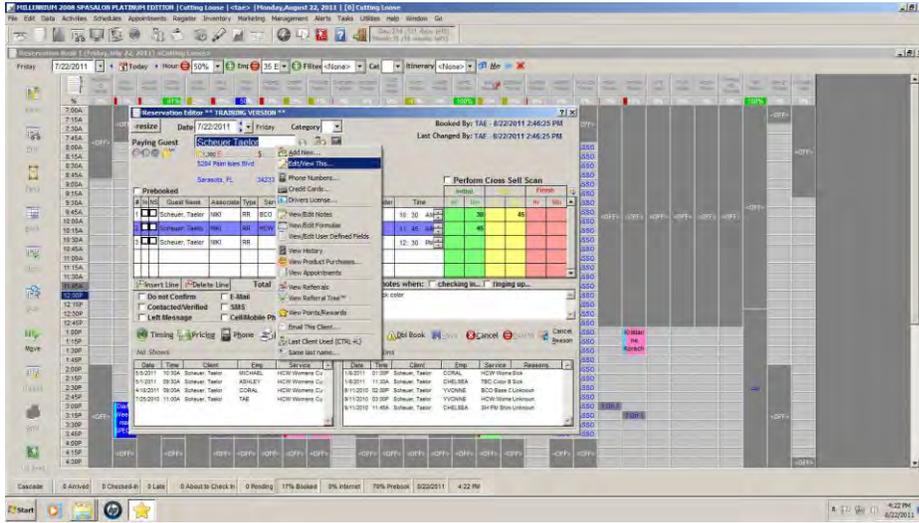


Image 12-1

Find.

Last, First name of guest. Enter

Edit/View this..

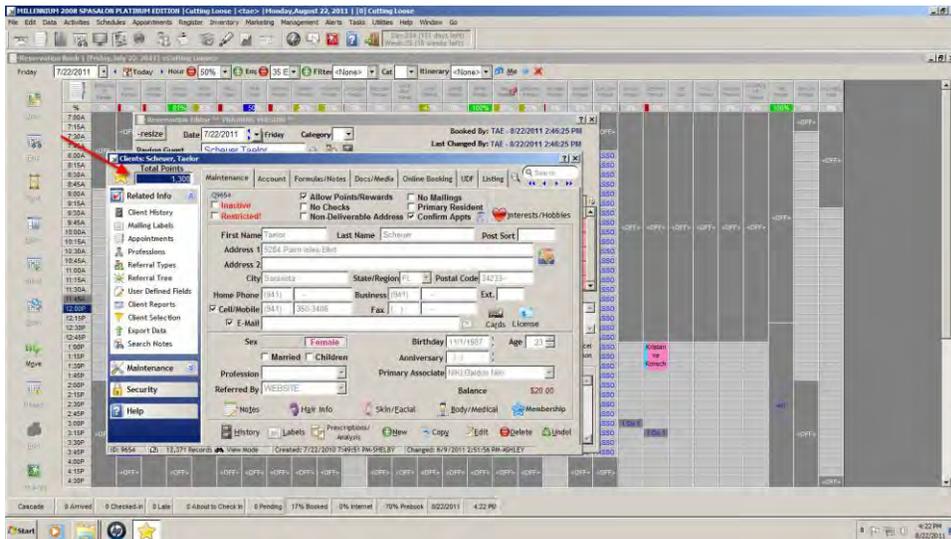


Image 12-2

Click the box under Total Points in the top left corner.



Image 12-3

Click Manual Points/ Value Adjustments.

