

# **CRM** of the beauty salon administrator

User's Guide 2020

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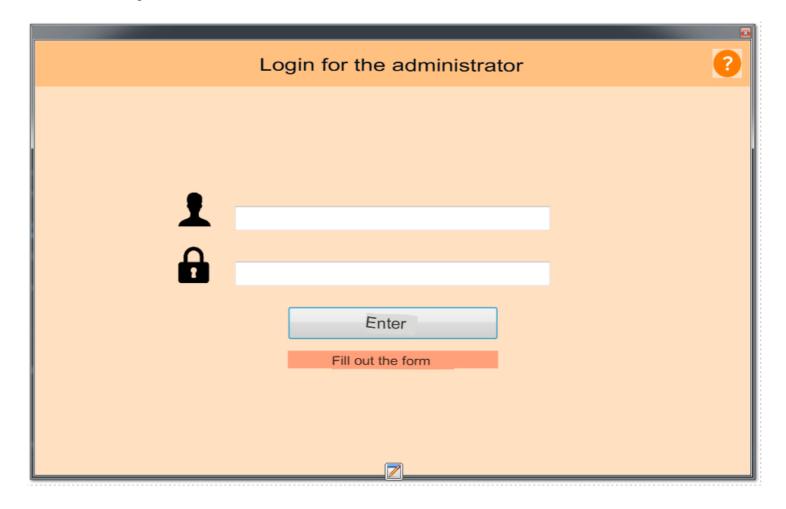
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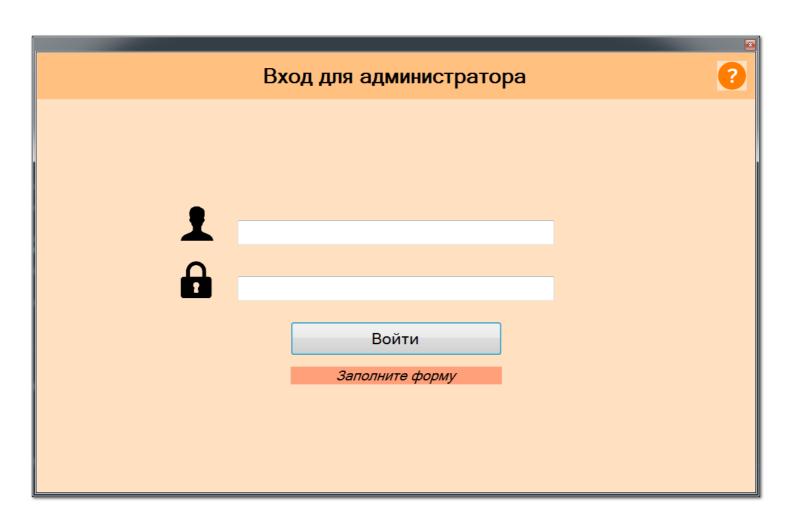
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## 1. Login for the administrator

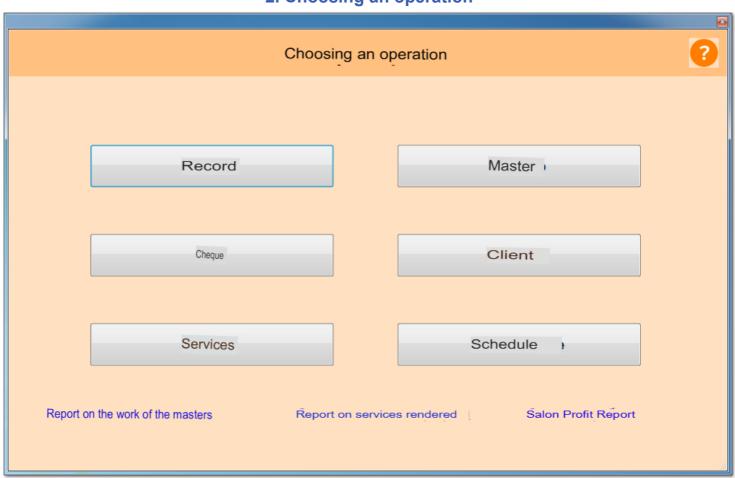
## To log in, you need to:

