Platinum

Contents

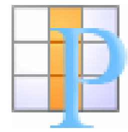
Welcome to the Platinum User Guide

Table of Contents:

For more detailed information and real questions and answers from existing customers, that you can search, please see:

http://www.xpectworld.net/help.html

Platinum



The Platinum icon

Getting Started

Starting Platinum

To start Platinum, double click the icon named 'Platinum' on the desktop.

Logging in –

After starting Platinum, the first page shown is the 'Sign in Page'.

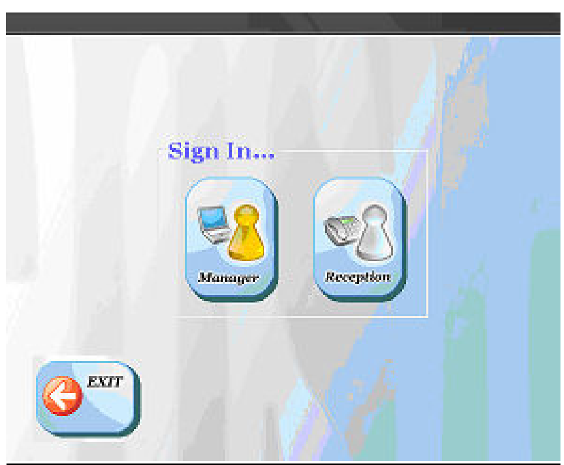
Signing in as Receptionist

Receptionists do not have access to most of the features e.g. Email Marketing and reports. To log in as receptionist, click the Reception Button on the Sign in Page.

Signing in as Manager – Demo Password = manager

The Manager has full access to all Platinum features. The Manager can setup pin numbers and secret words for employees to allow access and to track what employees are doing. To log in as Manager, click the Manager Button on the Sign in Page.

The Sign-in page



Main Menu

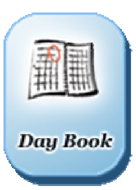
Overview of features...

Customers

New Customer – Click this button to add details of a new customer e.g. Name, address, phone number.

Customer Lookup – Click this button to search for and change details of existing customers that are stored in the database. Results are shown in a list view.

Appointments



Day Book – The Day Book is the area where appointments are added to the database.

Week Book – The Week Book is the area where a weekly view of all appointments can be seen.

Reminders (SMS & Email) – Use this area to send appointment reminders to customers via both email & text message.

Main Menu

Overview of features...

Management Tools and System Set-up

Reports – Here a manager can view information on business performance. You can report on groups of customers and contact them, very easily, using eMessaging.

eMessaging – Used to send mobile text messages and email marketing messages to customer groups, very easily.

Services – Allows adding, editing or deleting services that you provide including multi-prices for employee skill levels. You can order your top services first on screen so its easier to choose them.

Products – Allows adding, editing or deleting of products including buy and sell price, stock level and re-order level. Reports can be run to allow you to easily re-order stock.

Employees – Allows adding, editing or deleting of contact details, commission%, pay amount and skill level. The pin security number is used to track their use of the system.

Roster – Is used for booking leave, like days off or lunch times for employees.

Platinum Set-up   Part 1

When you first install Platinum it is in DEMO MODE – with example information already in the database i.e. employees, services, products and appointments. We recommend you have a really good play about in demo mode as a very first step. Before you can use Platinum in your work place, your will need to switch off demo mode to remove the example information. You can then start entering your own details into Platinum.

How to switch off demo mode

From the Main Menu click on the 'Advanced Setup' button in the 'Set-up' area.

Now click the 'Switch off demo mode' button.

Now click the 'Switch off demo mode' button.
Click ok to any messages that pop up.

Restarting Platinum and logging in

Now, go back to main menu, logout and exit Platinum so the program closes.

Start Platinum again and login as manager (password is just the word manager).

You are now ready to start entering your own details.

Follow the steps in the next section to learn how to do this.

<u>Platinum Set-up   Part 2</u>

To personalise Platinum, there are four main areas that need setting up: Services, Products, Employee and Roster.

<u>Setting up services</u>

From the Main Menu click on the 'Services' button in the 'System Set-up' area.
Here you list all the services that you provide.

Under the 'Service' heading type a long name for the service.
The Short Name can be left blank and is automatically created using the first letters of service name, but you can change these.
Under 'Price' type the price you charge the customer.
Repeat steps 1 to 3 for all the services you provide.
When finished, Click 'Main Menu' to save.

<u>Tip: If you scroll to the right and find the column called "The Order" you can order your top services to show first, 1 being the top.</u>

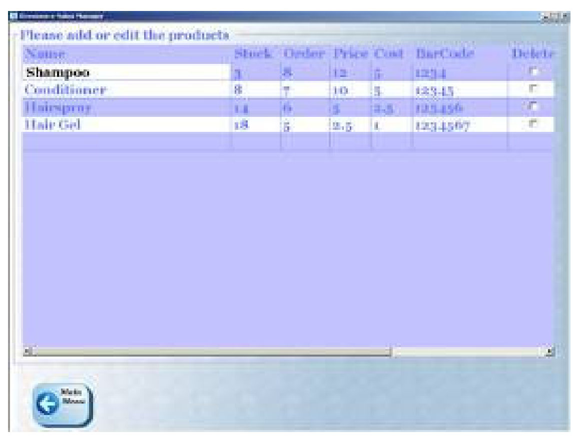
Services Setup

NOTE: To delete a service, scroll to far right, double left mouse click 'Delete' next to the service and then click 'Main Menu' to save.

<u>Setting up Products</u>

From the Main Menu click on the 'Products' button in the 'System Set-up' area.
Here you list all the products that you sell.

