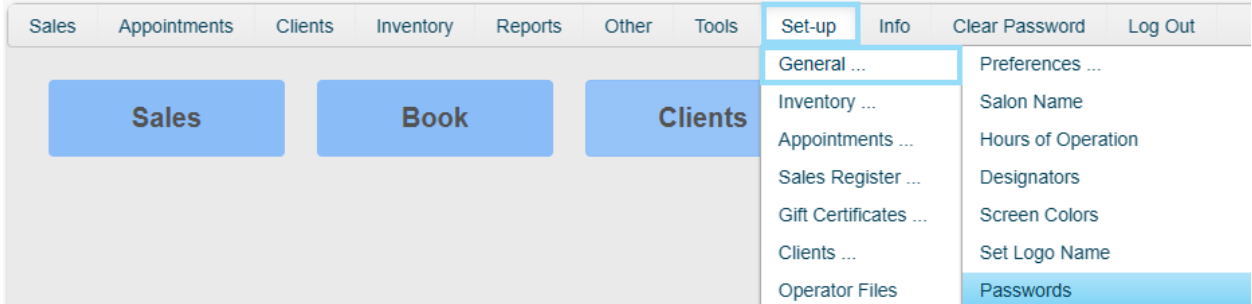


Setting Up Passwords

1. From menu at the top of the homepage, select Setup – General – Passwords



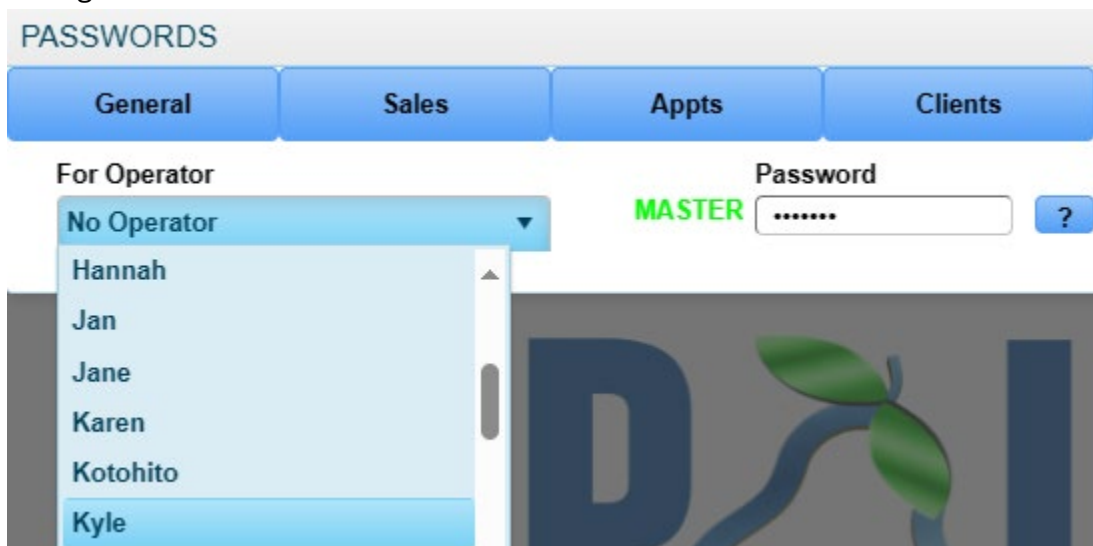
2. When prompted, enter your “master password” user name and password and click ‘Enter’ on your keyboard. (*Note: If this is your first time setting up passwords, your default user name is ‘master user’ and your password is ‘master1’) It is recommended you change this password.

User Name:

Password:

3. From the ‘For Operator’ drop down box, choose which operator you would like to configure.



4. Next, make up a 7-character password for this operator. Each password must include at least one number and one special character. (i.e. Kyle24!) Please note that passwords are case sensitive.

PASSWORDS

General	Sales	Appts	Clients	Inv
---------	-------	-------	---------	-----

For Operator: Kyle

Enter New Password

Password: ?

5. Now choose an effective time. This is the amount of time that the software will hold onto this password once it is entered so the operator does not need to constantly type in their information each time they attempt to perform a function. (*Please note that this effective time resets each time a function is performed. For example, if this operator books an appointment, then 3 minutes later books another appointment, the software will not prompt them to enter their information again and it will reset their 5-minute effective time.

PASSWORDS

General	Sales	Appts	Clients	Inventory	Reports
---------	-------	-------	---------	-----------	---------

For Operator: Kyle

Password: ?

Eff. Time (Mins): 5 Mins

- We will now work left to right on the main password toolbar, choosing which functions within the software this operator will be granted access to, beginning with 'General.' In the example below, this operator will have the ability to access both the Sales and Appointments screen but will not have access to any other main menu screens. Once you have clicked the options you want to give access to, click 'Accept.'