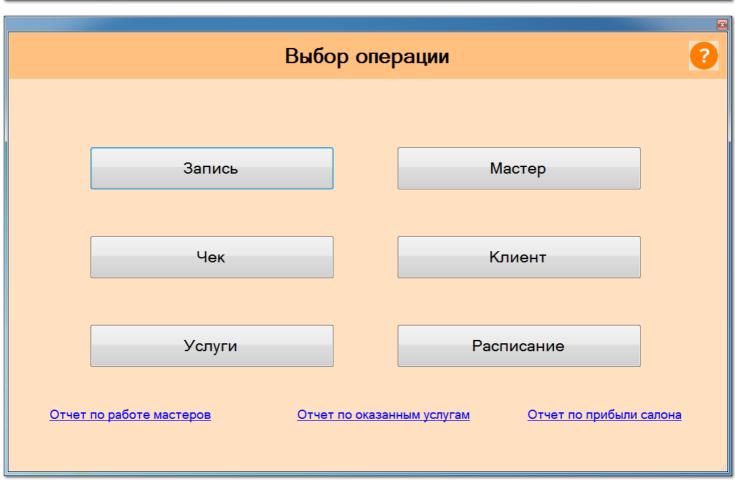
- 1. Enter your username
- 2. Enter your password3. Click the "Login" button





## 2. Choosing an operation





## 3. Operations with wokers

#### To add a new master:

- 1. Enter the full name of the new master
- 2. Select the position of the new master
- 3. Click the "Add" button

#### To edit a master:

- 1. Select the full name of the master
- 2. Choose the appropriate radio button
- 3. Fill in the required field according to the selected radio button

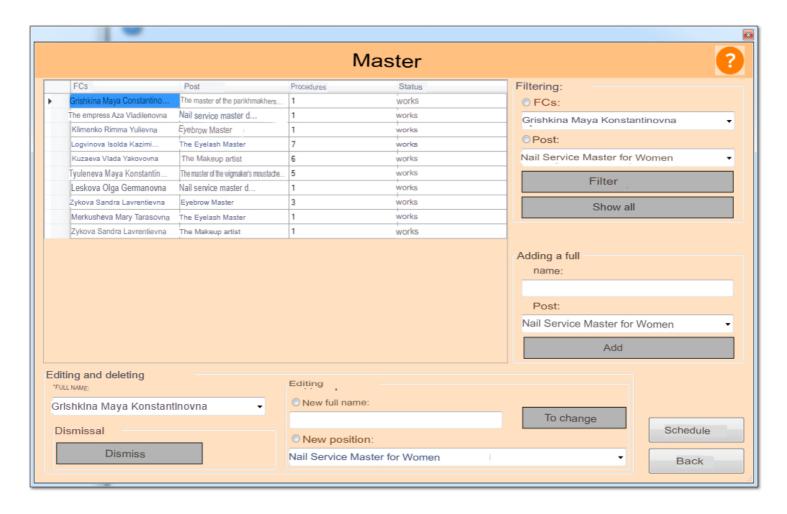
#### Click the "Edit" button

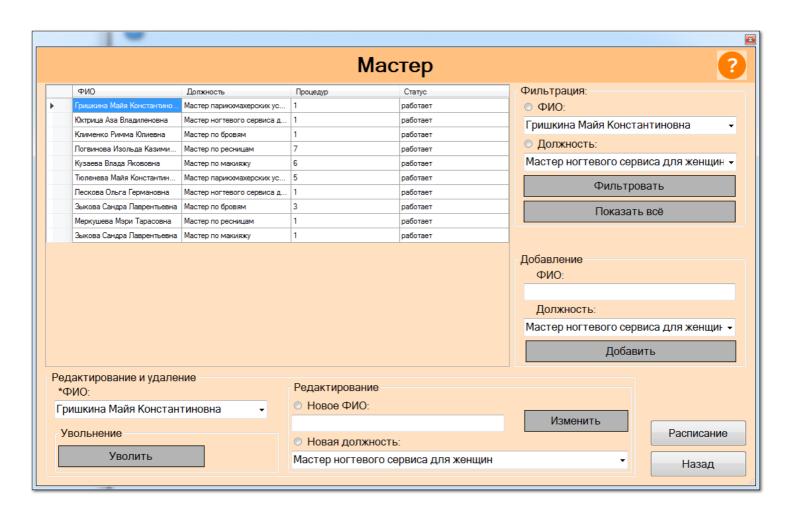
- 1. To dismiss a master:
- 2. Select the full name of the master
- 3. Click the "Dismiss" button