Under the 'Name' heading type a long name for the product.
Under 'Stock' type the number you currently hold in stock
Under 'Order' type the number that stock should fall to before you need to reorder e.g. if you reorder when only 3 items are left in stock, type 3.
Under 'Sell Price' type the price that is charged to the customer. Enter 'Buy Price' from your supplier if you want profit to be calculated.
If you use a barcode scanner, under 'Barcode' you can scan (or type) the barcode number of the product.
Repeat steps 1 to 6 for all products sold.
When finished, Click 'Main Menu' to save.



Products Setup

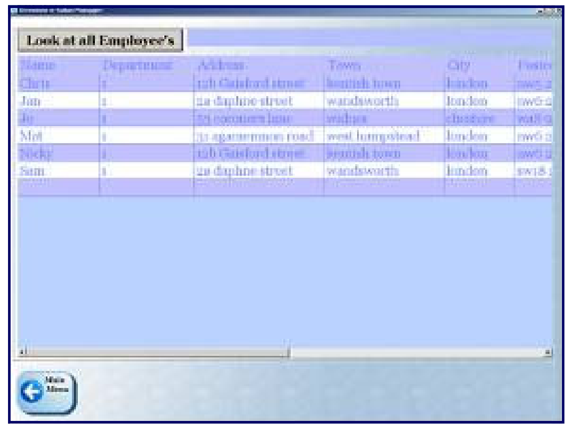
NOTE: To delete a Product, double left mouse click 'Delete' next to the product and then click 'Main Menu' to save.

Platinum Set-up   Part 3

Setting up employees

From the Main Menu click on the 'Employees' button in the 'System Set-up' area.
Here you enter the names of all employees.

Under the 'Name' heading type the name of the employee.
Under 'Department' select their working area.
Fill in as many of the other columns as needed. These are just for your own records and are not needed e.g. Address, Phone etc.
Repeat steps 1 to 3 for all your employees.
When finished, Click 'Main Menu' to save.



Employee Set-up

Setting up the Rosta

From the Main Menu click on the 'Rosta' button in the 'System Set-up' area,
rosta is for keeping track of which day's employees are working.

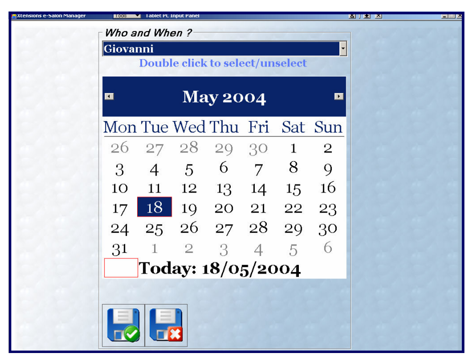
NOTE: If an employee is marked as having the day off, they will not appear in the Day Book on that day.

Instructions
Select the employee who will have the day off
Double click the dates they will be taking off or select multiple days by click and dragging multiple dates.
Repeat steps 1 and 2 for all employees until all timetables have been entered.
Click 'OK' to Return to the Main Menu
Notice that the Day Book will not show the employee name on the days you have marked as off.

NOTE: To delete an employee, double click 'Delete' to the right of their name and then click 'Main Menu' to save.

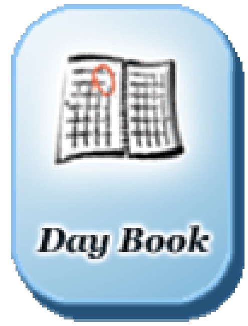
NOTE: The roster is only for marking **FULL DAYS** off, not half days.

To mark half days or mid day breaks see page 17 (Booking time off)



Roster Set-up

The Day Book



What is the Day Book?

If you are happy with your paper diary daybook, that's great, continue using it and use the Quick Service Sale from the main menu. You can decide to use the daybook at a later date.
The Day Book is like the paper appointment book that is used to keep track of appointments. It is here that appointments can be booked and managed.
The Day Book shows one full day of appointments and you can have a daybook per department.

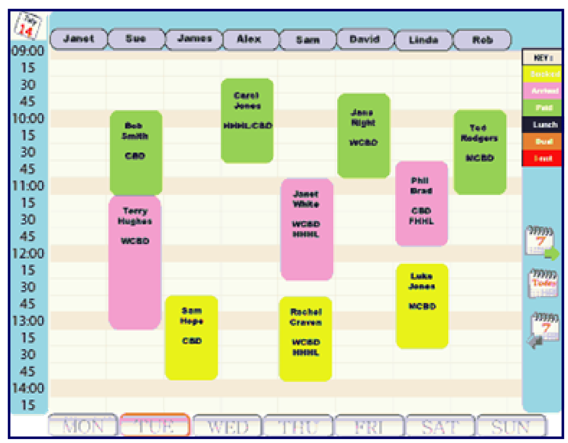
Navigating around the Day Book

Moving from day to day – When the Day Book opens, today's appointment schedule is shown. Moving from day to day in the Day Book is done by using the Monday to Sunday buttons along the bottom of the screen.

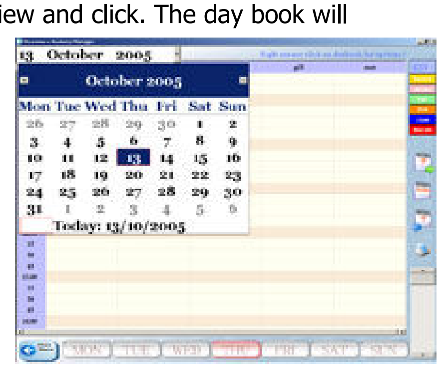
Moving from week to week—To move to a different week, use the buttons on the right of the screen marked with the number 7 and arrows that indicate forwards and back. Once navigated to a different week, use the buttons at the bottom of the screen to go from day to day in that week.

Moving back to today—To move back to today's view, click the 'Today' button on the right.