PASSWORDS

General Sales Apts Clients Inventory Reports Other

For Operator: Kyle Password: ***** Eff. Time (Mins): No Time User Name: Kyle

GENERAL ACCESS

Access to Main Menu Items:

Exit Time Clock	<input type="checkbox"/>
Exit Appointments	<input type="checkbox"/>
Change Label Captions	<input type="checkbox"/>

Sales	<input checked="" type="checkbox"/>	Setup	<input type="checkbox"/>
Appointments	<input checked="" type="checkbox"/>	Info	<input type="checkbox"/>
Clients	<input type="checkbox"/>	Store	<input type="checkbox"/>
Inventory	<input type="checkbox"/>	DARCI	<input type="checkbox"/>
Reports	<input type="checkbox"/>		
Other	<input type="checkbox"/>		
Tools	<input type="checkbox"/>		

Buttons: Accept, Cancel, Select All

- In the previous step, we granted access for this operator to the Sales screen. In this example, we decide once within the Sales screen, which functions this operator can perform. As you can see in the image below, this operator can Process Sales (check customers out) and Apply Discounts but can perform no other functions.

PASSWORDS

General **Sales** Apts Clients Inventory Reports Other Tools

For Operator: Kyle Password: ***** Eff. Time (Mins): No Time User Name: Kyle

SALES REGISTER

Access to Menu Items:

Register	<input type="checkbox"/>	Appointment Schedule	<input type="checkbox"/>
Close	<input type="checkbox"/>	Time Clock	<input type="checkbox"/>
Rollback	<input type="checkbox"/>	Book Appointments	<input type="checkbox"/>
End-of-Day Report	<input type="checkbox"/>	View	<input type="checkbox"/>
Service Sales Report	<input type="checkbox"/>	Transactions	<input type="checkbox"/>
Retail Sales Report	<input type="checkbox"/>	Prior Closings	<input type="checkbox"/>
Deposits	<input type="checkbox"/>	Appointment Waiting List	<input type="checkbox"/>
In-Salon Use	<input type="checkbox"/>	Service Price List	<input type="checkbox"/>

Allow Users to:

Process Sales	<input checked="" type="checkbox"/>
Modify Prices	<input type="checkbox"/>
Modify Service Prices	<input type="checkbox"/>
Modify Retail Prices	<input type="checkbox"/>
Apply Discounts	<input checked="" type="checkbox"/>
Modify discount code settings	<input type="checkbox"/>

Buttons: Accept, Cancel

8. In this last example we will look at the options that can be performed by this operator once in the Appointment screen. Notice the two options highlighted in red. This operator has been granted access to the 'Week View' screen, however, by having the option 'Only View Own Appointments in Week View' selected, they will only be able to see their own appointments. If this option is not chosen, they will be free to view the appointments of other operators within the Week View screen.

PASSWORDS

General Sales **Appts** Clients Inventory Reports Other Tools

For Operator: Kyle Password: ***** Eff. Time (Mins): No Time User Name: Kyle

APPOINTMENTS

Accept Cancel

Can Perform Following Operations:

Book Appointment	<input checked="" type="checkbox"/>	Set Appointment Attributes	<input type="checkbox"/>
Unbook Appointment	<input checked="" type="checkbox"/>	Change Service Name	<input type="checkbox"/>
Reschedule Appointment	<input checked="" type="checkbox"/>	Change Appointment Duration	<input type="checkbox"/>
View Appointment Info	<input type="checkbox"/>	Change Client Type	<input type="checkbox"/>
Check-In Client	<input checked="" type="checkbox"/>	Mark Appointment as a No-Show	<input type="checkbox"/>
Modify Appointment Waiting List	<input type="checkbox"/>	Mark Appointment as a Package	<input type="checkbox"/>
Confirm Appointment	<input type="checkbox"/>	Mark Appointment as a Standing Appointment	<input type="checkbox"/>
Book Blockout	<input type="checkbox"/>	Mark Appointment as a Series	<input type="checkbox"/>
View/Print Operators Schedules	<input type="checkbox"/>	Set Operator Display Order	<input type="checkbox"/>
Only View Own Appointments in Week View	<input checked="" type="checkbox"/>	Reschedule ALL Appointments	<input type="checkbox"/>

Access to Menu Items:

Multi-Book	<input type="checkbox"/>
Day View	<input checked="" type="checkbox"/>
Week View	<input checked="" type="checkbox"/>
Standing Appointments	<input type="checkbox"/>
Month View	<input type="checkbox"/>
Group Booking	<input type="checkbox"/>
Operator Appts	<input type="checkbox"/>
Service Pricelist	<input type="checkbox"/>
Appointment Confirmations	<input type="checkbox"/>
Appointment Waiting List	<input type="checkbox"/>

9. Once you have assigned all the functions you wish this operator to perform, click the 'Accept' button on the Passwords home toolbar.

