# Checkout Process for Reach in Salonbiz Enterprise (RDP app)

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## Appointment Book view

#### Appointment color

Reach appointments will always appear in blue on the appointment book, and they will also always have a note.

	SalonBiz Enterprise 5.2.4.34 (Reach 2) for Location 100 (staging)											
No	w Your Turi	n					Friday, (	October 02	, 2020		1:3	37 P
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	<<<		Sep	Sun				'ue Wed				
				27		28	2	29	30		1	
	Friday		ber 02,									_
		Susie	Nicki	Nancy	Ellie	Mike	Fernando	Choppy	Timmy O	Susi	Annalee	Tirr
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## Appointment Note

When there is an appointment note present, the Appt Note button will be colored red

Wed		Thu		Fri		Sat		Oct		>>>		electi	Date
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								_Customer	Inform	ation	6		
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# **Customer Check-in**

# Appointment Note Popup

When a Reach customer is checked it, the employer will be presented with the note that was added to the appointment. This note will specify that this was a Reach appointment and provide the incentivized pricing and payment information needed for checkout.

Check-In	а,	Continuation	Shet fine		Sherr.	Sev	Left Name	frid Natio
Check-In Appointment Appointme		ſ						
Print Traveler Appointme	5							
View Customer 2 Schedule	•							
View Open Appointments Customer His	>	00 Minute 2020 B 15 AM Infution	Appointment hole Inter1001/2020 2.25 AMM/II Dooling PropudmEntOrence: Massagen/Pronter: Mile I VAppointmentOren: 1002 Inflaquate Price: \$15.00m/ \$13.75mPaid: \$11.50mm \$10AChinoscather: \$15.em					
			OK	L Late	Cite Im. 204 PM	Shelf	Lad Nate and	fait Name
Check-Out		1		160	2:06 PM	Permando	Daw	Downe
			60	Ves	2:06 PM	Mes		Visitia

## **Customer Check-out**

#### **Check-out Screen**

On the check out screen the employee will double click on the Discount Type field in the line item for the service that was incentivized by Reach (see the yellow field below)

			飘	6	Ő				<u>-</u>		EXIT
First: C		Last: test		В	alance: 0.0	00	Add New	Number: <sup>5</sup>		Return	to Previous
Addr.: C	)40820 c						View	Status: Open			
City:	ampa		State: FL	Z	ip: 33604		Info	Date: 10/2/20	20		
Home <sup>.</sup>	813)408-2020	Vobile: ()-	Email: Coop	 otest0420d	@superc0	Oper.co		Staff: Nn			
							Search	Stall.			
Qty Ite	em#	Item Name		Staff1	Staff2	Price	Disc Type	Discount	Ext Price		
1 E>	xp Mani	Express Manic	ure	Nn		15.00			15.00		Delete
											Cust History
										E P	Book Appt
									<b>_</b>		
	Add	Add Gift	Return	Disc	Ticket	Pct. (%)	Amount				
l 🔒	Product		2 Item					SubTotal	15.00	10E+71 -RT+56 34PH+1	Formula
	Add	Add	s See	i 🖿				Discount	0.00		Ticket
80	Service	Series	More				_	Tax	0.00	<u>خ</u>	Note
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			Store	- I					10.00		
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	Visa/MC	American Exp	Nee More		Ticke			Ticket			

## Reach Discount Type

Next, they will select Reach in the Select a Discount window

Se	elect a Discount		
		Discount Name	Price Code 🗸
		Reach	Reach
l r			
	Category	1	
	Customer	1	
	Employee	1	
	Friends/family		
H	Reach	1	
		1	
		1	
		1	
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		1	
		1	
		I	
		🔿 Discount Name	Discount Code
		Discount Code	
:			
		Select	Cancel
:			

## Percent Discount

Then they will enter the percentage that was referenced on the Appointment Note in the Discount field on the line item for the incentivized service.

