

Quick Reference Guide

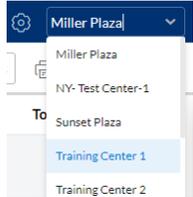
To login via username and password

- Enter your Zenoti URL in the browser
- Enter your individual username and password and click **Login**



Floating - salon change

- Use the dropdown in the upper right-hand corner to select the salon you are at for the day

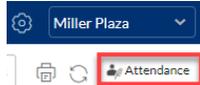


Clock-in (check-in) and clock-out (check-out) Employees

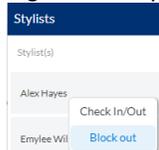
- On the queue, click
- Select your name for the list.
- Select whether this is production or non-production hours.
- Enter your PIN (if prompted)
- Click **OK**
- Follow the same steps to clock-out
- *Note that when clocking out, it will ask you to declare cash tips which is optional. You must enter a number, zero is accepted.*

Block Out/Breaks

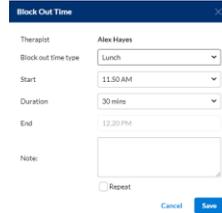
- Click on **Attendance** on the right-hand side



- Right click on your name and select **Block Out**

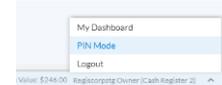


- Use the drop downs to fill in the details of the break. When done, click Save.



To activate PIN mode (if used by the salon)

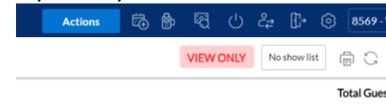
- Login with username and password as described above
- Click on your name at the bottom of the screen and choose **PIN Mode**



- PIN mode will be activated for the day

To login via PIN (if used by the salon)

- The system will auto log out after inactivity, and queue will enter **View Only** mode, prompting you to select your username and enter your PIN to perform any activity.



- Click on your name from the list
- Enter your pin and click **Submit**

Generate a PIN

- Login using your username and password and navigate to the queue
- Click on your name from the bottom of the queue and select **My Dashboard**



- Select **Generate PIN without Email**



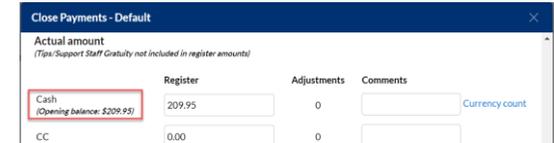
- Enter your login password and click **Generate PIN**



- Your PIN will be displayed
- **Login via salon generic login**
- Logout of your individual login
- Login using generic login to perform daily tasks

Opening Till

- Click on **Actions**
- Hover over **Manage Register** and select **Close Payments**
- Find the **Cash** section
- Use the **Currency Count** to determine the actual cash on hand matches opening balance. If there is a difference, this will show under **Adjustments**. Enter a **Comment**.



- Click **Save**. *Note that you need to ensure the deposit field is empty before clicking Save.*

Add a walk-in to the queue

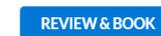
- Click the **Walk-In** button on the queue



- On the walk-in window
 - Search for the customer's profile or click **+New Guest** to create a new customer profile
 - Search for and select the service
 - *Optional** Clear **Any** stylist selection and choose the preferred stylist from the menu
 - *Optional** For additional services, click **+Service** to add a second service line and enter details



- Once done, click **Review&Book**

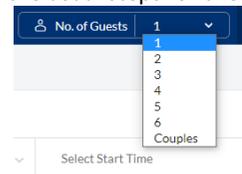


- Review the service details and click **Book**



Add a multiple walk-in customer to the queue

- If multiple customers check-in together, you can use the **No. of Guests** drop down at the top of the wizard to add multiple customers at once. Follow the usual steps for check-in per each customer.

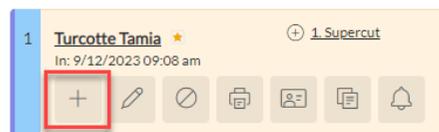


- The customers will be on the queue with group indication via **G** and will be checked out via a group bill.