#### To filter information:

- 1. Choose the appropriate radio button
- 2. Fill in the required field according to the selected radio button
- 3. Click the "Filter" button

or





## 4. Schedule operations

#### To add a new schedule:

- 1. Select the master's full name
- 2. Select the day of the week
- 3. Enter the start and end of the working hours
- 4. Click the "Add" button

#### To edit a schedule:

- 1. Select the master's full name
- 2. Select the day of the week
- 3. Enter the new start and end of the working hours
- 4. Click the "Edit" button

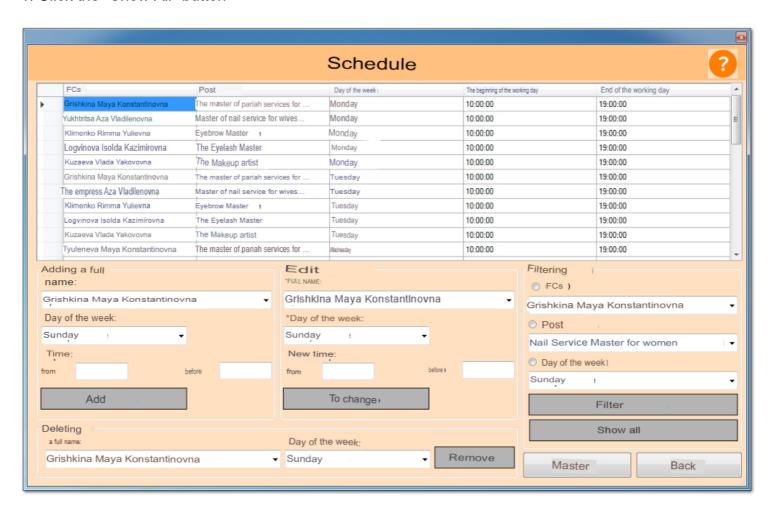
#### To delete a schedule:

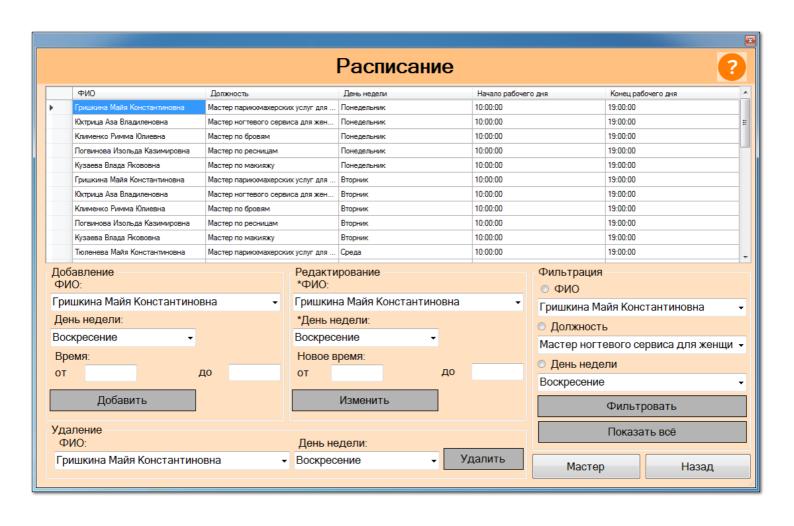
- 1. Select the master's full name
- 2. Select the day of the week
- 3. Click the "Delete" button

#### To filter information:

- 1. Select the appropriate radio button
- 2. Fill in the required field according to the selected radio button
- 3. Click the "Filter" button

or





## 5. Operations with clients

#### To add a new client:

- 1. Enter the full name of the new client
- 2. Enter the phone number of the new client
- 3. Click the "Add" button

#### To edit a client:

- 1. Select the client's full name
- 2. Choose the appropriate radio button
- 3. Fill in the required field according to the selected radio button
- 4. Click the "Edit" button

