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# Manual

## // Stencil apps for beauty salons

This version of the Manual was last updated on Feb 22, 2015. You can download the latest version from <https://salon.stencilapps.com/docs/StencilAppsManual.pdf>.

Stencil apps is the simple yet powerful set of software tools to help you manage your beauty salon. It lets you keep your work schedule on check. It provides you wide range of statistics and operational metrics to make informed business decisions. It helps you making the best use of what you know about your customers. It also gives you a unique mobile application to keep in touch with them and let them feel special.<sup>1</sup>

Our application is web based, easy to use and accessible from anywhere. It is carefully crafted to work well on great variety of devices -- from desktop computers all the way down to mobile phones. It works even when you are not connected to the internet and you never lose access to your data.

Stencil apps for beauty salons can be used by going to <https://salon.stencilapps.com>.

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<sup>1</sup> Coming in Q1 2015.

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## Getting started

### Account registration

We use Google accounts to handle user authentication. To put it simply, any Gmail account will do. Of course you can also use a Google Apps account with your custom domain. If you don't have a Google account, you can create one during your sign up to Stencil apps for beauty salons.

We use your Google managed email address as your Stencil account handle and redirect you to Google each time you have to login. In this way we never process or record your password -- it is safely stored by Google.

Once you have clicked the registration button and authenticated with your Google account for the first time, you are requested to provide:

- The name of your salon
- Your name (you will be recorded as the owner and have the full rights to administer your instance of Stencil apps for beauty salons)
- Location (city or town will do)
- The currency you will use

Once this is done, you are good to go. You will receive a confirmation email to the address you have signed up with. Also, don't forget to bookmark the web address in your browser.

### Navigation

The dark strip at the top of all pages contains the application's navigational menu. It has the following items:

- Home (represented by the Stencil logo, load the Dashboard)
- Calendar
- Customers
- Settings, which opens a menu containing:
  - Team
  - Services
- Current user's account, which opens a menu containing:
  - Logout

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In the footer, also accessible from all pages, you will find the contact details for inquiries and support requests, as well as links to documents related to the Stencil apps product.

## **Initial setup**

Once you enter the Stencil apps for the first time, you need to do a quick setup to make use of the tools the application provides. The cards in the application's homepage will guide you through that process.

First, you have to submit a list of your lines of service and their prices. Then you have to create entries for your staff members and mark some of them to appear in your work schedule, presented in the calendar module.

That's it, you and your team can start using the Calendar to manage the customer appointments and record all services you provide. You will get statistics derived from the processed appointments in the Dashboard.

You can activate additional modules from the cards in the Dashboard. We will describe all modules in more detail in the following sections.

## **The Dashboard**

The dashboard provides you with the important information about the state of your Stencil apps instance at a glance. It will also contain statistical data about your operations and sometimes alerts you need to attend to. Let's look at these items individually.

### **Settings cards**

When you start, this will be the first and only section on the dashboard. It will contain card entries for each module with some basic information about its current standings. As you activate the modules, the Settings card section will get out of the way and make room for other dashboard sections with bigger everyday importance.

### **Operational metrics**

Once you have created a lines of service list, created entries for the staff members in your work schedule, and started processing appointments in the Calendar, you will see a set of statistics in a special Operational metrics section on the Dashboard. It will provide the following statistics:

- Planned revenue for today and the next 3 days, based on the scheduled appointments in your calendar

- Acquired revenue for today and the previous 7 days based on all appointments which are marked as Done in the schedule;
- Monthly revenue for the ongoing and the last 3 months, additionally broken down per each employee included in the schedule.

## Notifications

In the upper right hand side of the dashboard we will conditionally display notifications which need action from you or any of your staff members accessing Stencil apps. Currently the only notification shown is for unresolved appointments which are in the past (hence are expected to be marked either as Done or No-show by now, see next section for details). Clicking on the alert will show a list of such appointments, each of them linked directly to the respective day in the Calendar to allow easy and quick resolution.

## Calendar

The calendar provides a view of the daily work schedule of your team. It contains a column for each individual staff member marked to appear in the work schedule (i.e. directly providing services to customers). It is graphed into time slots of 15 minutes. Appointments are visualised as cards taking one or more slots and are colour coded depending on their status.

### Calendar navigation

Navigating the calendar is done using the buttons and links at the top left hand side of the page. You can jump to the next or previous day using the arrow buttons. At any time you can hit the Today button to jump to the current day's view. The date is also a link which will open a full calendar from which you can quickly load any specific day.

### Working with appointments

To create an appointment, you have to simply click on the slot in the calendar you want it to start at. Here is a list of appointment's elements:

- The header of the appointment dialogue shows the staff member's calendar lane and the date;
- Start time (required; buttons add or subtract 15 minutes at a time);
- Duration (required; 1:00 is default; longer duration options might be disabled if the respective slot is already taken or the appointment is close to the end of the working time);
- Customer name field activates a helper dialogue where you can either enter name and/or phone number for a new customer or assign the appointment to an existing customer;
- Service line;

- Price (required and automatically populated for each service line, but also editable as there might be additional services or discounts provided to the customer);
- Notes (optional, freestyle text).

