

Quick Operating Guide

RETAINOO – *A Product by Retention Systems*

Salon Software

&

Client Retention Solution



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Platform Introduction

Thank you for choosing Retainoo. It's now time to start reaping the rewards. Using Retainoo for your day to day operations is as easy as using a simple mobile app. Here is a quick recap of all platform components that come with your Retainoo subscription.

1. **Business portal** – This is your personalized business portal that you can access over the web from anywhere, anytime. The business portal is used for platform settings as well as accessing your reports for effective decision making.

Anybody can login to your business portal who has an 'admin' role. All industry standard browsers can be used to login to the portal.

2. **Front-of-the- house App View** – This is your business app view for day to day business operations such as managing appointments, raising sales, enabling EPSON TM series thermal printer & POS connectivity (only PCEFTPOS POS is currently support). We strongly recommend to use an Android tablet or an ipad for best user experience.

Anybody can login to your front of the house app who has an 'admin' role. However, our recommended approach is as follows:

- I. Add a new 'dummy' staff user account in platform through **business portal** and allocate 'admin' rights through 'edit' profile feature. Then mark this user account's roster as always busy so clients cannot book an appointment with this user account. Alternatively, use login details for a real staff member and assign them 'admin' rights through business portal and login.
- II. Login in to the app with any staff member's login details who has an 'admin' role. Use any ANDROID / IOS tablet device (min 10.5 inches tablet preferred for best user experience). You are all set to use the app now to manage your day to day operations.

3. **Client App View** – For personalized client experience

When you add your clients in the system (with their email or mobile number), your clients will automatically get a welcome email or sms (if sms is enabled in settings) with instructions on how to download app and login. Clients can login via any android / ios device to get their personalized view.

4. **Business Owner App view** – Business owners can login to the app to get complete visibility of all business activities with real-time notifications.

Business owner can login to any android / ios device to not only see all business activities through the app but can also get real time notifications for most actions like appointments,

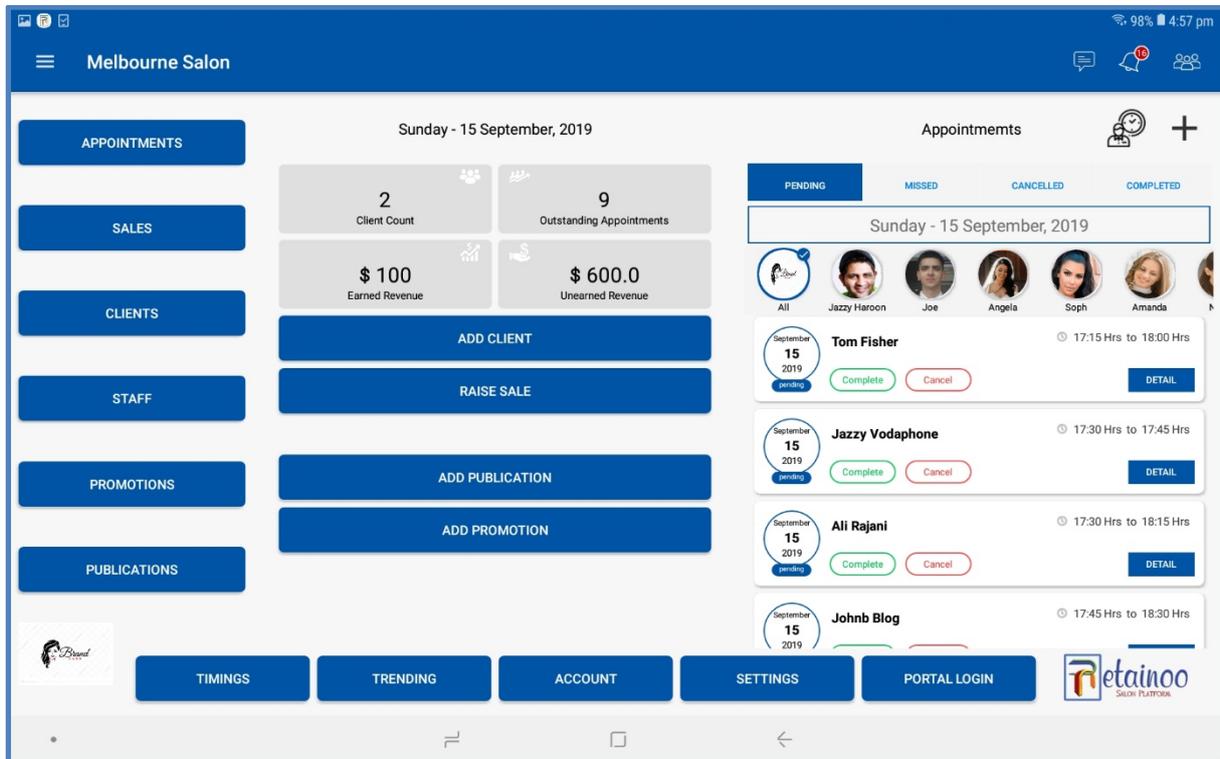
salon news publications, promotions etc. Business owners can perform all functions like front of the house app view – great for owner’s visibility of all business activities from anywhere anytime (with real time notifications)

