

User Manual

RETAINOO – *A Product by Retention Systems*

Salon Software

&

Client Retention Solution



Table of Contents

Getting Started.....	6
Now you have signed up, here are the next steps	6
Let's Login for the First time	6
Your Password was a bit Tricky? Let's Change it and Proceed	7
Set up your business profile.....	9
Add key business details.....	10
Enter the Primary Owner's & Primary Manager's details.	11
Setting you your business logo & picture	12
Add the Address of your business.	13
Add your Social Media pages so the clients can access them through the client's app.	14
Give your App a personalized color theme that goes with your business's persona.....	15
Setting up Exclusive features of the platform – Appointments & Loyalty	16
Add your business's Achievements and Awards	21
Add the business hours for your Salon.....	22
Load your menu of services – Important for Appointments, Point of Sales & Loyalty features.....	23
Enter your Staff Profiles.....	26
Load your Clients to the system – Optional	28
Your Business portal – access anywhere anytime with a browser and internet.....	31
How to access your business portal?.....	31
Which browser best supports the portal?.....	31
How can you reset your password?.....	32
Retainoo Client and Salon Apps.....	33
Introduction to Retainoo App Views	33
Business App View (Tablet) – Front of the House for Day to Day business operations	37
Business App View (Admin/Owner).....	38
Client app View	39
Installing the App (Android & IOS).....	40
Signing into the App.....	41

Online Appointments (Web & App)	42
How to enable or disable the appointment system for your clients?	42
How to enable web appointments so clients can book online without the app?	44
How can your clients make, reschedule or cancel appointments through the app?	45
How can client book for multiple services and staff?	47
How can your salon staff (owner, manager, and staff) book, reschedule or cancel appointments for your clients using the app?	48
How can the salon manager or owner see the client appointments?.....	51
How can I manage appointments if a staff member does not turn up?	53
Loyalty Program-Rewarding our Valued Customers	55
How to start the Loyalty Program?.....	55
Setting the Value of Loyalty Reward Points.....	56
Bonus Reward points for the Clients	57
Setting Number of Reward points for a specific Service	58
How The Client Can Redeem the reward points and gets Free Services?	59
Clients Management	60
Adding in new clients	60
Adding clients from the ‘Salon App’	62
Managing existing client details.....	64
Recording and viewing ‘Client Comments’, Reviews	65
Recording inactive clients using the ‘Client Report’ feature.....	66
Removing Clients from the system.....	66
Staff Management	67
Enter your Staff Profiles	67
Managing staff details.....	70
Recording and viewing Staff history—based on Feedback after Appointments.	72
Recording inactive Staff members.....	73
Removing staff members.....	73
Sales Promotions	74
Creating Sales Promotions	74
Creating Sales promotions from the ‘Salon App’	76

Promotions for Retaining Clients.....	77
Managing the Promotions for the Specific Client Category	78
Providing Sale Promotions to the Non-Returning Customers	78
Salon News Publications	79
Creating Salon News directly from the Salon’s app.....	79
Publishing Salon News through the portal	80
Viewing Published New in Client’s App	81
Reports.....	82
Introductions to Accurate Statistical Reports	82
Creating Staff Report	83
Report for a Specific ‘Staff member’	84
Establishing a Report, of the Clients	85
Reports that are based on Appointments	87
Creating a Performance Report	88
Financial Report	89
Report of the Transactions made.	90
Texting from the App & In-App notifications and emails	91
Need to get in touch? See how you can send a message to your Clients from the App.	91
Broadcasting message to all the clients through the salon App.....	92
How the Clients can send a text.....	93
Managing In-App notifications.....	94
User Access	95
User-based Roles Management,.....	95
Rights of Administration According to the Roles.....	95
Assigning a staff member the Role of a Manager.....	96
Change your Password through the App.	98
Account and Subscriptions	99
Managing Subscriptions, Invoices and Details.....	99
Viewing Admins Profile	100
Changing or Upgrading Subscription	100
Changing Payment Methods.....	101

Invoice History.	101
Cancelling Subscription	101
Support	102
Have Some Questions? Read FAQs Here.	102
Need Support?	103

Getting Started

Now you have signed up, here are the next steps

It's time to start reaping the rewards for opting for Retainoo. Setting up is super easy but please take some time to prepare the following information before logging in for the first time. Some of this information will appear on your salon app and client app so you can make full use of our digital capability.

- ✓ Name of your business, a picture of the logo and your salon
- ✓ Address and contact details of your business including email and telephone number
- ✓ Social media links for your business (if you have social media profiles for your business)
- ✓ List of your staff profiles including their name, email and very short bio to highlight their skills
- ✓ List of your client profiles including their name, email and contact number
- ✓ Menu of your services with price and duration
- ✓ List of your products (if you also sell products) including supplier details, product details and inventory on hand

If you do not have some of this information ready, don't worry. You can always add this information later when you are ready.

Let's Login for the First time

Welcome to Retainoo!

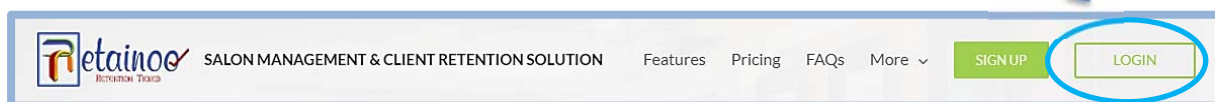
We sent you an email when you signed up with us. Please retrieve your login details from the email as you will need to login to your business portal.

If you did not get the email, please check your 'Junk' folder as the email might be hiding there.

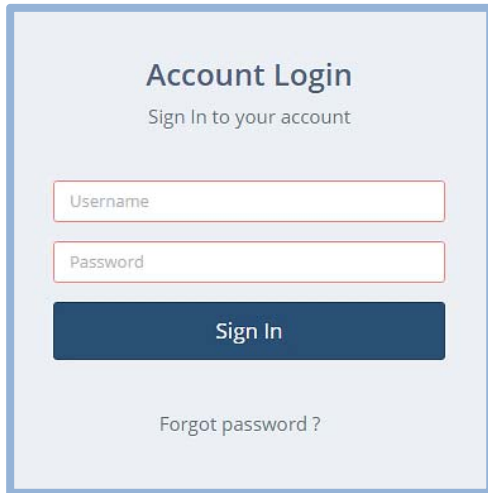
If you can't find the email, just click on the 'Forgot Password' link on the business portal login screen.

Once you get the login details,

Open 'www.Retainoo.com', and at the top right corner click on 'Login'.



You will see the login page;



The image shows a login form titled "Account Login" with the subtitle "Sign In to your account". It contains two input fields: "Username" and "Password". Below these fields is a dark blue button labeled "Sign In". At the bottom of the form, there is a link that says "Forgot password?".

Enter your 'Username' and 'Password'.

Press 'Enter key' or 'Sign in' button.

You will be successfully logged in.

You're in. Check out the next article in the **Getting Started** section. You'll see how to change your password.

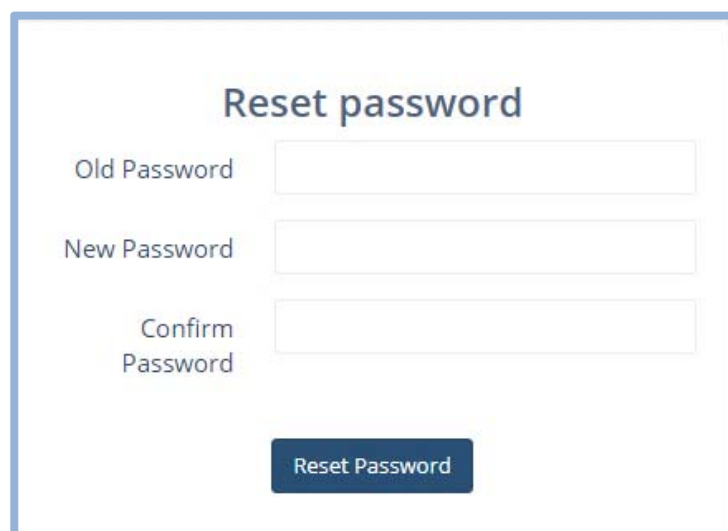
If there is any problem, you can contact [SUPPORT](#) any time 24/7. We will help you.

Your Password was a bit Tricky? Let's Change it and Proceed

When you enter your login details,

You will just see the following; enter the old password as it received in the email we sent.

Enter your new password and confirm it. Press 'Reset Password'.



The image shows a "Reset password" form. It has three input fields: "Old Password", "New Password", and "Confirm Password". Below these fields is a dark blue button labeled "Reset Password".

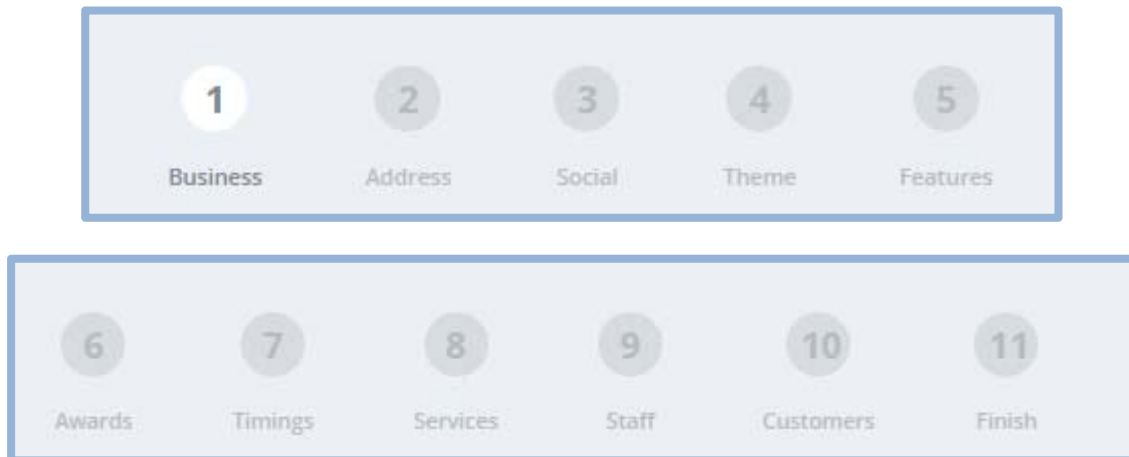
Check out the Next Articles, For the Setup wizard to add Details about the Salon.

If there is any problem, you can contact [SUPPORT](#) any time 24/7. We will help you.

Set up your business profile

After resetting your password, you will see an interactive setup wizard – a step by step process to enter the key information in order to set up your salon the platform. You can leave the non-mandatory information to be filled in at a later time (if required).

Following some simple steps, you can easily set up all the details about your salon in a few minutes.

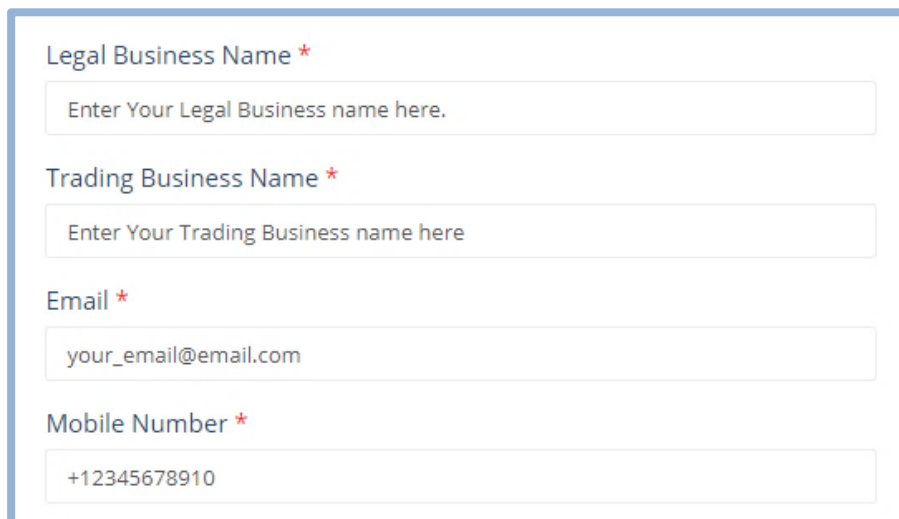


After successfully completing this Setup Wizard, You are then automatically taken to the landing page of the 'Business Portal'.

In the next articles, each of the steps is explained separately.

Add key business details

In the first tab of the wizard, you will see the following form,

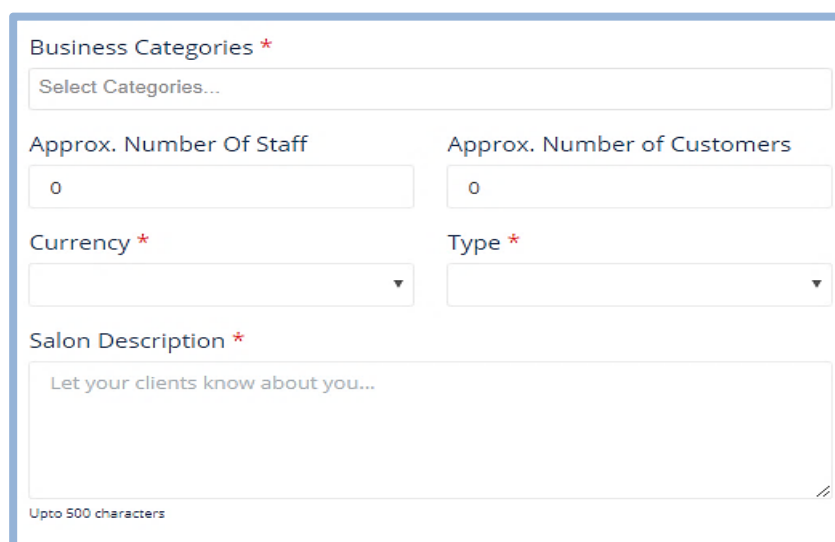


The screenshot shows a form with four input fields, each with a red asterisk indicating it is required. The fields are: 'Legal Business Name' with a placeholder 'Enter Your Legal Business name here.', 'Trading Business Name' with a placeholder 'Enter Your Trading Business name here', 'Email' with a placeholder 'your_email@email.com', and 'Mobile Number' with a placeholder '+12345678910'.

Enter the '**Legal Business Name**', by which you're registered.

After that enter the '**Trading Name**', then your 'Email' and your '**Mobile Number**'.

Below that you will see;



The screenshot shows a form with several fields. At the top is 'Business Categories' with a red asterisk and a dropdown menu showing 'Select Categories...'. Below this are two input fields for 'Approx. Number Of Staff' and 'Approx. Number of Customers', both containing the number '0'. Next are two dropdown menus for 'Currency' and 'Type', both with red asterisks. At the bottom is a text area for 'Salon Description' with a red asterisk, a placeholder 'Let your clients know about you...', and a character count 'Upto 500 characters'.

For '**Business Categories**' click on 'Select Categories', a drop-down menu will appear.

From that drop-down menu, you can select multiple categories at once as well.

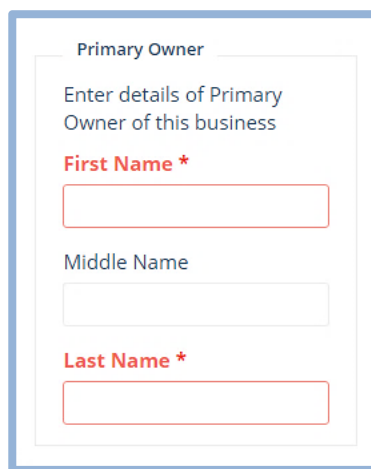
After that, enter 'Approx. **Number of Staff**' for your Salon, and 'Approx. **Number of Customers**'.

Then, select '**Currency**' and Salon '**TYPE**' (i.e. Unisex, Male or Female).

Next, Write a '**Salon Description**'.

Enter the Primary Owner's & Primary Manager's details.

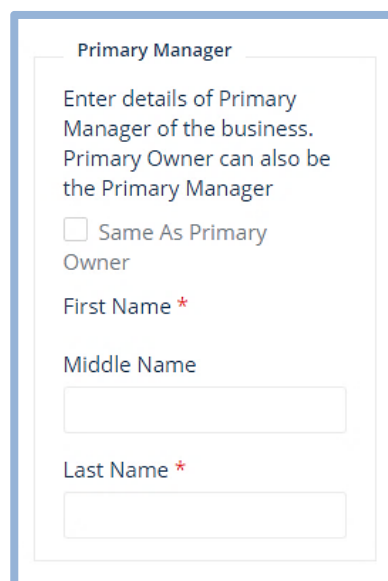
After entering essential details about the Salon, you will then Enter 'Primary owner's details.'



The screenshot shows a form titled "Primary Owner". Below the title, it says "Enter details of Primary Owner of this business". There are three input fields: "First Name *" (required), "Middle Name", and "Last Name *" (required). Each field is represented by a rectangular box with a red border.

After that, you will enter details of the 'Primary Manager'.

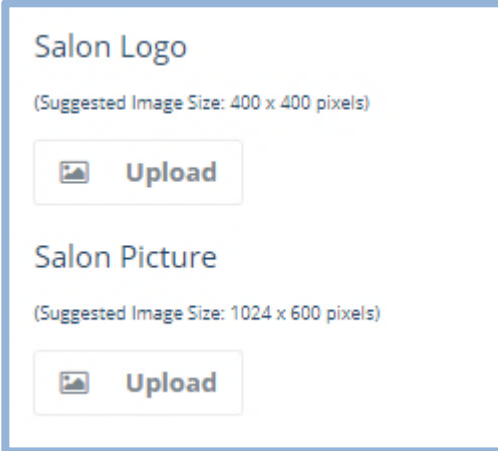
If the 'Primary Owner' is the primary Manager then, click the 'Checkbox' (same as Primary Owner).



The screenshot shows a form titled "Primary Manager". Below the title, it says "Enter details of Primary Manager of the business. Primary Owner can also be the Primary Manager". There is a checkbox labeled "Same As Primary Owner". Below this are three input fields: "First Name *" (required), "Middle Name", and "Last Name *" (required). Each field is represented by a rectangular box with a red border.

Setting you your business logo & picture

The last step on the 'Business tab' is to add the 'Salon's Logo' and 'Salon's Picture'.



The screenshot shows a user interface for uploading business images. It is divided into two sections. The top section is titled 'Salon Logo' and includes the text '(Suggested Image Size: 400 x 400 pixels)'. Below this text is a button with a camera icon and the word 'Upload'. The bottom section is titled 'Salon Picture' and includes the text '(Suggested Image Size: 1024 x 600 pixels)'. Below this text is another button with a camera icon and the word 'Upload'. The entire interface is enclosed in a blue rectangular border.

At this step, According to the Suggested Image sizes upload your salon's **Logo** and **Picture**.

Please ensure the image size is as per specifications mentioned above.

Now Click on 'Next' at the bottom right of the screen, the next tab will appear.

Add the Address of your business.

After successfully entering business details, the next tab you will see is the 'Address' tab.

Address Line 1*	Address Line 2
<input type="text"/>	<input type="text"/>
Directions To Access (If Applicable)	City/Town/Suburb*
<input type="text" value="e.g: turn right onto Ga. Hwy 67, you will see the Big Red Building on the left !"/>	<input type="text"/>
State/Province*	Zip/Postcode*
<input type="text"/>	<input type="text"/>
Country*	
<input type="text"/>	

Simply write your 'Salon's **Address**' and **Directions to Access (if Applicable)**.

After that, click 'Next'.

Add your Social Media pages so the clients can access them through the client's app.

