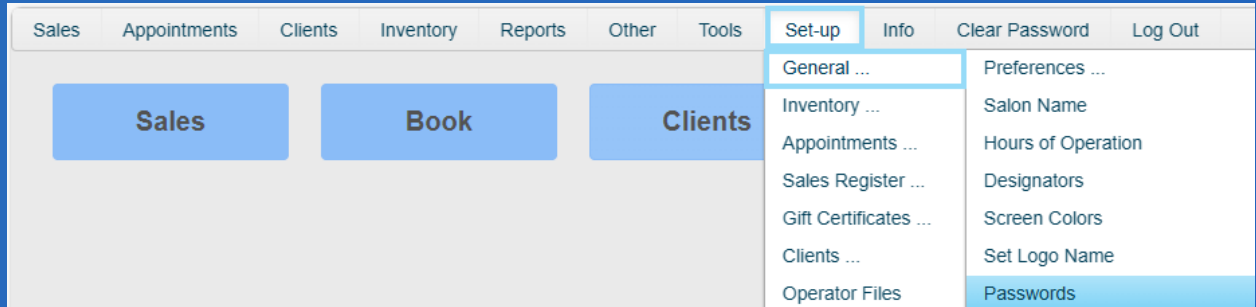



Changing a Password

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

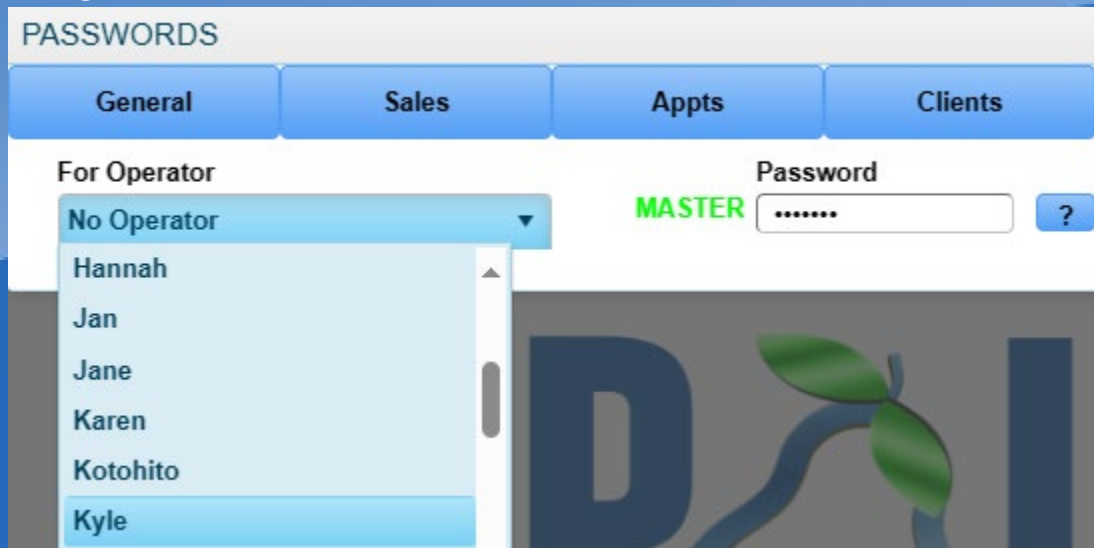


2. When prompted, enter your “master password” user name and password and click ‘Enter’ on your keyboard. (*Note: If this is your first time setting up passwords, your default user name is ‘master user’ and your password is ‘master1’) It is recommended you change this password.

User Name:

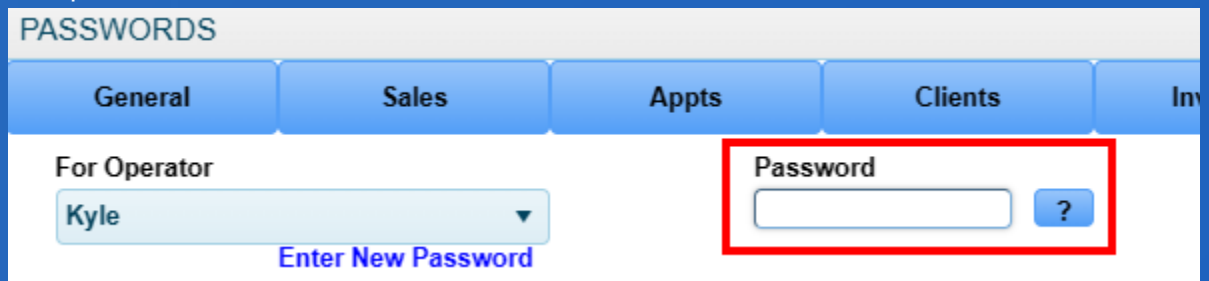
Password:
 

- From the 'For Operator' drop down box, choose which operator you would like to configure.