Using the big calendar—Click the date at the top left to reveal a large calendar (see below). Scroll through the calendar until you reach the day to wish to view and click. The day book will



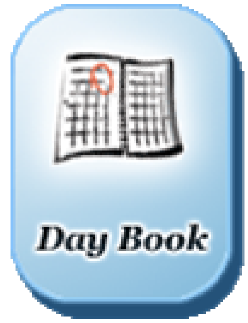
The Day Book

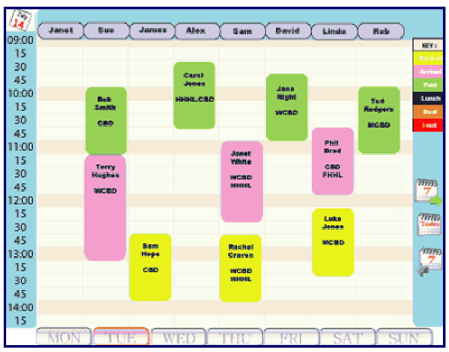


Big calendar

NOTE: The date of the day you are looking at can be found in the top left corner. You should always check this before making an appointment.

Entering an appointment





Customer Lookup

Booking an appointment

To book a new appointment into the database, find an employee who will take the appointment, click an empty cell under their name and start time.

You will now see the 'Customer Look up' screen.

You need to either:

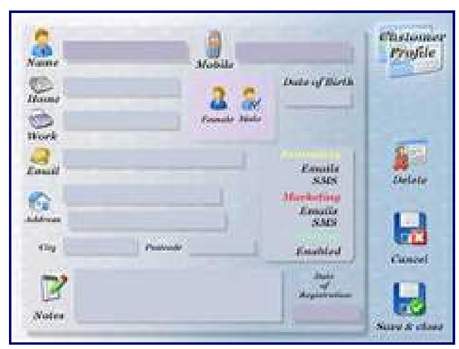
Create a new customer profile

Or

Find the name of an existing customer

Creating a new customer

If the customer does not yet exist in the database you will need to create a new customer profile for them.
Click the 'New Customer' Button (Top Right).
Enter the customers' details.
Note: It is important to enter at least their name, telephone number (preferably mobile) and gender.



Add a New Customer

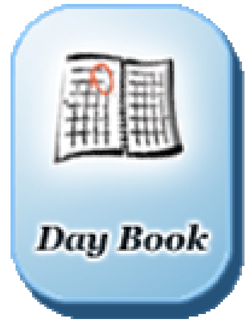
Searching for an existing customer

If the customer is an existing customer that is already in the database you will need to search for their profile.
Using the search fields at the top of the screen, enter the customers name, telephone number, address or postcode

Note: You can search using two or more categories e.g. name and postcode.

Search for an Existing Customer

View Customer history, book a new appointment



Appointment History for selected Customer

Viewing a customer's past appointment details

After finding and selecting the customer, you can view details of past appointments, services and products. Use the 'History' list to switch between past appointments. 'Details' sections gives the specifics. This is useful if you are assisting a customer in deciding which services or products they should choose again, by referring back to previous appointments.

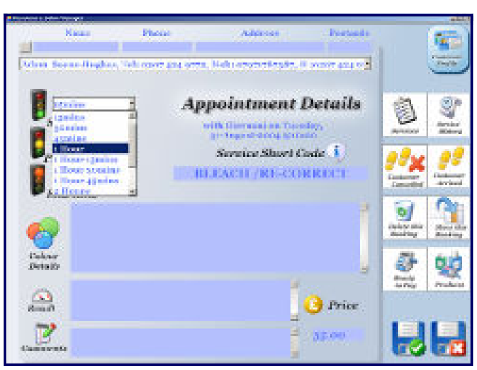
Make a new appointment

To book a new appointment for a customer, click the 'Next' button.

The service selection screen is now shown so that you can select the services for the appointment. Once selected it will turn red. If you know the services short code simply type it in to select that service very quickly. It will be added to the total. To remove a service simply click its name.

After selecting services, check the total, then click OK.

Add a New Appointment



Select duration of appointment

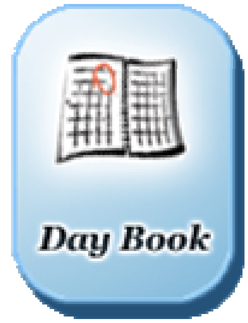
The appointment details page is now shown. You need to select the duration for the appointment. There are three boxes for time selection—'Start' and an optional 'Processing' and 'End'.

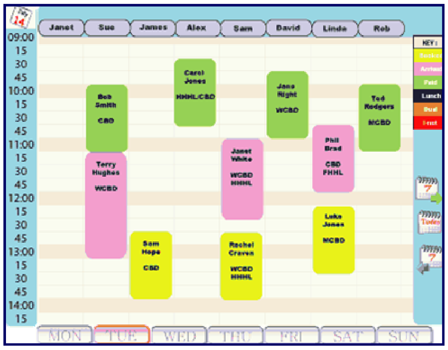
Fill these in as needed.

You can make notes for this appointment in the various boxes. When you are finished, click the Green Tick to return to DayBook.

You will now see the appointment that you have just booked!

Moving and copying Appointments





Moving an appointment by using drag and drop

Moving appointments

To move an appointment to a different employee or to a different time slot during the same day

1. Click and hold an appointment while dragging it to its new employee or start time.
2. Release the mouse button when you are happy that the appointment is relocated to the correct place.

NOTE: If you are moving the appointment to a time either later or earlier on the same day and the start time is not visible on screen (off screen), temporarily drag and drop the appointment to an empty slot nearer the preferred start time and use the scroll bar on the right either up or down so as to reveal the preferred start time.
Drag and drop the appointment to this time when it is visible.

