

SAM

Salon Appointment Module For Microsoft Retail Management System

SAM

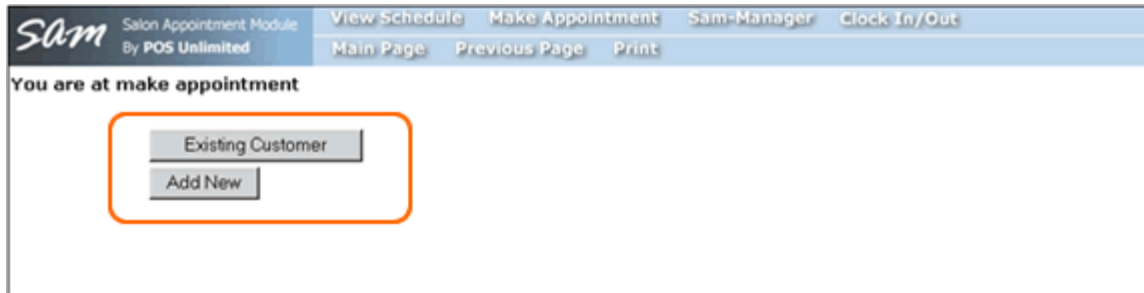
SAM, the Salon Appointment Module, is specifically made for the salon/retail industry. It is designed as an add-on to Microsoft Retail Management Systems Store Operations to provide salon appointment scheduling functions to RMS.

With SAM you can make/modify customer appointment schedules and manage stylist working schedules as well as viewing reports for stylists working schedules. SAM converts customer appointment schedules into work orders in RMS Store Operations automatically when each service is completed.

As an integrated add-on for MS RMS Store Operations, SAM makes MS RMS a more powerful and dedicated software solution for salons and retail businesses.

Making Appointments

With SAM, you can make appointments for customers for service items synchronized from RMS. You can find an existing customer by simply entering his/her telephone number that is registered in RMS database. If you have a new customer, you can add the customer's information in SAM. SAM will automatically create an account into RMS database for the customer.



When a customer is selected on "Make Appointment" screen, SAM displays the selected customer's information such as customer name, RMS account number, pre-defined preferences, total # of visits, total sales, last day of visit, and last services the selected customer purchased from your salon. The information is synchronized from RMS database to help you communicate better while you are making an appointment for the customer.

Appointment day, time, available service items, active stylists' names, and available times are offered to help you make an appointment for the customer.

Customer Information:

Customer Name:	Casey Yi	Account#:	0000020	Last Service:	Skin Waxing
Preference 1:	Dark Brown Hair	Total # of Visits:	2		facial
Preference 2:	Normal Skin	Total Sales:	\$155		Extra 15 min
Preference 3:	Long Nail	Last Visit:	1/6/2005 2:11:59 PM		Skin Waxing

Appointment Details:

Appointment Date/Time: 1/17/2005 / 11:00 AM

(*) Inactive service:

Skin Waxing(30m)	Nails Polish(15m)	Skin Massage(45m)	Service 4	Service 5
Service 6	Service 7	Service 8	Service 9	Service 10

Stylist Assigned: Pat (*) Non-Active Stylist

Store Hours and Availability:

Store Hours	Cathy	Jess	Joel	Pat	Sandra	Susan
10:00AM	JSmith					
10:15AM	//					
10:30AM						
10:45AM						
11:00AM					CStanford	
11:15AM					//	
11:30AM			BBrown		//	
11:45AM			//			
12:00PM			//	Break		
12:15PM			//	//		
12:30PM				//		
12:45PM				//		

Modifying or Updating Appointment Status

Appointments can be modified or updated to different status such as reserved, arrived, in service, completed or canceled at any time as their actual status change. This will help you to manage and monitor each service calls and stylists efficiently.