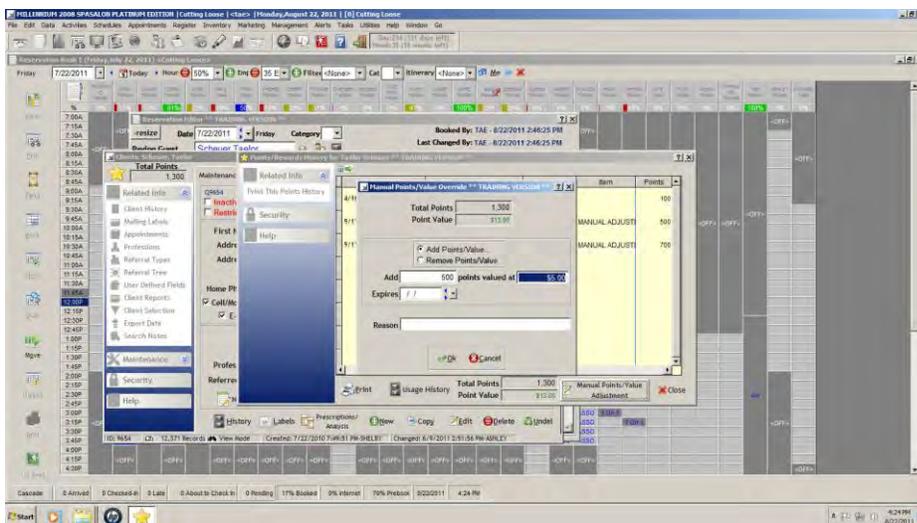


Image 12-4

Decide whether you are adding points or removing points.

In this case, I will add.

Type in how many points you want to add.

Type a Reason.

Click OK.

Updated 3/1/2012

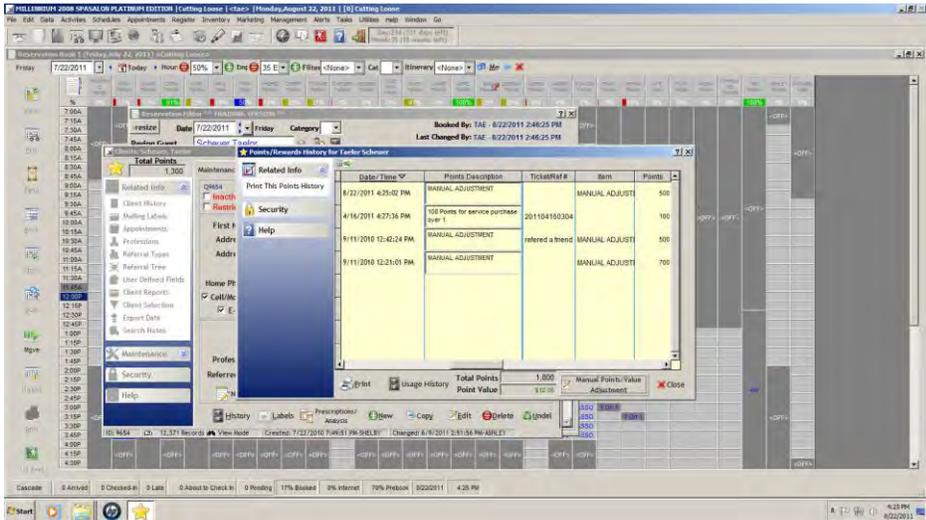


Image 12-5

See that it added the points.

Click Close.

