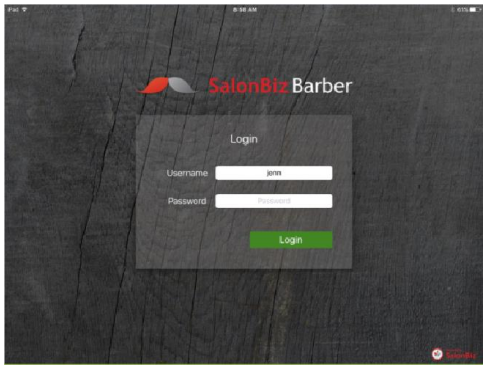
SalonBiz Barber

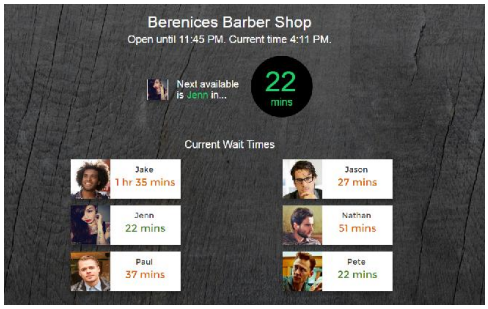
User

Customers view wait times and add themselves to a list for the next available barber or their preferred staff. They can monitor their place in line or receive a text when the staff is ready. And with the entire service experience (including product recommendations and checkout) taking place in the comfort of the barber chair, you'll have the perfect solution for customers who value both convenience and time.



SalonBiz Barber Log In

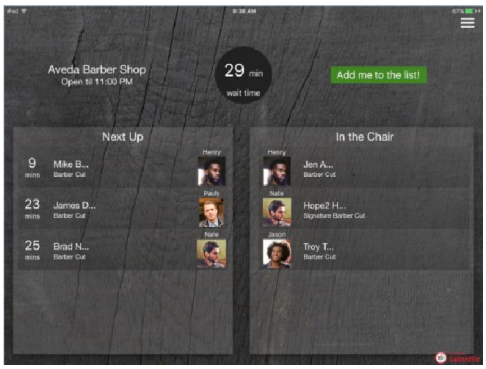
1. Download the SalonBiz Barber app from the iOS App Store.
2. Enter your Username and Password.
3. Click the Login button.
4. Click the menu button in the upper right corner, and tap the Edit Payment Info option to save your Vantiv Merchant ID and Password.
   - ★ Only Central Administrators will have this option.
   - ★ You will be required to enter the 4 digit Payment Info PIN.



Clients will be able to check on wait times for barber services, and add themselves to the list for an appointment.

Outside the Shop

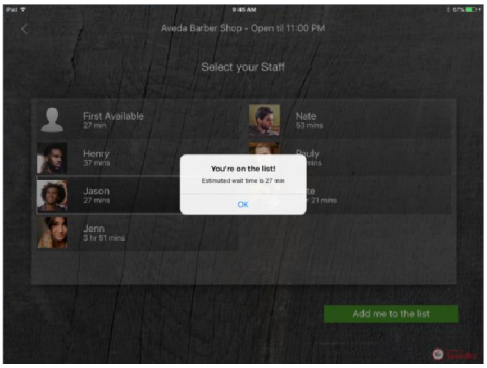
A web browser can be displayed in the shop's window indicating working staff's wait times for passers-by to view.

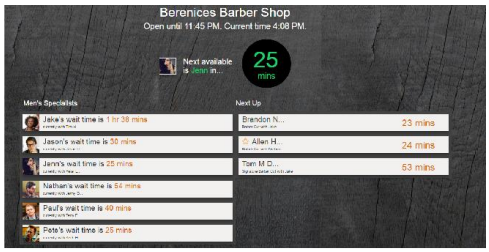


Client View

The closing time and wait time for the next available appointment are displayed on the home page of the app. If the salon is open, and staff are available, there will be an "Add me to the list!" button visible. Follow the steps below to add a client to the list:

1. Tap the "Add me to the list!" button.
2. For existing clients, search by name and/or mobile phone number.
3. New clients will need to create an account with their name, mobile phone number, and email address.
4. After adding or selecting the client's name, select the service, and tap the Next button.
   - ★ To select the service from the client's history of barber services, tap the Select from History button before tapping the service and tapping the Next button.
5. Select your staff. You can also select First Available as your staff.
   - ★ Estimated wait times and staff prices are displayed below their names.
   - ★ If they have no availability for the rest of the day, "Fully Booked" will be displayed.
   - ★ If they are working, but do not offer the selected service, that will be noted.
6. Tap the "Add me to the list" button. A pop up will confirm you're on the list, along with your estimated wait time.