In this tab, you need to enter the links of the specified social platforms

Social Links

f

in

t

i

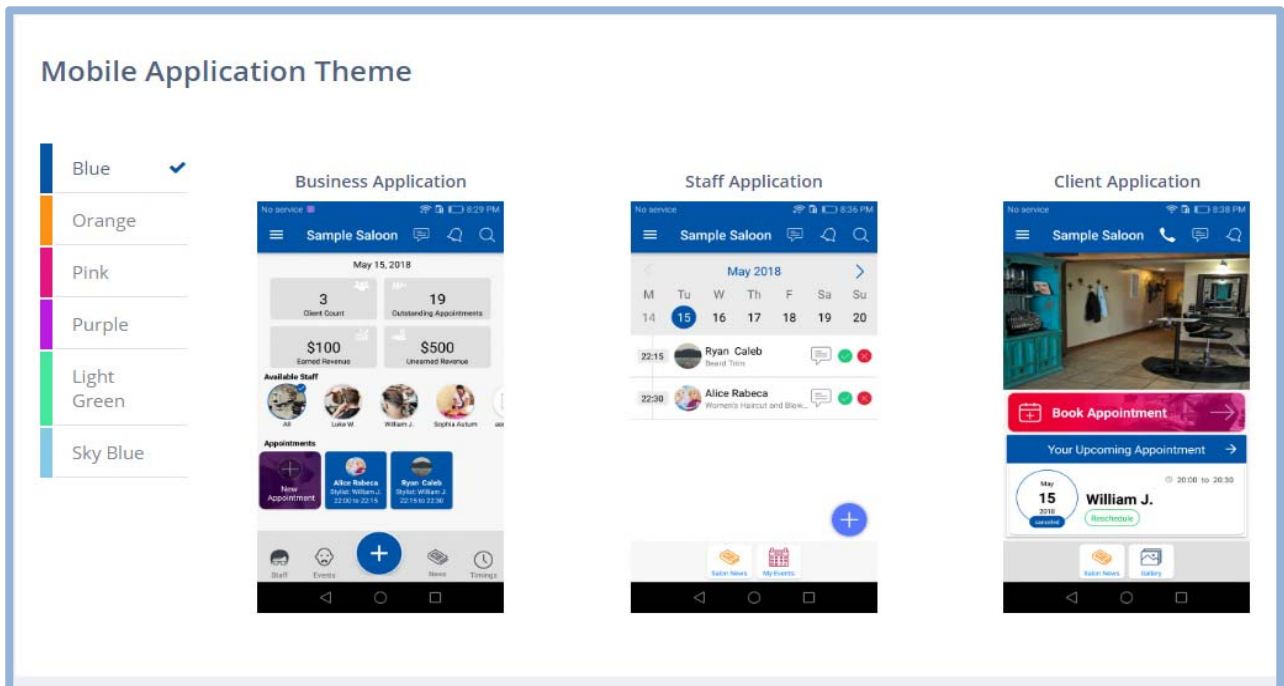
*Social links will be displayed in mobile app.

You can just 'copy' and 'paste' the links to your social platforms.

Once completed, click 'Next'

Give your App a personalized color theme that goes with your business's persona

In this section of the wizard, you can select a color scheme for your Salon's app.



Just click on the color, you will get its preview.

Select the suitable one, as this would be the default color scheme on your 'Mobile App' views.

You can Change it any time again, directly from your Business Portal.

Click 'Next' and you will see the [Features](#) tab.

Setting up Exclusive features of the platform – Appointments & Loyalty

In this 'features' tab, at first, you will see;

Online Appointments

This feature can be enabled by clicking 'Online Appointments Checkbox'.

By enabling this feature, your clients will be able to book appointments through the client app as well as through the web. If this feature is not enabled, the platform will not enable clients or salon staff to make client appointments.

Online Appointments

Online appointments feature allows your customers to book appointments for services, with or without preferred stylists through their smart phone application or through web. If your business does not take appointments, please disable this feature.

Online Appointments

When enabled, you will also see;

You can publish this URL on your website, Facebook page or any other online platform so your customers can also book appointments through web.

Online Appointment Link

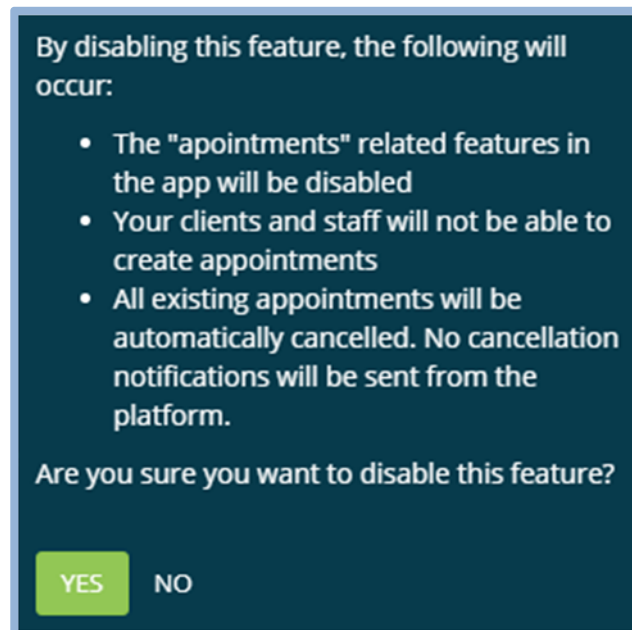
<http://stage.retainoo.com/#/public/salon-info/11&hash=ksjmdxkiwdilwpoiqedlkjdsao>

You can copy 'Online Appointment Link' and paste it to your Website or Even to your social media platforms as well.

Through this link, your clients can opt for 'web appointments' if they don't have the client's app installed.

You can even 'disable' this feature by unchecking the 'Online Appointments Checkbox'

It will show you a warning message,



If you are sure, you want to disable it.

Click 'yes' and it will be disabled.

You can enable them again anytime from the 'Business Portal' by Clicking on 'Appointments'

Check the next feature, [Customer Loyalty Program](#)

Curious How Loyalty Program Works?

Retainoo Loyalty program is super easy to setup. Please read through to understand how it works!

1. You enable the loyalty program through your business portal (Refer to steps below) and nominate currency value of each loyalty point. E.g. you can specify that each loyalty point is worth \$0.1 or 10 cents or you can specify another value depending on how much you want to reward your clients.
2. When you create a client transaction in the platform, client will be automatically awarded loyalty points equal to the amount they spend at your salon. E.g. if a client spends total of \$100 at your salon in one transaction, they will be awarded 100 loyalty points. Clients can view their loyalty point's balance and transactions history through the client app.
3. The clients can then redeem their points in exchange for a free service only if they have enough points to redeem the full service value. Partial payments through points are not allowed.
4. For recording the transaction to be paid by points, you can choose 'Points' as the 'Payment Method' when creating a transaction. This will adjust the balance of client's loyalty points automatically. The platform will not process the transaction if client does not have enough points to redeem the full service amount.

Follow these steps to setup the loyalty program

Step 1:

You enable the loyalty program by clicking on the checkbox

Customer Loyalty Program

By enabling this feature, you can create a quick and simple customer loyalty program where customers shall be rewarded loyalty points which can be redeemed for services based on the points system that you design yourself. This is a fantastic way to bring back customers time and time again.

Customer Loyalty Program

You can Enable or Disable this feature by clicking on the 'Customer Loyalty program checkbox' at any time.

By enabling this feature, you will be able to offer a loyalty program to your clients.

If this feature is not enabled, the platform will not allow the clients to be awarded the Loyalty points.

When enabled, you need to set the Value of the Loyalty points as per your 'currency'.

Step 2:

You can specify currency value for each loyalty point which would determine how many points they need in order to redeem points for a free service, depending on the price of the service.

Dollar value of a loyalty point: *

\$	0.1
----	-----

Dollar value of a loyalty point determines how much a loyalty point is worth in dollar value. For example, if you enter \$0.1, this means that each loyalty point is worth \$0.1 and in order to redeem a service of \$10, the client shall need 100 loyalty points to make up for \$10.

Note: Each dollar spent by client shall earn them one loyalty point by default. E.g. if a client spends \$50, they shall be rewarded 50 loyalty points.

In this example, if you set the currency value of a loyalty point as 0.1, that means each loyalty point is equal to 10 cents. So if a client spends \$100, they will get 100 loyalty points and their currency value will be equal to \$10.

TIP: Industry standard currency value for a loyalty point is \$0.1 or 10 cents. You can choose your own value according to how much you want to reward your clients for being loyal to you.

Step 3:

Select if you want to give any bonus loyalty points to your clients. Choose one or more from the three options.

Bonus Loyalty Points

We recommend you to consider giving bonus loyalty points to your clients to encourage them to connect with your salon via app.

Loyalty Points on downloading app

Loyalty Points on client's birthday

Loyalty Points on client's Anniversary

When you click any of the 'checkboxes' it will ask you to enter the number of **Bonus Loyalty Points**.

TIP: The entire purpose of this platform is to help you to connect with your clients through the app so you can offer superior customer experience and leverage the connection to gather useful data in order to keep providing value to your clients.

It is strongly recommended to award BONUS LOYALTY points to your clients for downloading the app. This will encourage clients to download the app and connect with you digitally. You can specify how many points should be awarded for each of the three options.

Bonus Loyalty Points

We recommend you to consider giving bonus loyalty points to your clients to encourage them to connect with your salon via app.

Loyalty Points On Downloading App

No of loyalty points that will be credited to the client: *

These bonus points will be credited to the client when they connect with you via app.

Loyalty Points On Client's Birthday

No of loyalty points that will be credited to the client: *

These bonus points will be credited to the client on their birthday if they are connected with your salon via app.

Loyalty Points On Client's Anniversary

No of loyalty points that will be credited to the client: *

These bonus points will be credited to the client on the anniversary of their registration with your salon on the platform.

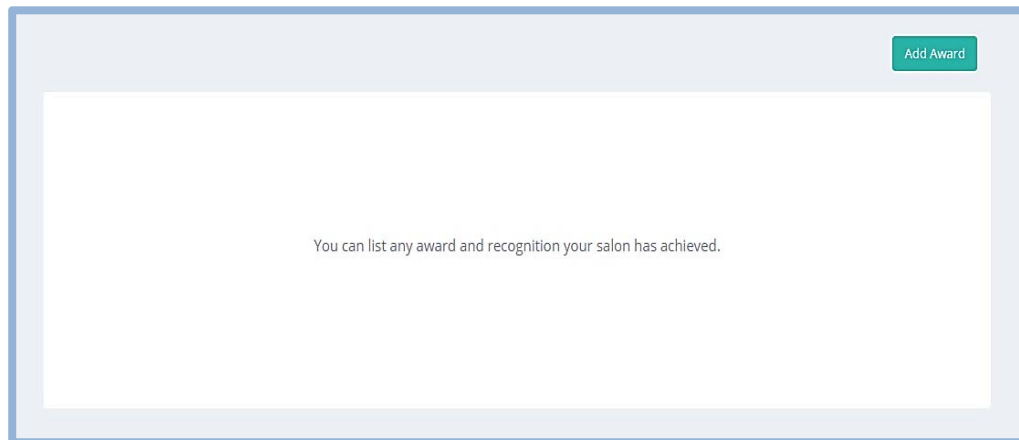
The clients would automatically be awarded the bonus loyalty points depending on number of loyalty points you enter for each selected option.

Note: The last option, Client anniversary refers to the date on which the client connected with you on the platform.

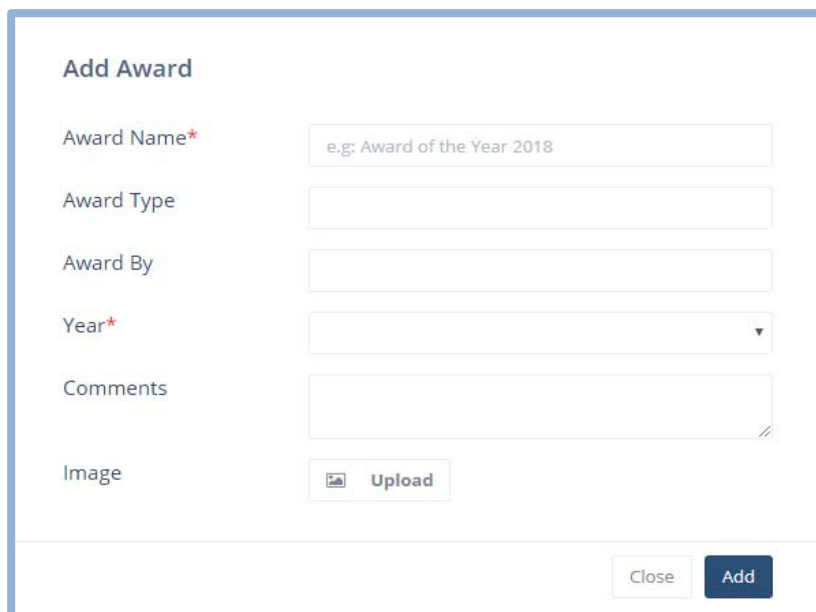
Check out the next article also, that is about the [Add your business's Achievements and Awards.](#)

Add your business's Achievements and Awards

In this Section of the wizard, you can add your 'Achievements and awards'.



When you click on **Add Award** button, you will see;

A screenshot of a form titled "Add Award". The form contains the following fields:

- Award Name* (text input, example: e.g. Award of the Year 2018)
- Award Type (text input)
- Award By (text input)
- Year* (dropdown menu)
- Comments (text area)
- Image (button with camera icon and "Upload" text)

At the bottom right of the form, there are two buttons: "Close" and "Add".

Fill the details required, add an image of the award or achievement and click 'Add'.

It will be added.

Click 'Next'. You will be taken to the next tab.

Add the business hours for your Salon

In this tab, you can set up the 'operating time' (**Business Hours**) of your Salon; you will see the table below.

Day Of Week	Business Open	Opening Time	Closing Time
MONDAY	<input checked="" type="checkbox"/>	9:00 AM <input type="text"/>	5:00 PM <input type="text"/>
TUESDAY	<input checked="" type="checkbox"/>	9:00 AM <input type="text"/>	5:00 PM <input type="text"/>
WEDNESDAY	<input checked="" type="checkbox"/>	9:00 AM <input type="text"/>	5:00 PM <input type="text"/>
THURSDAY	<input checked="" type="checkbox"/>	9:00 AM <input type="text"/>	5:00 PM <input type="text"/>
FRIDAY	<input checked="" type="checkbox"/>	9:00 AM <input type="text"/>	5:00 PM <input type="text"/>
SATURDAY	<input checked="" type="checkbox"/>	9:00 AM <input type="text"/>	5:00 PM <input type="text"/>
SUNDAY	<input checked="" type="checkbox"/>	9:00 AM <input type="text"/>	5:00 PM <input type="text"/>

You can set the '**Opening**' and '**Closing**' time by clicking on it.

You can Even Toggle '**Business Open**' switch to set that as well.

Click 'Next'. You will be shifted to the next tab.

Check out the next article also, that is about the [Loading your services menu for Appointment system.](#)

Load your menu of services – Important for Appointments, Point of Sales & Loyalty features

There are two methods to create your menu of services in the system. You can either choose from a default services menu that is grouped by most popular salon categories. Alternatively you can create your own menu by creating new categories and services.

Choosing menu of service from the default list

In this Section, you will see a list of default ‘Business Services’ according to the ‘Salon Category you selected at the start.

Service Name	Loyalty Points Required	Loyalty Points Earned	Price	Duration	Category	Active	Edit
Eyebrow Tinting	0	0	0	30	Eyelash Extensions And Tinting	<input type="checkbox"/>	
Eyelash Extension Fill	0	0	0	30	Eyelash Extensions And Tinting	<input type="checkbox"/>	
Eyelash Extension Partial Set	0	0	0	30	Eyelash Extensions And Tinting	<input type="checkbox"/>	

First, you need to make your set of services ‘Active’.

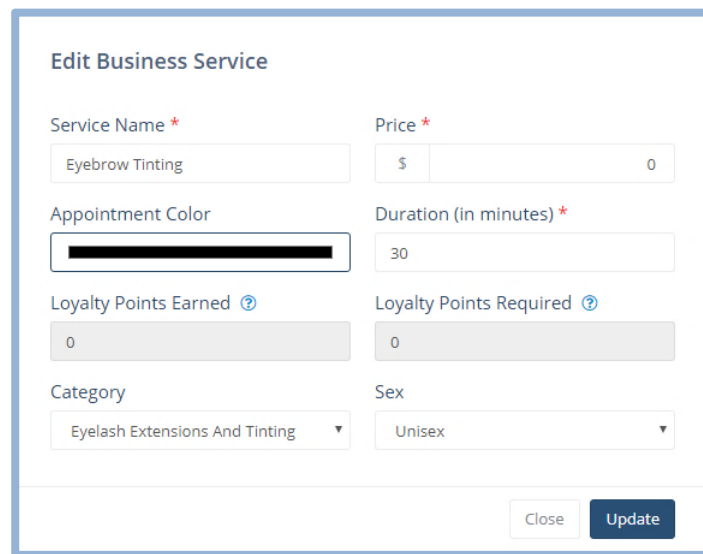
For, ‘Activating Services for your Salon’, you can Scroll through the list and ‘Select’ the Services you will be providing at your salon.

Once you activate your selected services, they will appear on top of the list;

Service Name	Loyalty Points Required	Loyalty Points Earned	Price	Duration	Category	Active	Edit
Eyebrow Tinting	0	0	0	30	Eyelash Extensions And Tinting	<input checked="" type="checkbox"/>	
Eyelash Extension Partial Set	0	0	0	30	Eyelash Extensions And Tinting	<input checked="" type="checkbox"/>	
Eyelash Extension Set	0	0	0	30	Eyelash Extensions And Tinting	<input checked="" type="checkbox"/>	
All Over Color	0	0	0	30	Hair Color	<input checked="" type="checkbox"/>	
Head Massage - 15 mins	0	0	0	15	Massage	<input checked="" type="checkbox"/>	
Head Massage - 30 mins	0	0	0	30	Massage	<input checked="" type="checkbox"/>	
Spa Manicure and Pedicure	0	0	0	30	Nail Care	<input checked="" type="checkbox"/>	
Back Facial	0	0	0	30	Skincare	<input checked="" type="checkbox"/>	
Exfoliation - Hydrating	0	0	0	30	Skincare	<input checked="" type="checkbox"/>	
Exfoliation - Retinol Treatments	0	0	0	30	Skincare	<input checked="" type="checkbox"/>	

Now, you can 'Edit' them one by one, by clicking the 'Pencil' icon.

You will see;



The screenshot shows a form titled "Edit Business Service" with the following fields:

- Service Name ***: Text input field containing "Eyebrow Tinting".
- Price ***: Input field with a "\$" symbol and a value of "0".
- Appointment Color**: Color selection field showing a black color bar.
- Duration (in minutes) ***: Text input field containing "30".
- Loyalty Points Earned ?**: Text input field containing "0".
- Loyalty Points Required ?**: Text input field containing "0".
- Category**: Dropdown menu with "Eyelash Extensions And Tinting" selected.
- Sex**: Dropdown menu with "Unisex" selected.

At the bottom right of the form, there are two buttons: "Close" and "Update".

Here, just enter the required information.

The 'loyalty points earned' and 'loyalty points required' will automatically appear when you add the 'price' for a service.

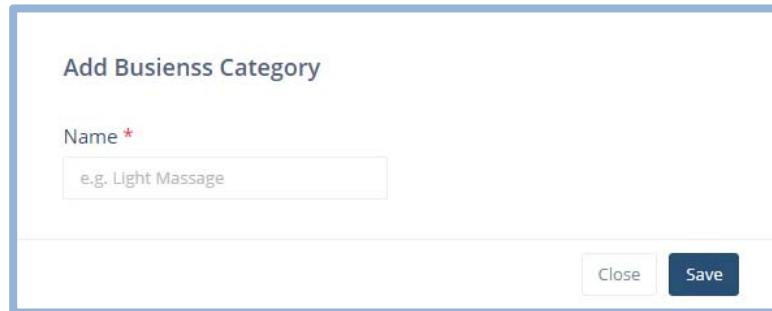
Note: If you don't activate the services first, then you won't be able to keep track of those services, you 'edited' first and marked them 'active' later.

