



# iSALON COMMAND CENTRE 2017

## PRICEBOOK MANAGER

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INTRODUCTION

Pricebook Manager

Pricebook Manager / Overview

Get every aspect of your salon set-up. [Learn more](#)

Search Pricebook:

Welcome to **Pricebook**  
Now you are in control

**Pricebook Categories:**  
Make changes to your salon.

347 Discounts active	45 Packages active
961 Services active	3660 Products active
113 Team Members active	3 Sites / Groups active

**Pricebook Scheduler overview:**  
Send changes to your salons.

14 New updates to send	4 Scheduled updates
0 Updates being sent now	21 Updates overdue

Get help with a specific area of the software

Search for a specific record in one or all of the iSalon databases

Remotely update, amend and manage your records, then choose which salon/s the changes should be applied to.

Organise when you want your changes to take effect and keep track of their progress

Settings

Settings / Overview

Essential set-up for your salons. [Learn more](#)

Welcome to **Setup**  
Set up Team Members, User Accounts and Sites...

**Setup Categories:**

435 Team Members active	22 User Accounts
3 Sites	

Manage Team Members across the group

Update and amend individual site info

Control access levels for Command Centre User Accounts

SERVICES

Add a Service

- 1) From the Pricebook Manager Home screen select the 'Edit Services' option
- 2) Select the name of the department you wish to add the new service to, followed by the category name e.g. Hair Services – Cutting & Styling
- 3) Select the 'Add New Service' button and fill in each field as indicated

The full name of the Service

The name that should appear on the till button in iSalon

VAT Rate

The Aspect Code (5\* Reports)

Select if a Skin test is required

Select if the Service can be booked online

- 4) Select the 'Price Levels' tab and fill in each field as indicated

Alongside each different price level, input the selling price

For technical services only, input the development time (in minutes)

Alongside each different price level, input the time (in minutes) it takes to carry out this service

5) Select the 'Advanced' tab and fill in each field as indicated

Notes entered here will appear as a mouse over when booking the service

Notes entered here will appear as a Pop Up reminder message when the service is booked onto the diary

Notes entered here will appear in the info field within iBookings

By linking a Product to this service a Pop Up reminder will appear on the till screen whenever the service is sold, asking if that product should be added to the bill.

6) Select the 'Save Service Changes' tab.

7) The new service is now saved in the 'Pricebook Scheduler' folder under the 'New Updates to Send' tab, ready to be sent to the relevant salon/s

**NB** See also [Rooms & Resources](#). To enable the service to be booked online it must also be assigned to at least one [Team Member](#) via the Service Skills section of their record card.

### Edit a Service (All Sites)

- 1) From the Pricebook Manager Home screen select the 'Edit Services' option
- 2) Locate the service you wish to modify either by selecting the name of the department followed by the category name, or use the 'Search Services' option at the top of the screen

Enable/disable internet bookings for this service

Deactivate this service

Edit Price Levels for this service

Edit any other details of this service

## Edit a Service (Individual Site)

- 1) From the Pricebook Manager Home screen select the 'Edit Services' option
- 2) Locate the service you wish to modify either by selecting the name of the department followed by the category name, or use the 'Search Services' option at the top of the screen
- 3) Select the 'Choose Salons' button at the top of the screen
- 4) Select your salon name from the list and select 'Confirm'
- 5) Edit each field as required