Qty Item#	Item Name	Staff1	Staff2	Price	Disc Type	Discount	Ext Price
1 Exp Mani	Express Manicure	Nn		15.00	Reach	15	15.00

#### **Final Price**

The incentive will be calculated and the Ext Price will be updated

Qty	Item#	Item Name	Staff1	Staff2	Price	Disc Type	Discount	Ext Price
1	Exp Mani	Express Manicure	Nn		15.00	Reach	2.25	12.75

## Add Gratuity (if applicable)

I

If there was a tip collected by Reach, they will click the Add Gratuity button to open the popup. Enter or select the employee who performed the service. Then add the amount of the tip as indicated on the Appointment Note.

Add Gratuity	
Staff	Gratuity
otal Gratuity Amount	0.00
Staff	Amount 5 <mark>.00</mark>
Get Percentage	0.00
🗸 Add	X Delete
	en Split



#### **Reach Payment Type**

Next they will select the Reach payment Type from the area on the bottom right of the check-out screen. If there isn't a button visible, they will need to click the See More button.

Qty	Item#	Item Name	દ	select a Payment Type	
4	Eve Moni	Everaça Maniaura	N	Payment Type 🛆	E
	Exp Mani	Express Manicure	N	American Exp	
				Cash	
				Check	
				Cust Owes	
				Gift	
				Promo Credit	
				Reach	
			_	Series	
				Store Credit Visa/MC	
			_	Web Openings	
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_	1				
			_		
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	Add	👝 Add Gift 🔰 🛛 Return			
L 10					E
	Product	📍 🛛 📔 🔁 Item		Payment Name	
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89	Service	Series Series More		Select K Cancel	
				Add Gratdity	۰.
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		Web		Pay Type Amount #	
°(\$	Cash			Fay Type Amount #	
(3)	📓 Cash 🛛 🖆	🚟 Check 🛛 🗹 Openin	gs		
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📥 Gir	🛄 Gift 🔤 🕯	🛰 Cust Owes 🛛 🗹 Credit			
				Process Void	
		American			-
	Visa/MC	Exp See Mo	re	Ticket 🔀 Ticket	f
					-
					-

#### **Reach Payment Amount**

Then enter the total amount of payment collected by Reach as noted in the Appointment Note. This is the Reach payment amount only. There could be other items added to the ticket that will have other payment types and amounts.

Pay Form		×
Payment	Sales Service 12.75 Product 0.00	Save Payment
	Discount	K Return to Ticket
	Product 0.00	

#### **Process Ticket**

After all payments are applied, they will process the ticket as normal.

Now Your Turn	*	Friday, October 02		:46 PM	<b>Ž</b>				<u>ع</u> لا	: <b>Q</b> :	EXIT
First:	соор	Last: test		E	Balance: 0.0	00	Add Mew	Number: 5		Return	to Pre∨ious
Addr.:	040820 c						View	Status: Open			
City:	tampa		State: FL	2	Zip: 33604		Info	Date: 10/2/20	20		
Home:	(813)408-2020	Mobile: ()-	Email: Coop	otest0420	c@superc0	Oper.co	Search	Staff: Nn			
		literra bilerra	_	Obeffel	04+550	Drine	Dies Trees	Discount			
Qty I	tem# Exp Mani	Item Name Express Manicu	ire	Staff1 Nn	Staff2		Disc Type Reach	Discount 2.25	Ext Price * 12.75	-	Delete
	·										
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	Add	Add Gift	Return	Disc	c Ticket	Pct. (%)	Amount		_	10E+71 -RT+56 34PH+1	Formula
<u>L</u>	Product		2 Item					SubTotal Discount	12.75 0.00		
	Add Service	Add Series	See More					Tax	0.00	2	Ticket Note
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			Store					Change	0.00		
A	Gift	🖎 Cust Owes	Credit	l les						<b>N</b>	Member
	Visa/MC	American Exp	🍇 See More		Proce Ticke		Void Ticket	New Ticket	Print Ticket		