Create your own menu services by creating a category or service

If you don't want to choose from the default menu of services, you can create your own menu by firstly adding a 'category' and then 'service'. The service must be tagged to a particular category.

To create a 'custom category, click on the 'Add Service Category' button.

You will see the following;

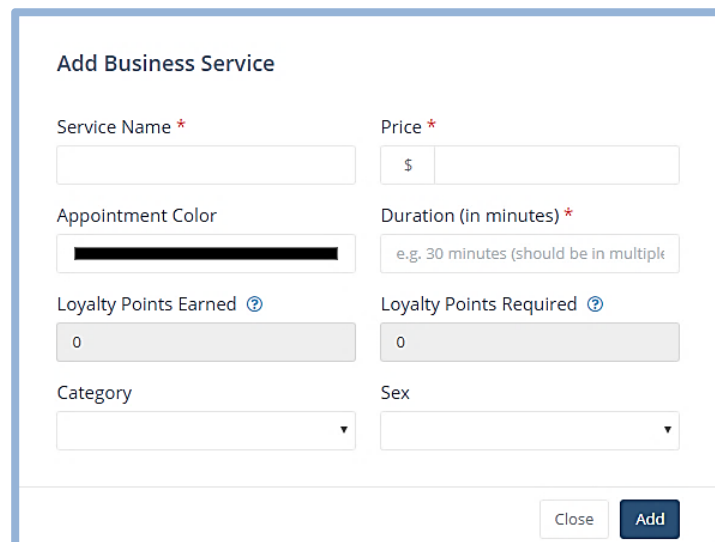


The screenshot shows a form titled "Add Business Category". It has a single text input field labeled "Name *" with a red asterisk, containing the placeholder text "e.g. Light Massage". At the bottom right of the form are two buttons: "Close" and "Save".

Enter the name of your 'Custom Category' click 'Save', It will be added.

You can add the 'Business Service' in the newly created 'Custom category' by Clicking 'Add Business Service' button.

You will see this;



The screenshot shows a form titled "Add Business Service". It contains several fields: "Service Name *" (text input), "Price *" (text input with a "\$" symbol), "Appointment Color" (color picker), "Duration (in minutes) *" (text input with placeholder "e.g. 30 minutes (should be in multiple)"), "Loyalty Points Earned" (text input with "0"), "Loyalty Points Required" (text input with "0"), "Category" (dropdown menu), and "Sex" (dropdown menu). At the bottom right are "Close" and "Add" buttons.

Fill it up the Same way we did before to 'Edit' business Service at the start of this section. Click 'Add', the business service will be added.

Click 'Next'.

Check out the next article also, that is about [entering your Staff Profiles](#)'.

Enter your Staff Profiles

In this section, you can 'add' or 'upload staff profiles'.

You can add the staff profiles one by one, or you can use the bulk upload option using an EXCEL template that you can download by clicking 'Add multiple staff via bulk upload feature' button.

Adding staff one by one

Staff Details

[Add Staff](#) [Add multiple staff via bulk upload feature](#)

Name	Designation	Email	Mobile Number	Active	Rating	Actions
------	-------------	-------	---------------	--------	--------	---------

To add a single staff profile at once, click 'Add Staff'.

You will see;

Staff Details

Staff Details

Title * First Name * Middle Name Last Name *

Email * Phone Number * Employment Type * Designation *

Preferred Name * Hire Date * Picture

(Suggested Image Size: 400 x 400 pixels)

Address

Address Line 1 Address Line 2

Close Add

In this form, you need to enter all the required details about the staff member.

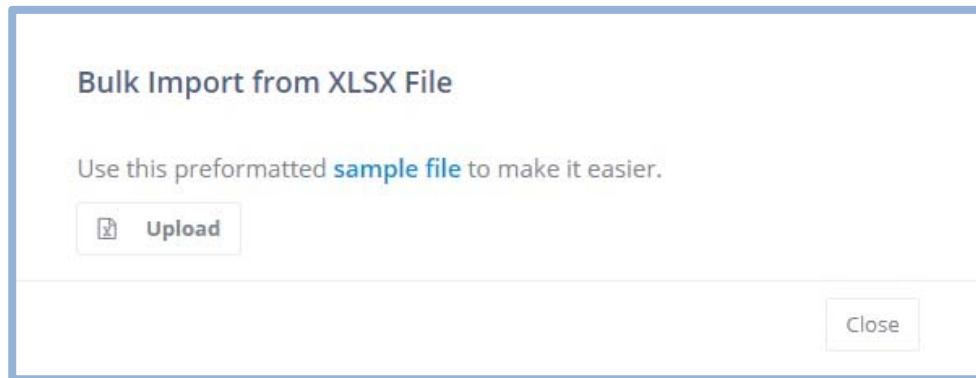
Once done, click 'Add'. The Staff member's profile will be added

Note: The items marked with (*) are necessary to be filled.

Bulk Upload, Adding Multiple Staff Profiles at once with an EXCEL sheet

Click on 'Add Multiple staff via bulk upload'.

You will see this;



Click on 'Sample file'. A file will be downloaded.

Open the Sample file, according to the template enter the data. Use the 'guidelines' tab to see what values can be entered for each column.

Once done, Click on 'Upload'. Select that file, all the entered profiles will be uploaded to the system.

Note: The file will not upload correctly if the values entered for each column do not follow the instructions in the 'Guidelines' tab. Only choose from specified values.

Click 'Next'.

Check out the next article also, that is about [loading your Clients to the System](#).

Load your Clients to the system – Optional

In this section, you can ‘add’ or ‘upload client profiles’.

You can add the client profile one by one, or you can use the bulk upload option using an EXCEL template that you can download by clicking ‘Add multiple clients via bulk upload feature’ button.

Adding client one by one

Client Details

[Add Client](#) [Add multiple client via bulk upload feature](#)

[Search](#)

Name	Email	Mobile Number	Active	Actions
« Previous Next »				
No customer found.				

Click on ‘Add Client’. You will see;

Add Customer

Client Details

Title *

First Name *

Middle Name

Last Name *

Preferred Name *

Email *

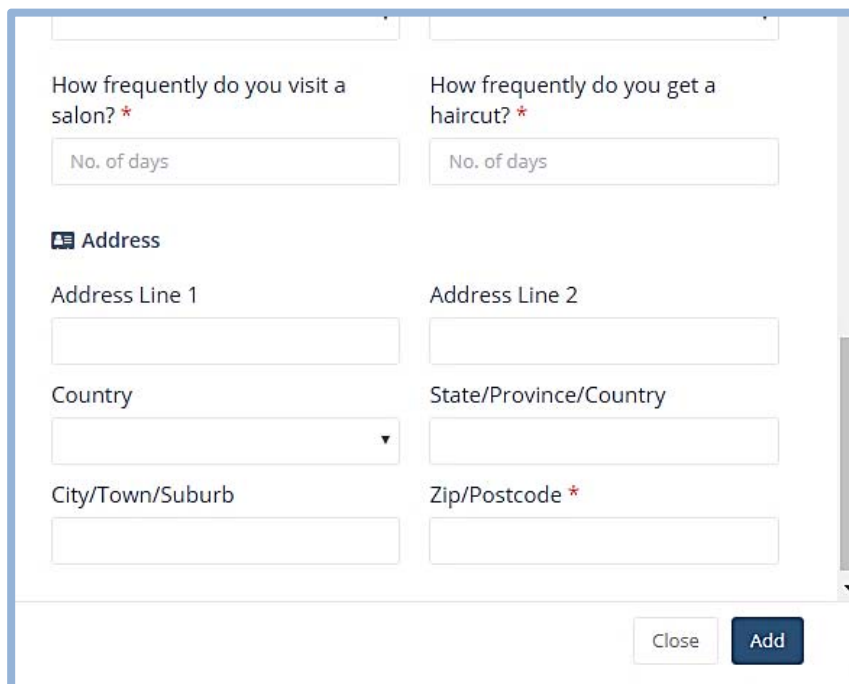
Phone Number

Picture
(Suggested Image Size: 400 x 400 pixels)

[Close](#) [Add](#)

Enter *Title, Name and Email*. if you scroll down this menu, It will ask you to enter a few more things.

Have a look at them as well,



The screenshot shows a form with the following fields:

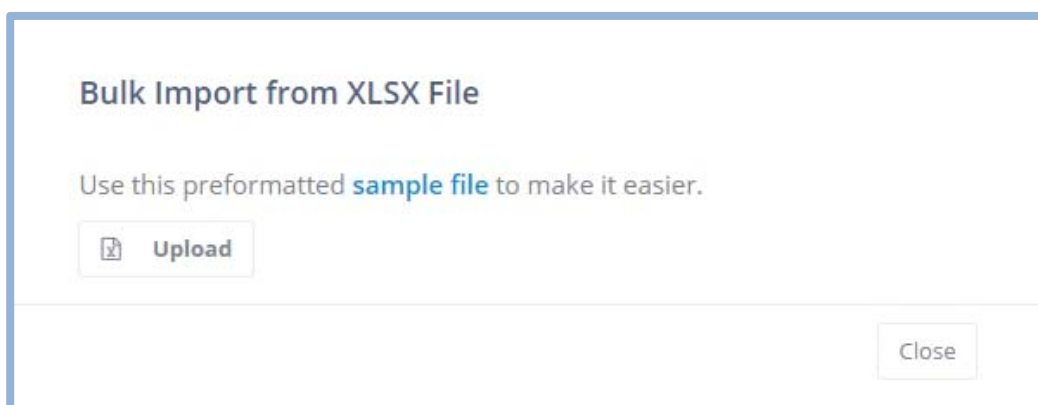
- How frequently do you visit a salon? * (No. of days)
- How frequently do you get a haircut? * (No. of days)
- Address section with:
 - Address Line 1
 - Address Line 2
 - Country (dropdown menu)
 - State/Province/Country
 - City/Town/Suburb
 - Zip/Postcode *

Buttons: Close, Add

Enter the required details, especially the items marked with (*).

Click 'Add'. A Client's profile will be added.

For Bulk Upload, Adding Multiple Profiles at once through an EXCEL Sheet



The screenshot shows a dialog box titled "Bulk Import from XLSX File". It contains the text "Use this preformatted [sample file](#) to make it easier." and an "Upload" button with a document icon. A "Close" button is located at the bottom right.

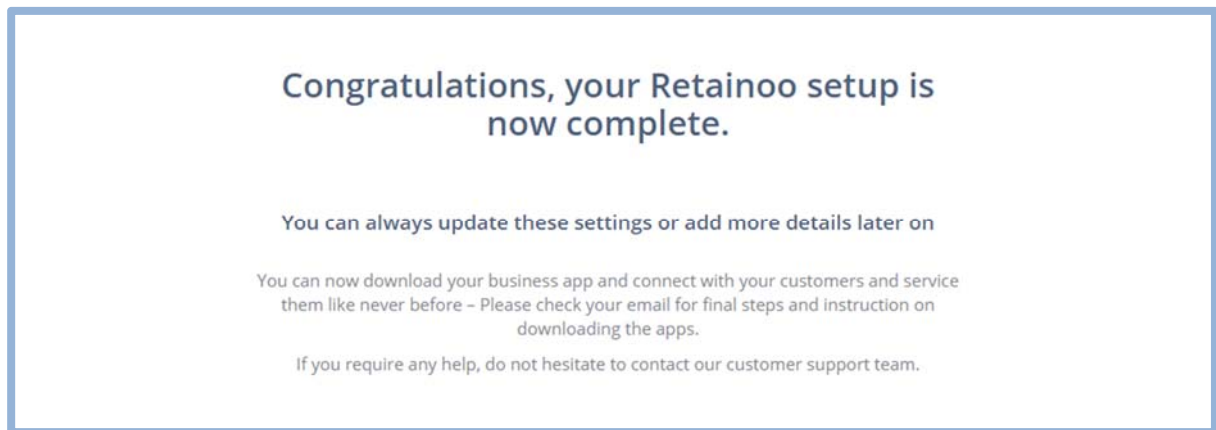
Open the Sample file, according to the template enter the data. Use the 'guidelines' tab to see what values can be entered for each column.

Once done, Click on 'Upload'. Select that file, all the entered profiles will be uploaded to the system.

Note: The file will not upload correctly if the values entered for each column do not follow the instructions in the 'Guidelines' tab. Only choose from specified values.

Click 'Next'.

In the Last tab you will see;



You may also get an email as you reach this step. That email contains instructions for downloading and using the Retainoo Apps.

After this, click 'Finish' at the bottom right of the screen.

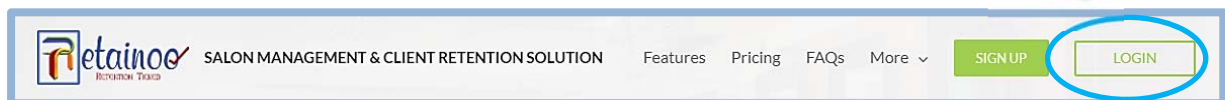
Your Business portal – access anywhere anytime with a browser and internet

After successfully completing the setup wizard, your business portal for your salon is all personalized for use.

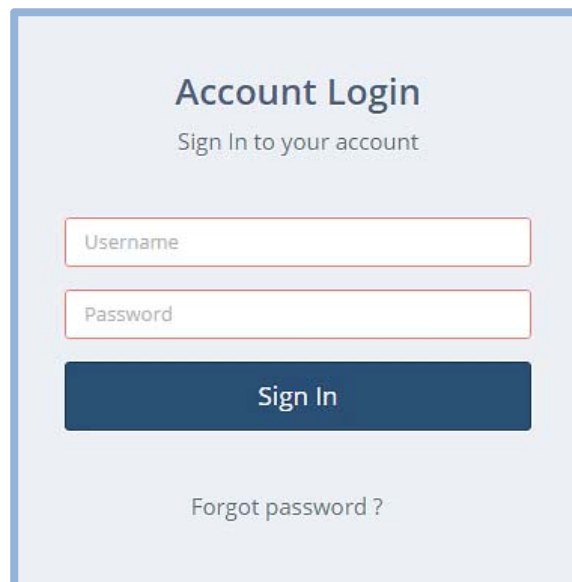
How to access your business portal?

Accessing your business portal is very easy,

Open 'Retainoo.com', and at the top right corner click on 'Login'.



You will see the login page;

A screenshot of the 'Account Login' page. The page has a light blue background. At the top, it says 'Account Login' in a bold, dark font, followed by 'Sign In to your account' in a smaller, lighter font. Below this are two input fields: 'Username' and 'Password'. Underneath the input fields is a dark blue button with the text 'Sign In' in white. At the bottom of the form area, there is a link that says 'Forgot password?'. The entire form area is enclosed in a blue border.

Enter your 'Username' and 'Password'.

Press 'Enter key' or 'Sign in' button.

You will be successfully logged in.

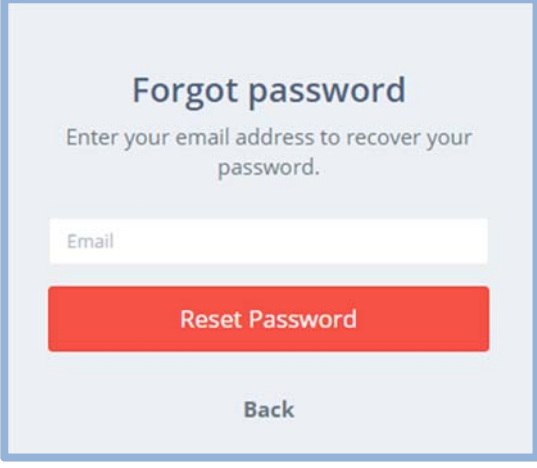
Which browser best supports the portal?

Almost all the browsers support the portal, but it is highly recommended to open it up on

GOOGLE CHROME, for fast and very smooth experience.

How can you reset your password?

To 'Reset your Password', Click on 'Forget Password' at the 'Login Page'.



The image shows a 'Forgot password' form with a light blue background and a blue border. At the top, the text 'Forgot password' is centered. Below it, the instruction 'Enter your email address to recover your password.' is centered. There is a white text input field with the placeholder text 'Email'. Below the input field is a red button with the text 'Reset Password' in white. At the bottom of the form is a link labeled 'Back'.

Here, enter your 'Email', and click 'Reset Password'.

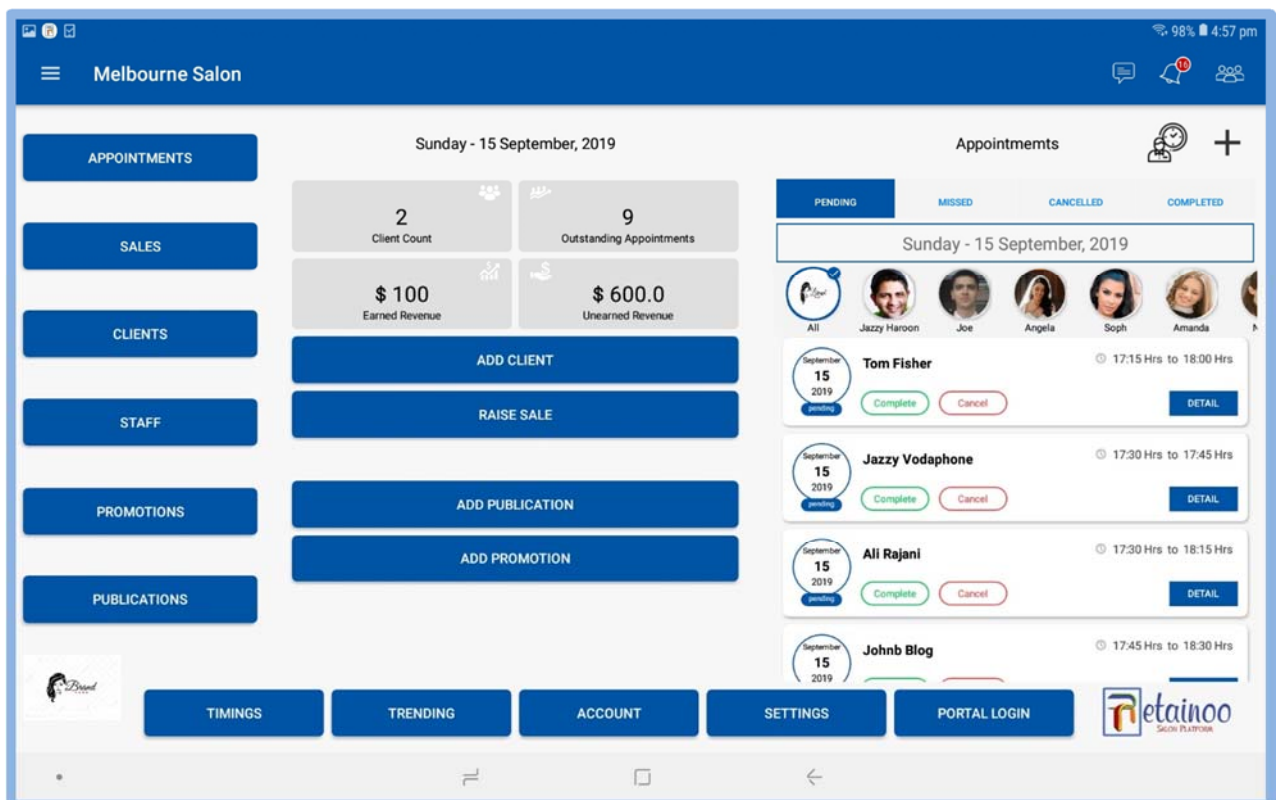
A reset link will be sent to your 'email'; by clicking on the link in the email you can easily reset your password.