Sam

Salon Appointment Module
By POS Unlimited

[View Schedule](#) [Make Appointment](#) [Sam-Manager](#) [Clock In/Out](#)

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Customer Name: Lauren Jones

Preference 1:

Preference 2:

Preference 3:

Account# 0000024

Total # of Visits: 0

Total Sales: \$0

Last Visit: 1/11/2005 11:49:08 AM

Last Service:

You are at appointment status change

Detailed View

Reserved

Arrived

In Service

Completed

Cancel Appointment

Viewing Schedules

Viewing a complete appointment schedule is always an easy access in SAM and RMS. Each appointments are shown in different colors indicating their different status. The "View Schedule" screen is refreshed every thirty seconds to provide you an up-to-date schedule. You can view future or old schedules for up to 30 days.

The screenshot displays the 'View Schedule' screen in the SAM software. The main window shows a grid for the date 1/17/2005. The y-axis represents time slots from 10:00AM to 05:45PM in 15-minute increments. The x-axis lists stylists: Cathy, Jess, Joel, Pat, Sandra, and Susan. The grid contains several colored blocks: a green block for 'Reserved' at 10:00AM for Cathy; a yellow block for 'Arrived' at 11:00AM for Sandra; and another yellow block for 'Arrived' at 11:45AM for Sandra. There are also white blocks for 'In Service' at 11:00AM for Joel and Pat, and at 12:00PM for Sandra. A legend at the top of the grid indicates the colors: Available (gray), Reserved (green), Arrived (yellow), In Service (white), and Completed (red). A summary table at the bottom of the grid shows: Sub Total: \$0.00, Sales Tax: \$0.00, Total: \$0.00. The interface also features a Microsoft Office XP sidebar on the right and a navigation menu at the top.

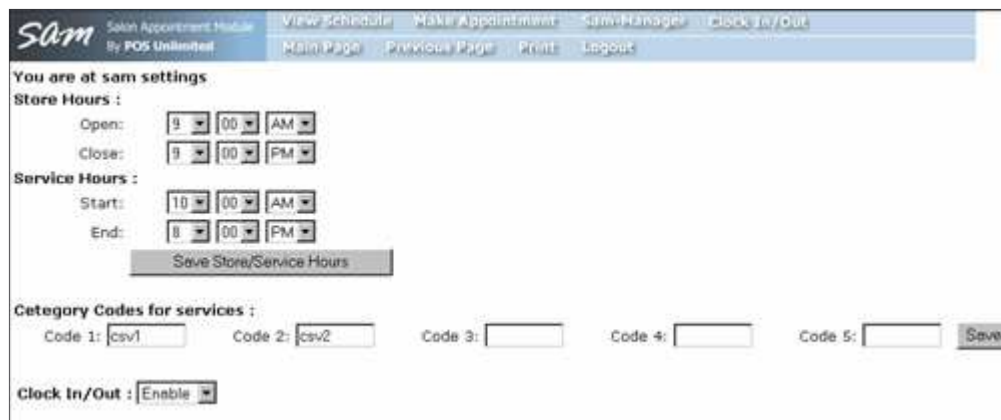
SAM Manager-Store and Service Item Settings

Sam Manager offers much access to settings to connect SAM with your salon. It is important to secure SAM with SAM Managers ID's and passwords that are only intended for administrators such as the salon manager and/or owner. Of course, ID's and passwords are also changeable in SAM Manager settings.

In SAM Settings, you can set/modify the open to close hours and services available hours for your salon. You can define each service items to a particular category in RMS and it will be synchronized into SAM by entering the category code from RMS. Enabling or disabling time clock option for stylists is also presented in SAM settings.