Enable/disable internet bookings for this service

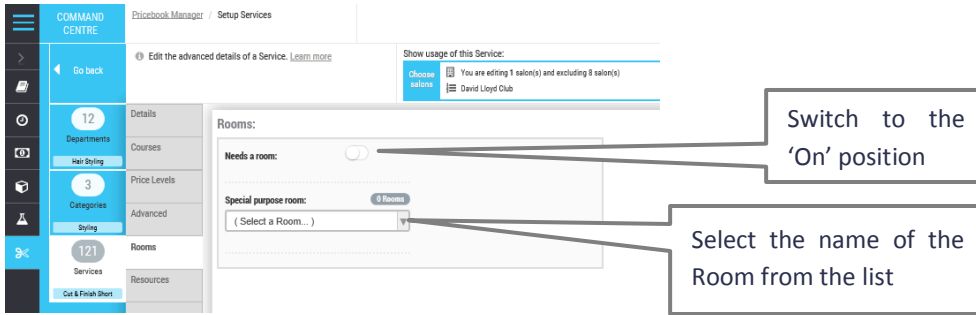
Deactivate this service

Edit Price Levels for this service

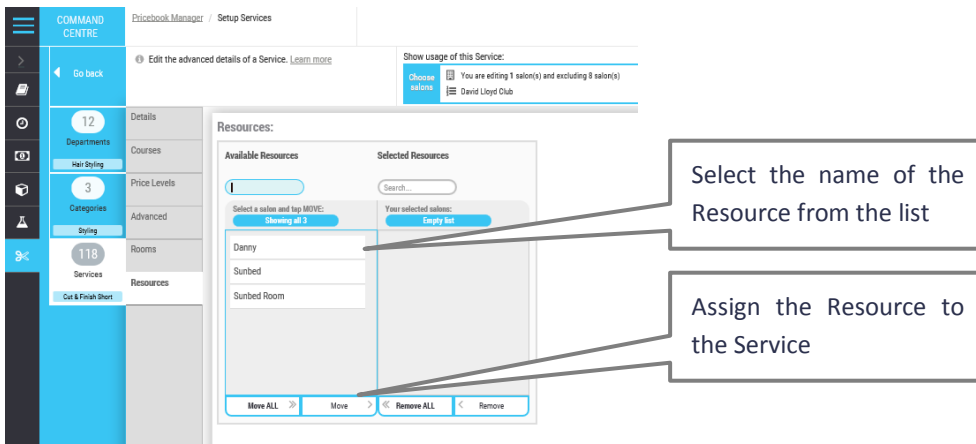
Edit any other details of this service

## Rooms & Resources

- 1) To allocate a Room to a Service select the 'Edit Services' option from the Pricebook Manager Home screen
- 2) Type the name of the service into the 'Search Services' option at the top of the screen, or locate it by selecting the name of the department followed by the category name
- 3) Select the 'Edit Service' button of the Service you wish to Modify then select the 'Choose Salons' button at the top of the screen
- 4) Select your salon name from the list and select 'Confirm'
- 5) Select the 'Rooms' tab and fill in each field as shown

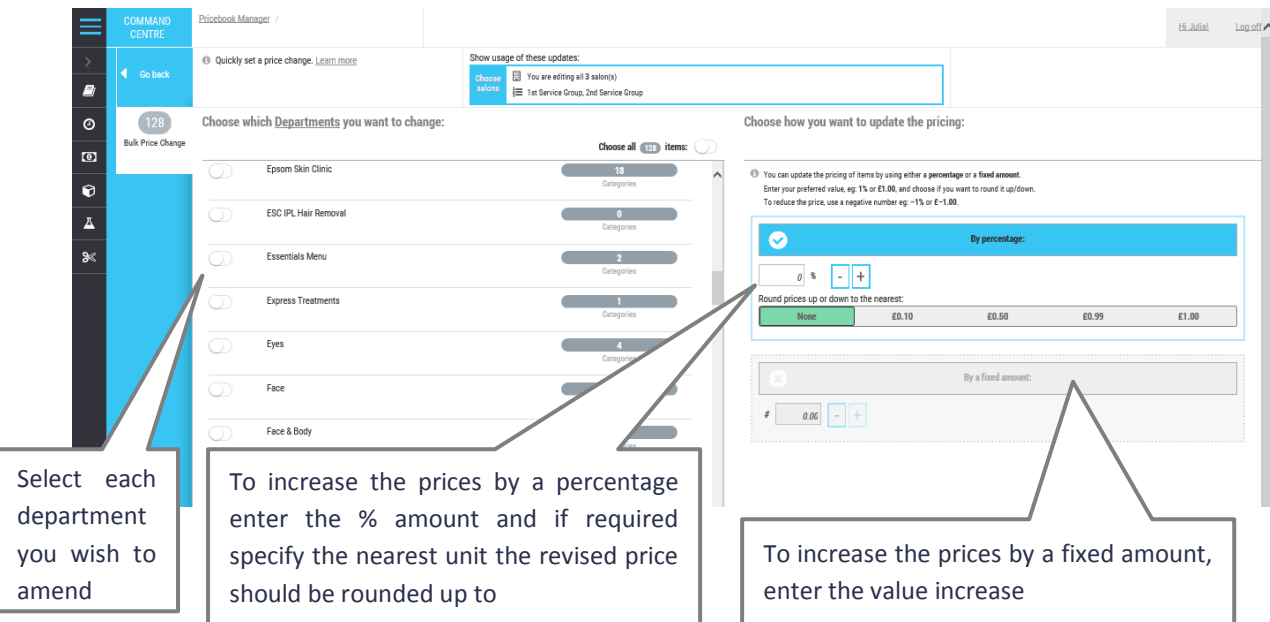


6) To allocate a Resource to a Service select the 'Resources' tab, highlight the name of the resource that is required and select 'Move'



### Bulk Price Change (Services)

- 1) From the Pricebook Manager Home screen select the 'Edit Services' option
- 2) Select the 'Bulk Price Change' option



3) Select 'Apply Price Change'

**PRODUCTS**

**Add a Product**

- 1) From the Pricebook Manager Home screen select the 'Edit Products' option
- 2) Select the name of the supplier you wish to add the new product to, followed by the supplier line e.g. GHD - Stylers
- 3) Select the 'Add New Product' button and fill in each field as indicated

- 2) Select the 'Retail' tab and fill in each field as indicated

- 5) Select the 'Save Product Changes' tab.
- 6) The new product is now saved in the '[Pricebook Scheduler](#)' folder under the 'New Updates to Send' tab, ready to be sent to the relevant salon/s

### Edit a Product (All Sites)

- 1) From the Pricebook Manager Home screen select the 'Edit Products' option
- 2) Locate the product you wish to modify either by selecting the name of the supplier followed by the supplier line, or use the 'Search Supplier Lines' option at the top of the screen

Deactivate this product

Edit the cost price of this product

Edit the selling price of this product

Edit the Barcode

Edit all other details of this product

### Edit a Product (Individual Site)

- 1) From the Pricebook Manager Home screen select the 'Edit Products' option
- 2) Locate the product you wish to modify either by selecting the name of the supplier followed by the supplier line, or use the 'Search Supplier Lines' option at the top of the screen
- 3) Select the 'Choose Salons' button at the top of the screen, specify the salon name from the list and select 'Confirm'