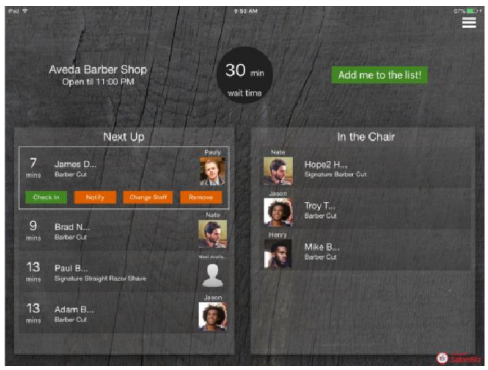


Checking on Wait Times

A web browser can be displayed inside the shop indicating a list of the clients currently receiving services, as well as waiting clients' wait times. This display will also show the wait for the next available appointment. New clients will be displayed in the Next Up list with a star before their names.

Staff Functions

Staff with access to the 4 digit PIN will be able to perform all of the functions within SalonBiz Barber including checking in clients, notifying clients when they're up next, recommending products to clients in the chair, and checking out clients.



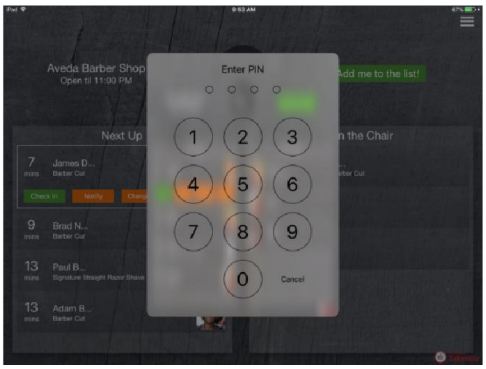
Checking in a Client

1. Tap the client's name in the Next Up list.
2. Tap the Check In button.
3. Enter the 4 digit Quick Access PIN.
4. Provided the staff is available, the client will be checked in, and moved to the In the Chair list. An appointment and ticket will be created in SalonBiz.
   ★ If the client selected First Available as their staff, the user will need to select the staff from a list at check in.

Notifying a Client

When a client's wait time has reached 10 mins, a text will be automatically sent to their mobile phone number. If a staff is ready for their client now, a text can be sent notifying the client.

1. Tap the client's name in the Next Up list.
2. Tap the Notify button.
3. Enter the 4 digit Quick Access PIN.
4. Provided the client has a valid mobile phone number in their file, they will receive a text message including the shop's name and a message that states, "We are ready for your [Service Name].



Changing the Selected Staff

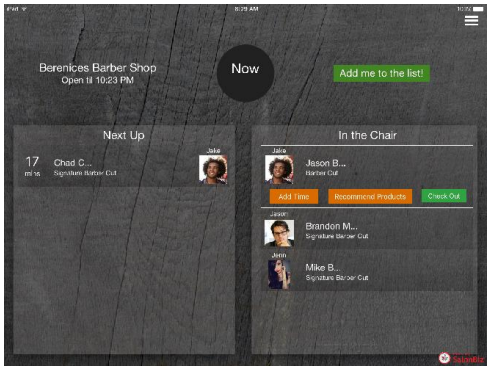
When a client wishes to change the staff they requested in order to see someone sooner or to simply change their mind, a staff can make this change for them.

1. Tap the client's name in the Next Up list.
2. Tap the Change Staff button.
3. Enter the 4 digit Quick Access PIN.
4. Select the staff that the client requests, or select First Available.
5. The client's wait time will be adjusted automatically.

Removing a Client from the List

Clients whose wait times have gotten down to 0min and have remained there for 60 minutes or more will be automatically removed from the walk-in list. Other clients that have abandoned their spot can be manually removed.

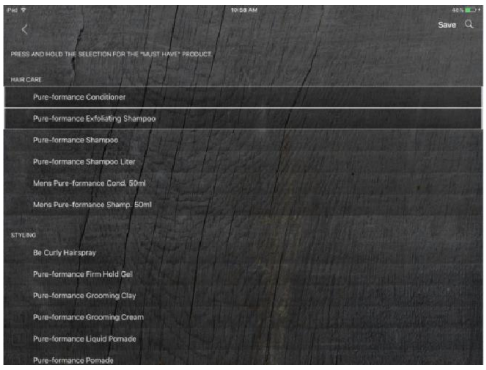
1. Tap the client's name in the Next Up list.
2. Tap the Remove button.
3. Enter the 4 digit Quick Access PIN.
4. The client will be removed from the Next Up list. All following wait times will be adjusted accordingly.