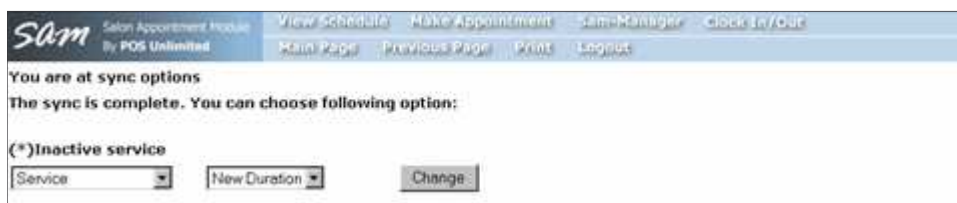


The screenshot shows the SAM Manager login interface. At the top, there is a navigation bar with the SAM logo and the text "Salon Appointment Module By POS Unlimited". To the right of the logo are links for "View Schedule", "Make Appointment", "Sam-Manager", and "Clock In/Out". Below the navigation bar are links for "Main Page", "Previous Page", and "Print". The main content area is titled "You are at sam manager" and contains a login form with fields for "ID:" and "Password:", and a "Submit" button.



The screenshot shows the SAM Manager settings page. At the top, there is a navigation bar with the SAM logo and the text "Salon Appointment Module By POS Unlimited". To the right of the logo are links for "View Schedule", "Make Appointment", "Sam-Manager", and "Clock In/Out". Below the navigation bar are links for "Main Page", "Previous Page", "Print", and "Logout". The main content area is titled "You are at sam settings" and contains several sections: "Store Hours:" with "Open:" and "Close:" fields; "Service Hours:" with "Start:" and "End:" fields; "Category Codes for services:" with five input fields labeled "Code 1:" through "Code 5:" and a "Save" button; and "Clock In/Out:" with a dropdown menu set to "Enable".

In SAM Manager you are able to choose the minimum time required for each service items with fifteen minute blocks once all service items are synchronized from RMS.



The screenshot shows the SAM Manager sync options page. At the top, there is a navigation bar with the SAM logo and the text "Salon Appointment Module By POS Unlimited". To the right of the logo are links for "View Schedule", "Make Appointment", "Sam-Manager", and "Clock In/Out". Below the navigation bar are links for "Main Page", "Previous Page", "Print", and "Logout". The main content area is titled "You are at sync options" and contains the text "The sync is complete. You can choose following option:". Below this text is a section titled "(*)Inactive service" with a dropdown menu for "Service", a dropdown menu for "New Duration", and a "Change" button.



The screenshot shows the SAM Manager sync options page. At the top, there is a navigation bar with the SAM logo and the text "Salon Appointment Module By POS Unlimited". To the right of the logo are links for "View Schedule", "Make Appointment", "Sam-Manager", and "Clock In/Out". Below the navigation bar are links for "Main Page", "Previous Page", "Print", and "Logout". The main content area is titled "You are at sync options" and contains the text "The sync is complete. You can choose following option:". Below this text is a section titled "(*)Inactive service" with a dropdown menu for "Skin Message(45m)", a dropdown menu for "45m", and a "Change" button.

SAM Manager-Stylist Settings

Stylists are defined as Sales Reps in RMS. SAM synchronizes all Sales Reps from the RMS database into SAM. You can modify each Sales Reps' settings to define them as Stylist or Non-Stylist and Active or Inactive status in SAM. Only those ones defined as Stylist and Active Status will be available for service appointments.

There are many features for stylist settings such as making/modifying their work schedules, viewing a stylists' schedule, and clocking in/out. Stylists/non-stylists will be asked their user ID and password to clock in and out.