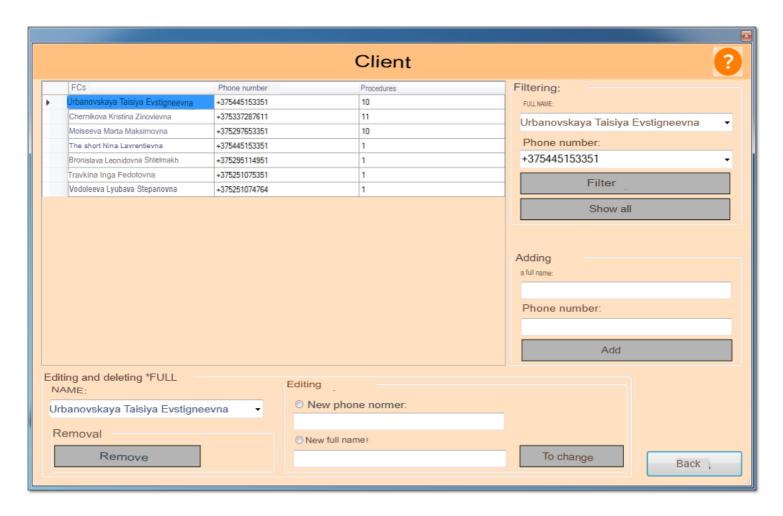
#### To delete a client:

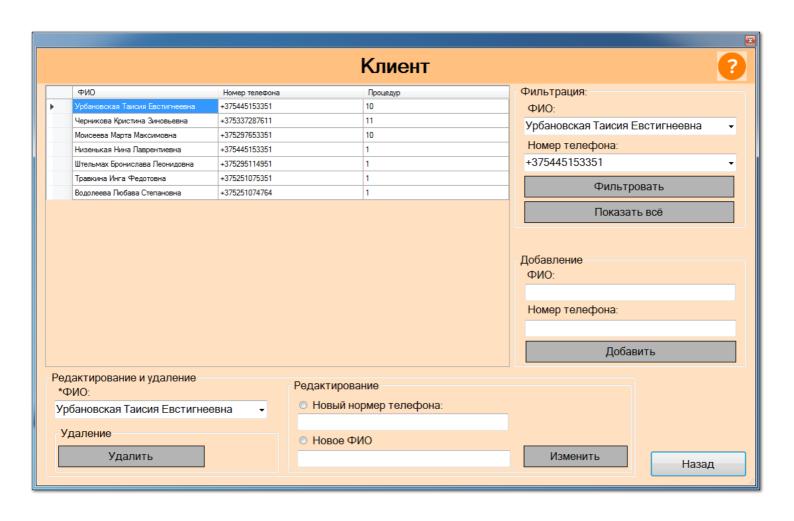
- 1. Select the client's full name
- 2. Click the "Delete" button

#### To filter information:

- 1. Choose the appropriate radio button
- 2. Fill in the required field according to the selected radio button
- 3. Click the "Filter" button

or





## 6. Operations with services

#### To add a new service:

- 1. Enter the name of the new service
- 2. Enter the price of the new service
- 3. Enter the maximum duration of the new service
- 4. Select the category of the new service
- 5. Click the "Add" button

#### To edit a service:

- 1. Select the name of the service
- 2. Choose the appropriate radio button
- 3. Fill in the required field according to the selected radio button
- 4. Click the "Edit" button

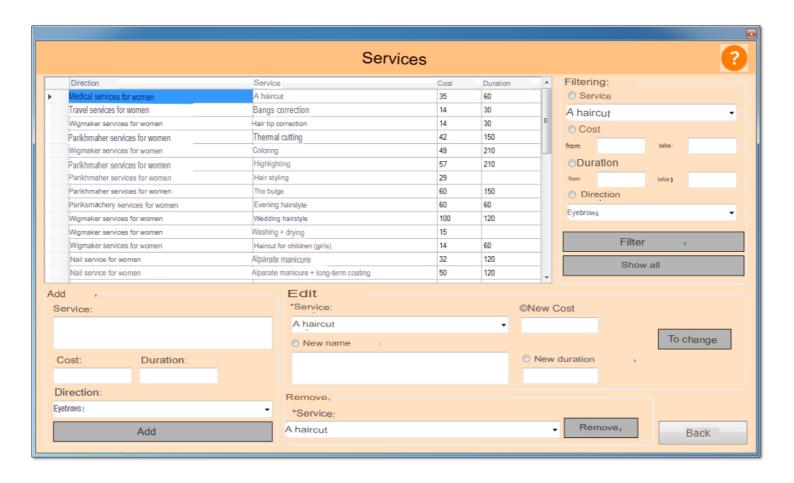
## To delete a service:

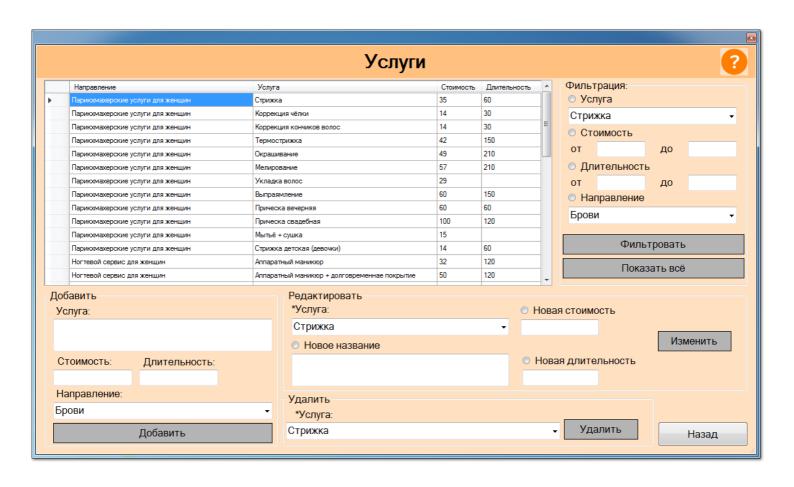
- 1. Select the name of the service
- 2. Click the "Delete" button

#### To filter information:

- 1. Choose the appropriate radio button
- 2. Fill in the required field according to the selected radio button
- 3. Click the "Filter" button

or





## 7. Note operations

## To add a new appointment:

- 1. Select the client's full name
- 2. Select the service name
- 3. Select the day of the week and the master
- 4. Select the date
- 5. Select the start time
- 6. Click the "Add" button

### To edit an appointment:

- 1. Decide how the appointment will be identified.
- 2. If by appointment ID:
  - 1.1 Select the "By appointment ID" radio button
  - 1.2 Select the appointment ID

If by searching with other criteria:

- 1.1 Select the "By search" radio button
- 1.2 Select the client
- 1.3 Select the date
- 1.4 Select the start time
- 3. Select the appropriate radio button
- 4. Fill in the required field according to the selected radio button
- 5. Click the "Edit" button

### To delete an appointment:

- 1. Decide how the appointment will be identified.
- 2. If by appointment ID:
  - 1.1 Select the "By appointment ID" radio button
  - 1.2 Select the appointment ID

If by searching with other criteria:

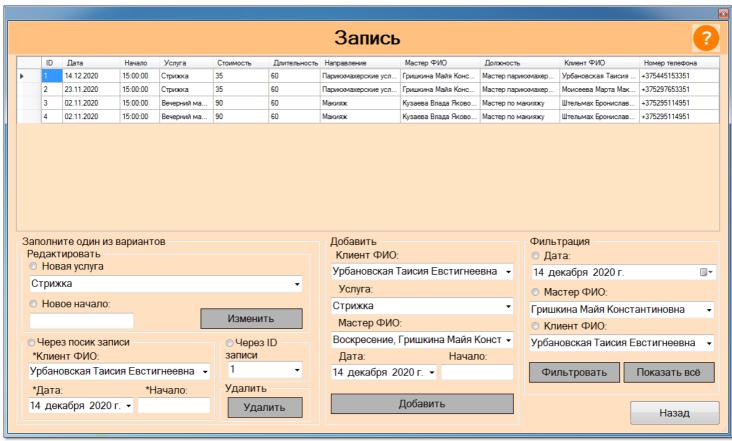
- 1.1 Select the "By search" radio button
- 1.2 Select the client
- 1.3 Select the date
- 1.4 Select the start time
- 3. Click the "Delete" button

### To filter information:

- 1. Select the appropriate radio button
- 2. Fill in the required field according to the selected radio button
- 3. Click the "Filter" button

or





## 8. Operations with tranzactions

## To add a new receipt:

1. Decide how the receipt will be created:

If by appointment ID:

- 1.1 Select the "By appointment ID" radio button
- 1.2 Select the appointment ID

If as a new receipt:

- 1.1 Select the "Add as new receipt" radio button
- 1.2 Select the service
- 1.3 Select the master
- 1.4 Select the client
- 2. Click the "Add" button

## To edit a receipt:

- 1. Select the receipt ID
- 2. Enter the cash amount
- 3. Click the "Edit" button

## To delete a receipt:

- 1. Select the receipt ID
- 2. Click the "Delete" button

#### To filter information:

- 1. Select the appropriate radio button
- 2. Fill in the required field according to the selected radio button
- 3. Click the "Filter" button

or

1. Click the "Show All" button

## To print a receipt:

- 1. Click the "Receipt" button
- 2. Select the receipt number
- 3. Click the print icon