5. **Manager App view** – For same rights as business owner except inability to login to business portal for changing platform settings, viewing dashboard of reports & access client profiles.

6. **Staff App view** – For staff to view their appointments & checkout clients if required

Day to day operations

Day to day operations will be managed via the front-of-the-house app on a tablet that can be installed at the reception of your business.



Front-of-the-house App

Day to day operations can also be done using the owner, manager or staff app however, front of the house tablet app view is preferred.

Managing appointments

Appointments can be made by the salon or by the client.

Clients can create an appointment via two channels.

Appointments via Client App

When a client creates an appointment, the following actions take place.

1. Client receives a notification via the app
2. Client also receives an email if client email is present in the system
3. Client receives an SMS if client email does not exist in the system and SMS settings are enabled in the platform
4. Client can see the new appointment in the app as 'Upcoming Appointment'
5. Business app users receive a notification via the app

Online Appointments via online booking link (through a browser over the internet)

When a client creates an appointment, the following actions take place.

1. Client receives an email confirmation
2. Business app users receive a notification via the app

Appointments via Business App Users

Business app users can also make a new appointment for any client via the app views. The following actions take place

1. Client gets an email confirmation if client email exists in the system
2. Client gets an SMS confirmation if client email does not exist in the system and SMS settings are enabled in the platform
3. Client gets an in-app notification if client has an app downloaded and logged in

The screenshot shows a mobile application interface for a calendar. At the top, it says "Calendar" and "Sunday - 15 September, 2019". Below the date is a legend for appointment statuses: Arrived (green), Available (white), Booked (green), Break (grey), Canceled (purple), Completed (blue), Confirmed (orange), In-Service (cyan), Late (yellow), Missed (red), Overlap (red), and Past (grey). The main part of the screen is a grid with columns for staff members: Amanda, Angela, Jazzy Haroon, Joe, John Nash, Nadia, Soph, and Windsor. The rows represent time slots from 16:45 to 20:30. Appointments are shown as colored blocks with the staff member's name inside. For example, at 17:00, Usman is booked by Jazzy Haroon. At 17:15, Tom is booked by Joe. At 17:30, Jazzy is booked by Angela, Tom by Joe, and Ali by Soph. At 17:45, Johnb is booked by Jazzy Haroon, Tom by Joe, and Johnb by John Nash. At 18:00, Tom is booked by Angela, Johnb by Jazzy Haroon, Johnb by John Nash, and Ali by Soph. At 18:15, Tom is booked by Angela, Ali by Jazzy Haroon, and Johnb by John Nash. At 18:30, Tom is booked by Angela, and Ali by Jazzy Haroon. At 18:45, Ali is booked by Angela. At 19:00, Peter is booked by Joe. At 19:15, Peter is booked by Joe. At 19:30, Peter is booked by Joe.

Time	Amanda	Angela	Jazzy Haroon	Joe	John Nash	Nadia	Soph	Windsor
16:45								
17:00			Usman					
17:15				Tom				
17:30		Jazzy		Tom			Ali	
17:45			Johnb	Tom	Johnb		Ali	
18:00	Tom		Johnb		Johnb		Ali	
18:15	Tom	Ali	Johnb		Johnb	Ali		
18:30	Tom	Ali						
18:45		Ali						
19:00				Peter				
19:15				Peter				
19:30				Peter				
19:45								
20:00								
20:15								
20:30								

Front-of-the-house App – Calendar View

Raising Sale (Point of sales) & Invoices

A sale can be raised via two channels.