Retainoo Client and Salon Apps

Introduction to Retainoo App Views

Retainoo provides 5 different 'App Views' including one business app view on tablet & four app views on phone for your (owner/admin, manager and staff) and client. Users will have access to features and information based on their role profile that will be setup by you as the salon owner/admin.

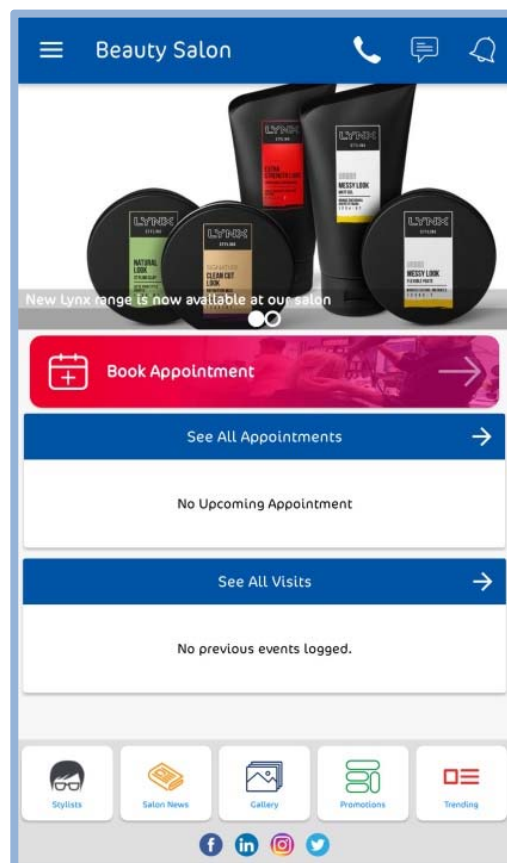
Business App View (Tablet) – Front of the House for Day to Day business operations



With this App View, you can;

- ✓ Access Appointments (calendar view & list view) – Create & historical information
- ✓ Access sales transactions – Create & historical information
- ✓ Access clients database – Create new & access existing client profiles
- ✓ Access staff profiles – Access staff profiles
- ✓ Create new promotions & access history
- ✓ Create new salon publications & access history
- ✓ Access notifications
- ✓ Message & call clients
- ✓ And many other features

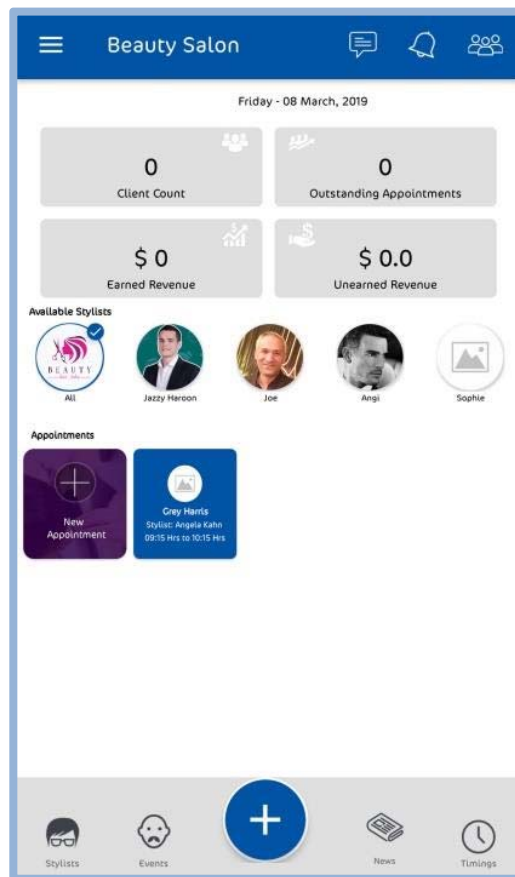
Client's App View



With this App View, 'Clients' can;

- ✓ Interact with the Salon to book appointments.
- ✓ Check Loyalty point's balance and transactions history.
- ✓ View history of their visits and access their invoices.
- ✓ See Pictures tagged to each transaction record.
- ✓ View salon news publications, promotions and many more engagement features.

Admin / Owner's App View

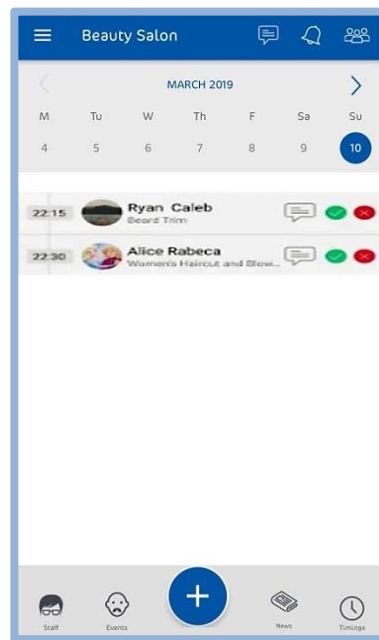


With this App View, 'Admin/Owners' can;

- ✓ Have the Exact Snapshot of all the activities of the Salon.
- ✓ Check revenue and appointments summary.
- ✓ View summary of appointments as well as detailed appointment cards.
- ✓ Create and manage transactions.
- ✓ Create salon publications and sales promotions.
- ✓ Update staff profiles and rosters, and many more features.

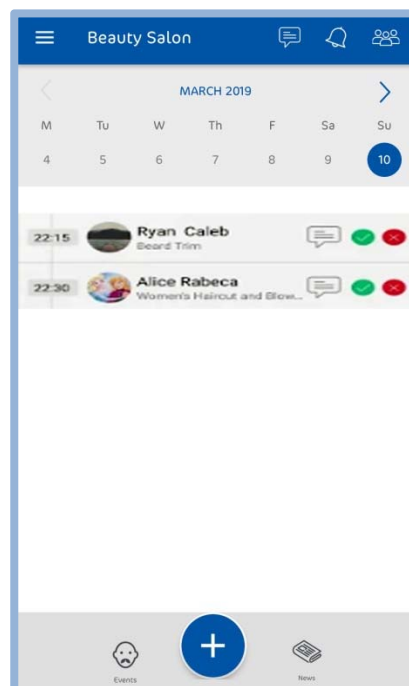
Scroll down, to see the other two views.

Manager's App View



With this App View, 'Managers' can access all the features as owner/admin view excluding the revenue summary.

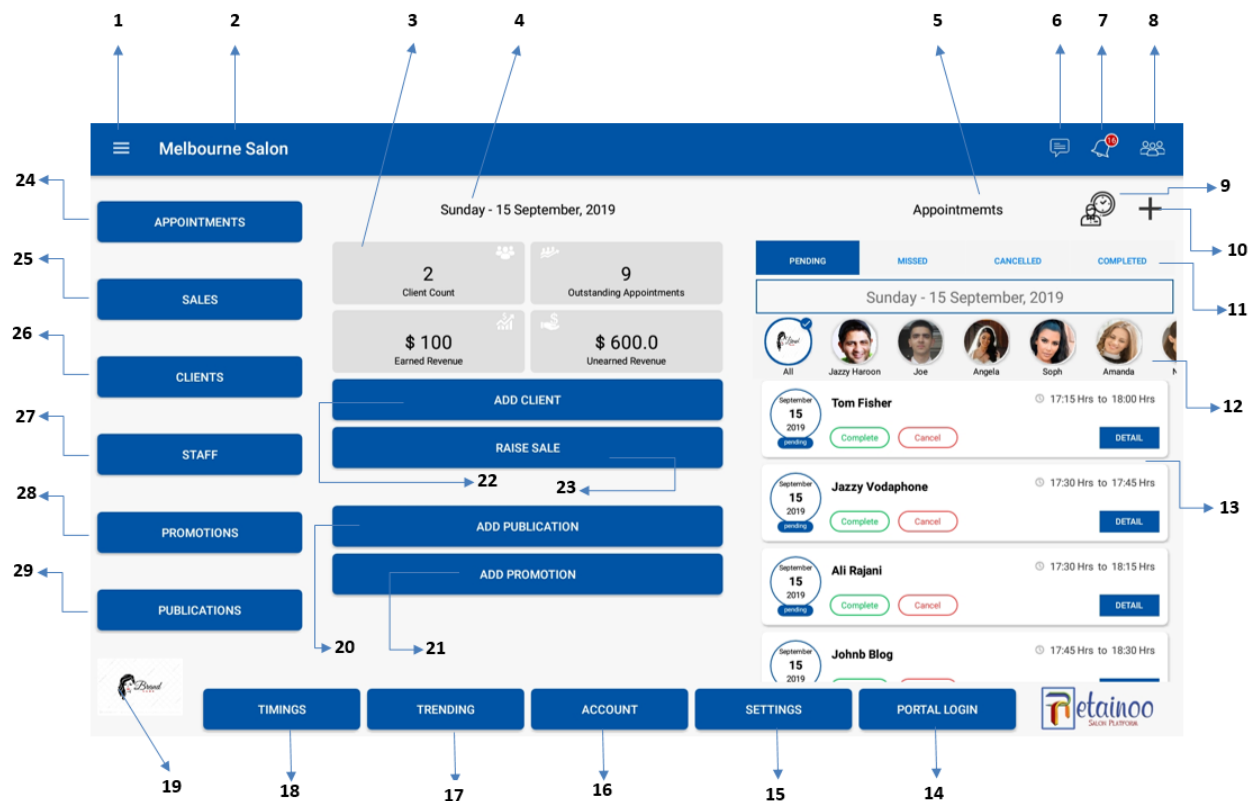
Staff Member's App View



With this App View, 'Staff Members' can create client appointments, transactions, see their personal rosters and appointments and many more features.

Business App View (Tablet) – Front of the House for Day to Day business operations

Following is the complete layout guide, you can use for accessing different features of the business app view in Tablet mode.

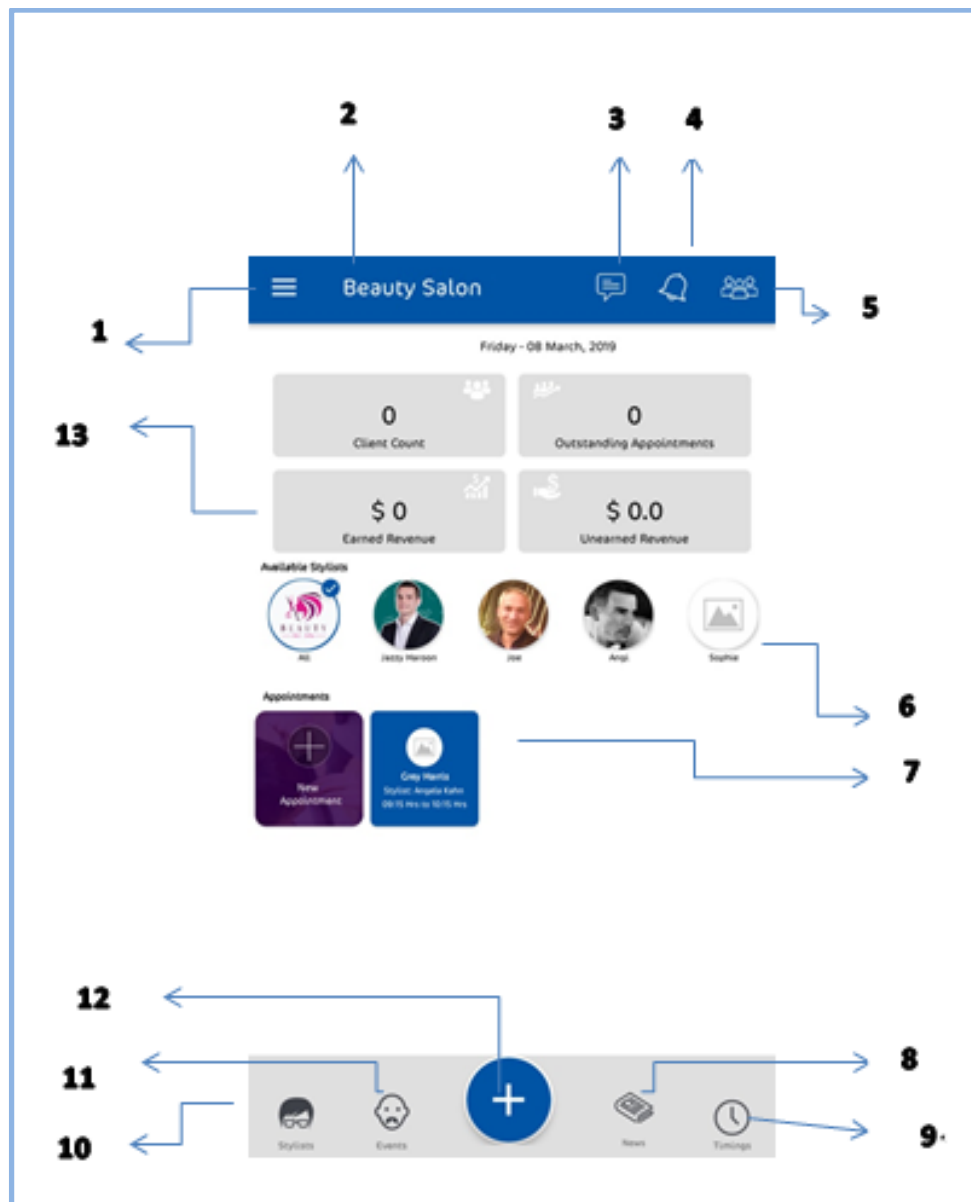


Following shows the details about the App layout with numbers corresponding;

- | | |
|-------------------------------|-------------------------------------|
| 1. Left Menu panel | 16. Account Profile |
| 2. Your business name | 17. Articles on hair & beauty |
| 3. Dashboard | 18. Business hours & client rosters |
| 4. Today's date | 19. Your business logo |
| 5. Upcoming appointments | 20. Create new salon publication |
| 6. Client texting | 21. Create new discount promotion |
| 7. Notifications | 22. Add new client |
| 8. Clients list | 23. Add new transaction / sale |
| 9. Shortcut to Calendar view | 24. All Appointments list |
| 10. Add appointment | 25. All transactions/sales list |
| 11. Appointments by status | 26. All clients profiles |
| 12. Appointments by staff | 27. All staff profiles |
| 13. Appointment details | 28. All discount promotions |
| 14. Link to portal login page | 29. All salon publications |
| 15. Notification settings | |

Business App View (Admin/Owner)

Following is the complete layout guide, you can use for Accessing different features of the 'Salon's App'



Following shows the details about the App layout with numbers corresponding;

1. Left menu panel
2. Salon' name
3. Client messages
4. Notifications.
5. List of clients
6. Sort by staff
7. Upcoming appointments
8. All published publications
9. Business hours and staff rosters
10. All staff profiles
11. All transactions/sales
12. Add Options (Publications, Sale, Promotions)
13. Dashboard of revenue and appointments

Client app View

Following is the complete layout guide, you can use for Accessing different features of the 'Client's App'



Following shows the details about the App layout with numbers corresponding;

- | | |
|---|---|
| 1. Left menu panel | 10. Trending (Hair & Beauty articles) |
| 2. Your business name | 11. Links to salon's social platforms |
| 3. Call option | 12. All staff profiles |
| 4. Messages | 13. All publications shared by salon |
| 5. Notifications | 14. Gallery of all pictures |
| 6. Book new appointment | 15. Most Recent Salons publication & Sales Promotion & Retainoo Hair & Beauty article (Slider) |
| 7. All upcoming appointments | |
| 8. All visit history | |
| 9. Available discount promotions | |

Installing the App (Android & IOS)

You will get an email, on the 'Registered Email Account' with Retainoo.

That Email contains all the information below as well.

You can download and Install the Apps, Following some simple instructions;

Search for 'Retainoo' app on the Android or iOS app store or use the following links



Login to the app. Use the login details provided in the Email you received.

Note: You will be required to update your password when you log in for the first time.

The app will automatically link you to your salon – Please wait for a few seconds when you first login.

You are now ready to use your app.

Signing into the App

For Signing into the App following conditions will apply;

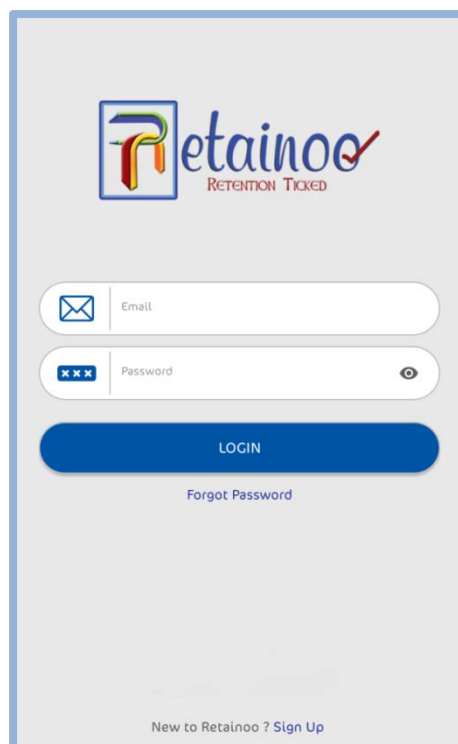
Salon Owner/admin - If you are logging in as a salon owner/admin, your salon must be registered with your email.

Salon Staff - Staff users must be first added in the platform by the Salon's Admin with their email address. Once added, salon staff will get an email with login details.

Salon Clients – Salon clients must be first added in the platform by the Salon admin or staff. Once added, clients will get an automated email with their login details and a brief on value of the app.

If you have a valid 'Username' and 'Password' as per the conditions above;

Open the App.



Enter your 'Login Details'

Click 'Login'

Note:

The 'Retainoo App' will give you a view based on your 'Role'.
Every user of the platform will have the same 'Login Page', but a different app view.

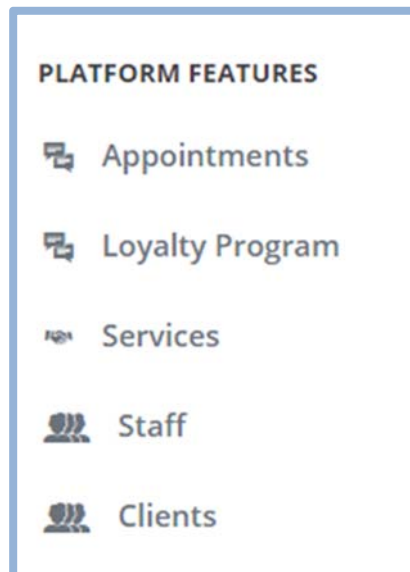
Online Appointments (Web & App)

How to enable or disable the appointment system for your clients?

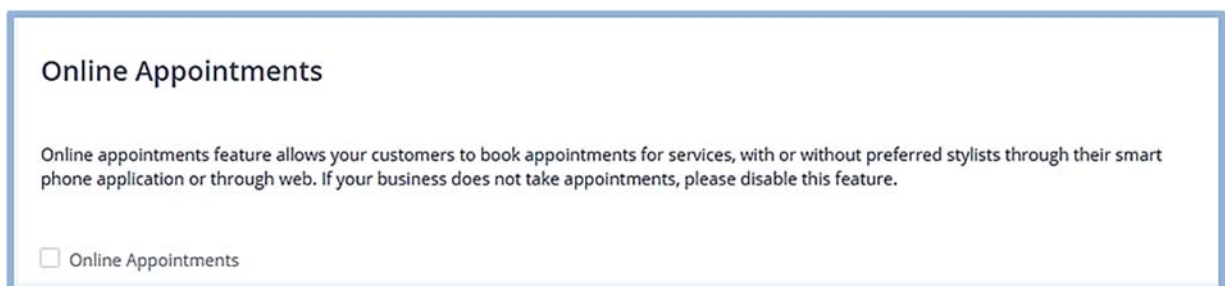
You can enable or disable the appointments feature, only from the 'Business Portal'.

Just go to your Salon's 'Business portal'.