Adding Time to an Appointment

When a service provider is running behind on their current appointment, they can add additional minutes to quickly update their book's productivity and wait time in one step.

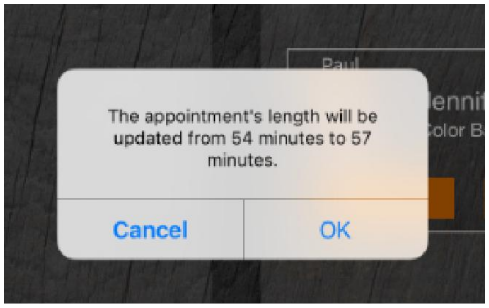
1. Tap the client's name in the In the Chair list.
2. Tap the Add Time button.
3. Enter the 4 digit Quick Access PIN.
4. Select one of the preset number of minutes, or tap the Custom button.
5. If using the Custom option, use the number pad to type the number of minutes you'd like to add to the appointment.
6. Tap the Done button.



Recommending Products

Service providers can recommend products to their clients during their service. These recommendations will be sent to the ticket note, to be viewed at check out.

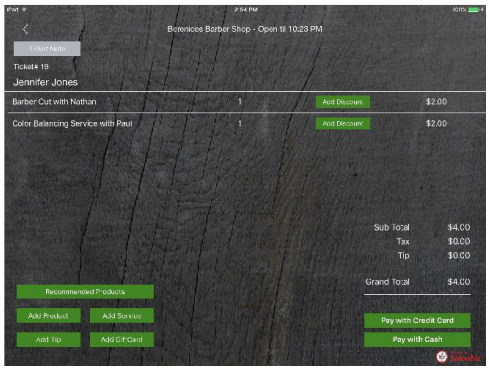
1. Tap the client's name in the In the Chair list.
2. Tap the Recommend Products button.
3. Enter the 4 digit Quick Access PIN.
4. Tap a product once to recommend it.
5. Tap and hold a product to mark it as the "Must Have" product.
6. Tap a selected product to deselect it.
7. Tap the search icon in the upper right corner to search the database for products you don't see in the list.
8. Tap the Save button to save the recommendations to the client's ticket note and formula, if applicable, and return to the list.
   - ❖ The saved recommendations will also be waiting for you at check out in the Recommended Products button in the ticket. Just tap the Add Product button next to the recommendation to add it to the ticket.



Checking out a Client

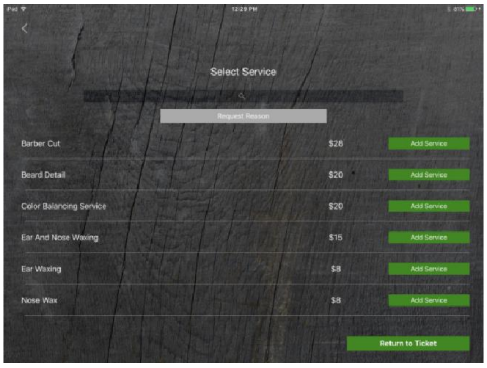
When a client has received their service(s), and is ready to check out, follow the steps to bring up their ticket for editing and processing.

1. Tap the client's name in the In the Chair list.
2. Tap the Check Out button.
3. Enter the 4 digit Quick Access PIN.
   - ★ The client's appointment time will be updated to that of the check out time to ensure accurate productivity and wait times for the service provider.
   - ★ To avoid the ending time of the appointment being updated, tap the Cancel option in the prompt to return to the list without checking out the appointment.
4. Tap the Ticket Note button, if applicable, to view Product Recommendations and other info.



Adding a Product

1. Tap the Add Product button to add products to the ticket.
   - ★ Products set up in the Regimen will be displayed automatically.
   - ★ Start typing in the search field for any products not shown.
   - ★ The sale of professional products will be allowed if the SalonBiz default setting, "Allow sale of professional products?" allows it.
2. Increase the quantity, if desired, and tap the Add Product button to add the product to the ticket.
3. Tap the Recommended Products button to add saved recommendations to the ticket.