Add services to the customer

- On the queue, click on the block of the guest for which you'd like to add a service.
- Click the **+** icon to add a service



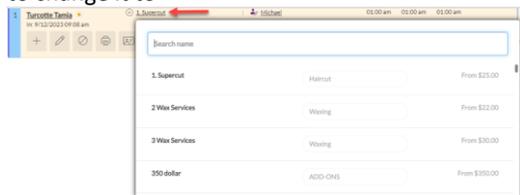
- Use the drop downs to select the additional service and stylist and click **Add**



- When done, click **OK**

Change existing services on the ticket

- Click the service name
- Use the drop down to select which service you want to change it to

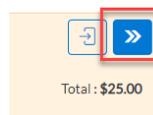


Check-In and Start

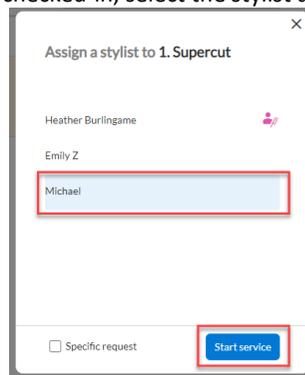
- To check in a customer who has arrived, but you are not ready to service, click **Check-In** on the customer's service



- When you are ready to service a customer, click **Start** to move from **Waiting** to **Being Served**

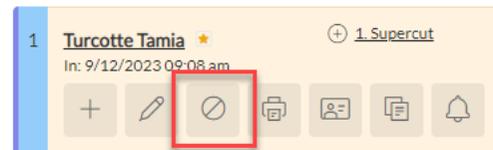


- If no stylist was assigned when the customer was checked-in, select the stylist and click **Start service**



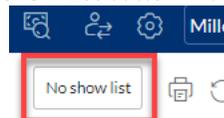
Walk out / no-show

- To remove a no-show customer's service from the queue, click on the **Walk Out** button.



Return a no-show

- To return a no-show customer who was removed from the queue via the walk out button, click the **No Show List** button in the upper right-hand corner



- Click **Return To Queue** for the no-show customer you would like to add back to the queue and use the

wizard to return them to the queue.

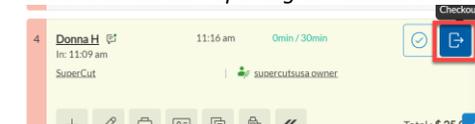


Mark Complete and Check Out a Customer

- If you are done servicing a customer but they are not ready to check out, click **Mark Complete** to stop the service time



- When the customer is ready to check out, click **Checkout**. *Note that you do not need to mark as complete to check out. Checkout marks the service as done while also opening the checkout screen.*



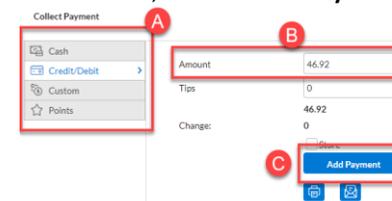
- To add product, scan the barcode or search for the product name. Adjust the quantity if desired. When done, click **Add**. *Note the stylist who performed the service will be the default for the **Sale By** of this product and will receive commission for this sale.*



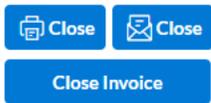
- To add a discount to the invoice, use the **Campaign** drop down and select the campaign you want to apply. Once selected, click the **Play** button.



- When ready to take payment, choose the payment type the customer wants to use and select **Add Payment**. If they want to split payment types: select the first payment type, change the amount in the amount field, and click **Add Payment**.



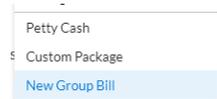
- When accepting a Credit/Debit payment, the customer will be able to add tips to the credit card terminal after you click **Add Payment**. *Note that the credit card terminal will be selected by default. If it says manual, ensure to change it to terminal to process the card payment with the card reader.*
- After full payment has been accepted, you can close the invoice and print or email the receipt.



Add Customers to a Group Bill

Note that this only needs to be done if the customers did not check-in together as mentioned above.

- Click **Actions** and select **New Group Bill**



- On the group invoice, select **Today's Open Invoices**



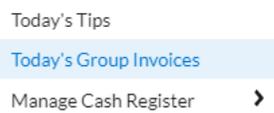
- Check the box next to each invoice you want to combine and click **Add**.



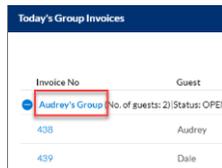
Add Customers to an existing Group Bill

Note that this only needs to be done if the customers did not check-in together as mentioned above.

- Click **Actions** and select **Today's Group Invoices**



- Click the name of the existing group you want to add a customer to



- On the group invoice, select **Today's Open Invoices**



- Check the box next to each invoice you want to combine and click **Add**.