In the portal's Left Menu panel, when you Scroll down you will see;



Click on 'Appointments', The following Screen appears;

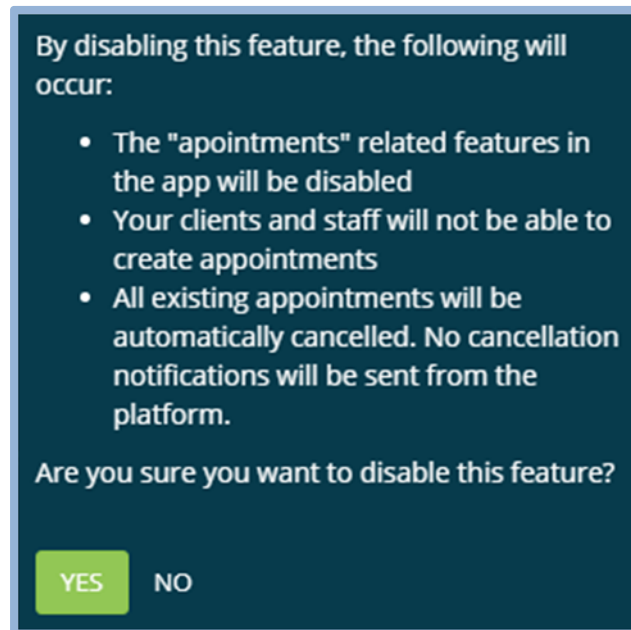


You can 'Enable' it by clicking on the 'Online Appointments' Checkbox.

Once clicked, the 'Online Appointments' Feature will be enabled.

Whenever you want to 'Disable' this feature, you will need to click again on the 'Online Appointments' checkbox.

It will show you a warning message,



If you are sure, you want to disable it.

Click 'yes' and it will be disabled.

Check out the next article also, that is about ['how your clients can book an appointment without the App'](#).

How to enable web appointments so clients can book online without the app?

When 'online appointments' are enabled, you will also see;

You can publish this URL on your website, Facebook page or any other online platform so your customers can also book appointments through web.

Online Appointment Link

<https://portal.retainoo.com/#!/public/salon-info/5&hash=ksjmdxkiwdilwpoiqlkjdlsao>

You can copy 'Online Appointment Link' and paste it to your Website or Even to your social media platforms as well.

Through this link, your clients can opt for 'web appointments' if they don't have the client's app installed.

This feature makes it a lot easier to book appointments directly from a web browser.

Once your clients click on the link, they just need to select the 'stylist', 'services' and appropriate time.

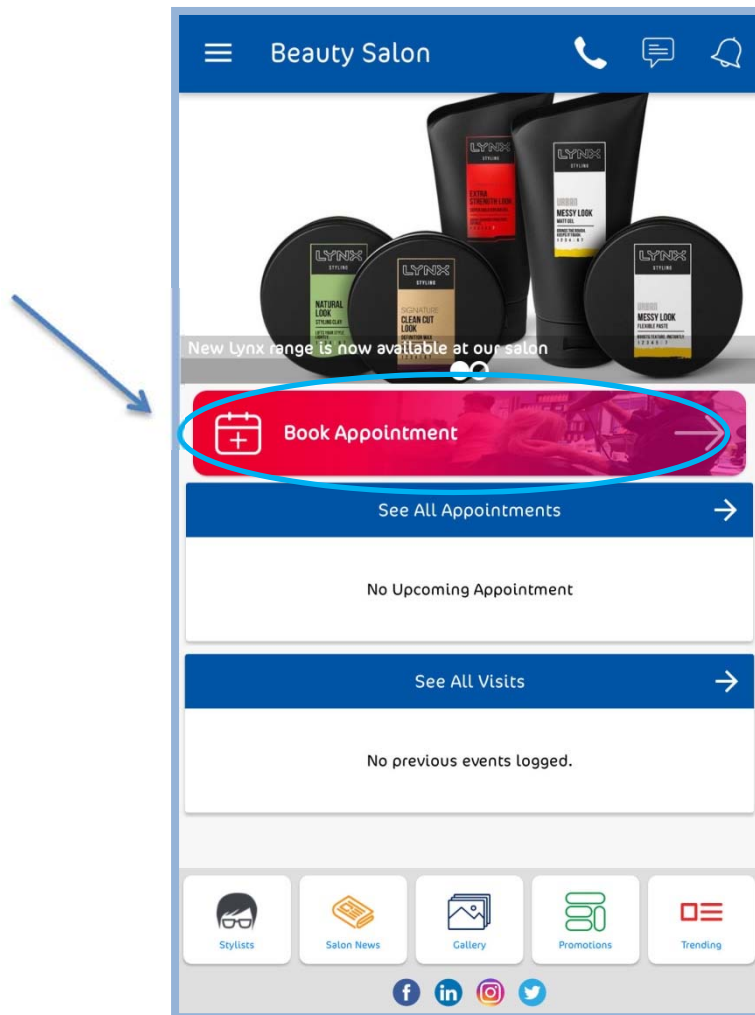
Click on 'Confirm'

The appointment will be confirmed as soon as the client login with credentials.

How can your clients make, reschedule or cancel appointments through the app?

Clients can make an appointment through the App by following some simple steps;

Open the 'Client' app'.



Just click on 'book Appointment'

You will see;

Here you need to select, the 'Date and time' first.

Select your 'Stylist', Select the 'Services' and click on 'Book Appointment'.

It will show you a description of your 'Appointment'

Click 'confirm'

And, your appointment is confirmed.

Now the confirmed appointment will appear here;



From here,

You can 'Reschedule' or 'Cancel' your appointment.

Click on the desired option, and you can reschedule or cancel an appointment.

How can client book for multiple services and staff?

A client can book multiple services with a single staff member just following the upper method.

If a client needs to book multiple services with multiple staff members for that;

A separate appointment needs to be created.

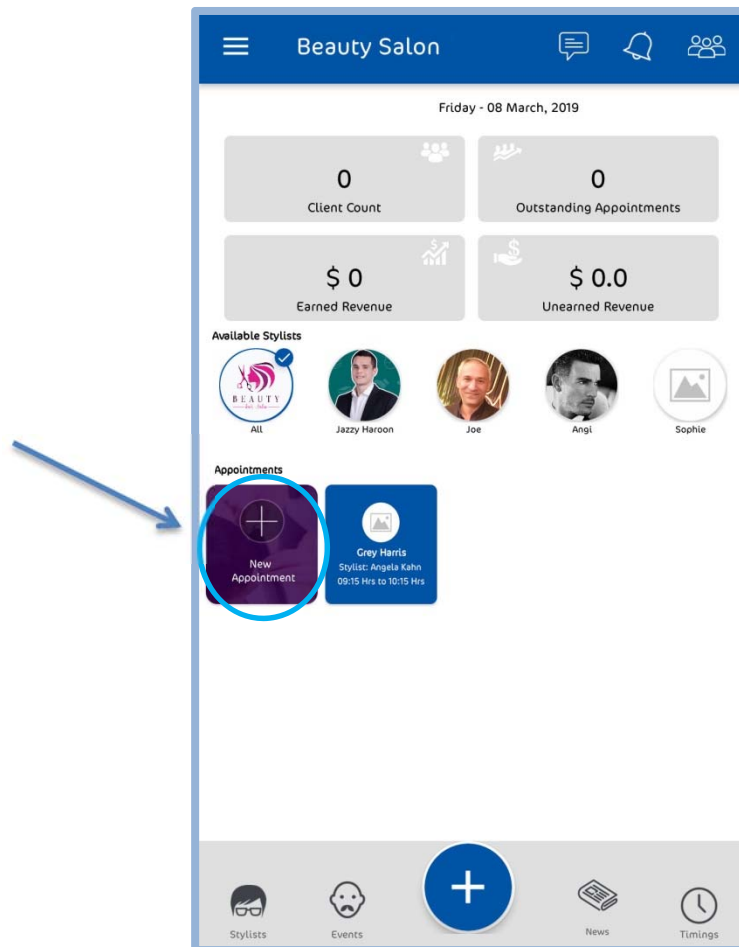
One Appointment will work for one staff member at a time.

How can your salon staff (owner, manager, and staff) book, reschedule or cancel appointments for your clients using the app?

If the salon's staff needs to book an appointment for a client;

Open Salon's App.

You will see;



Click on 'New Appointment' a form for new appointment will appear.

Just enter the required details;

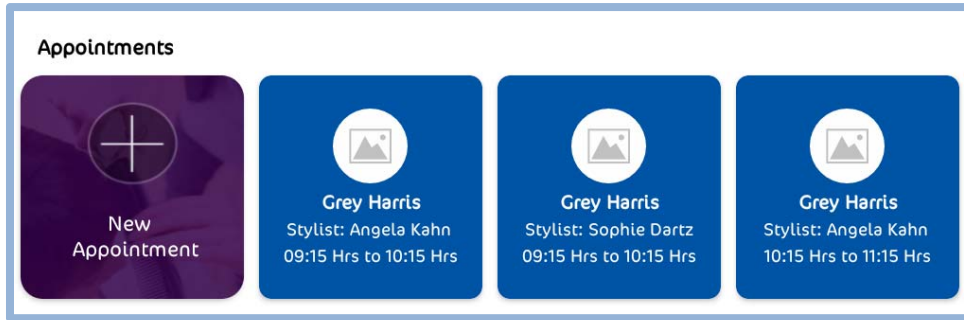
*(similar to how 'Clients Create Appointments')

Select the 'Client'

Select 'date and time' and 'services' and the 'stylist'

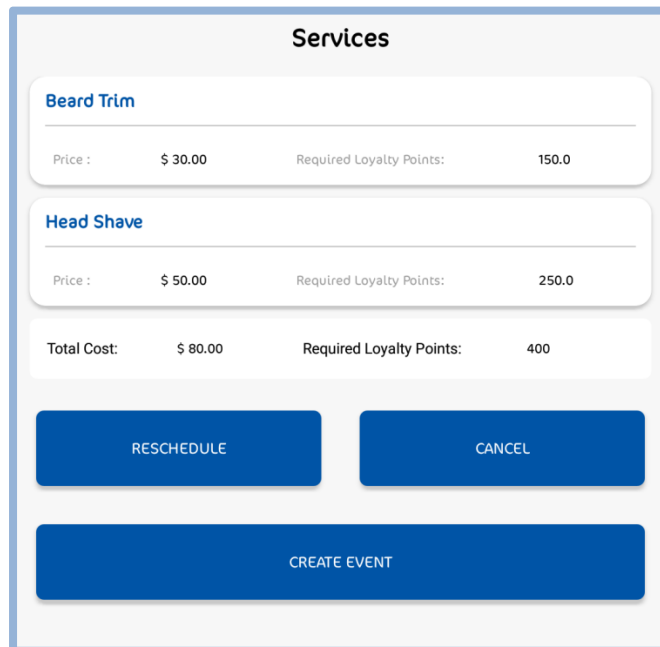
Once done, Click on 'confirm'

The newly made appointment will appear right next to the 'new appointments' button



Click on any of the 'Appointments'

It will show the details of the appointment.



Salon Staff can 'Reschedule' or 'Cancel' the appointments right from there.

And when the services are done; Staff can create a transaction from here

By clicking 'Create Sale' button

The screenshot shows a mobile application interface for creating an event. The title bar at the top is blue with a back arrow on the left, the text "Create Event" in the center, and a checkmark icon on the right. Below the title bar, the form is organized into several sections:

- Stylist:** A section with a blue header and a dropdown menu labeled "Select Stylist".
- Client:** A section with a blue header, a dropdown menu labeled "Select Client", and an "Add Client" button with a plus sign. Below this is a "Photos" section with a plus icon in a square.
- Services:** A section with a blue header and a plus sign button.
- Custom Time:** A section with a blue header and a plus sign button.
- Payment Type:** A section with a blue header.

Below these sections is a summary area with two columns:

- Points:** Represented by a person icon and the number "0".
- Funds:** Represented by a stack of money icon and the number "00".

Below the summary area are four rows of input fields:


- Discount %:** A field with a percentage icon.
- Discount Price:** A field with a price tag icon.
- Amount Due:** A field with a stack of money icon and the number "00".
- Payment Method:** A field with the text "None".

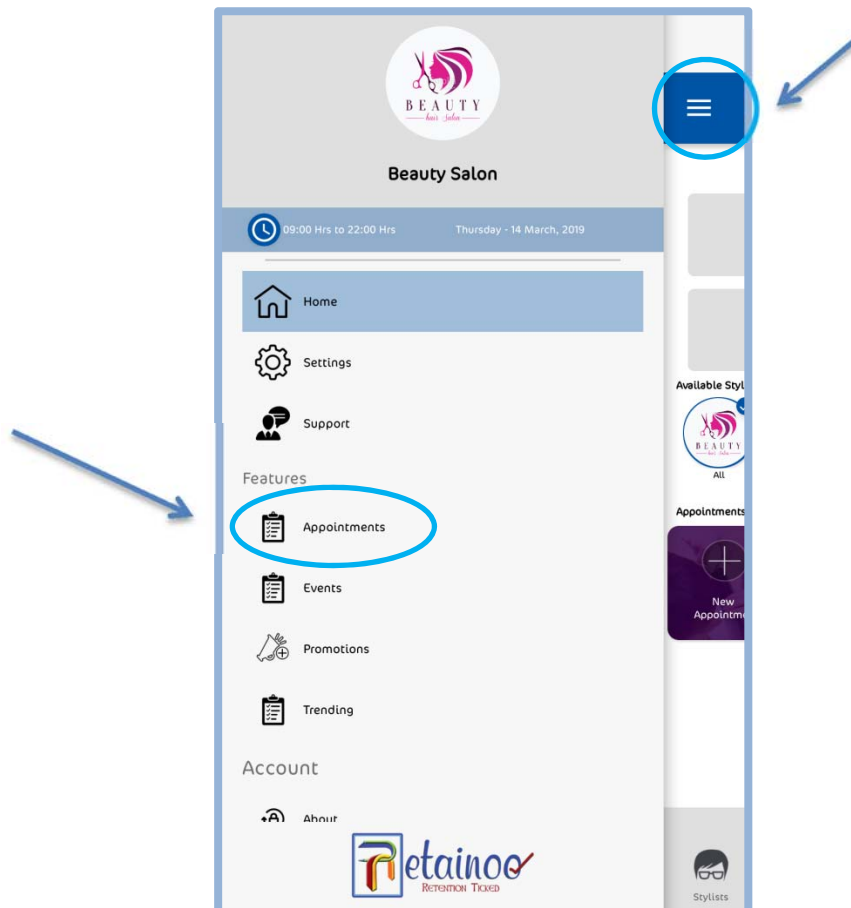
After entering details to this form, the appointment will be marked as 'Completed'

How can the salon manager or owner see the client appointments?

If the salon owner or manager wants to see the client appointments;

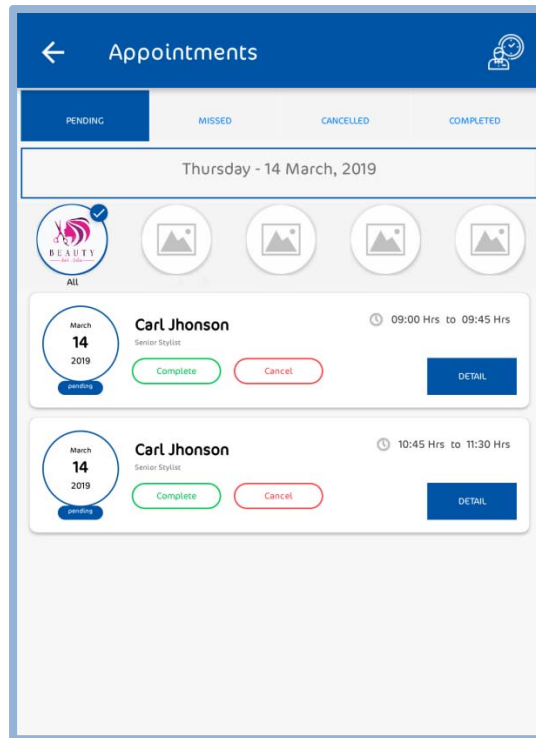
Just open Salon's App.

Click on '  'left side panel will appear.



Click on 'Appointments' under the features heading.

You will see a list of all appointments,

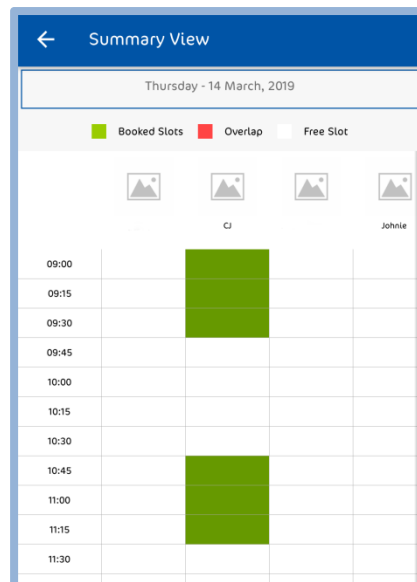


You can have a detailed view of them by switching to the 'Summary view'

by clicking



You will see;



In this view, all the appointments will be listed for the specific 'time slots' for specific 'stylists'

*(Slots marked 'green' are booked appointments)

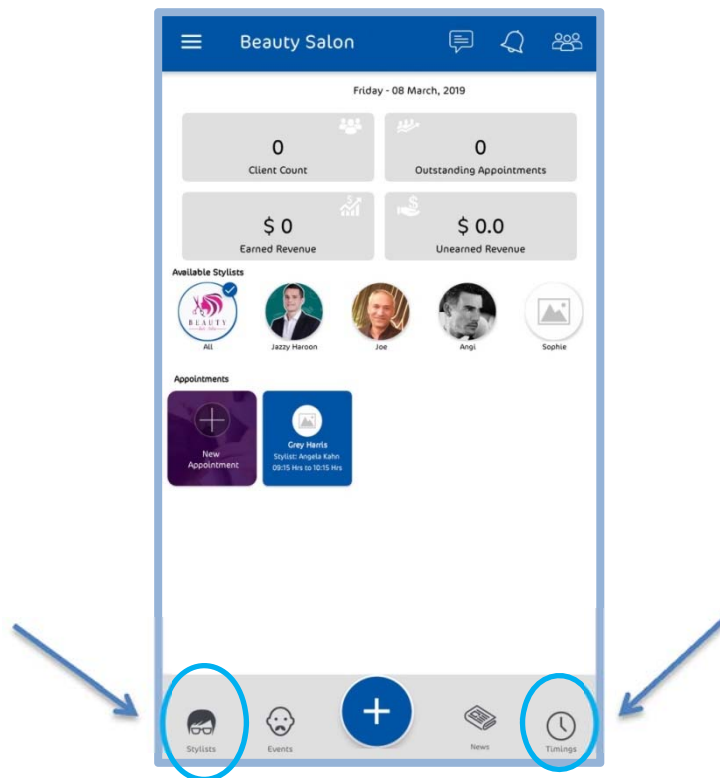
If you want to change the date and see future 'appointments', click on the 'date displayed'

How can I manage appointments if a staff member does not turn up?

If anything like this Happens Retainoo allows you to easily deal with the situation by following some simple steps below;

First, you need to update the 'Staff roster'

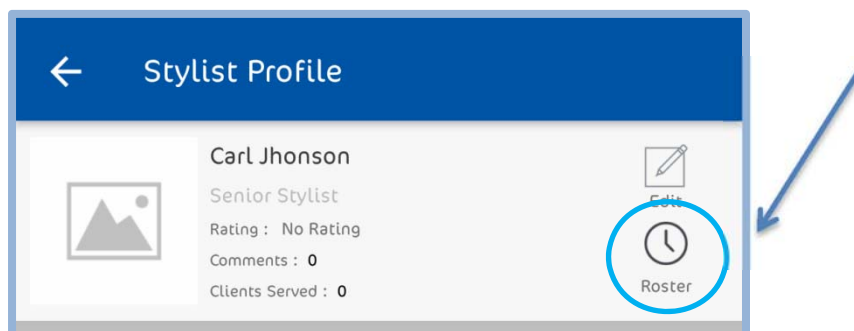
For that just see the bottom menu,



This can be done by clicking the 'stylist' or 'timings'

Then, you can select the 'stylist' and update staff 'roster'.