PASSWORDS

General Sales Appts Clients Inventory Reports Other Tools Setup **Accept**

For Operator: Kyle Password: ***** Eff. Time (Mins): 5 Mins User Name: Kyle

Change Copy Delete Print

Copying Permissions

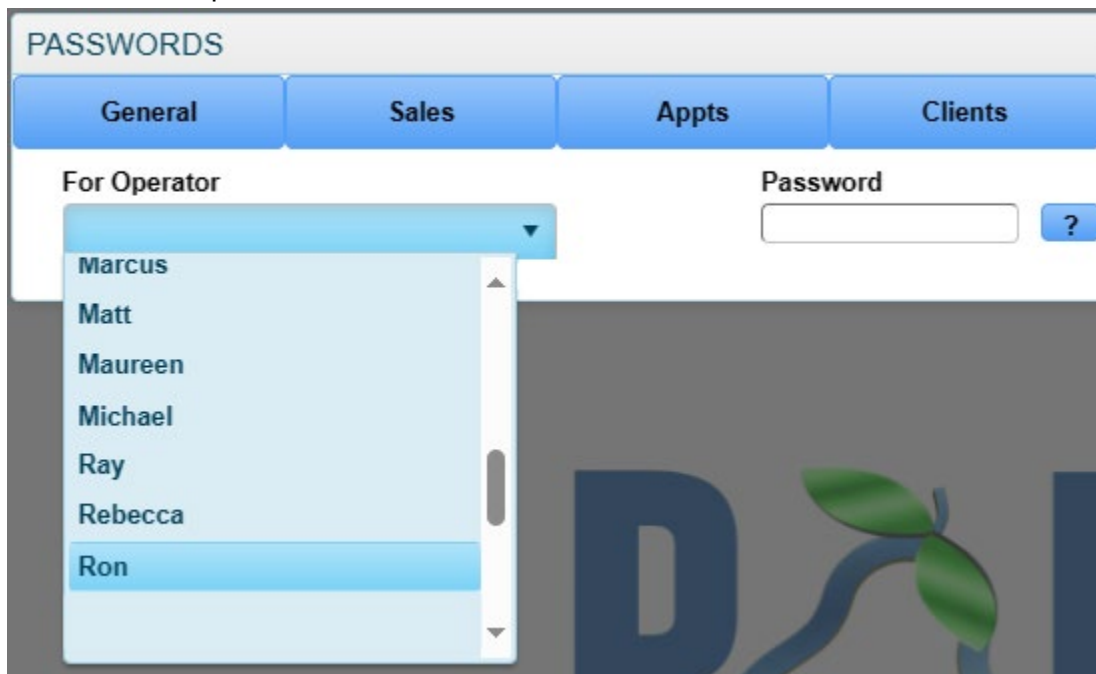
(Once an operator has been setup, if you wish to give the same access rights to another operator without having to set them up individually, you can follow these steps.)

1. Select the Operator's name on the left from the dropdown who has already been setup with the permissions you want and click the 'Copy' button on the right.



The screenshot shows the 'PASSWORDS' form with a navigation bar containing 'General', 'Sales', 'Appts', 'Clients', 'Inventory', 'Reports', 'Other', 'Tools', 'Setup', and 'Accept'. The 'General' tab is active. The form includes a 'For Operator' dropdown menu with 'Kyle' selected, a 'Password' field with a masked password and a '?' button, an 'Eff. Time (Mins)' dropdown menu with '5 Mins' selected, and a 'User Name' field with 'Kyle' entered. On the right side, there are four buttons: 'Change', 'Copy' (highlighted with a red border), 'Delete', and 'Print'.

2. Select the name of the Operator you wish to assign these exact same permissions to from the dropdown to the left.



The screenshot shows the 'PASSWORDS' form with the 'General', 'Sales', 'Appts', and 'Clients' tabs. The 'For Operator' dropdown menu is open, displaying a list of operator names: Marcus, Matt, Maureen, Michael, Ray, Rebecca, and Ron. 'Ron' is currently selected and highlighted. The 'Password' field is empty and has a '?' button next to it. The background of the form features a large 'D' and a green plant graphic.

3. If you have previously assigned a password to this Operator already, simply click the 'Accept' button.

PASSWORDS

General	Sales	Appts	Clients	Inventory	Reports	Other	Tools	Setup	Accept
For Operator Ron	Password *****	Eff. Time (Mins) 5 Mins	User Name Ron	Change	Copy	Delete	Print		

4. If the Operator you are assigning the rights do does NOT already have a password, select their name followed by typing in their 7-character password and clicking 'Enter' on they keyboard, selecting their effective time and clicking the Accept button.

PASSWORDS

General	Sales	Appts	Clients	Inventory	Reports	Other	Tools	Setup	Accept
For Operator Kotohito <small>Enter New Password</small>	Password [] ?	Eff. Time (Mins) No Time	User Name Kotohito	Change	Copy	Delete	Print		