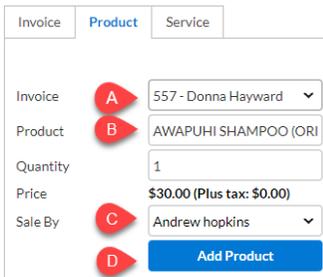
Add campaigns to group bill

- Click on the **Discount** tab
 - Choose the invoice from the drop down
 - Choose the campaign from the drop down
 - Click the **Play** button



Add product to group bill

- Click on the **Product** tab
 - Choose the invoice from the drop down
 - Search for or scan the product
 - Choose the employee for the sale
 - Click **Add Product**



Remove customers from group bill

- Clients on a group bill can only be checked out together. To check out separately, click the **Trash** icon next to the name of each client you'd like to remove from the group bill and check them out individually.



Price Check

- Click the **Price Check** icon and search for services or products.



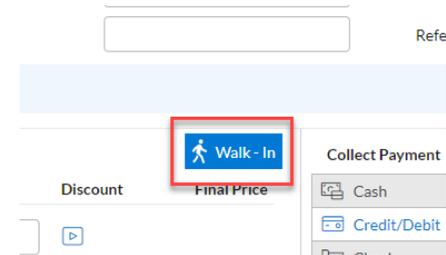
Point of Sale

- To sell products or gift cards to walk-in customers, launch the **Point of Sale**, search for the client profile, add items, and take payment as usual.



Quick Sale

- After launching the **Point of Sale** click the **Walk-in** icon



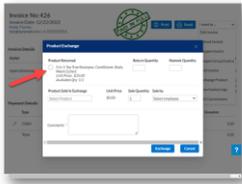
- Search for or scan the product
- Choose the employee for the sale
- Click **Add**

Exchange a Product

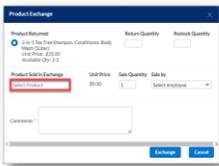
- Locate the product in the products tab of the guest profile. Click the **Exchange** icon.



- Select the checkbox next to the item you'd like to exchange



- Enter the qty you wish to exchange (only include **Restock** if unused)
- Search for the new product the guest would like to purchase in exchange for the existing product. Add the qty the guest wants to purchase and select the employee making the sale. Enter comments and click **Exchange**



- A new invoice will open with one of two scenarios
 - The new item is lesser value than the original, the amount due will be added as a balance to their profile
 - The new item is greater value and you will need to collect payment from the guest.

Mid-Day Spot Check

- Hover over **Manage Register**, select **Close Payments**
- Find the **Cash** section under **Actual Amount**
- Use the **Currency Count** to determine the actual cash on hand.



- If short from the expected amount, the difference populates automatically on the **Adjustments**
- Put down notes for any reason for the discrepancy
- Hit **Save** to submit the mid-day closure. **Please note: do not hit "Calculate" during mid-day spot checks. You will only calculate during the end of**

day process before you remove the cash to perform the deposit at the end of the night.

End of Day Cash Up

First step:

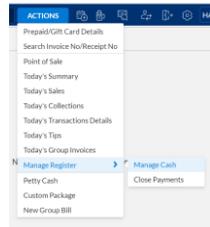
To close the invoices for the day

- Click on **Actions**
- Click **Today's Sales**
- Change **Status** to **Open** to see if there are any open invoices remaining before closing the register.
- Close or delete any open invoices.

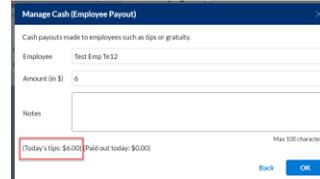
Second Step (OPTIONAL):

Pay out Tips

- Click on **Actions**
- Hover over **Manage Register** and select **Manage Cash**



- Click **Pay Out** cash
- Type the employee's name in the search, enter amount to pay out (see total tips in bottom left) and enter any notes (optional)



- Click **OK**
- Repeat for each employee

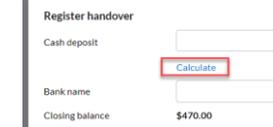
Third Step

Close Register for the Day (Cash)

- Hover over **Manage Register** and select **Close Payments**
- Find the **Cash** section under **Actual Amount**
- Use the **Currency Count** to determine the actual cash on hand.



- If short from the expected amount, the difference populates automatically on the **Adjustments**
- In the case of a discrepancy, add notes.
- In the **Register Handover** section, Zenoti will guide you on how much money you should be depositing at the end of the night. Click **Calculate** and Zenoti will calculate and display how much you should deposit in the **Cash Deposit** field. Remove that cash from the register and deposit it per your typical end of day process.



- Your closing balance will update to reflect the till float that you have configured in center settings.
- Hit **Save** to submit the cash register closure.

Fourth Step (OPTIONAL)

Add Cash to Float

- Click on **Actions**
- Hover over **Manage Register**, select **Manage Cash**
- Click **Add Cash**
- Enter the amount you are adding to the float and enter notes.
- Click **OK**