Deactivate this product

Edit the cost price of this product

Edit the selling price of this product

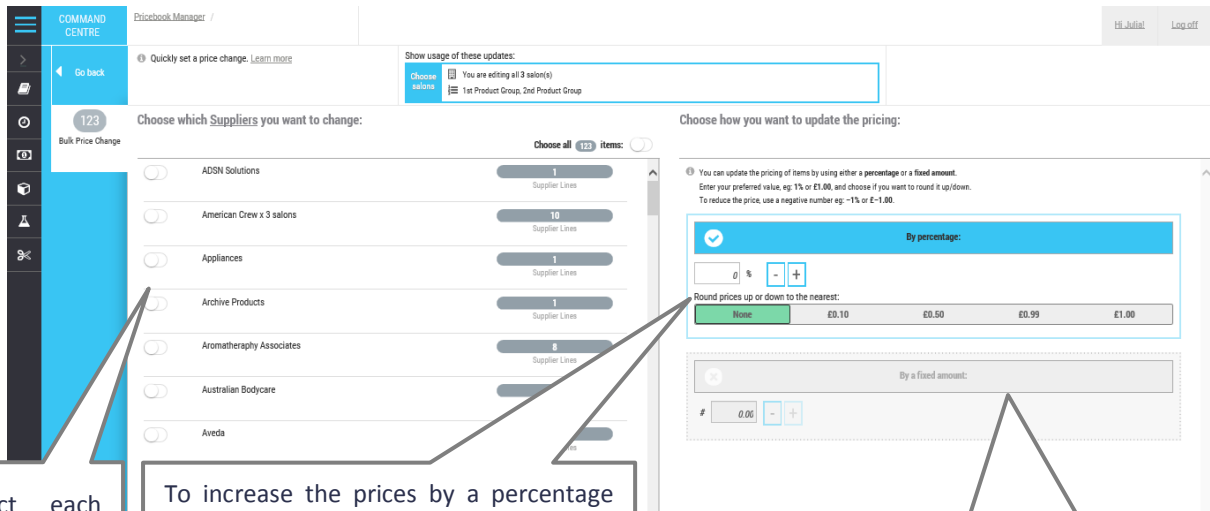
Edit the Barcode

Edit all other details of this product



## Bulk Price Change (Products)

- 1) From the Pricebook Manager Home screen select the 'Edit Products' option
- 2) Select the 'Bulk Price Change' option



The screenshot shows the 'Bulk Price Change' interface in the Pricebook Manager. On the left, a sidebar lists various suppliers with their respective item counts. The main area is divided into two sections: 'Choose which Suppliers you want to change:' and 'Choose how you want to update the pricing:'. The 'By percentage' option is selected, showing a percentage input field and a table of price points. The 'By a fixed amount' option is also visible but not selected.

Select each Supplier you wish to edit

To increase the prices by a percentage enter the % amount and if required specify the nearest unit the revised price should be rounded up to

To increase the prices by a fixed amount, enter the value increase

- 4) Select 'Apply Price Change'

DISCOUNTS

Add a Discount

- 1) From the Pricebook Manager Home screen select the 'Edit Discounts' option followed by 'All Discounts'
- 2) Select the 'Add New Discount' button and fill in each field as indicated

(If req) Type the barcode for the discount here

Specify the date range that the discount is valid from and to

(If applicable) Select a Discount Category

Type the name of the Discount here

Type in either a discount amount, a discount %, or a fixed price offer/promotion

(If req) specify how and when the discount should be applied, and how it should be recorded on the commission report

- 3) To restrict the discount to specific times and days of the week, select 'Weekday Rules' tab

Enable/Disable the discount from being applied on this day

Enter the times that the discount can be used alongside a particular day

4) To configure the discount for use by a 3<sup>rd</sup> Party Booking App or iBookings select the 'Online Bookings' tab

**Once enabled, the discount rules tabs are removed and the discount will be unavailable for selection in iSalon**

**Type in the online promo code of the discount e.g. WEB25**

**Apply the discount to the cheapest service on the bill**

**Apply the discount to the most expensive service on the bill only**

**Activate / Deactivate the discount in iBookings**

**Restrict the discount for use within iBookings only**

5) Select the 'Save Discount Changes' tab.

6) The new service is now saved in the [Pricebook Scheduler](#) folder under the 'New Updates to Send' tab, ready to be sent to the relevant salon/s. **NB** See also [Discount Rules](#).

### Edit a Discount (All Sites)

1) From the Pricebook Manager Home screen select the 'Edit Discounts' option followed by 'All Discounts'

2) Locate the Discount you wish to modify

**Deactivate this Discount**

**Activate / Deactivate within iBookings**

**Edit any other details of this Discount**

### Edit a Discount (Individual Site)

- 1) From the Pricebook Manager Home screen select the "Edit Discounts" option followed by 'All Discounts'
- 2) Locate the discount you wish to modify and select the 'Choose Salons' button at the top of the screen
- 3) Select your salon name from the list, select 'Confirm' and edit the fields as required

(If req) Amend the barcode here

Amend the expiry date here

Amend either the discount amount, the discount %, or the fixed price value

Amend how and when the discount should be applied, and how it should be recorded on the commission report

### Discount Rules

- 1) From the Pricebook Manager Home screen select the "Edit Discounts" option followed by 'All Discounts'
- 2) Locate the discount you wish to modify and select the 'Choose Salons' button at the top of the screen
- 3) Select your salon name from the list and select 'Confirm'
- 4) To specify which services are included/excluded from the discount, select the 'Service Rules' tab