Once an appointment's start time is in the past, it can be marked as Done or No-show. Here is a list of appointment statuses:

- Pending is every appointment in the future, as well as those in the past which have not yet been updated;
- Done means that the service is provided (when marking the appointment as Done, you should consider re-checking and updating the price to reflect the actual value of the service provided; appointments with this status influence the various revenue stats);
- No-show means that the customer didn't show up or that the service was not provided due to some other reason (appointments with this status do not influence the revenue stats);
- Expired is a status which is applied automatically to all appointments which were still Pending two weeks after their scheduled time (these also do not influence the revenue stats).

The following rules to editing the appointments apply:

- Everybody can create and edit an appointment for today, for future days and for the last 6 days in the past;
- Everybody can also delete such appointments, as long as they are not already resolved by being marked as Done or No-show (i.e. are still with Pending status);
- The owner can create, edit or delete appointments with no restriction;

### **Calendar settings**

Calendar settings dialogue is accessible only by the salon's admin account. It allows defining the start and end of the working time. The Calendar view for today and all future days is updated accordingly. The change is not allowed if there are scheduled appointments outside of the selected time range.

### **Appointment details table**

Below the calendar view there is a table which provides a tabular detailed list of all appointments for the respective day.

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## Customers

This section provides you a list with all of your salon's customers existing in the system. This database is feeded by the events created in the calendar where each appointment is either assigned to an existing customer profile or creates a new customer profile.

### Searching in the customers database

You can search the customers database by starting to type into the search field at the top. As you type the list is filtered based on your search string in real time.

### Customer profiles

Clicking on a customer card opens their profile. Each profile contains the following editable elements:

- Customer name;
- Customer phone number;
- Customer email address;
- Notes.

Additionally, each profile visualises a list of all appointments for the respective customer, past or future, in a reverse chronological order.

### Merging customers

When your staff creates new appointments, they might occasionally create a new customer record instead of assigning the appointment to an already existing customer. In that case you will have that person's history separated in two or more places which is, of course, not desirable. Therefore, we provide the option to merge customer profiles into a single profile.

You should first search the customers database and select the profiles you want to merge by clicking on the checkboxes in the upper right corner of each customer card. As you make your selections, the cards are pinned and will be visible in your search results regardless of the criteria entered in the search box.

Then you should simply click on the Merge button in the provided dialogue, verify the details of the resulting profile and confirm the action.

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## Settings

The settings module provides a set of pages to manage the data and configurations required or used by other parts of your Stencil apps instance.

### Team

This is where you submit a list of your staff members. Normally you will need an entry for every member who will be included in the work schedule and/or will access Stencil apps. You can control each of these options for every staff member entry you create.

- If you activate a staff member to be included in the work schedule, respectively receive a column in the Calendar, you can edit the way their name appears in the Calendar's header.
- To allow access to Stencil apps for a particular staff member, you will have to provide the email address for their Google account.<sup>2</sup> They will receive an email message informing that you have added them to Stencil apps for your salon. Then they can simply load <https://salon.stencilapps.com>, login with their Google account and use the application.
- For each account with access to your instance of Stencil apps, you can also choose to allow access to the statistics on the dashboard.

### Services

This is where you maintain the list of your lines of service as associate a price with each of them. Services are organised into groups. Create one or more groups first and then list the appropriate service lines in the respective groups.

You can re-order both the service groups and the individual lines of service within them by simply using the drag handles in front of their name.

It is not possible to edit a service line after it is created -- you should simply delete it and create a new one with the correct details.

If you want to delete a service group, you should first delete all items it contains.

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<sup>2</sup> If they don't have such account yet or want to use a new one for their work, ask them to sign up by going to <https://accounts.google.com/SignUp> and then submit their email address into their profile on the Team page.



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## Application messages

### **Updated version available**

Sometimes a newly deployed version requires the application to be reloaded in order for some new feature to take effect. In such cases we will show a message on top of the page, just below the navigation bar. All you need to do is click the “Reload” link provided in the message.

### **Page not found**

If you are signed in and try to load a URL to a non-existent page due to a broken link or typo, we will show a message that the page you are trying to access does not exist. In this case, simply load the Dashboard and use the navigation menu from there to access the resource you are looking for. If you believe there is a bug we have to fix, please let us know.

### **The server cannot be reached**

This message shows that you have no internet connection or the server is not accessible due to some other reason. If you test and verify that your connection is up and working and you still get this message, please let us know, so that we can check and address the issue.

### **Offline mode**

This message is shown when network connectivity is lost by the browser. Offline mode has some limitations on editing your data which you can review by clicking on the Help button next to the message. Once connection is restored, the message is updated to show that and you are asked to reload the page to go online and sync the latest data from the server.