To move an appointment to a different day

Move to a different day

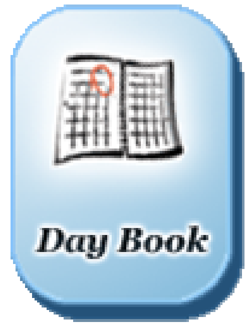
1. Click the appointment.
2. Click the 'Move Appointment' button. You are sent back to the Day Book.
3. Go to the day you want to place the booking.
4. Choose a suitable employee and click the start time for the appointment.
5. The appointment is moved to this new location.

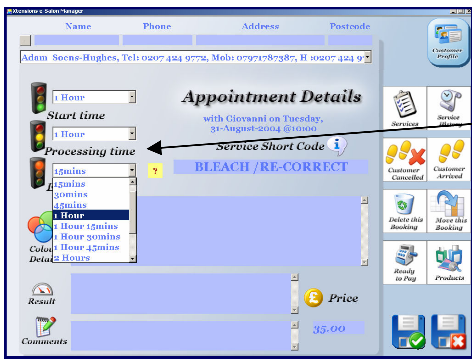
Tip1: When finished always return to 'Today' to avoid confusion regarding which day the DayBook is focused on.

Tip2: To **copy** a regular appointment or even a regular 'leave type' eg. Lunch.

Simply open it from the daybook and hover over the picture button called 'Move This' for easy instructions.

Changing appointment duration or deleting an appointment





Appointment Details

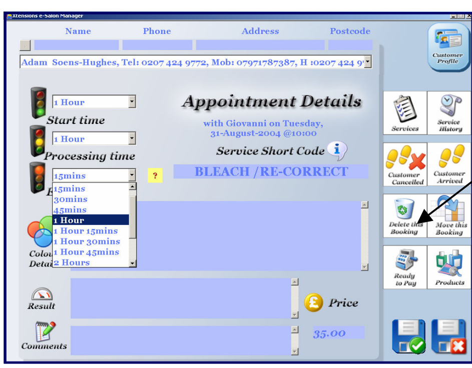
Increasing or decreasing appointment duration

1. From the daybook, click the appointment to reveal its details page.
2. Alter the start, processing or end time.
3. Click OK to return to the Day Book.

Notice that the appointment has been adjusted accordingly.

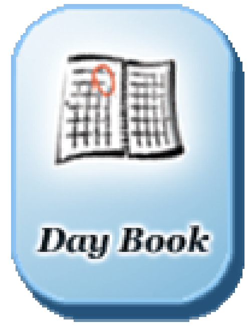
Deleting an appointment

1. Single click the appointment in the Day Book to reveal its details page.
2. Click the 'Delete' Button.
3. You will be prompted, asking whether you are sure you want to delete this appointment.
4. Click 'Ok' if you want to proceed.



Appointment Details

Cancelling an appointment



Cancelling an appointment

If a customer cancels or does not show up for their appointment, you can mark the appointment as Cancelled or no-show.

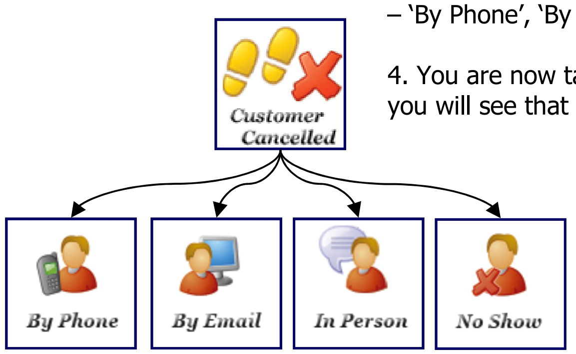
To cancel an appointment:

1. Single click the appointment in the Day Book to reveal its details page.

2. Click the 'Customer has cancelled' button.

3. Select the method that the customer used to cancel the appointment
– 'By Phone', 'By Email', 'In person' or 'No Show' –

4. You are now taken back to the Day Book, and you will see that the appointment has been

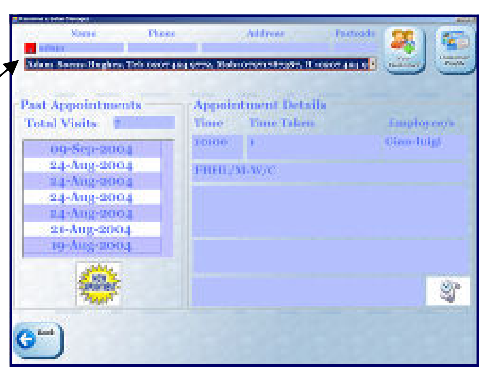


Select how the customer cancelled the appointment

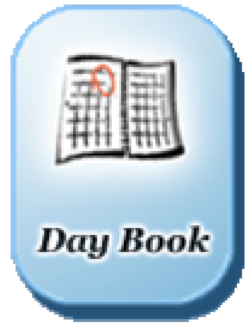
NOTE: If a customer does not show up for an appointment, Platinum remembers.

Next time they try to book an appointment, after you search for their name, the top of the screen will turn RED indicating that they have a red mark next to their name. Click on 'Customer Profile' and look at 'notes' to view the reason why they have a red mark next to their name.

Tip: When a customer is set to no-show you can optionally send them a mobile text message and e-mail to ask them to contact you to re-schedule. This means they are more likely to stay a customer and not be too embarrassed to ever return.



Red Mark against Customer Name



When a Customer arrives

Marking a customer as 'Arrived'

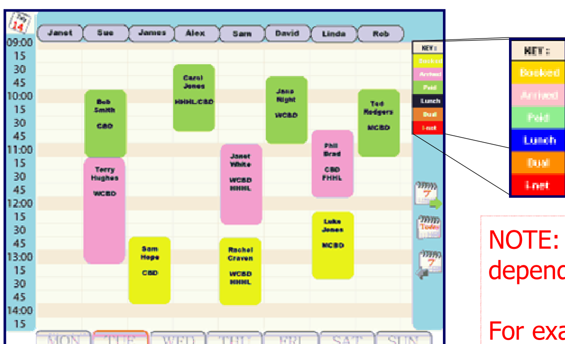
When a customer arrives, you need to mark the appointment as '<u>Arrived</u>'.