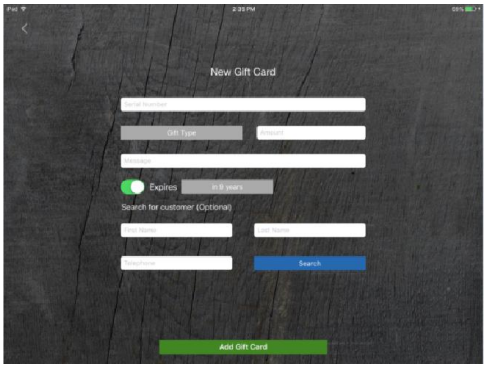


Adding a Service

1. Tap the Add Service button to add services performed during the visit to the ticket.
   - ✶ Services from the designated service category will be displayed automatically.
   - ✶ Start typing in the search field for any services not shown.
2. You will need to select a Request Reason if SalonBiz settings require one for services.
3. Tap the Add Service button to add the service to the ticket.

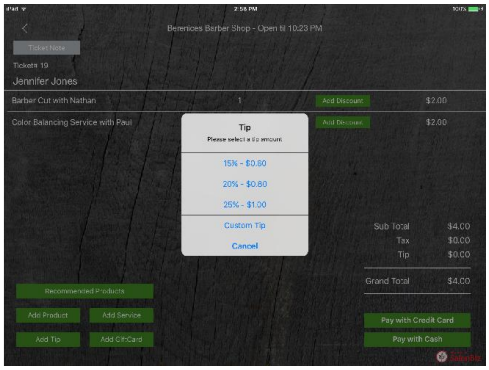
Discounting a Line Item

1. Tap the Add Discount button on a ticket line to discount the price.
2. Type part of the discount's name or code in the search field to bring up matches.
   - ✶ Discounts will only be available for use if they:
     - Are set up as Ticket Line Only or Anywhere on Ticket
     - Have a specified amount (no open amounts allowed)
     - Are set up as either a $ or & (not Both)



Adding a Gift Card

1. Tap the Add GiftCard button to sell a new gift card.
2. Fill in the gift card's serial number.
3. Select the Gift Type.
4. Fill in the desired Amount.
5. If desired, fill in the Message.
6. Expiration options are dependent upon the GiftCard Settings in iPad Admin – Checkout.
7. If you wish to assign the gift card to the purchaser's file, tap the Add Gift Card button to add it to the ticket.
   - ✶ You can also search for a recipient to assign to the gift card to. Select the recipient's name from the search results, and tap the Add Gift Card button to add it to the ticket.

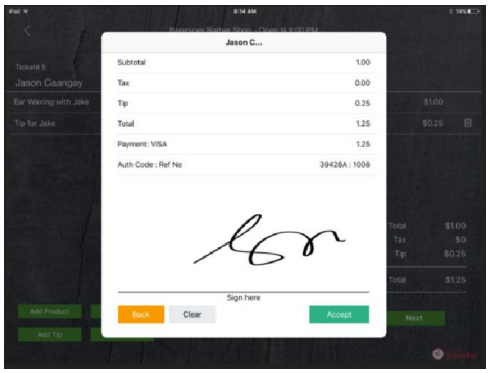


Adding a Tip

1. Tap the Add Tip button if you are aware of the client's wish to leave gratuity.
2. Select one of the suggested tip amounts based on the ticket's service total, or select Custom Tip to set your own amount.
   - ✶ The tip will be automatically split between all service providers on the ticket.
3. Tap the Add Tip button to add the tip to the ticket.
4. Tap the "Pay with credit card" button to process the credit card payment, and close the ticket.

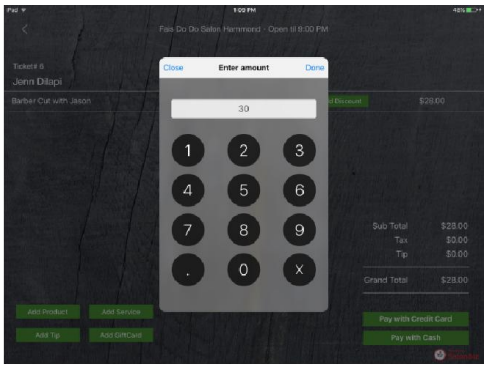
Removing a Line Item

1. Tap the trash can icon on the item you wish to remove from the ticket.
   - ✶ The service that was selected to create the ticket cannot be removed. It must be removed in SalonBiz.