SAM Salon Appointment Module By POS Unlimited | View Schedule | Make Appointment | Sam-Manager | Clock In/Out
Main Page | Previous Page | Print | Logout

You are at modify stylists/non-stylists

All | Active Stylists | Non-Active Stylists | Active Non-Stylists | Non-Active Non-Stylists/New Added

You are viewing ALL employees

ID	Short Name	First Name	Last Name	HPhone#	CPhone#	Stylist	Active	Select
9	Amber	Amber	Portland			No	No	Modify
5	Cathy	Cathy	Volume			Yes	Yes	Modify
3	Jess	Jessica	Ram			Yes	Yes	Modify
7	Joel	Joel	Johnson			Yes	Yes	Modify
2	Pat	Patrick	Sands	(425) 555-1089		Yes	Yes	Modify
6	Patric	Patric	Eassy			Yes	No	Modify
4	Sandra	Sandra	Butler			Yes	Yes	Modify
1	Susan	Susan	Metters	(206) 555-1087		Yes	Yes	Modify

SAM Salon Appointment Module By POS Unlimited | View Schedule | Make Appointment | Sam-Manager | Clock In/Out
Main Page | Previous Page | Print | Logout

You are at stylist schedule

Make/Modify Schedule

View Stylist Schedule

Clock In/Out Options

SAM Salon Appointment Module By POS Unlimited | View Schedule | Make Appointment | Sam-Manager | Clock In/Out
Main Page | Previous Page | Print | Logout

You are at make/modify stylist schedule

Select Date:

Stylist:

Same up to:

Make/Modify

SAM Salon Appointment Module By POS Unlimited | View Schedule | Make Appointment | Sam-Manager | Clock In/Out
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You are at make/modify stylist schedule

Re-schedule for 1/17/2005
Re-scheduling Sandra

Shift Open: AM

Shift Close: PM

Break Start: AM

Break End: AM

Save

Being able to view the work schedules for ALL stylists is also offered in SAM. Work hours from clocking in and out and break times are displayed.

Sam Salon Appointment Module By POS Unlimited		View Schedule	Make Appointment	Sam-Manager	Clock In/Out	
		Main Page	Previous Page	Print	Logout	
You are at view stylist schedule						
1/17/2005 , (+) Stylist, (-) Non-Stylist						
Store Hours	+Cathy	+Jess	+Joel	+Pat	+Sandra	+Susan
9:00AM						
9:15AM						
9:30AM						
9:45AM						
10:00AM	W		W	W	W	
10:15AM	W		W	W	W	
10:30AM	W		W	W	W	
10:45AM	W		W	W	W	
11:00AM	W	W	W	W	W	W
11:15AM	W	W	W	W	W	W
11:30AM	W	W	W	W	W	W
11:45AM	W	W	W	W	W	W
12:00PM	W	W	W	Break	W	W
12:15PM	W	W	W	//	W	W
12:30PM	W	W	W	//	W	W
12:45PM	W	W	W	//	W	W

Creating Work Order into RMS

SAM creates Work Orders into RMS automatically when service appointments' status are changed to "Completed" in SAM. You can use the built in "recall work order" function in RMS StoreOperations to convert the order into sales transactions.

The screenshot displays the Microsoft Store Operations POS interface. A 'Work Orders' dialog box is open, showing a list of 29 entries. The selected entry is order #49, dated 1/15/2005 at 3:00:59 PM, for customer Stanford with comment 'SAM'. The background shows a 'Beauty Salon' transaction screen with a 'Sales' tab selected for Alex Nayberg. The transaction summary at the bottom shows Sub Total, Sales Tax, and Total all at \$0.00.

Order #	Date	Reference	Customer	Comment
34	12/14/2004 5:22:14 PM		Robinson	
35	12/14/2004 5:23:18 PM		Robinson	
36	12/15/2004 3:04:07 PM		Muhammad	
38	12/22/2004 3:47:50 PM		Miller	
39	12/22/2004 4:46:26 PM		Muhammad	
40	12/28/2004 11:02:27 AM		kang	
41	1/3/2005 3:49:34 PM		Muhammad	
44	1/10/2005 11:25:17 AM		Muhammad	
45	1/11/2005 12:03:14 PM		Smith	
46	1/11/2005 12:04:13 PM		Stanford	
48	1/14/2005 2:38:54 PM		Smith	
49	1/15/2005 3:00:59 PM		Stanford	SAM