To mark the customer as 'Arrived':

1. Single click the appointment in the Day Book to reveal its details page.

2. Click the 'Customer has Arrived' button.

3. You are now taken back to the Day Book, and you will see that the appointment colour has changed to pink.



Appointment Colour Key

NOTE: Appointments change to a different colour depending on their status.

For example, 'Booked' appointments are gold, 'Arrived' appointments are pink, and 'Paid' appointments are green. If you use this it means you can easily see who has not made their appointment as it will still be gold. You can then eMessage that person with a mobile text message and email to request that they get back in contact to avoid any embarrassment. Which could mean that they never deal with you again.

There is a key on the right side of the Day Book indicating what each colour means.

This is to remind you of each colour meaning.

When an appointment has finished

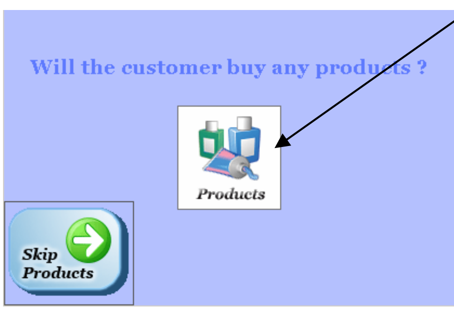
When an appointment has finished, the customer needs to pay so you need to start the 'Pay Process'.

To mark the appointment as finished:

1. Single click the appointment in the Day Book to reveal its details page.
2. Click the 'Pay' button. You are now taken through the 'Pay Process'.

The 'Pay Process' ...Offer products to customer

NOTE: Ask the customer if they would like to buy any products. Click 'Products' if they wish to buy products, these words can be set to whatever you like to remind staff to up-sell in 'your own words'.



If the customer wishes to buy products, the products selection screen is shown.

To select products that the customer would like to buy, search through the list of products and click the product name. The product will now appear in the shopping basket. If you need to add a discount, you can do this here by inputting a percentage discount or by just changing the price.

Using the barcode scanner:

Alternatively you can use a barcode scanner to scan the products into the shopping basket. To do this, find the barcode for the product and press the scanner button. The product will automatically be added to the shopping basket. Repeat the process with the next product if required until all products are added to the shopping basket.

Removing products from the list: to remove products from the shopping basket, click the product name in the shopping basket.

When you are finished click the green tick save button to continue...

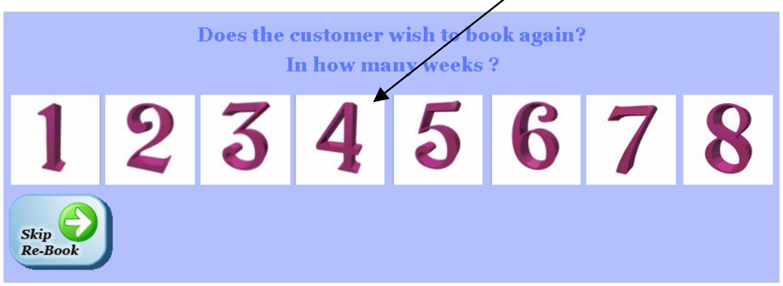
When an appointment has finished -Part 2

The 'Pay Process' continued...request a rebook

Ask the customer if they would like to book again for their next appointment.

If the customer would like to pre-book their next appointment, click the number of weeks away they would like to book their next appointment.

NOTE: If the customer does not want to rebook their next appointment, just click 'Skip'.



The 'Payment Method' screen is now shown. Here you will see a breakdown of the total bill for the appointment. Total price for services and products is shown.

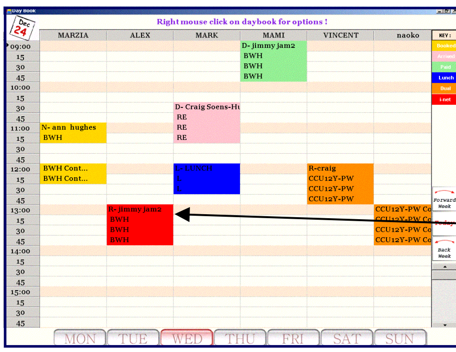
Click the method of payment that the customer has chosen (Cash, Cheque, Credit Card, Voucher or Tab). Once chosen an optional cash drawer will open.

You are now taken back to the Day Book to place the new re-booking.

NOTE: Click 'Cancel' if you would like to exit the pay sequence without saving any changes. If you do this, you will return to the Day Book where you can start the payment process again from the beginning for this appointment.

When an appointment has finished -Part 3

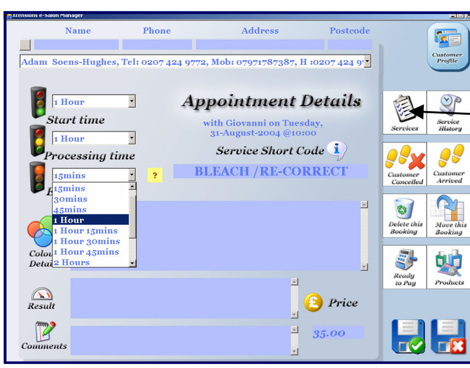
<u>The 'Pay Process' continued...make the rebooking</u>



If the customer requested a new booking, the Day Book is taken into the future by the number of weeks that were requested e.g. 4 weeks.

Simply click the correct time under the chosen employee to drop the new booking into place. The booking that is made is an exact copy of the appointment that the customer just had.