## Printing Stylist Tickets for the Following Business Day

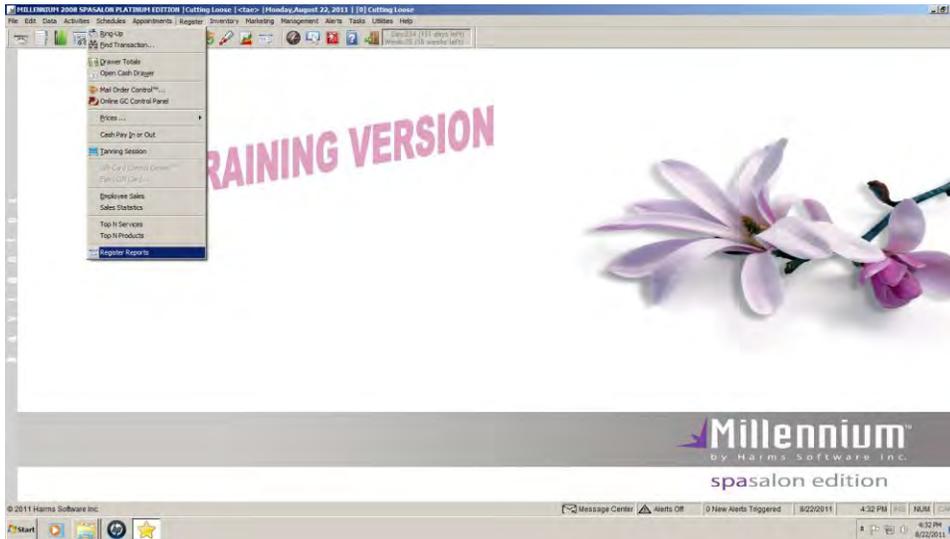


Image 13-1

Register

Register Reports

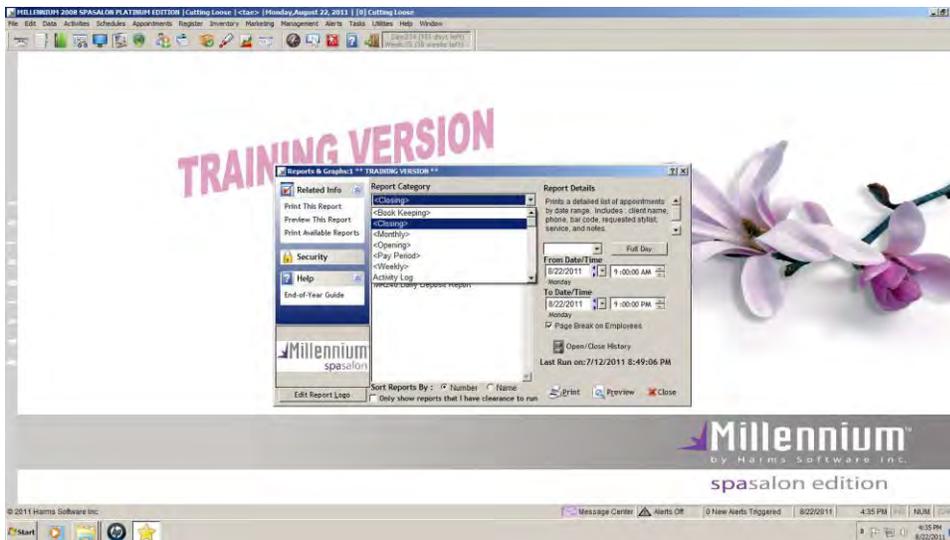


Image 13-2

Report Category

Scroll up to :<Closing>

Click once.

Updated 3/1/2012

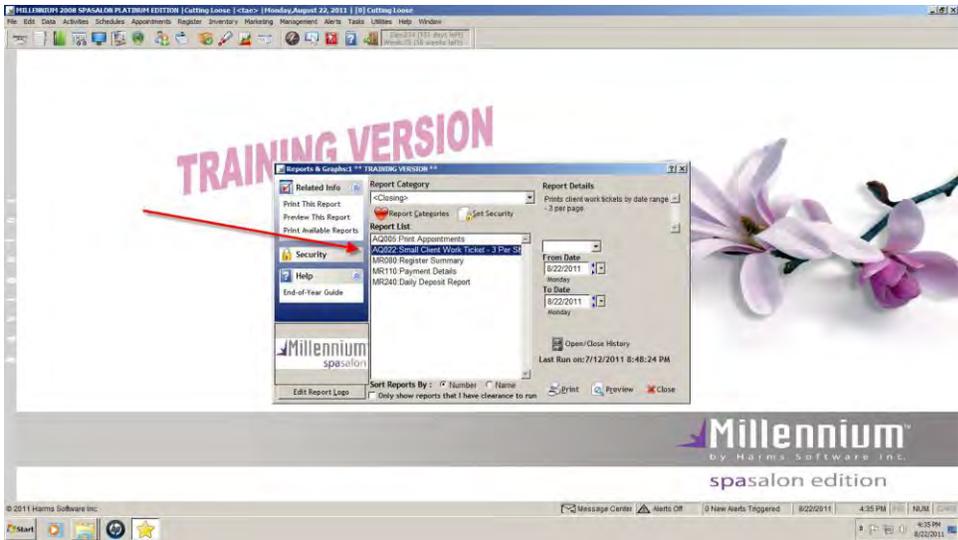


Image 13-3

AQ022: Small Client Work Ticket – 3 per Sheet

Make sure you are printing for the following business day.

Click Print.