Select to exclude all services

To exclude one or more services highlight the service names/and select 'Move'

To add an additional service that needs to be purchased to qualify for the discount, highlight the service name and select 'Move'

5) To specify which products are included/excluded from the discount, select the 'Retail Rules' tab

**Select to exclude all products**

To exclude one or more product highlight the product name/s and select 'Move'

6) To specify which team members are included/excluded from the discount, select the 'Team member Rules' tab

To exclude one or more team members highlight their name/s and select 'Move'

**PACKAGES**

**Add a Package**

- 1) From the Pricebook Manager Home screen select the 'Edit Packages' option
- 2) Select the 'Add New Package' button and fill in each field as indicated

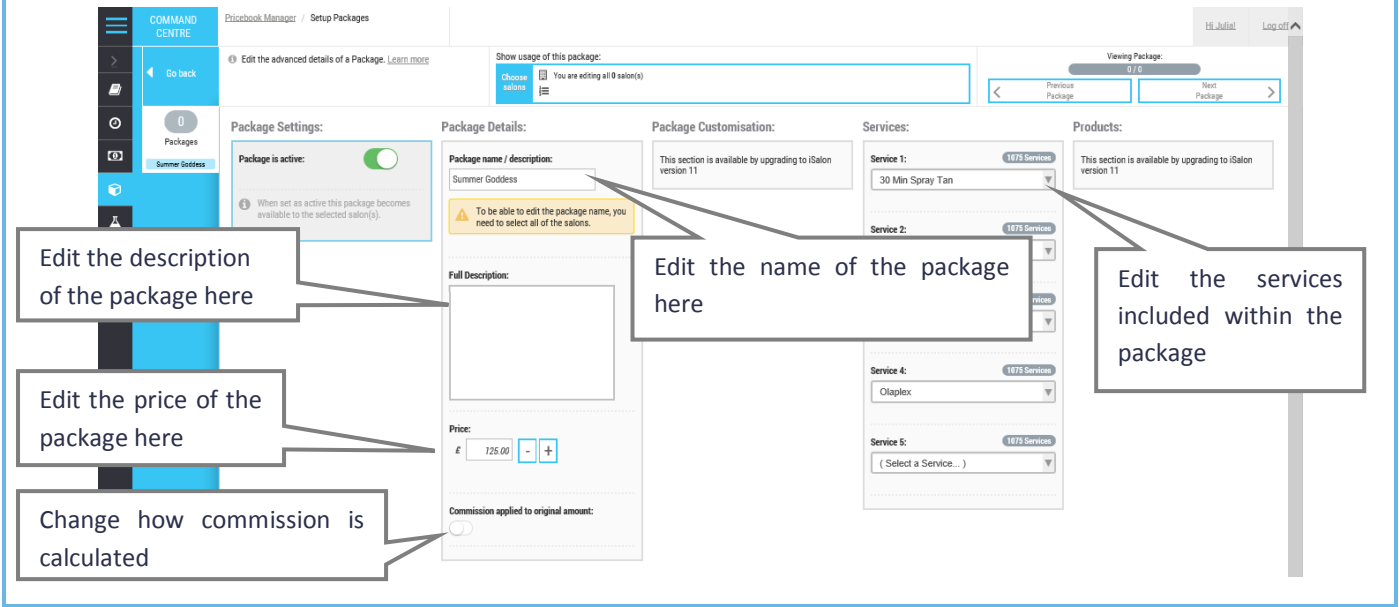
- 3) Select the 'Save Package Changes' tab.
- 4) The new service is now saved in the '[Pricebook Scheduler](#)' folder under the 'New Updates to Send' tab, ready to be sent to the relevant salon/s

**Edit a Package (All Sites)**

- 1) From the Pricebook Manager Home screen select the 'Edit Packages' option
- 2) Locate the package you wish to modify

### Edit a Package (Individual Site)

- 1) From the Pricebook Manager Home screen select the 'Edit Packages' option
- 2) Locate the package you wish to modify and select the 'Choose Salons' button at the top of the screen
- 3) Select your salon name from the list, select 'Confirm' and edit each field as required



The screenshot shows the 'Setup Packages' interface in the Pricebook Manager. The package being edited is named 'Summer Goddess'. The interface is divided into several sections:

- Package Settings:** Includes a toggle for 'Package is active' (currently on) and a note that it becomes available to selected salons when active.
- Package Details:** Contains the 'Package name / description' field (currently 'Summer Goddess'), a 'Full Description' text area, a 'Price' field (set to £ 125.00), and a 'Commission applied to original amount' checkbox.
- Package Customisation:** A note states 'This section is available by upgrading to iSalon version 11'.
- Services:** Lists five services: '30 Min Spray Tan', 'Olaplex', and three dropdown menus for 'Service 2', 'Service 4', and 'Service 5'.
- Products:** A note states 'This section is available by upgrading to iSalon version 11'.

Callout boxes provide instructions for editing:

- 'Edit the description of the package here' points to the 'Full Description' field.
- 'Edit the price of the package here' points to the 'Price' field.
- 'Change how commission is calculated' points to the 'Commission applied to original amount' checkbox.
- 'Edit the name of the package here' points to the 'Package name / description' field.
- 'Edit the services included within the package' points to the 'Services' section.

