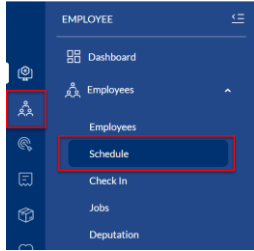


Quick Reference Guide

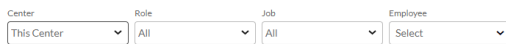
To access the employee scheduler

- Click on the employee module
- Click Schedule



Filter list of employees on scheduler

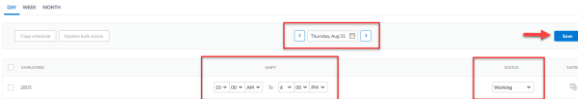
- Use the dropdowns to filter by center, role, job or individual employee



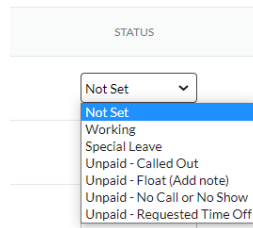
- When filtering by center: This Center = the salon's base employees / Other Center = employees of other locations that cover at this location

Managing daily schedules in the day view

- Use the calendar to manage the schedules for that specific date
- The status column shows who is working and who is not set to work
- The shift column shows the scheduled shift for those with a working status
- To schedule an employee who is not set, set their scheduled shift in the shift column
- Their status will automatically change to working
- Once done, click Save

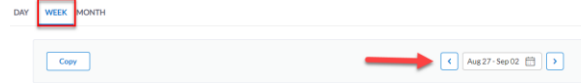


- To take an employee off the schedule, change their status to the appropriate selection (e.g., Not Set, Unpaid – Called Out)
- Once done, click Save

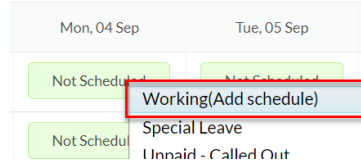


Managing weekly schedules in the week view

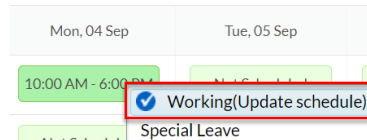
- Click on the Week tab
- Change the week by using the calendar or arrows



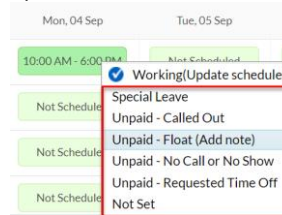
- Set the schedule per day for an employee by clicking on non-scheduled days and selecting **Working(Add schedule)**



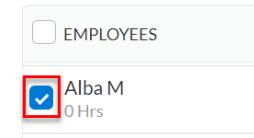
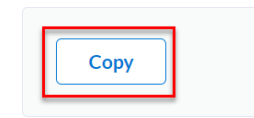
- To update an employee's already scheduled shift, click on the day and select **Working – Update Schedule**



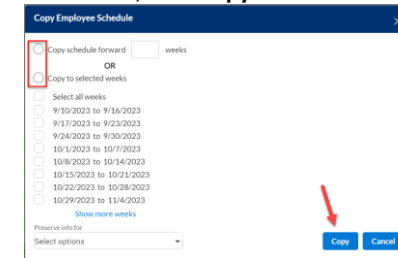
- To change an employee from working, click the scheduled date and select from any of the other options



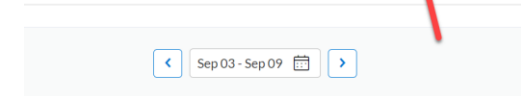
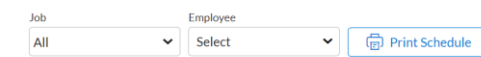
- To set this same week's schedule for future weeks, check the box next to the employee's name and click **Copy**



- To copy the schedule for a set number of weeks, click the first option and set the number of weeks
- To copy to alternating weeks, click the second option and choose the specific weeks to copy this schedule to
- Once done, click **Copy**