NOTE: The booking is coloured red; this indicates that the booking needs to be 'approved' i.e. the service details need checking to make sure that the customer requires the 'same as last time'.



To 'Approve' the booking or change the services that the customer has at the time of the new booking:

Click the appointment to reveal its details.
Click the 'Services' button.
Change the services selected as needed
Click save to services.
Click save to appointment details.

You are now taken back to the Day Book where you can see that the new booking has changed to yellow i.e. the normal colour of a booking.

NOTE: Click 'Cancel' if you would like to exit the pay sequence without saving any changes. If you do this, you will return to the Day Book where you can start the payment process again from the beginning for this appointment.

Quick Product Sale &
Quick Service Sale

What is quick product sale?

Quick product sale is used when a customers visits to buy a product without having an appointment.

It is also used for keeping track of products used by employees 'in shop'.

How to do a quick product sale
Go to the main menu and click the 'Quick Product Sale' button.
Put the product or products that are being sold into the shopping basket by clicking them on the left hand side or scan them with your bar code reader.
Click the Green tick to save.
Finally, select the payment method – cash, cheque, etc...

NOTE: Platinum can be setup so that you can record which customers buy products through quick product sale, this is good for marketing campaigns.

How to tell the system a product is being used 'in shop'
Use the same instructions as above but select 'In Shop' as the payment method.
You will now see a screen that allows you to select which employee is using the product.

NOTE: View the report called 'Product Use By Employees' to monitor in-shop product use.

Quantity

If you hold down the SHIFT key on the computer keyboard and click the product on the left hand side you will be asked how many to add to the shopping basket on the right hand side.

Discounts

Hold down the SHIFT key on the computer keyboard and click the price of any Product that is already in the shopping basket on the right. You will be asked for the new price.

What is quick service sale?

Quick service sale is used when a customers visits to have a service without having an appointment. If you do not use the electronic daybook, quick service sale is a great way to quickly record your financial transactions.

You can choose an employee who is to perform the appointment for commission tracking and to choose the correct price for that persons skill level.
At the end of the day you can look at the daybook and see all of your sales visually. Allowing 'who and when' analysis to be done.

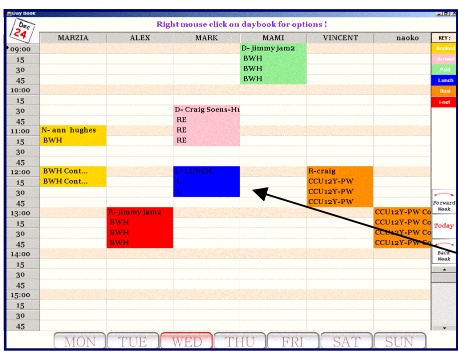
Tip1: You can click any service price and change it to give a discount, press enter on the computer keyboard when finished and you will see the new total calculate.

Tip2: If you are familiar with your service short codes, when you see the list of Services you can type the full short code in and press enter on the computer keyboard to select it, without scrolling, making it super fast to use.

Booking time for leave (breaks,training,days off)

Booking 'leave' time

To mark time for lunch for each employee simply book another appointment and click one of the big buttons; LUNCH, TRAINING or TIME OFF.



Instructions

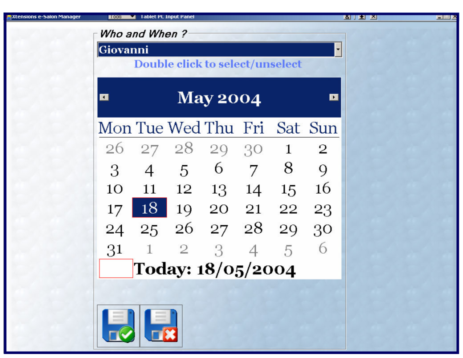
Click the start time under the employee that you would like to book lunch for

Click one of the big buttons; 'LUNCH', TRAINING' or 'TIME OFF', these are Known as 'Leave Types'.

Select the length of the break from the 'Start Time' drop down list e.g. 45mins, 1hr etc.

Click 'OK' to Return to the Day Book, Notice that these 'Leave Types' are coloured in blue.

NOTE: You can drag & drop appointments, change 'Time needed' and 'Delete', the 'Leave' types can be drag dropped, the same as any other appointment.



Booking days off

(Repeated from system set-up pg6)

To mark time off for each employee, click Roster on the Advanced Menu.

Instructions

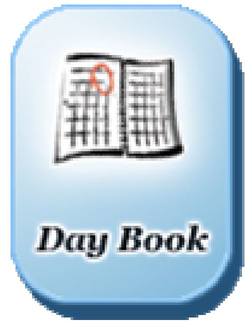
Select the employee who will have the day off.

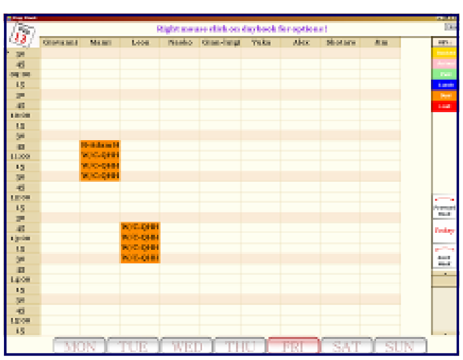
Double click the dates they will be taking off or select multiple days by click and dragging multiple dates.

Click 'OK' to Return to the Main Menu

Notice that the Day Book will now not show their name on the days you have set them as off.