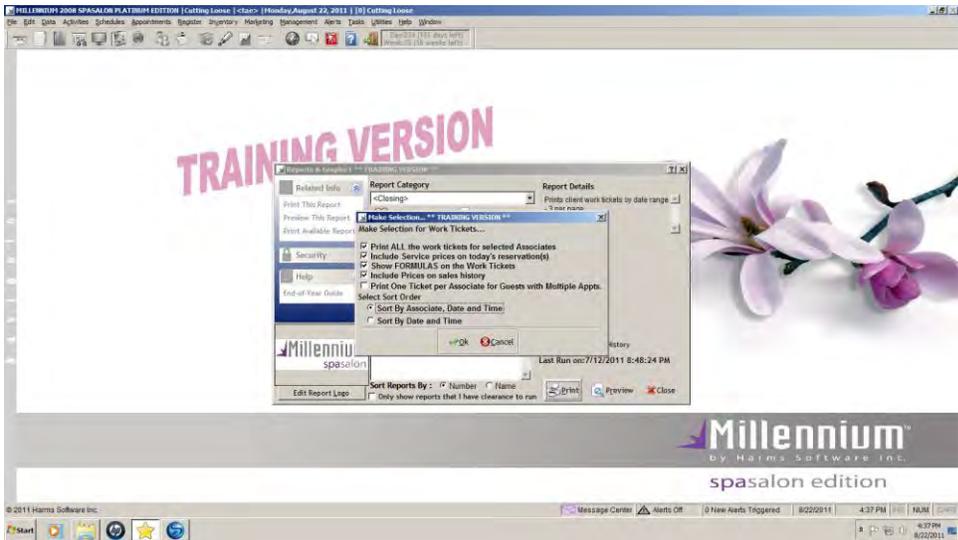


Image 13-4

Keep everything the same

Click OK

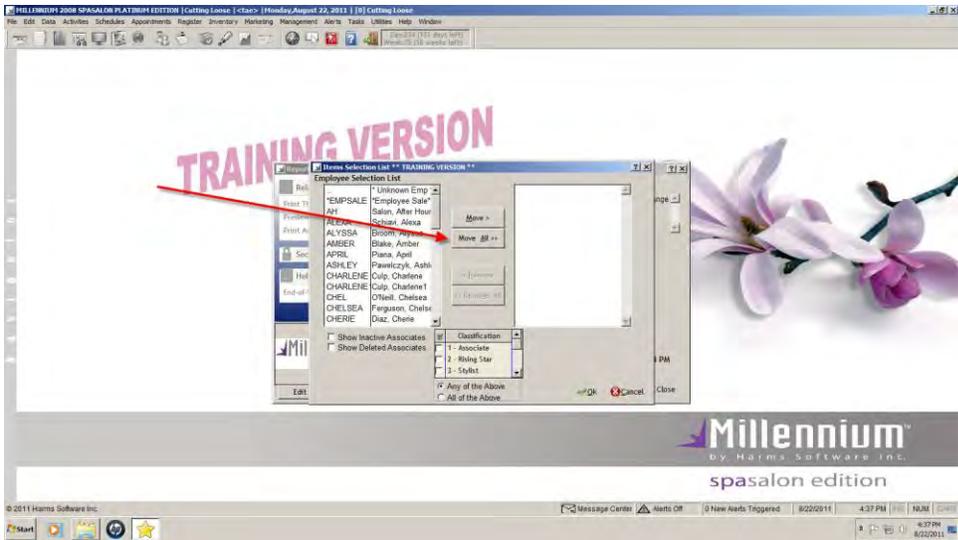


Image 13-5

Click Move All

Click OK



Image 13-6

Click OK

Make sure you are printing to the correct printer

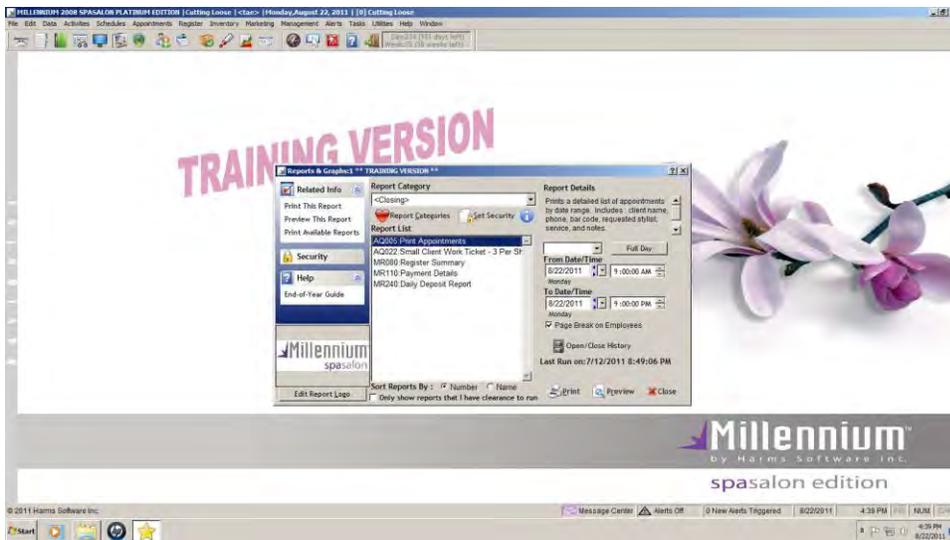


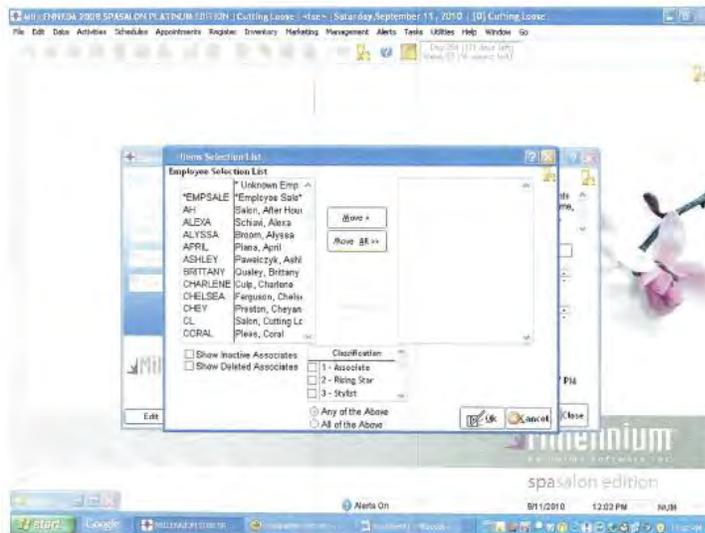
Image 13-7

AQ005: Print Appointments

Make sure you are printing the following business day and time frame is the full business day.