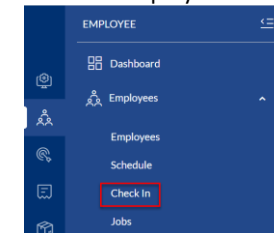


- To print the schedules for the week, click the **Print Schedule** button next to the filters at the top



To adjust time entries

- Click the employee module and select **Check In**



- Select the date from the calendar and click **Go** to see all time entries for that day

Manage check-ins for

- To edit time entries for an employee, click **Edit** next to their name

Manage check-ins for

Employee	Expected Check In	Actual Check In
<input type="button" value="Edit"/> Test Stylist	08:00 AM	03:30 AM

- Enter the time entries in the **Check In** and **Check Out** fields
- Click **Add** when done

UPDATE ATTENDANCE DETAILS - Test Stylist - (9/5/2023)

Employee: Test Stylist

ADD CHECK IN/CHECK OUT

Expected Check In: AM

Expected Check Out: PM

Check In Time: AM

Check Out Time: AM

Consider this checkout for Meal Break

Vacation Hours: min

Holiday Hours: min

Work Task:

Comments:

- You can remove any overlapping time entries via the red **X**

ATTENDANCE DETAILS

CHECK IN	CHECK OUT	WORK TASK	COMMENTS
<input type="button" value="X"/> 03:30 AM	03:31 AM	Production Work Task	
<input type="button" value="X"/> 03:35 AM	04:11 AM	Production Work Task	
<input type="button" value="X"/> 04:23 AM	04:24 AM	Production Work Task	

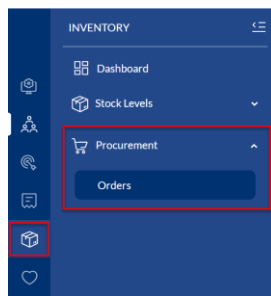
- To add attendance for an employee with no time entries for the day, click **Add Attendance**

ments

- Select the employee and add expected hours (scheduled) and actual hours (actual clock in/out)

Raising a purchase order

- Click on the inventory module, click **Procurement** and click **Orders**



- Click the **I want to...** dropdown and select **Add Order**

I want to ...

- Add Order
- Add Order (Auto)
- Add Returns
- Add Transfer
- Add Transfer (Auto)
- Add Transfer Return
- Import Order

- Select the vendor from the dropdown and check the box next to each product for the order

Editing of Delivered Orders will be restricted 90 days from today's date

Select vendor & products (Step 1/2)

Vendor:

Product:

Brand:

Product Name	Product Code	Vendor Part Number	Brand
<input type="checkbox"/> Tea Tree Lemon Sage Thickening Spray (6.8 fl. oz.)	USA-574093	574093	John Paul Mitchell Systems
<input checked="" type="checkbox"/> Ultimate Radiance Leave-In Conditioner (6.4 fl. oz.)	USA-022307	022307	

- Enter the quantity into the order quantity field on the right

Retail Order Quantity	Consumable Order Quantity	Unit Total (\$)
<input type="text" value="5"/>		34.15
<input type="text" value="5"/>		24.35
<input type="text" value="5"/>		22.75

- When done, click **Review Order**

- Remove items (if necessary) via the trash can icon and to add more products, click **Edit Order**
- When done, click **Save & Continue**

Total value **\$81.25**

- On the next screen, click **Save & Raise** **Look up raised orders**
- You can access raise purchase orders by clicking on the inventory module, clicking on **Procurement** and then clicking on **Orders**
- Use the filters to select the list of orders and refresh the report
- Click on the **REF#**

Manage Procurement

Inventory > Manage Purchase Orders & Transfers

Report Name: Order Type: Order Status: Order Date:

Order No. Notes

REF #	Order On	Deliver On	To	From	Status	Qty	Value	Tax	Notes
<input type="button" value="X"/> 77	9/5/2023 5:47 PM		8569 WOODBURY	Supercenter	RAISED	15	112.15	28.05	

Page size: 25

Full delivery

- If all quantities of products have been received in the order, click **Full Delivery** to update the salon's on hand stock and close the order