When you selected the stylist for updating roster, you will see; Click on 'Roster'



Then, you will see;

The screenshot displays the 'Staff Timings' interface. At the top, there is a blue header with a back arrow and the title 'Staff Timings'. Below the header, there are two tabs: 'DEFAULT TIMING' and 'CUSTOM TIMING'. The main content area includes a date selector showing 'Mar 14 2019' with the text 'Select Date' below it. To the right of the date selector is a checkbox labeled 'Is Day off'. Below the checkbox is the text 'Non working times'. Further right are two input fields for 'Start' and 'End' times, both set to '00:00'. At the bottom of the form, there are two blue buttons: 'CANCEL' and 'CONFIRM'. In the bottom right corner of the screen, there is a blue circular button with a white 'X' icon.

From here, just update the roster.

'Reschedule' and reassign the appointment to another staff member.

Inform the clients, if required.

Clients would get a notification about it, but the best way is to call them and confirm.

You can have a detailed idea for 'staff roster' in ['Staff Management'](#) Section.

Check the next post about ['Loyalty points and Rewards for the Clients'](#)

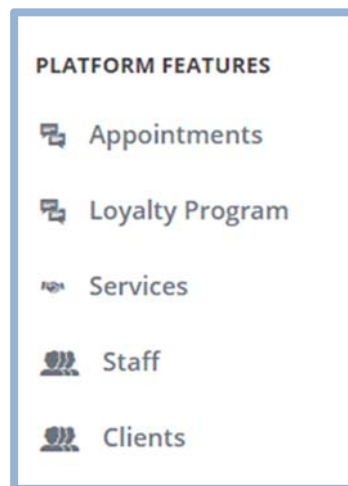
Loyalty Program-Rewarding our Valued Customers

How to start the Loyalty Program?

To start the Loyalty program,

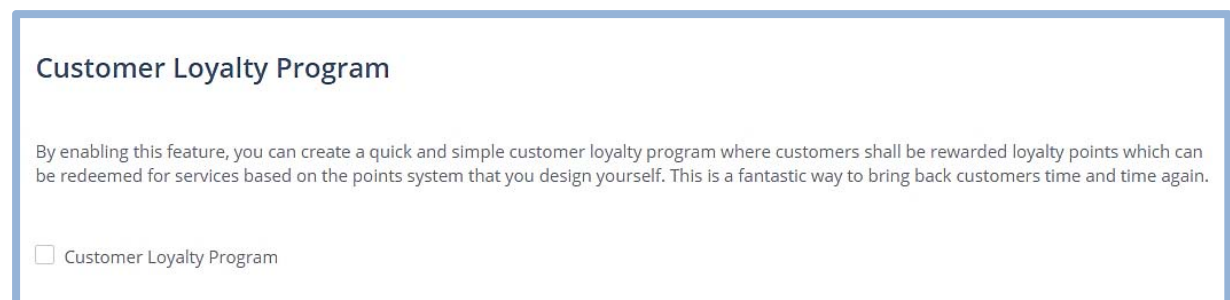
Open your business portal.

At the left menu panel, you will see;



Click on 'Loyalty Program'

In the **Customer Loyalty Program** you will see;



You can Enable or Disable this feature by clicking on the 'Customer Loyalty program checkbox'.

By enabling this feature, your clients will be awarded loyalty points which can be redeemed for services.

If this feature is not enabled, the platform will not allow the clients to be awarded the Loyalty points.

Setting the Value of Loyalty Reward Points

When Loyalty program is enabled,

You can specify currency value for each loyalty point which would determine how many points they need in order to redeem points for a free service, depending on the price of the service.

Dollar value of a loyalty point: *

\$	0.1
----	-----

Dollar value of a loyalty point determines how much a loyalty point is worth in dollar value. For example, if you enter \$0.1, this means that each loyalty point is worth \$0.1 and in order to redeem a service of \$10, the client shall need 100 loyalty points to make up for \$10.

Note: Each dollar spent by client shall earn them one loyalty point by default. E.g. if a client spends \$50, they shall be rewarded 50 loyalty points.

In this example, if you set the currency value of a loyalty point as 0.1, that means each loyalty point is equal to 10 cents. So if a client spends \$100, they will get 1000 loyalty points and their currency value will be equal to \$100.

TIP: Industry standard currency value for a loyalty point is \$0.1 or 10 cents. You can choose your own value according to how much you want to reward your clients for being loyal to you.

Bonus Reward points for the Clients

Select if you want to give any bonus loyalty points to your clients. Choose one or more from the three options.

Bonus Loyalty Points

We recommend you to consider giving bonus loyalty points to your clients to encourage them to connect with your salon via app.

Loyalty Points on downloading app

Loyalty Points on client's birthday

Loyalty Points on client's Anniversary

When you click any of the 'checkboxes' it will ask you to enter the number of **Bonus Loyalty Points**.

TIP: The entire purpose of this platform is to help you to connect with your clients through the app so you can offer superior customer experience and leverage the connection to gather useful data in order to keep providing value to your clients.

It is strongly recommended to award **BONUS LOYALTY** points to your clients for downloading the app. This will encourage clients to download the app and connect with you digitally. You can specify how many points should be awarded for each of the three options.

Bonus Loyalty Points

We recommend you to consider giving bonus loyalty points to your clients to encourage them to connect with your salon via app.

Loyalty Points On Downloading App
No of loyalty points that will be credited to the client: *

These bonus points will be credited to the client when they connect with you via app.

Loyalty Points On Client's Birthday
No of loyalty points that will be credited to the client: *

These bonus points will be credited to the client on their birthday if they are connected with your salon via app.

Loyalty Points On Client's Anniversary
No of loyalty points that will be credited to the client: *

These bonus points will be credited to the client on the anniversary of their registration with your salon on the platform.

Enter the Suitable number of 'Bonus Loyalty points'.

Setting Number of Reward points for a specific Service

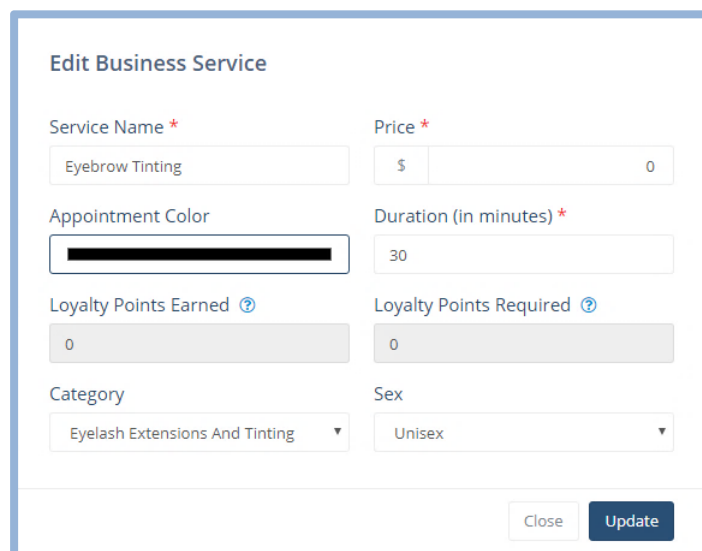
Setting reward points for a specific service is based on its price.

For this purpose, first, go to the 'Services' in the left menu panel.

Choose the service you want to set the number of reward points for,

Click the 'pencil icon' next to it.

When you click on 'pencil icon for edit', you will see;



The screenshot shows a form titled "Edit Business Service" with the following fields:

- Service Name ***: Text input field containing "Eyebrow Tinting".
- Price ***: Currency input field showing "\$" and "0".
- Appointment Color**: Color selection field showing a black color bar.
- Duration (in minutes) ***: Text input field containing "30".
- Loyalty Points Earned ?**: Text input field containing "0".
- Loyalty Points Required ?**: Text input field containing "0".
- Category**: Dropdown menu showing "Eyelash Extensions And Tinting".
- Sex**: Dropdown menu showing "Unisex".

At the bottom right of the form are two buttons: "Close" and "Update".

Here, just enter the required information.

The 'loyalty points earned' and 'loyalty points required' will automatically appear when you add the 'price' for a service.

How The Client Can Redeem the reward points and gets Free Services?

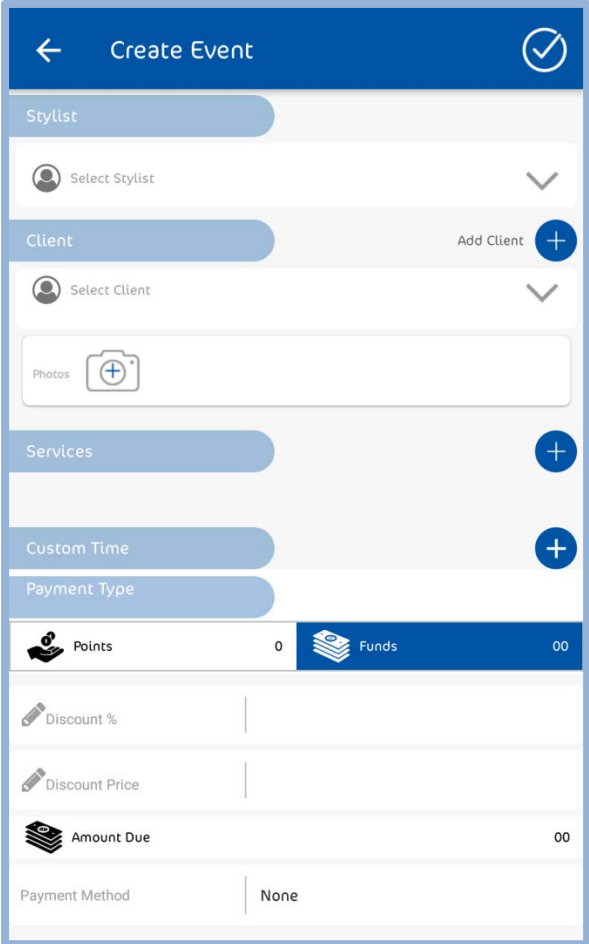
At the time when a service is taken, the salon staff will create an 'Sale' for that.

When you create an Sale,

You could ask the Client for the payment method.

If the client has enough reward points to pay for the services taken, he won't be charged any amount.

In that case;



The screenshot shows the 'Create Event' screen in a mobile application. The interface is primarily blue and white. At the top, there is a blue header with a back arrow on the left, the text 'Create Event' in the center, and a checkmark icon on the right. Below the header, there are several sections: 'Stylist' with a 'Select Stylist' dropdown menu; 'Client' with a 'Select Client' dropdown menu and an 'Add Client +' button; 'Photos' with a camera icon and a plus sign; 'Services' with a plus sign; 'Custom Time' with a plus sign; 'Payment Type' with two options: 'Points' (with a hand icon and a value of '0') and 'Funds' (with a stack of coins icon and a value of '00'); 'Discount %' and 'Discount Price' fields; 'Amount Due' with a value of '00'; and 'Payment Method' with a value of 'None'. A blue border surrounds the entire form.

All you need to do is enter, required details of the Sale and for payment method,

Select 'Points'

Click on the 'tick' at the right corner and Sale will be successfully created.

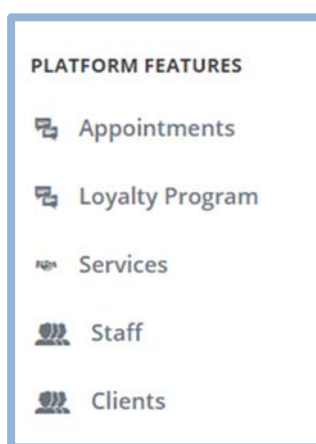
Clients Management

Adding in new clients

You can add new clients to the system, either by the 'Business portal' or 'Salon's App'.

To add clients from the business portal,

Open the 'business portal'.



In the left menu panel just scroll down, click on 'Clients'.

In this section, you can 'add' or 'upload client profiles'.

You can add the client profile one by one, or you can use the bulk upload option using an EXCEL template that you can download by clicking 'Add multiple clients via bulk upload feature' button.

Adding client one by one

Client Details

[Add Client](#) [Add multiple client via bulk upload feature](#)

[Search](#)

Name	Email	Mobile Number	Active	Actions
No customer found.				

[« Previous](#) [Next »](#)

Click on 'Add Client'. You will see;

Add Customer

👤 Client Details

Title *

First Name *

Middle Name

Last Name *

Preferred Name *

Email *

Phone Number

Picture
(Suggested Image Size: 400 x 400 pixels)

Enter *Title, Name and Email*. if you scroll down this menu, It will ask you to enter a few more things.

Have a look at them as well,

How frequently do you visit a salon? *

How frequently do you get a haircut? *

📍 Address

Address Line 1

Address Line 2

Country

State/Province/Country

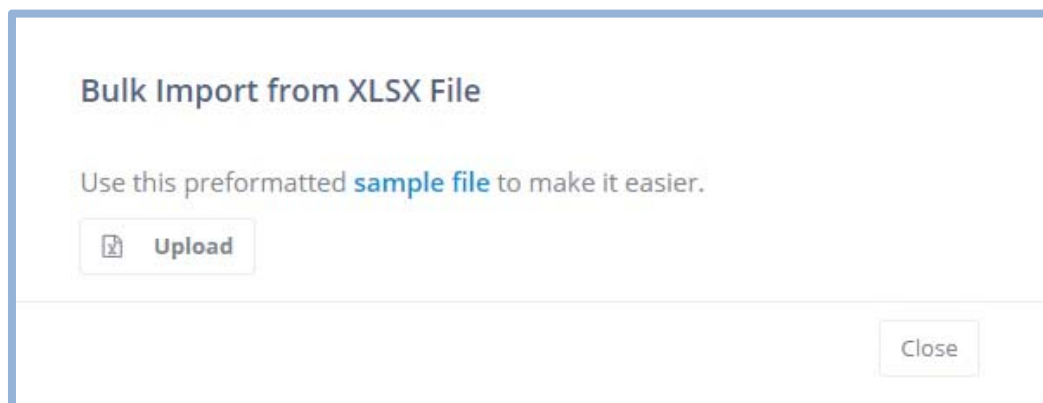
City/Town/Suburb

Zip/Postcode *

Enter the required details, especially the items marked with (*).

Click 'Add'. A Client's profile will be added.

For Bulk Upload, Adding Multiple Profiles at once through an EXCEL Sheet.



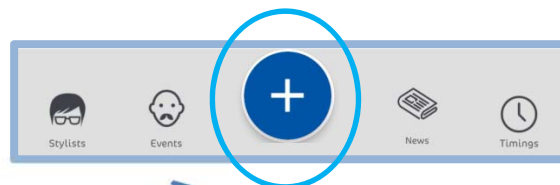
Open the Sample file, according to the template enter the data. Use the 'guidelines' tab to see what values can be entered for each column.

Once done, Click on 'Upload'. Select that file, all the entered profiles will be uploaded to the system.

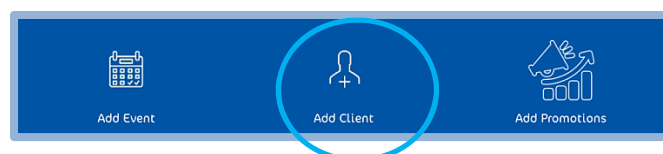
Note: The file will not upload correctly if the values entered for each column do not follow the instructions in the 'Guidelines' tab. Only choose from specified values.

Adding clients from the 'Salon App'

Open Salon's App.



Click on '+'

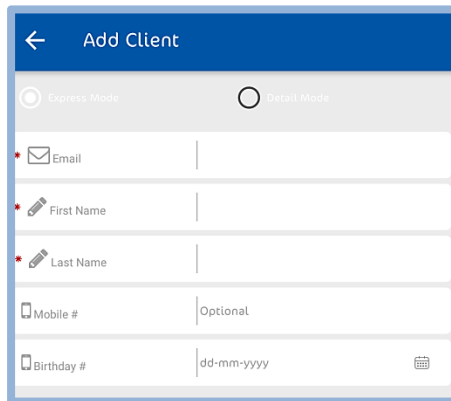


Click on 'Add Client'



Clients can be in two modes either by 'Express mode' or 'detail mode'

'Express mode'

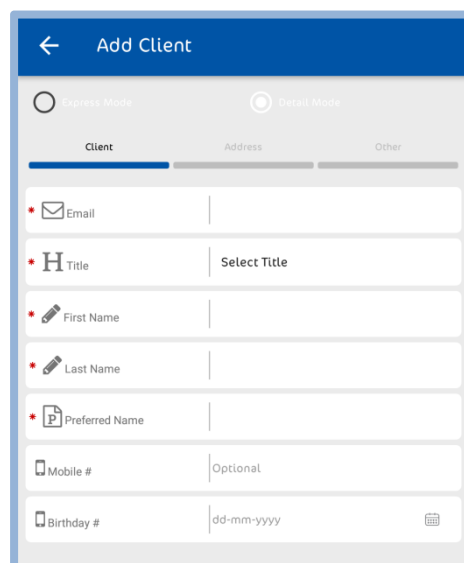


The screenshot shows the 'Add Client' form in Express Mode. At the top, there is a blue header with a back arrow and the text 'Add Client'. Below the header, there are two radio buttons: 'Express Mode' (selected) and 'Detail Mode'. The form consists of several input fields: 'Email' (with an envelope icon), 'First Name' (with a pencil icon), 'Last Name' (with a pencil icon), 'Mobile #' (with a mobile phone icon and the text 'Optional'), and 'Birthday #' (with a calendar icon and the format 'dd-mm-yyyy').

here you can, add details and Click 'done'.

Above is the express mode, for quickly adding up a client.

'Detailed mode'



The screenshot shows the 'Add Client' form in Detailed Mode. At the top, there is a blue header with a back arrow and the text 'Add Client'. Below the header, there are two radio buttons: 'Express Mode' and 'Detail Mode' (selected). Below the radio buttons, there is a tabbed interface with three tabs: 'Client' (selected), 'Address', and 'Other'. The 'Client' tab contains several input fields: 'Email' (with an envelope icon), 'H Title' (with a person icon and the text 'Select Title'), 'First Name' (with a pencil icon), 'Last Name' (with a pencil icon), 'Preferred Name' (with a person icon), 'Mobile #' (with a mobile phone icon and the text 'Optional'), and 'Birthday #' (with a calendar icon and the format 'dd-mm-yyyy').

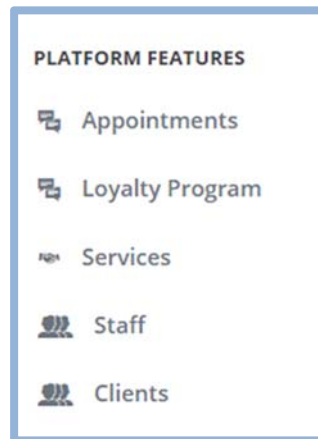
This takes some time but stores more information about the client.