From an existing appointment

You click on an appointment in calendar view and can choose from the available options to mark a client 'Arrived', 'Late', 'In-service' or 'Raise sale' to complete the transactions.

Walk-in client sale

You have two options to entertain a walk-in client

1. Create an appointment first and repeat the steps above
2. Directly raise a new sale by clicking on 'Raise sale' from salon app landing (home) page

Invoices

Once a sale has been raised, you can use the following two methods to provide your clients an invoice

1. Go to sales 'details' page and next to invoice press 'Send' button for automatically emailing the invoice to the client
2. You can ask the client to download the invoice themselves through client app by going to the 'detail' section of their visit history

Day end Cash reconciliation

Click on 'Day End' button on business app landing (home) screen and follow the wizard

Managing inventory

1. Login to the 'Business Portal'
2. Navigate to 'Inventory Management' section and follow the options to see inventory reports, add a new supplier, add a new product or raise a new 'stock order'

Engage unhappy clients

1. Login to the 'Business Portal'
2. Go to Reports -> Clients
3. Filter the report by 'Last event' to see all clients who have provided lower ratings of their last visit
4. Follow up each client to ensure they feel that their comments & feedback have been heard. They are more likely to return next time if their feedback is addressed

Marketing (Once or twice a week Preferred)

There are three main marketing and client engagement features that are available via the Retainoo platform.

Business Publications / Client Engagement

Business publications feature is super powerful as you can use this feature to broadcast anything you want to share with your clients to keep them engaged. Whether it is a new service or a product that you have launched, or a new superstar stylist that you have hired, or a celebrity visiting your salon – you can share anything within minutes using your salon app view. Follow the following steps.

1. Click on 'Salon Publications' or click on 'Add new Publication' from home screen (can also be done by owner app or manager app views)
2. Upload header image – this image will be displayed to all your client on the client app home screen in the slider.
3. Add a 'Headline' and 'Description' of what you want to share
4. Click on Save
5. Click on publish – At this time, all your clients will receive an in-app notification to view your new publication. Super cool isn't it?

You can also create the salon publication via the 'Business Portal' on the laptop or your desktop computer. Just login to business portal and navigate the menu options to select the right option.

Targeted Discount Promotions

You can create certain discount promotions through the platform. It is recommended to keep this to one promotion per week to ensure your clients see value in your promotions. You can create a discount promotion and only target the client segment that you wish to receive the promotion as only those clients will receive the promotion notification and details. Follow the following steps

1. Click on 'Add Promotion' button from your salon app
2. Upload a promotion banner pic
3. Add headline and description of promotion
4. Enter promotion start and end date and time
5. Enter promotion 'Execution' date and time – At this time, the notification will be sent out to all selected clients and the promotion status will be marked as 'Active'
6. Select the client segments you want to target for this promotion – Only those clients who fulfill the selected criteria will receive the in-app notification and promotion details.
7. Promotion will also be displayed on client app home screen in the slider

You can also create the discount promotions via the 'Business Portal' on the laptop or your desktop computer. Just login to business portal and navigate the menu options to select the right option.

In-app Message Broadcast

You can greet all your clients with a 'Merry Christmas' message or a 'Happy New Year' message in seconds through your salon app views by sending a quick 'text' message using the in-app text messaging feature. You can also target individual clients for sharing something specific.

Just click on 'Messaging' icon on home screen of your app and select 'Broadcast' and type in the message.

To send a message to individual client, select the client and send the message.

Decision Making with Reports (Once every 2 weeks)

Review business performance

Login to business portal and click on 'Reports'. Here you can see a number of visual reports to see your overall business performance, appointments, revenues, cancellations etc. It is suggested to at least review these reports twice a month to identify opportunities for improvement.

Review staff performance

Login to business portal and click on 'Reports -> Staff' to see your staff reports. This is where you can see your each staff profile and get a view of client ratings received by staff members. This is an important section of reports so you can make effective decisions around staff improvement, training & development.

Need Support?

If you need support, from the app just click on this icon “”



After, clicking Left side menu panel will appear, in that menu click on;

You will get;



From here, you can contact support.

Or, you can just send an email to support@retainoo.com.