**TEAM MEMBERS**

**Add a Team Member**

- 1) From the Setting Home screen select the 'Edit Team Members' option
- 2) Select the 'Add New Team Member' button and fill in each field as indicated

This screenshot shows the 'Add a Team Member' form. Callouts indicate the following fields and actions:

- Full name:** Type their full name here
- Short / button name:** Type their first name here
- Price Level:** Select their Price Level
- Gender:** Specify whether they are male or female
- Security Level:** Select their Security Level
- Security PIN:** Type their Pin Number here

Additional form fields include: Mobile number, Address, Start Date, End Date, Employee Number, Security Level, Clock-in Number, and Holiday Allowance. A 'Delete this team member' button is also visible at the bottom of the form.

- 3) Select the 'Settings' tab

This screenshot shows the 'Settings' tab for a team member. Callouts indicate the following settings and actions:

- Do not book after a particular date:** Enable to stop bookings from being made after a certain date
- Within i-Salon's Appointment Book, disable snap-to-grid:** Enable to override time slot grid settings and allow bookings to commence at any time
- Team Member profile text:** (If req) Type a short introduction to the team member for iBookings clients to view when making an appointment

The form also includes a text area for 'Team Member profile text' and a 'Delete this team member' button.

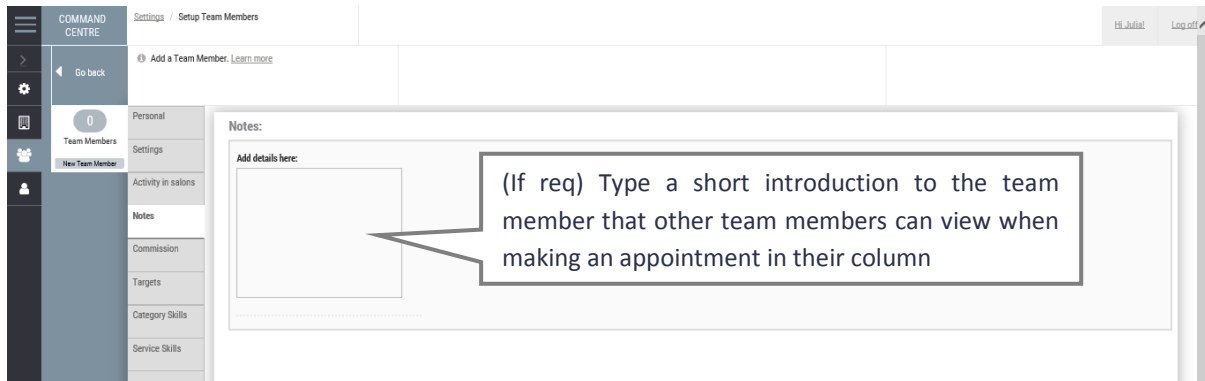


4) Select the 'Activity in Salons' tab

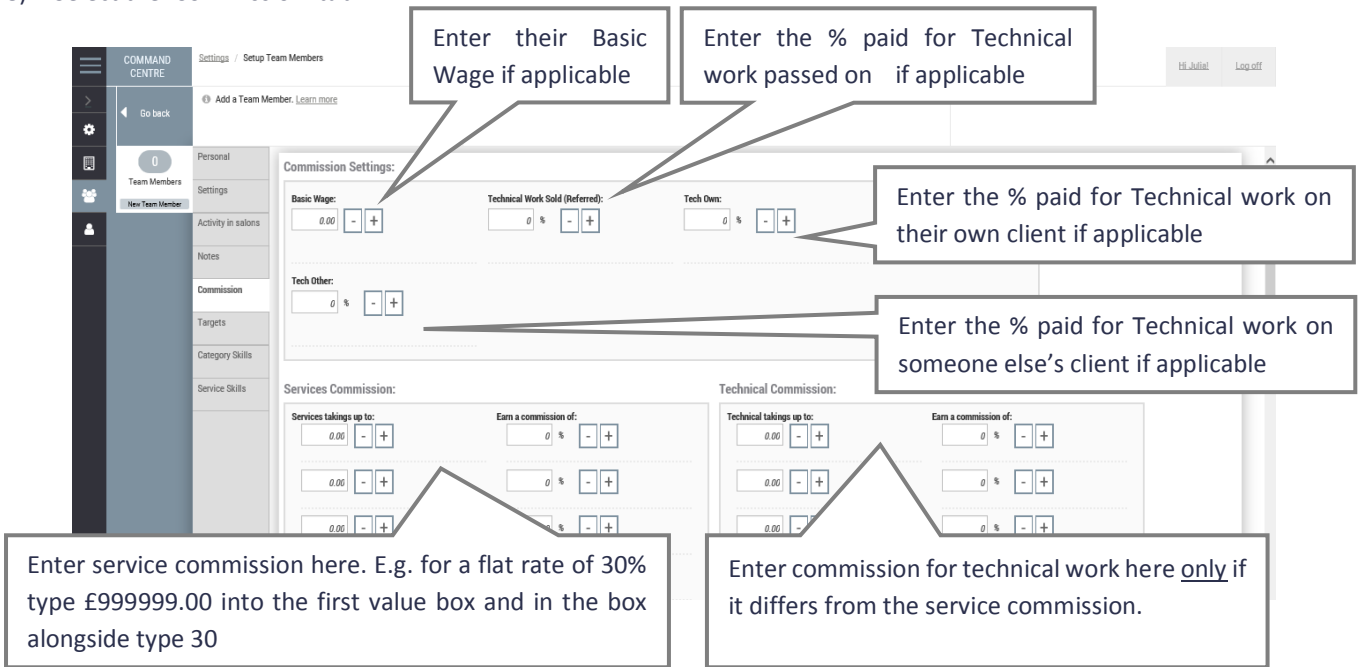
5) Scroll down the page to allocate their diary column/s