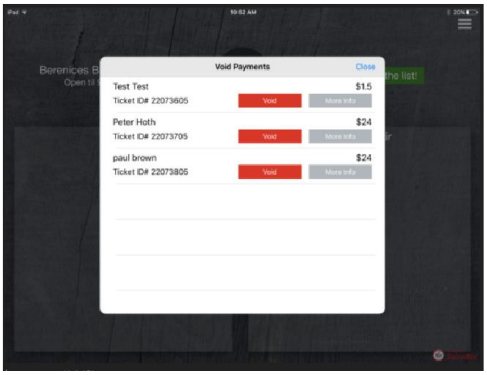
Receiving a Credit Card Payment and Processing Ticket

1. Tap the "Pay with credit card" button to begin processing the ticket.
2. Verify the amount of the credit sale (includes gratuity already added) at the top of the form.
3. Attach the iDyanmo 5 card reader to your iPad®, and swipe the card.
4. You will be presented a form that includes the ticket's Subtotal, Tax, Tip, and Total that is due. The authorized payment is also displayed. You can then hand the iPad® to the client.
5. The client can choose to add a tip, continue to the signature page, or cancel the authorized payment.
   - ✶ To add a tip, the client will choose a predetermined amount, or select the Custom Tip option.
   - ✶ Continue and Sign will display the same info about as above, with the added place to sign their name, and accept the charges.
6. The ticket will be processed automatically when the payment is authorized, and accepted.
7. A visual receipt is displayed after processing with the option to email it to the client.



Receiving a Cash Payment and Processing Ticket

1. Tap the "Pay with Cash" button to begin processing the ticket.
2. Enter the amount of the payment using the keypad.
3. Click "ok" on the message informing you of change due to the client.
4. Tap the "Complete Transaction" button to process the ticket.
5. A visual receipt is displayed after processing with the option to email it to the client.



Voiding a Payment

1. Tap the button in the upper right corner of the home page.
2. Tap the Void Payments option.
   - ✶ Only Managers and Central Administrators will see this option.
3. Enter the 4 digit Payment Info PIN.
4. All processed payments from the current day will be displayed.
5. Tap the Void button to void that payment.
6. When the order has been voided, tap ok on the confirmation.
   - ✶ The ticket in SalonBiz will still need to be voided.

Creating a Ticket (with no service)

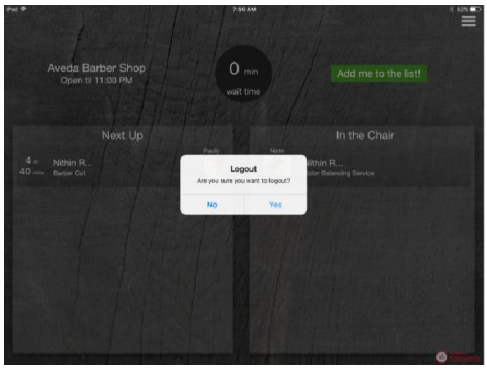
Tickets can be created without having to add the client to the walk-in list. This is helpful when a client just wishes to buy retail.

1. Be sure there is a shift open for the Barber Shop's designated workstation.
2. Tap the button in the upper right corner of the home page.
3. Tap the Create Ticket option.
4. Enter the 4 digit Quick Access PIN.
5. Create or Search for the client's name.
6. Add the items to the ticket and process as usual.

Accessing the Book

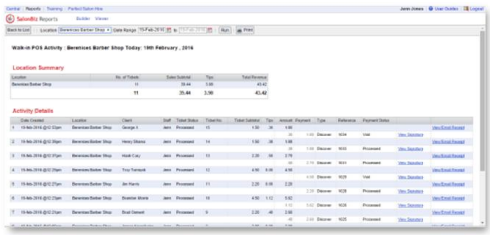
The appointment book can be viewed from the menu to view and create additional appointments, as well as to view history, formulas, and client information.

1. Tap the button in the upper right corner of the home page.
2. Tap the View Book option.
3. Enter the 4 digit Quick Access PIN.
4. Perform appointment book actions as needed.
5. Tap the Back button to return to the list.



Logging Out

1. Tap the button in the upper right corner of the home page.
2. If presented with a menu, choose the Logout option.
   ✶ Managers and Central Administrators will see a menu, while others will just be asked if they want to log out.
3. Tap Yes when asked if you'd like to log out.
4. Enter the 4 digit Quick Access PIN.



Viewing your Mobile POS Activity Report

1. Click the Reports link in Central.
   ✶ Central Administrators determine employee access to reports. This is accomplished by making them administrators, giving them access in their employee filed, or adding them to a Report Group.
2. Click on the Mobile POS Activity (Apps) Report in the list.
3. Select the location and date range you wish to view.
4. Click the Run button.
5. All tickets processed on SalonBiz Barber will be listed with details including status, payment status, and amounts.
6. Print the report, if desired.