Product Code	Vendor Part Number	Product Name	Retail Raised	Consumable Raised	Pending Retail Quantity	Pending Consumable Quantity	MRP(\$)
USA-024893	024893	3-in-1 Tea Tree Shampoo, Conditioner, Body Wash (15.2fl.oz.)	5	0	5	0	19.00
USA-573692	573692	Tea Tree Firm Hold Gel (6.8 fl.oz.)	5	0	5	0	16.50
USA-019841	019841	Tea Tree Special Shampoo, Conditioner (1 Prepack)	5	0	5	0	25.00

Additional Details

Total Qty: 15 Total Value: 112.15

Subtotal: 112.15 Total Tax: 28.05

Discount % or \$: 0 Grand Total: 140.20

Discount \$: 0.00

Shipping & Handling: 0 Other: 0

Partial delivery

- If not all quantities have been received, adjust the received quantity field for each product to match what you did receive

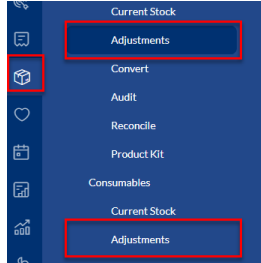
Retail Received	Consumable Received
<input type="text" value="5"/>	<input type="text" value="0"/>
<input type="text" value="5"/>	<input type="text" value="0"/>
<input type="text" value="5"/>	<input type="text" value="0"/>

- Click **Partial Delivery** to update the salon's on hand stock for the products you did receive
- The order will remain open and you can return to accept more products from the delivery
- If you will not get any back ordered products in, click **Close Order**



Adjust on hand quantities

- Click on the inventory module and click **Adjustments** under retail or consumable (backbar)

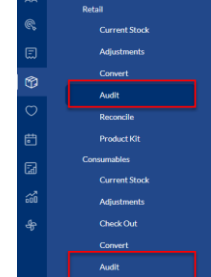


- Click **Add**
- Search for the name or scan the barcode of the product
- Use the arrows in the **Adjust Store Quantity By** to increase or decrease stock

- Select a reason and click **Save**

Submit an audit

- To submit a count of your products, click on the inventory module and select **Audit** under retail or consumable (backbar)



- All retail or consumable products will show, which you can filter use the drop downs and search at the top



- Enter the count for the products in the **On-Hand Qty** field

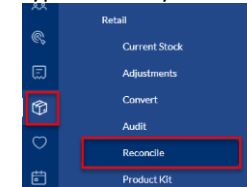
Name	ProductColor	Size	Unit	Category	Sub Category	ON-HAND QTY	Notes
Supraja Void test1			1 units	1	1	<input type="text"/>	<input type="text"/>
Miracle Leave-In (10_fl_oz)			1 units	Its A 10	CONDITIONER	<input type="text"/>	<input type="text"/>
Miracle Leave-In (4_fl_oz)			1 units	Its A 10	CONDITIONER	<input type="text"/>	<input type="text"/>

- If counts have been entered and you are going to look for new products to enter more counts, click **Save Changes**
- Once you've entered counts for all the desired products, check the first option below of **Submit**

Only Above Products and click **Submit Audit**

Reconcile an audit

- To compare the count to the on hand stock, click the inventory module and click **Reconcile** under the type of audit you submitted (retail or consumable)



- The comparison of your count vs on hand stock is shown

- Current On-Hand Qty = Current stock in Zenoti
- Audited On-Hand Qty = Count submitted in audit
- UnAccounted (After Audit) On-Hand Qty = Difference between the two previous columns
- Reconciled On-Hand Qty = New on hand qty for the salon

Current On-Hand Qty	Audited On-Hand Qty	UnAccounted (After Audit) On-Hand Qty	Reconciled On-Hand Qty
0.00	6.00	(6.00)	<input type="text" value="6"/>

- If you recount a product based on the discrepancy, you can change the Reconciled On-Hand Qty to the new count before reconciling.
- Once done, click **Reconcile Now**