Click Print.

Click NO



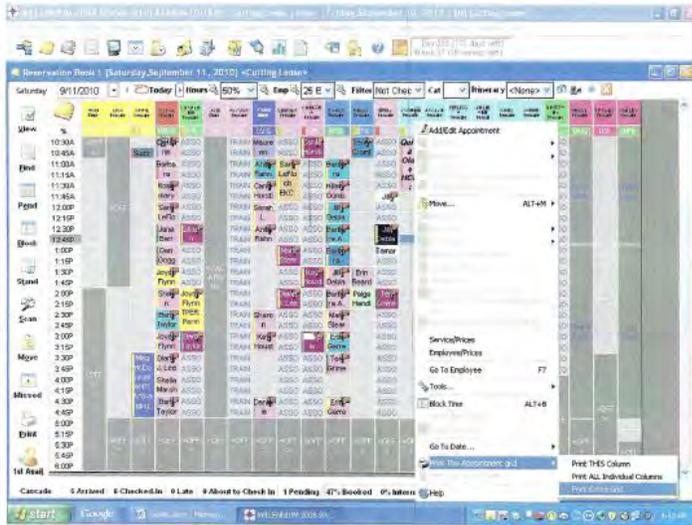
Click Move All

Click OK

Updated 3/1/2012



## Print Appointment Grid for the Following Business Day

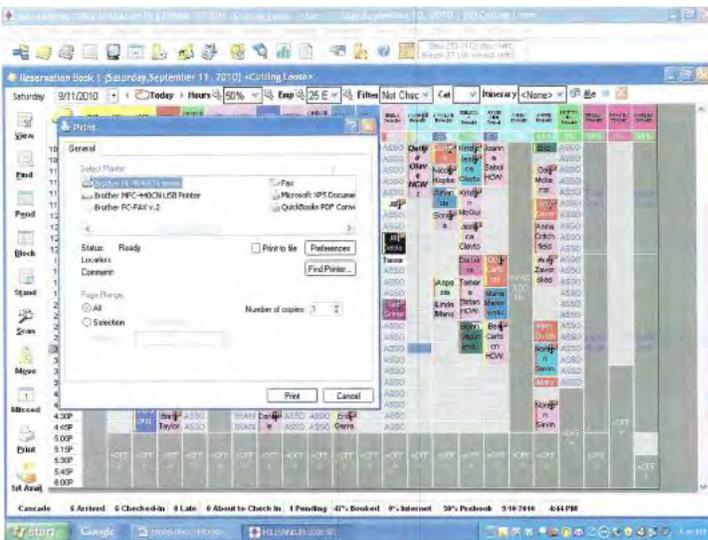


Right click on a stylist column not in use.

Drag mouse to Print this Appointment Grid.

Drag to Print Entire Grid.

Single Click.



Insure the correct printer is chosen and Print.