Managing existing client details

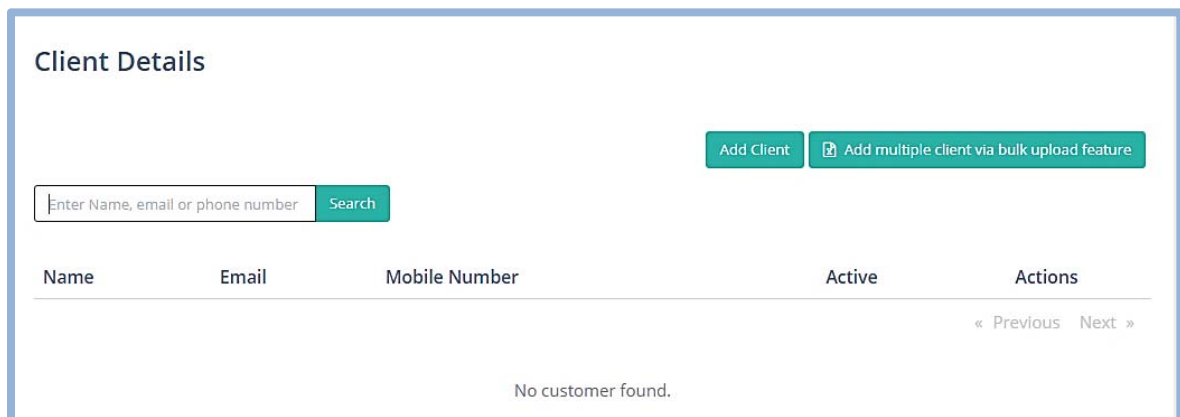
For managing existing clients,

Open the 'business portal'.

On the left side menu panel, you will see;



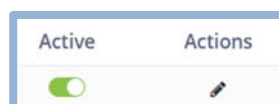
Click on 'Clients'



Here, you will find the profiles of your all your 'Clients'

Find out the client you are looking for in the list.

Next to 'client's profile' you will see;



When you toggle the 'Active' switch, the client will be made inactive for the system.

And, if you click on 'pencil icon' you will be able to edit your client's profile.

Recording and viewing 'Client Comments', Reviews

Clients can add 'Comments' and Reviews.

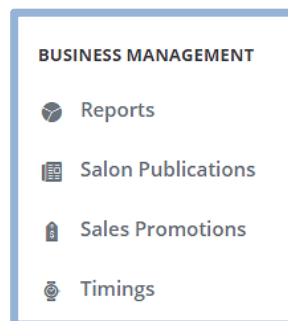
When the client takes some services from the Salon and an Sale is created.

As the Sale appears on 'Client's app,

The client will then give comments and reviews.

To view the 'Client's comments';


Open 'business portal'

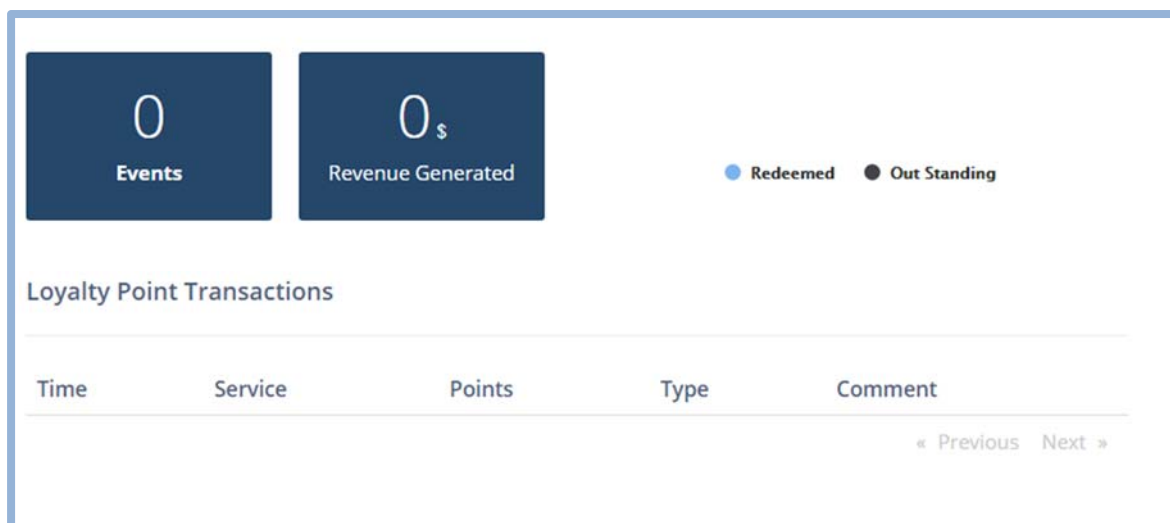


Click on 'Reports'

Scroll down to the bottom of the page.

You will see a list of all clients,

Click on this icon 



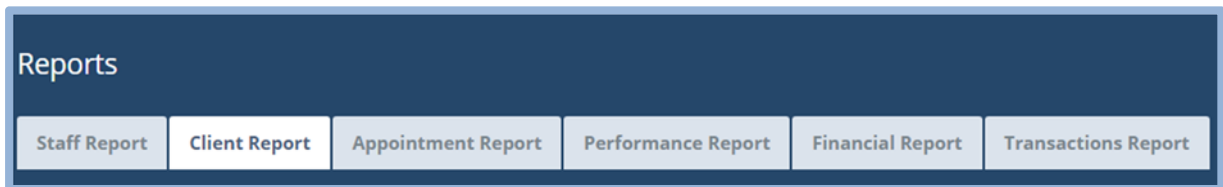
Here, you can see the number of 'Sales', 'Revenue Generated' and 'Comments'.

Recording inactive clients using the 'Client Report' feature.

To look for inactive clients in 'Client's Report' feature,

Open 'Business portal'

You will see;



Click on 'Client Report'

In this Section, you will see;



Here, you can find the number of 'New Customers', 'repeat', 'Non-Repeat' and 'Total' customers.

For having a detailed look on customers individually, you can scroll down on this page.

And click on 'Report' for any of the customers.

Removing Clients from the system

Retainoo system is about retention, in any case, if you want to remove the Clients,

You can go to 'Client's profile'.

Toggle the 'Active' button; the customer will become 'Inactive' for the system.

Staff Management

Enter your Staff Profiles

In this section, you can 'add' or 'upload staff profiles'.

You can add the staff profiles one by one, or you can use the bulk upload option using an EXCEL template that you can download by clicking 'Add multiple staff via bulk upload feature' button.

Adding staff one by one

Staff Details

[Add Staff](#) [Add multiple staff via bulk upload feature](#)

Name	Designation	Email	Mobile Number	Active	Rating	Actions
------	-------------	-------	---------------	--------	--------	---------

To add a single staff profile at once, click 'Add Staff'.

You will see;

Staff Details

Staff Details

Title *	First Name *	Middle Name	Last Name *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Email *	Phone Number *	Employment Type *	Designation *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Preferred Name *	Hire Date *	Picture <small>(Suggested Image Size: 400 x 400 pixels)</small>	
<input type="text"/>	<input type="text" value="dd-----yyyy"/>	<input type="button" value="Upload"/>	
Address			
Address Line 1		Address Line 2	
<input type="text"/>		<input type="text"/>	

In this form, you need to enter all the required details about the staff member.

Once done, click 'Add'. The Staff member's profile will be added

Note: The items marked with (*) are necessary to be filled.

Scroll down and you will see;

Staff Details

Services Select All

Select Categories...

Speciality

Short Bio

Add a short bio...

Upto 500 characters

Qualification

Title	Year	Awarded By
-------	------	------------

+

Here, you can add a few more details, 'Specialities' and 'Services' a staff member can provide.

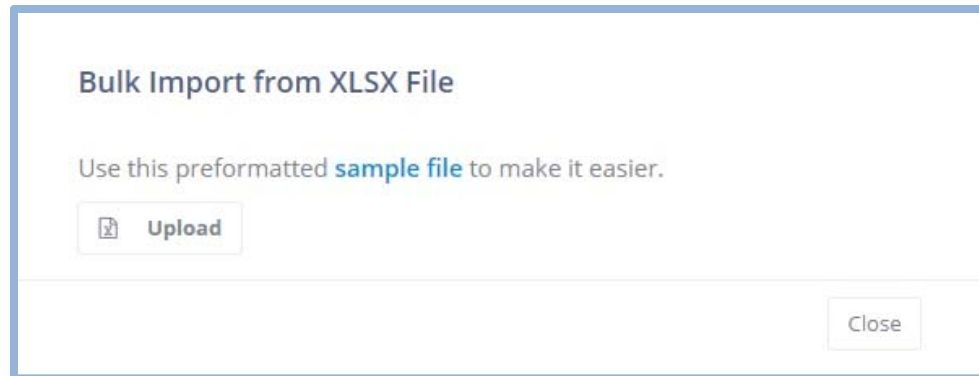
Once done, click 'Add'. The Staff member's profile will be added.

Note: The items marked with (*) are necessary to be filled.

Bulk Upload, Adding Multiple Staff Profiles at once with an EXCEL sheet

Click on 'Add Multiple staff via bulk upload'.

You will see this;



Click on 'Sample file'. A file will be downloaded.

Open the Sample file, according to the template enter the data. Use the 'guidelines' tab to see what values can be entered for each column.

Once done, Click on 'Upload'. Select that file, all the entered profiles will be uploaded to the system.

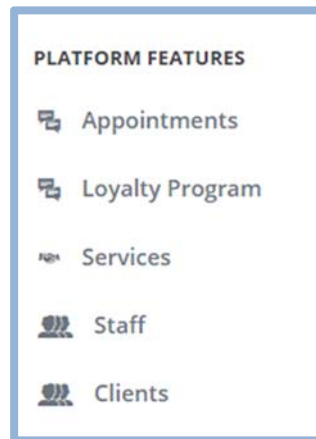
Note: The file will not upload correctly if the values entered for each column do not follow the instructions in the 'Guidelines' tab. Only choose from specified values.

Managing staff details

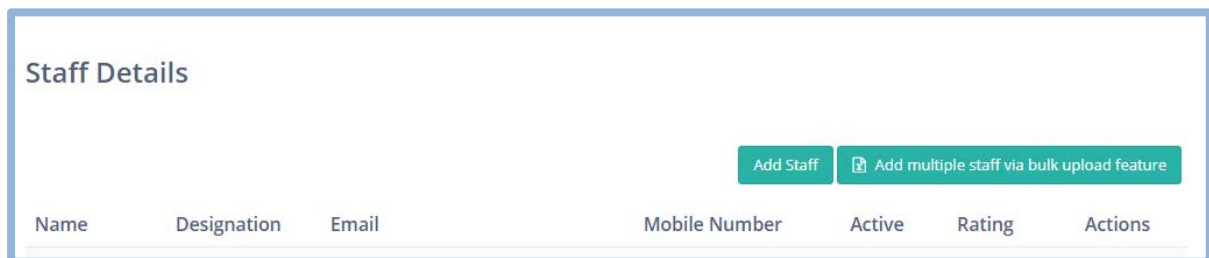
For managing Staff details,

Open the 'business portal'.

On the left side menu panel, you will see;

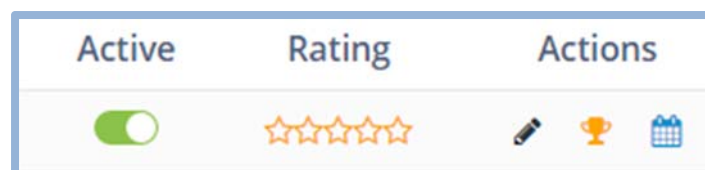


Click on 'Staff'



Here, you will find the profiles of your all your 'Staff Members'

Next to 'Staff Member's profile' you will see;



When you toggle the 'Active' switch, the 'Staff member' will be made inactive for the system.

'Rating' shows staff member's ratings.

And, if you click on 'pencil icon' you will be able to edit your Staff member's profile.

When you click on 'Trophy' icon you can add 'Awards and Achievements' of a staff member.

You will see;

Add Award

Award Name*

Award Type

Award By

Year*

Comments

Image

If you click on the 'Calendar' icon, with that you can update and manage 'Staff Roster'

[Staff Details](#) > [Andy Louis](#) > Roster

Day Of Week	Business Open	Opening Time	Closing Time
MONDAY	<input checked="" type="checkbox"/>	<input type="text" value="9:00 AM"/>	<input type="text" value="5:00 PM"/>
TUESDAY	<input checked="" type="checkbox"/>	<input type="text" value="9:00 AM"/>	<input type="text" value="5:00 PM"/>
WEDNESDAY	<input checked="" type="checkbox"/>	<input type="text" value="9:00 AM"/>	<input type="text" value="5:00 PM"/>
THURSDAY	<input checked="" type="checkbox"/>	<input type="text" value="9:00 AM"/>	<input type="text" value="5:00 PM"/>
FRIDAY	<input checked="" type="checkbox"/>	<input type="text" value="9:00 AM"/>	<input type="text" value="5:00 PM"/>
SATURDAY	<input checked="" type="checkbox"/>	<input type="text" value="9:00 AM"/>	<input type="text" value="5:00 PM"/>
SUNDAY	<input checked="" type="checkbox"/>	<input type="text" value="9:00 AM"/>	<input type="text" value="5:00 PM"/>

Here, you can define the time Schedule and Routine for a specific staff member.

Click 'Update' after changing.

Staff roster will be updated.

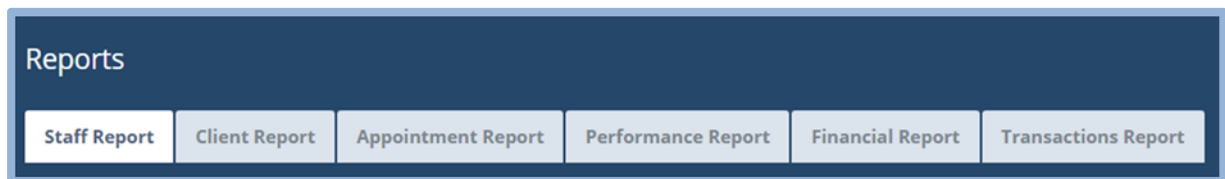
Recording and viewing Staff history—based on Feedback after Appointments.

Feedback on staff depends upon the feedback given by the client after taking the services,

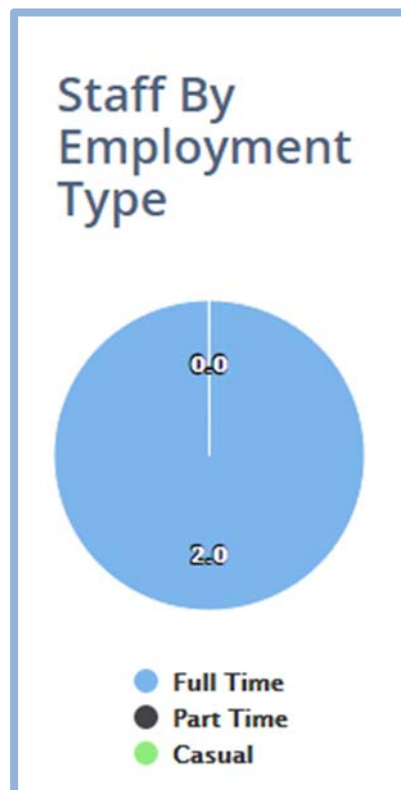
To see 'Staff History'

Open 'Business Portal'

The landing page is the staff Report page here you will see,



When you are on this tab first is;



This shows the number of staff members with 'Employment type'.

Next, to this, there is;



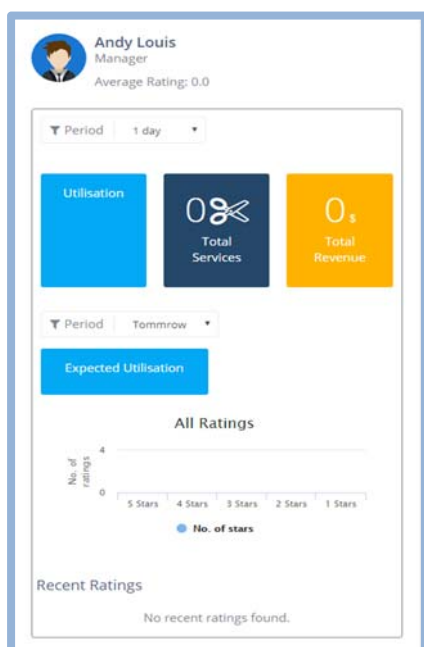
Here, you can see your staff by 'Duration' and by 'Client's Ratings'.

If you scroll down this page; you will have a detailed overview of a specific staff member.

Recording inactive Staff members

To record staff member's performance;

On the 'staff report' page when you scroll down you have a detailed overview of a staff member.



This Section shows;

'Utilisation' that is calculated on the basis of a staff member's active participation.

Also shows 'Number of Services' and 'Total Revenue' that member had given.

This can also show 'Expected Utilisation' for that 'Staff Member'

You can see 'All Ratings' and 'Recent' ratings as well.

Removing staff members

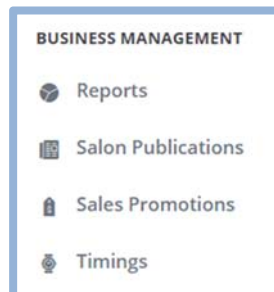
Like the clients, we suggest using the 'Active' Switch to Make that member active or inactive in the system.

Sales Promotions

Creating Sales Promotions

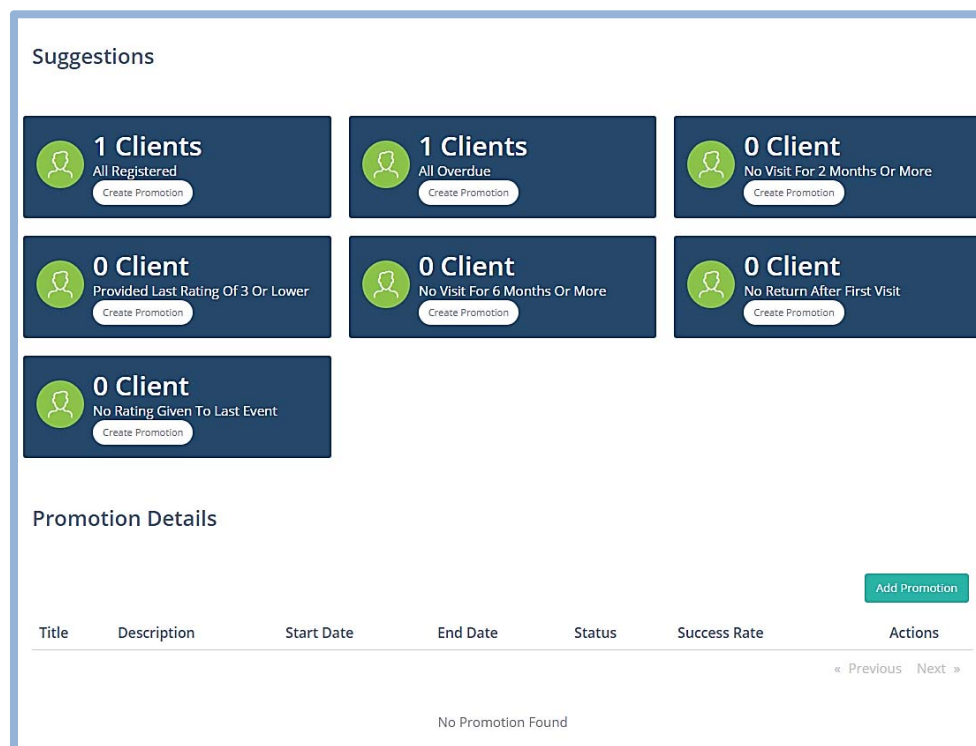
Sales promotions can be created by the 'business portal' as well as from the 'Salon's app'

For the 'business portal',



Click on 'Sales Promotions'

You will see;



Here, you will see some 'Suggestion' about promotions.

Click on 'Add promotion'

Add Promotion

🔗 Promotion Details

Promotion Title *

Description *

Status

Draft

Recipients

All Clients

Banner Image

(Suggested Image Size: 1024 x 600 pixels)

Upload

You will enter some details here.