6) Scroll down the page to allocate their online booking column/s

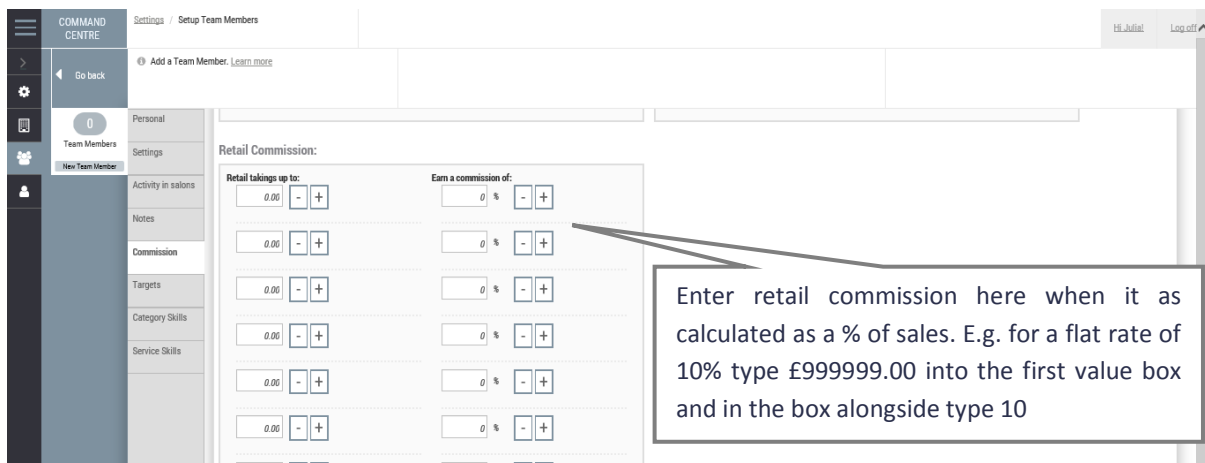
7) Select the 'Notes' tab



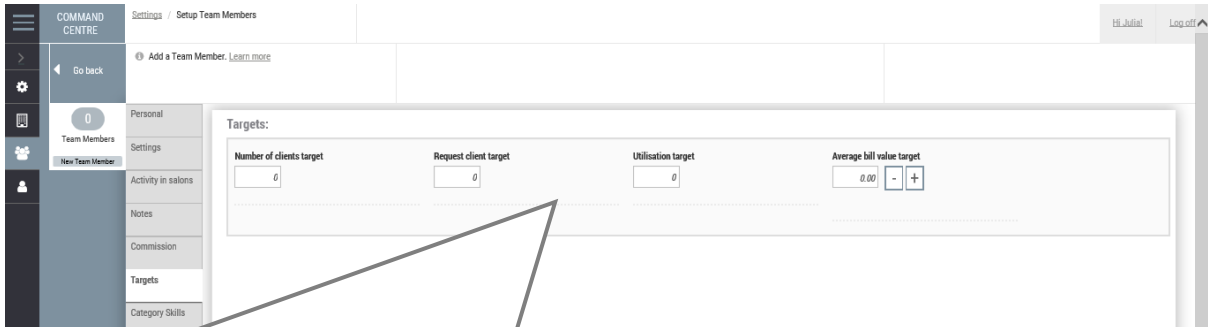
8) Select the 'Commission' tab



9) Scroll down the page to enter their Retail commission column/s



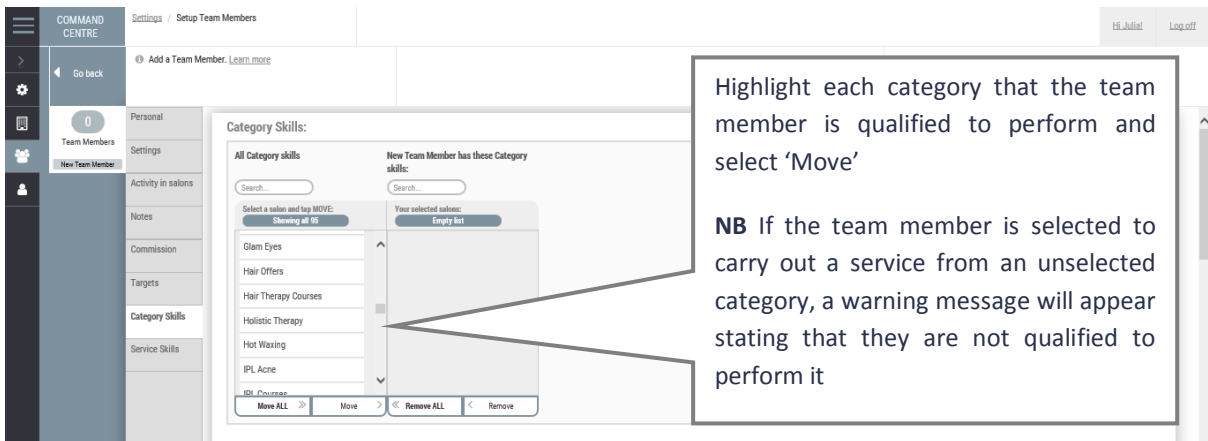
10) Select the 'Targets' tab



Input the team members targets as they should appear on the Individual Performance target Report in iSalon.