Booking a two employee appointment…
(A ‘Dual’ Booking)





Creating a booking for a two employee appointment

Create a new appointment by clicking the start time under the first Employees name
Search for the customer or create a new one.
Select the services that the first employee will perform by choosing them from the drop down list next to the service name. Also select ‘1st Employee’ from the ‘Order’ drop down list next to each service.
Repeat the process for the services that the second employee will undertake but select the second employee name in the ‘Employee’ column also select ‘2nd Employee’ in the ‘Orders’ Column next to each service.
Click ‘OK’ then select the start, processing and end times for this appointment. Click ‘OK’ to return to the Day Book.

To change one or both of the employees that are working on this type of booking

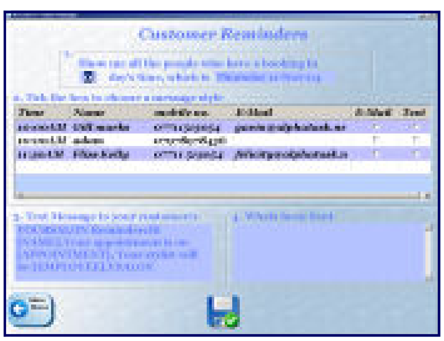
View the daybook and ensure the employee is free
Click the appointment in the Day Book
Click ‘Services’
Choose either the 1st or 2nd employee and change their name to the new employee you want to move it to.
Click ‘OK’ to return to ‘Appointment Details’
Click ‘OK’ to return to the ‘Day Book’

Reminding Customers about their appointments

Reminding Customers about their Appointments

You can remind customers about appointments by text message to their mobile phone or by email to their Inbox.

On the Main Menu, click the 'Reminders' button.
When you are in the reminders area, select how many days ahead of their appointment you would like to search for customers.
Search through the list of customers selecting either 'Send Email' or 'Send Text' (you can select both if you prefer, right mouse on them to select all).
Click 'OK', to send your reminders.
Close this window to return to the Main Menu.



NOTE: If there is a problem sending reminders to any customers, search through the list in the 'What was sent' window to identify why the problem occurred.

Examples of problems are:

You attempted to send an Email reminder to a customer with an incorrect email address.

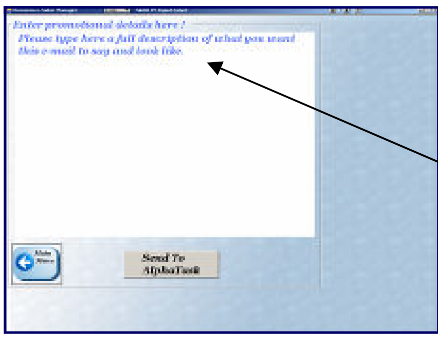
You attempted to send a text message to a customer with mobile phone number that is wrong.

PLEASE NOTE THAT YOU WILL NEED TO CONTACT US TO SETUP THE TEXT MESSAGE REMINDERS FEATURE.

This feature can also be setup to automatically remind your customers, without you having to think about it.

There is a charge per text message but setup and e-mail is free.

Sending Marketing messages to Customers…Easily…



eMessaging
To easily send an email or mobile text message to all your customers:

1. Click ‘eMessaging’ on the Main Menu.

2. Type your subject and message in the white boxes.

3. Click ‘Next’.

4. Type the text message in the box, the word [NAME] will be Replaced with the customers name for personalisation. You can see a countdown of remaining letters at the bottom.

5. Choose the customers to send to by ticking the boxes next To their names. Click right mouse to tick them all.

6. Click send to send the email or Text Messages to the seldcted customers, you will see a count down at the bottom as it sends.

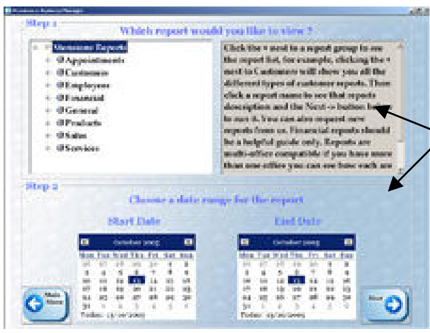
Note: Creating graphical emails requires specialised computer knowledge and can be quite tricky and time consuming to get right. (we can provide you with our preferred suppliers for this)

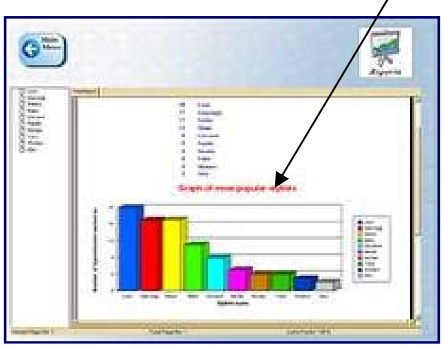
Tip1: If you choose a customer based report you will see a button that says ‘eMessage Them’ if you click that, you can target JUST the customers who are covered by this report. This allows you to do very powerful and targeted marketing to specific groups of customers with special offers, etc.

With this you have the power to turn your quiet day into your busy day.

Tip2: If you want to contact a customer directly and you have their mobile phone number and email in the system. You can click the little ‘e’ to the right of their mobile number. You can find this on the customer profile page. This allows you to JUST contact that one person with an email and/or mobile text message.

Viewing Reports on Performance...





VERY IMPORTANT NOTE:

If the expected amounts for product/service sales, do not match your **actual** total taken for the day.

Did you take a payment **earlier** in the week for the appointment?

If you did this will obviously effect the total you take on the day and they will not match.

Reports

When the Owner or Manager wants to view how the business is performing, they can go to the reports section, this is a restricted area and a password can be set. To go to the 'Reports' section, click 'Reports' from the Main Menu.

You will now need to choose the report that you want to see. Next you will select a start date and end date for the report.

When selecting reports, for information about what the report will show, read the description in the window on the right.

Example reports

End of day report: If you open the reports screen and go to General…End of day. You will see a report that allows you to double check your till total with what the system says **should** be in there. If you use vouchers you should use the report under Financial…Till Total (Voucher Aware) instead.