The screenshot shows a window titled "PASSWORDS" with tabs for "General", "Sales", "Appts", and "Clients". The "For Operator" dropdown menu is open, displaying a list of operators: "No Operator", "Hannah", "Jan", "Jane", "Karen", "Kotohito", and "Kyle". The "No Operator" option is currently selected. To the right, the "Password" field contains "MASTER" and a masked password "*****". A blue button with a question mark is next to the password field.

- 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.



The screenshot shows the same "PASSWORDS" window. The "For Operator" dropdown menu is now set to "Kyle". Below the dropdown, the text "Enter New Password" is visible. The "Password" field is highlighted with a red box and is currently empty. A blue button with a question mark is next to the password field.

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

6. 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	Appts	Clients	Inventory	Reports	Other
---------	-------	-------	---------	-----------	---------	-------

For Operator: Kyle

Password:

Eff. Time (Mins): No Time

User Name: Kyle

GENERAL ACCESS

GENERAL ACCESS

- Exit Time Clock
- Exit Appointments
- Change Label Captions

Access to Main Menu Items:

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

7. 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.

The screenshot shows the 'PASSWORDS' application interface. The 'Sales' tab is selected and highlighted with a red box. The 'For Operator' field is set to 'Kyle'. The 'Access to Menu Items' section contains several toggle switches, all of which are currently turned off. The 'Allow Users to:' section contains several toggle switches, with 'Process Sales' and 'Apply Discounts' turned on (blue), while others are turned off (grey). 'Accept' and 'Cancel' buttons are visible in the top right corner.

Access to Menu Items:	Allow Users to:
Register <input type="checkbox"/>	Process Sales <input checked="" type="checkbox"/>
Close <input type="checkbox"/>	Modify Prices <input type="checkbox"/>
Rollback <input type="checkbox"/>	Modify Service Prices <input type="checkbox"/>
End-of-Day Report <input type="checkbox"/>	Modify Retail Prices <input type="checkbox"/>
Service Sales Report <input type="checkbox"/>	Apply Discounts <input checked="" type="checkbox"/>
Retail Sales Report <input type="checkbox"/>	Modify discount code settings <input type="checkbox"/>
Deposits <input type="checkbox"/>	
In-Salon Use <input type="checkbox"/>	
Appointment Schedule <input type="checkbox"/>	
Time Clock <input type="checkbox"/>	
Book Appointments <input type="checkbox"/>	
View <input type="checkbox"/>	
Transactions <input type="checkbox"/>	
Prior Closings <input type="checkbox"/>	
Appointment Waiting List <input type="checkbox"/>	
Service Price List <input type="checkbox"/>	

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.

The screenshot shows the 'PASSWORDS' application interface. The 'Appointments' tab is selected and highlighted with a red box. The 'For Operator' field is set to 'Kyle'. The 'Can Perform Following Operations:' section contains several toggle switches, with 'Only View Own Appointments in Week View' highlighted in red and turned on (blue). The 'Access to Menu Items:' section contains several toggle switches, with 'Week View' highlighted in red and turned on (blue), while others are turned off (grey). 'Accept' and 'Cancel' buttons are visible in the top right corner.