**NB** The targets can be Weekly, Monthly or Quarterly, as long as the date range used when running the report reflects this e.g. For weekly targets, run the report for a week. For monthly targets, run the report for a month

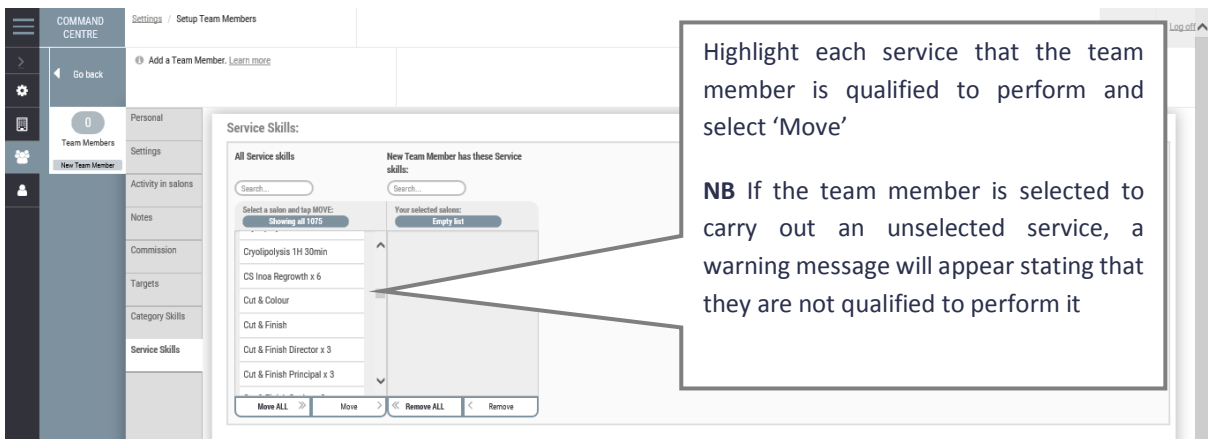
11) Select the 'Category Skills' tab



Highlight each category that the team member is qualified to perform and select 'Move'

**NB** If the team member is selected to carry out a service from an unselected category, a warning message will appear stating that they are not qualified to perform it

12) Select the 'Service Skills' tab



Highlight each service that the team member is qualified to perform and select 'Move'

**NB** If the team member is selected to carry out an unselected service, a warning message will appear stating that they are not qualified to perform it

13) When you have finished making all of your changes select 'Save Team Member Changes'

14) The new team member is now saved in the '[Pricebook Scheduler](#)' folder under the 'New Updates to Send' tab, ready to be sent to the relevant salon/s

### Edit a Team Member (All Sites)

- 1) From the Pricebook Manager Home screen select the 'Edit Team Members' option
- 2) Locate the team member you wish to modify

Enable/disable the team member from appearing on the till screen

Enable/disable the team member from appearing on the appointment book

Enable/disable the team member from appearing in Online Bookings

Edit any other team member details

### Edit a Team Member (Individual Site)

- 1) From the Pricebook Manager Home screen select the 'Edit Team Members' option
- 2) Locate the team member you wish to modify and select them by clicking 'Edit'
- 3) Select the 'Activity in Salons' tab and amend their salon details accordingly

Enable/disable the team member from appearing on the till screen

Enable/disable the team member from appearing on the appointment book

Enable/disable the team member from appearing in Online Bookings

Edit any other team member details

PRICEBOOK SCHEDULER

- 1) Whenever new records are added to the Pricebook, or changes are made to existing records, a confirmation message will appear to advise that whilst the changes have been saved, they have not yet been sent to the salons.
- 2) These changes will be held in the 'Pricebook Scheduler' folder under the 'New Updates to Send' tab, until such time you specify they can be sent.
- 3) To schedule the updates either select the 'Go to Pricebook Scheduler' button on the confirmation message, or access the Scheduler directly from the Pricebook Manager Home screen and selecting 'Schedule Updates Now'