Product and Service commission: This report shows how much to pay employees who receive commission for products and services. For example, if an employee receives 20% commission on their services, this will be calculated and shown here, with a total, for any length of time required.

Total Bookings (Men/Women): This report shows the total number of bookings made and highlights which percentage is by men and which percentage is by women.

Bookings by Employee: This report shows the total number of appointments taken by each employee. This report shows a break down of the work done by each employee for a given day. It includes the total price for each appointment and the total money made by each employee for the day. NOTE: This report is not normally used with a period of time like other reports, instead just select the 'start day' as the day for the report.

Least Recent Customers: This report shows the customers that have visited the least frequently during the selected time period.

Product Sales by Employee: This report shows the number of products sold per employee (following appointments taken by the employee). It can be useful in analysing which employee is best at selling products to the customers and which need training in this area.

Best Selling Product: This report shows the product that was sold the most during the selected time.

Cancelled Bookings: This report shows the number of cancelled bookings for the selected period and indicates which percentage of these cancellations have been 'By Phone', 'By Email', 'In Person' or 'No Show' for internal discussions.

New Registrations: This report shows the number of new customer registrations for the selected timeperiod.

By Postcode: This report shows the number of appointments booked during the selected period by customers from a particular postcode group.

More Advanced Topics…

There is a lot more information on the help website, it has questions and answers from actual customers, you can search this for answers to your own questions. http://www.xpectworld.net/help.html

Multi Departments

This feature allows you to have more than one electronic appointment book (paper diary), see above. Customers can have appointments in more than one daybook and when paying, Platinum will add up the total price for all appointments that day.

This is perfect for you in the following circumstances:

1. You have more than 8 employees who can be grouped for simplicity
2. You supply different types of services and want a separate appointment book for each

To setup Multi-Departments, please click 'Help Me' on the main menu or contact Platinum help

Multi Level Pricing

The multi-level pricing feature of Platinum allows you to have a different price for a service for each employee. Platinum automatically enters the correct price for the service depending on which employee the appointment is booked for. This feature is perfect if you have different levels of employee i.e. Junior, Senior, Manager – who all with different charges for services.
To setup Multi Level Pricing, please click 'Help Me' on the main menu or contact Platinum help

Courses and Vouchers

Platinum supports the use of paying with Vouchers and manages Multiple Courses per customer. Time remaining on courses is automatically recorded in a customer's profile. Courses are sold the same way as products (through the shopping basket) and are associated with a customers account. Sessions are booked the same as any other appointment and minutes used are automatically deducted from the customers total remaining.
To setup support for Courses and Vouchers, please click 'Help Me' on the main menu or contact Platinum help

Refunds (There is much more information about refunds on the help website.)

Imagine this situation:
Yesterday you sold a product for 20
today it gets returned and you take 20 out of the till to refund the customer
you must tell Platinum or the till report at the end of the day will show 20 less than it should

Steps:
Go to the daybook from the main menu
right mouse click anywhere
choose Xtras....
choose "remove cash"
type in 20 and then press enter
type in the reason eg. "A refund of 20 due to wrong purchase", then press enter

Vouchers

To pay with part voucher and part another payment (like cash)
When you are about to select the payment type
on the screen that tells you how much the customer needs to pay:

Hold down the shift key on the keyboard
(the shift key is the long key below "Caps Lock" and above "Ctrl" key on the keyboard)
with the shift key held down click the Cash button (if it is a part cash payment)

you will notice that the cash button shrinks slightly
and with shift key still held down
click the Voucher button
you can now let go of the shift key on the keyboard

This will then ask about how much each amount is
e.g.
How much on cash e.g. you could type 20
How much on voucher e.g. you could type 20

One person paying for services for two people

In the case of, say, a young child and its mother,
both appointments will come under the mothers name,
so it will then add the two upon payment time.

You can have the exact same customer with appointments in the same
or different departments.

In other words, upon payment time it will add up all UNPAID
appointments that day, for that customer, anywhere that day.

This is exactly the same method for any two individuals, put them through as
the same persons name.

Admittedly this could be better, as the second persons history will be either lost or incorrectly logged in the system along with the wrong person.

If the persons history IS important (i.e. they are not a child)
Another way is to simply put them through as two different appointments with
two different customer names, go through the payment process twice
and take just one payment, its that simple. The result is the same.

Tab Usage

Customers can have a running tab. This means that trusted customers can have services or products and hold a credit value with you. This can also be used to support any pre-pay system that you currently run. To use tab simply chose tab instead of Cash on the payment screen. The current tab value can be seen from the 'customer profile' page2 (click 'More Details'). Read a lot more on the help web page or contact Platinum help for more information.

Chair or Space Rental

Platinum can record how much money temporary employees owe for chair or space rental and produce a report to show this. To setup Chair Rental Tracking set the daily rental amount in the employee record area, roster off employees properly and run the chair rental report from the employee report group. Contact Platinum help for more information.

Pin Security

You can optionally setup each of your employees with a pin number, once you are set to pin security mode, each employee needs to type their own pin number to open the till or to enter the system. Their actions are then recorded by the system for you to later examine. This can be setup to just secure the till opening if needed.

Swipe cards and finger print identification

You can optionally have finger print access to the system by only certain employees and the system is magnetic card or swipe card compatible for security.

Customising the system to your business….easily!

If you go the advanced menu; which is found on the main menu, then click your right mouse button in any blank space you will get a popup menu saying Easy Setup…..
This allows you to completely customise the application, including enabling security and secret passwords to the system and your till to setting up manager email and mobile phone numbers.

Top Tip: If something disappears make sure you have not set it to the wrong department, scroll to the far right on the edit screen to see.

For more detailed information and real questions and answers from existing customers that you can search, please see:

http://www.xpectworld.net/help.html