Can Perform Following Operations:	Access to Menu Items:
Book Appointment <input checked="" type="checkbox"/>	Multi-Book <input type="checkbox"/>
Unbook Appointment <input checked="" type="checkbox"/>	Day View <input checked="" type="checkbox"/>
Reschedule Appointment <input checked="" type="checkbox"/>	Week View <input checked="" type="checkbox"/>
View Appointment Info <input type="checkbox"/>	Standing Appointments <input type="checkbox"/>
Check-In Client <input checked="" type="checkbox"/>	Month View <input type="checkbox"/>
Modify Appointment Waiting List <input type="checkbox"/>	Group Booking <input type="checkbox"/>
Confirm Appointment <input type="checkbox"/>	Operator Appts <input type="checkbox"/>
Book Blockout <input type="checkbox"/>	Service Pricelist <input type="checkbox"/>
View/Print Operators Schedules <input type="checkbox"/>	Appointment Confirmations <input type="checkbox"/>
Only View Own Appointments in Week View <input checked="" type="checkbox"/>	Appointment Waiting List <input type="checkbox"/>
Set Appointment Attributes <input type="checkbox"/>	
Change Service Name <input type="checkbox"/>	
Change Appointment Duration <input type="checkbox"/>	
Change Client Type <input type="checkbox"/>	
Mark Appointment as a No-Show <input type="checkbox"/>	
Mark Appointment as a Package <input type="checkbox"/>	
Mark Appointment as a Standing Appointment <input type="checkbox"/>	
Mark Appointment as a Series <input type="checkbox"/>	
Set Operator Display Order <input type="checkbox"/>	
Reschedule ALL Appointments <input type="checkbox"/>	

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

The screenshot shows the 'PASSWORDS' interface with a navigation bar containing buttons for General, Sales, Appts, Clients, Inventory, Reports, Other, Tools, Setup, and Accept. The 'Accept' button is highlighted with a red border. Below the navigation bar, there are fields for 'For Operator' (set to Kyle), 'Password' (masked with asterisks), 'Eff. Time (Mins)' (set to 5 Mins), and 'User Name' (set to Kyle). On the right side, there are buttons for Change, Copy, Delete, and 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.)

- 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.

This screenshot is similar to the previous one, but the 'Copy' button in the bottom right corner is highlighted with a red border. The 'For Operator' dropdown is still set to 'Kyle'.

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

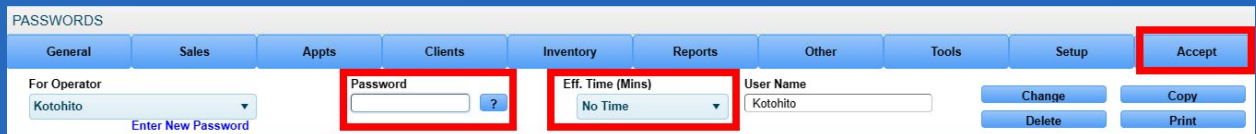
The screenshot shows the 'PASSWORDS' interface with the 'For Operator' dropdown menu open. The menu lists several names: Marcus, Matt, Maureen, Michael, Ray, Rebecca, and Ron. 'Ron' is highlighted in blue, indicating it is the selected operator. The 'Password' field is empty, and the 'Eff. Time (Mins)' dropdown is set to 5 Mins.

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



The screenshot shows the 'PASSWORDS' form with a navigation bar containing 'General', 'Sales', 'Appts', 'Clients', 'Inventory', 'Reports', 'Other', 'Tools', 'Setup', and 'Accept'. The 'Accept' button is highlighted with a red box. Below the navigation bar, the form has four main sections: 'For Operator' with a dropdown menu showing 'Ron', 'Password' with a masked input field and a '?' button, 'Eff. Time (Mins)' with a dropdown menu showing '5 Mins', and 'User Name' with a text input field showing 'Ron'. To the right of these fields are four buttons: 'Change', 'Copy', 'Delete', and 'Print'.

4. If the Operator you are assigning the rights to, 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.



The screenshot shows the 'PASSWORDS' form with a navigation bar containing 'General', 'Sales', 'Appts', 'Clients', 'Inventory', 'Reports', 'Other', 'Tools', 'Setup', and 'Accept'. The 'Accept' button is highlighted with a red box. Below the navigation bar, the form has four main sections: 'For Operator' with a dropdown menu showing 'Kotohito' and a link 'Enter New Password', 'Password' with an empty input field and a '?' button, 'Eff. Time (Mins)' with a dropdown menu showing 'No Time', and 'User Name' with a text input field showing 'Kotohito'. To the right of these fields are four buttons: 'Change', 'Copy', 'Delete', and 'Print'. The 'Password' and 'Eff. Time (Mins)' fields are also highlighted with red boxes.