Sending Updates

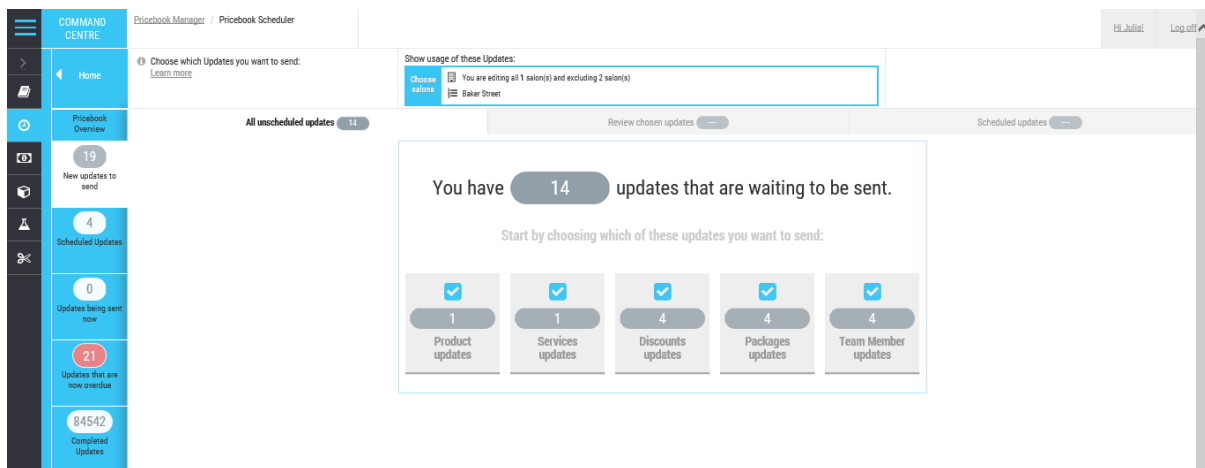
Close X

**Almost done:**  
These changes have been saved but haven't been sent to your salons yet. They can now be found in the Pricebook Scheduler's 'Scheduled Updates' tab.

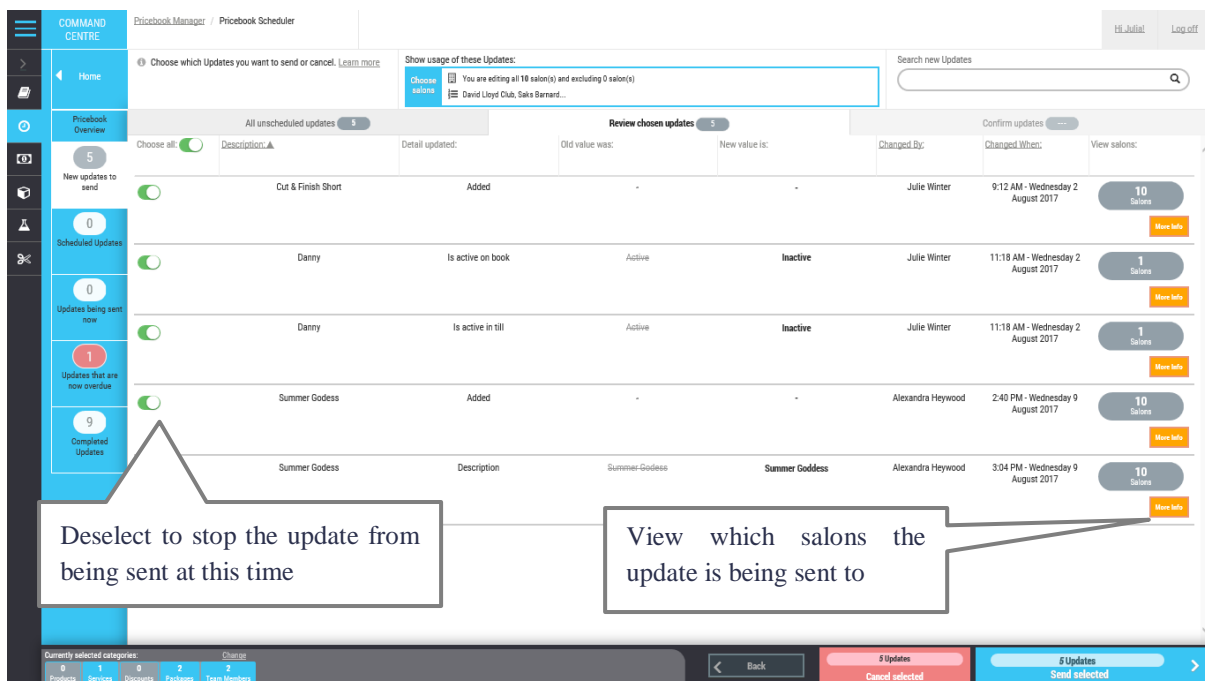
Please review the Awaiting Updates section to schedule a time for these changes to take effect.  
Note: When this update is sent, these changes will be sent to each of the selected salons only.

[Open undo this update](#)

Close    [Back to Pricebook Overview](#)    [Go to Pricebook Scheduler](#)



- 4) Choose which updates you wish to send and select 'Review Updates'



5) Select 'Send Selected'

The screenshot displays the 'Pricebook Scheduler' interface. A left-hand navigation menu includes 'COMMAND CENTRE', 'Home', 'Pricebook Overview', 'New updates to send' (5), 'Scheduled Updates' (0), 'Updates being sent now' (0), 'Updates that are now overdue' (1), and 'Completed Updates' (9). The main content area is divided into three tabs: 'All unscheduled updates' (5), 'Review selected updates' (5), and 'Confirm updates' (5). The 'Review selected updates' tab is active, showing a confirmation screen with two numbered steps:

- 1 When do you want to send these updates?**  
Currently set as: 29 August, 2017  
Buttons: **Send now** and **Send on a different day**
- 2 Review a summary of these updates:**  
These change consist of:  
- 5 updates affecting 10 selected salons  
- on 29 August, 2017 at 3:10 PM  
If you are happy to proceed: Press **Send** to confirm these updates for the selected salons.  
Update details:  
1. Services  
2. Team Members  
3. Packages

Two callout boxes provide instructions:

- Highlight to send the updates now** (points to the 'Send now' button)
- Highlight and pick a date and time to send the updates on a different day** (points to the 'Send on a different day' button)

At the bottom, there are 'Back' and 'Send 5 Updates' navigation buttons.

6) Select 'Send'

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