You can select,

'Client-Category'

For which you want to create

'Promotion'

Recipients

All Clients

All Clients

Overdue Clients

Two Month Clients

less satisfied Clients

Six Month Clients

Never Returned Clients

No Last Rating Clients

The scroll down, you will see;

🔗 Time

Start Date *

Start Time *

dd----yyyy

--:-- --

End Date *

End Time *

dd----yyyy

--:-- --

Execution Date *

Execution Time *

dd----yyyy

--:-- --

Close Save

Here, enter 'Time' and 'Date' and click on 'Save'.

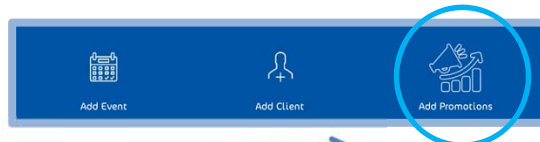
The Promotion will be created.

Creating Sales promotions from the 'Salon App'

Open 'Salon's App'



Click on '+'



Click on 'Add Promotion'

The image shows the 'Promotions' form. It has a blue header with a back arrow and a 'Promotions' title. Below the header are several input fields: 'Heading' (with a 'Type Title' placeholder), 'Description' (with a 'Type Description' placeholder), 'Add Image' (with a camera icon and a note: '(Suggested Image Size: 1024 x 600 pixels)'), and three rows for 'Start', 'End', and 'Execution'. Each of these rows has a date picker (calendar icon) and a time picker (clock icon).

Here, you can enter 'details', and select 'date and time' for 'Start', 'End' and 'Execution'.

The image shows the 'Select Participants' screen. It has a title 'Select Participants' and a 'Send to' label. Below are several rounded rectangular buttons representing different client groups with their respective counts: 'All registered clients' (42), 'All overdue clients' (16), 'Provided last rating of 3 or lower' (1), 'No visit for 2 months or more' (0), 'No visit for 6 months or more' (0), 'No return after first visit clients' (6), and 'No rating given To last event clients' (9). At the bottom is a large blue 'Save' button.

Here, just select 'Participants'

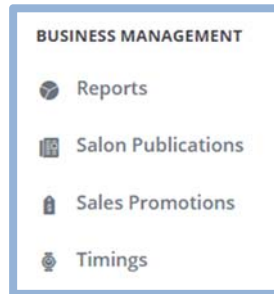
Click on 'Save'

Sales Promotion Will be successfully Created.

Promotions for Retaining Clients

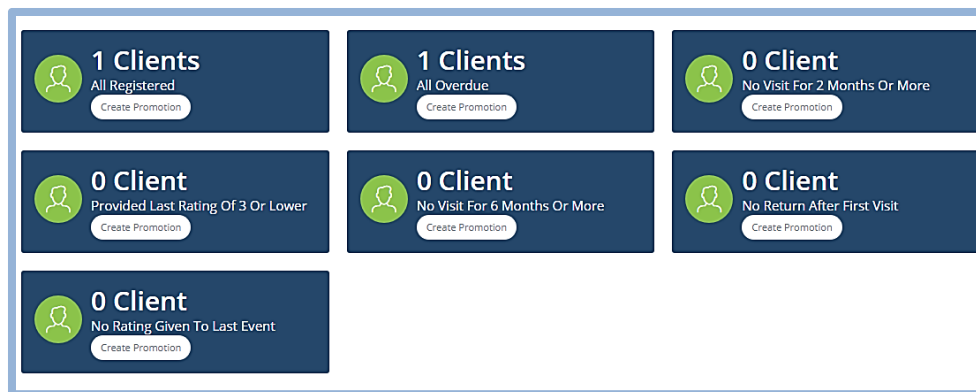
To create promotions for 'Retaining Clients'

Open 'business portal',



Click on 'Sales Promotions'

You will see;



This will show the Accurate Snapshot of all your clients.

You can select from the 'Category'.

And create 'Promotions' for 'All registered clients', or those 'who provided lower rating'

Give them, bonuses and rewards to retain.

Managing the Promotions for the Specific Client Category

Once you have created the promotions for a specific category of clients.

It will appear at the bottom of this page;

Title	Description	Start Date	End Date	Status	Success Rate	Actions
						« Previous Next »
No Promotion Found						

Here, you will also see;

Success Rate	Actions
0%	  

You can see 'Success rate' here.

Or

You can perform different 'Actions' for a specific promotion.

You can 'Edit' the promotion by clicking the 'Pencil' icon.

By clicking on the 'Bin' icon, you can remove it.

Or, you can make a copy of it by clicking on the 'Copy' icon.

Providing Sale Promotions to the Non-Returning Customers

To create promotion of promotion for non-returning clients;

You can just select 'Never Returned Clients', 'Two-month Clients', or 'Six-month Clients'.

You can even select,

'Multiple Client Categories'

Recipients
All Clients ▼
All Clients
Overdue Clients
Two Month Clients
less satisfied Clients
Six Month Clients
Never Returned Clients
No Last Rating Clients

Salon News Publications

Creating Salon News directly from the Salon's app

To create 'News' from the app;

Open the 'Salon's App'



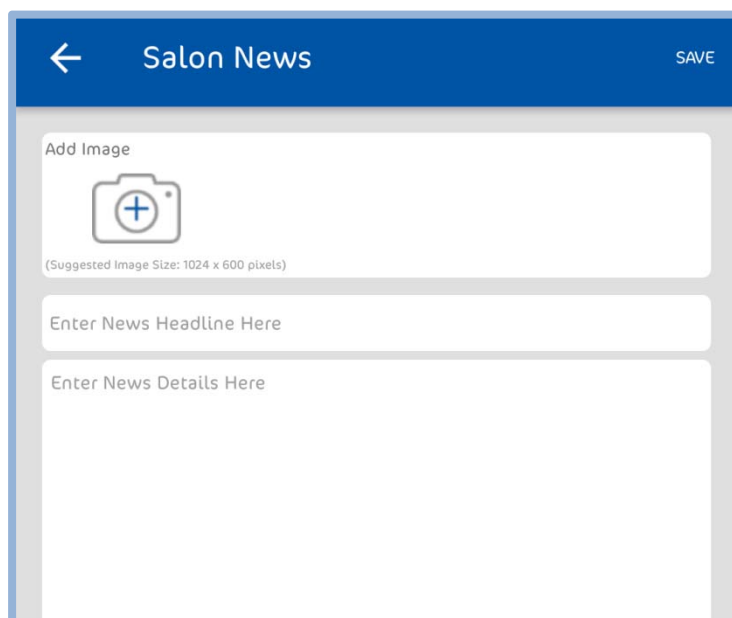
In this menu, at the bottom

Click 'News'

You will see;



Click on the '+' to add News.

A form screen with a dark blue header. The header contains a white back arrow, the text 'Salon News', and a white 'SAVE' button. Below the header is a form area with a light gray background. It contains three main sections: 1. 'Add Image' with a camera icon containing a plus sign and the text '(Suggested Image Size: 1024 x 600 pixels)'. 2. 'Enter News Headline Here' with a text input field. 3. 'Enter News Details Here' with a larger text input area.

Here, you can add 'Images', 'headlines' and 'News Details'.

After adding, just click on 'Save'.

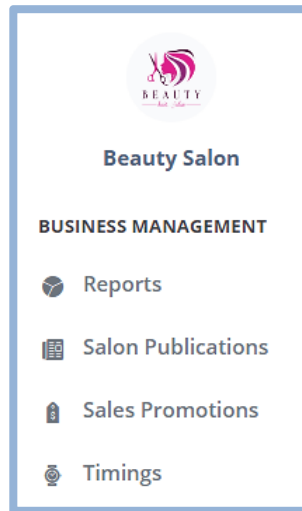
News will be published.

Publishing Salon News through the portal

To publish news through the business portal,

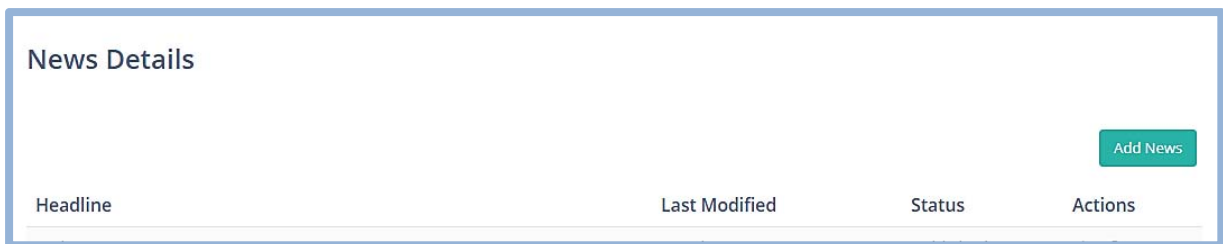
Open your 'Business portal'

Below the Salon's Name, you will see;

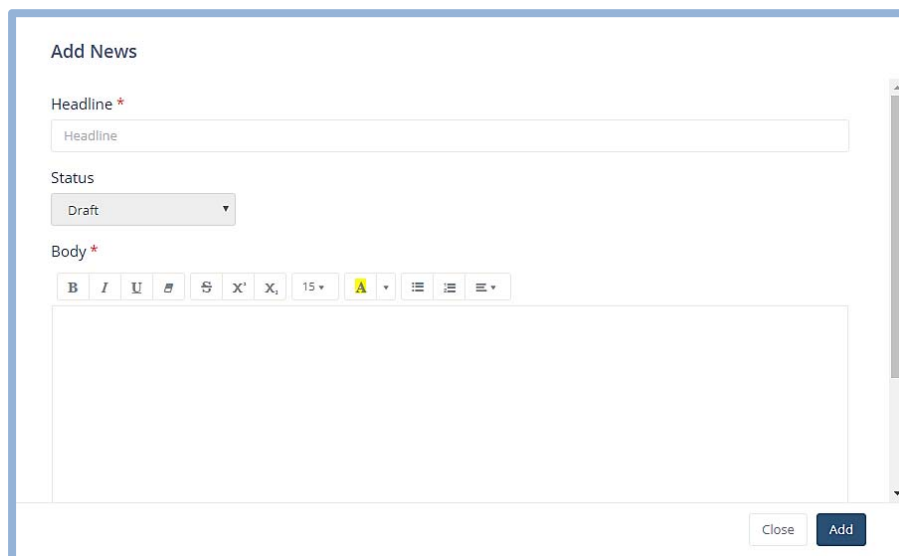


Click on 'Salon Publications'

You will see this;



Just click on 'Add News'

A screenshot of the 'Add News' form. The form has a title 'Add News' at the top. Below the title, there are three main sections: 'Headline *' with a text input field containing the word 'Headline'; 'Status' with a dropdown menu set to 'Draft'; and 'Body *' with a rich text editor. The rich text editor includes a toolbar with icons for bold (B), italic (I), underline (U), strikethrough (ABC), link (X'), unlink (X), font size (15), background color (A), bulleted list, numbered list, and indent. At the bottom right of the form, there are two buttons: 'Close' and 'Add'.

Here, you can create the news, and press 'Add'.

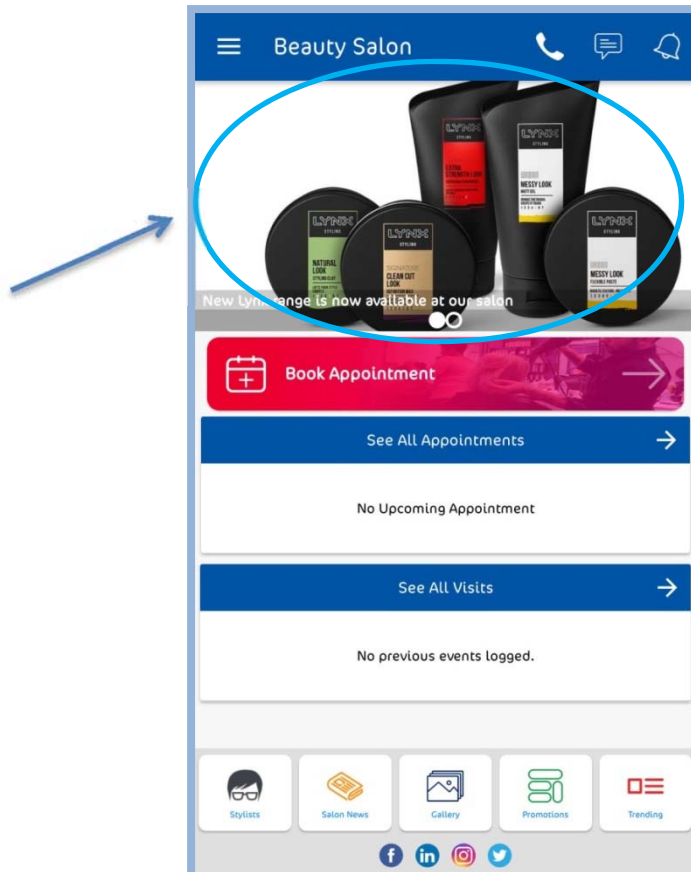
News will be 'Published'.

Viewing Published New in Client's App

To view the published news in the client's app,

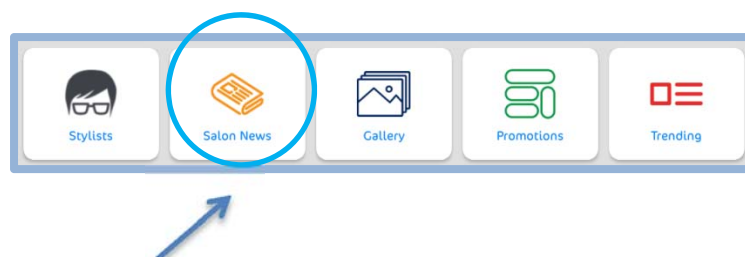
Open 'Client's App'.

Below the top menu bar, you will see the 'News' published by your salon.



Most recent news articles will appear here.

If you want to see all the news articles by your salon, you can see the menu at the bottom of the screen.



In this menu, you can click on 'Salon News' to see all the news articles.

Reports

Introductions to Accurate Statistical Reports

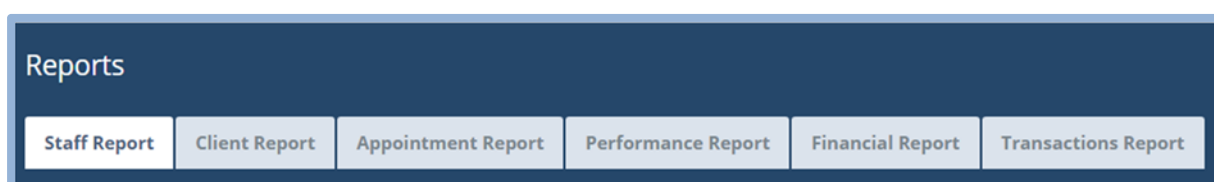
Retainoo offers accurate statistical Reports.

To see the reports about your business,

Open 'Business Portal'

The default landing page of the 'Business Portal' is 'Reports' page.

You will see;



Clicking on any of the 'tabs' of the report section, you will see detailed information about it.

Staff Report

This report will show; 'Staff details by Employment', 'Duration' 'Ratings' and you can see a detailed view of the stats of each 'Staff member'.

Client Report

This report will show; 'New customers', 'All customers', 'Snapshot of Loyalty points' and individual stats of each 'Client'.

Appointment Report

This report will show; 'The Appointment summary' and 'Number of bookings made via platform'.

Performance Report

This report will show; 'Retainoo performance snapshot' and 'Retainoo's Utilisation'

Financial Report

This report will show; 'Revenue recorded on the platform' and 'Platform subscription expenditures'.

Transactions Report

This report will show; 'Sale Summary Report' based on all the transactions made using the Platform.

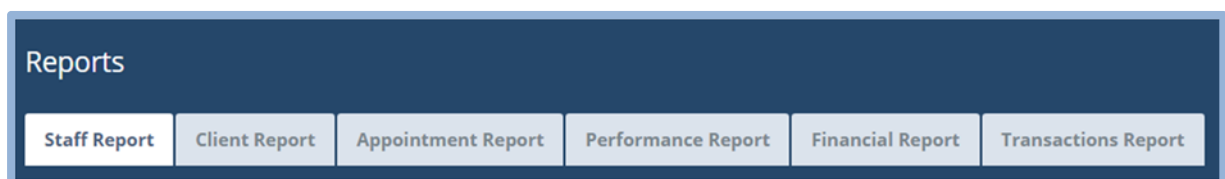
You can also see;

Creating Staff Report

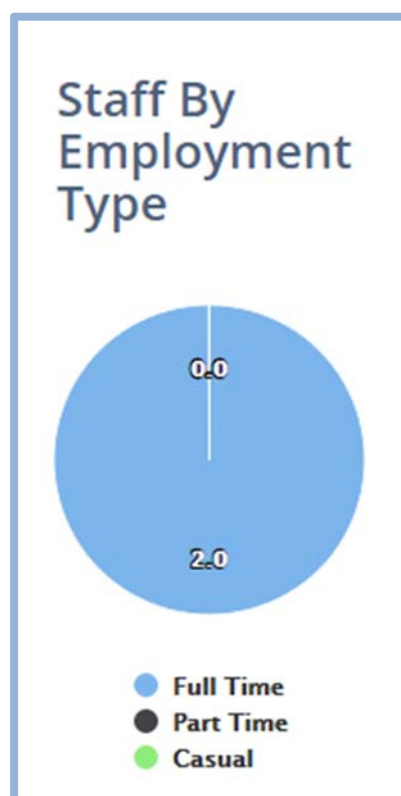
To create a staff report from the Staff stats,

Open 'Business Portal'

The landing page is the staff Report page here you will see,



When you are on this tab first is;



This shows the number of staff members with 'Employment type'.

Next, to this, there is;



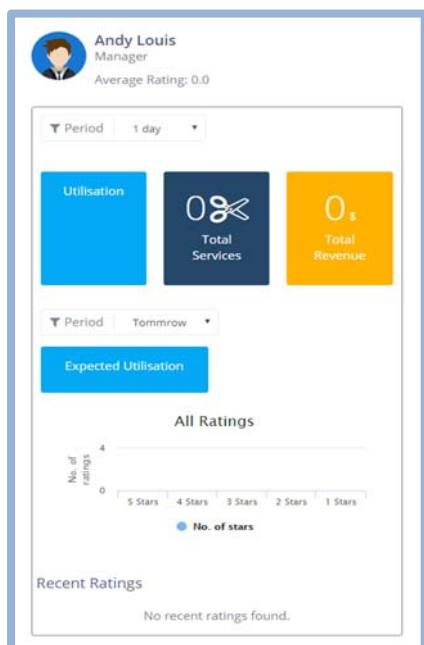
Here, you can see your staff by 'Duration' and by 'Client's Ratings'.

If you scroll down this page; you will have a detailed overview of a specific staff member.

Report for a Specific 'Staff member'

To record staff member's performance;

On the 'staff report' page when you scroll down you have a detailed overview of a staff member.



This Section shows;

'Utilisation' that is calculated on the basis of a staff member's active participation.

Also shows 'Number of Services' and 'Total Revenue' that member had given.

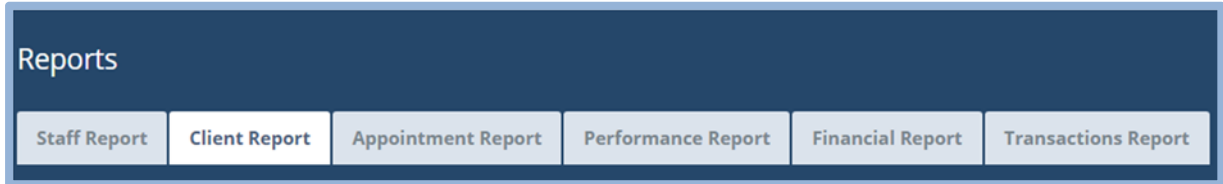
This can also show 'Expected Utilisation' for that 'Staff Member'

You can see 'All Ratings' and 'Recent' ratings as well.

Establishing a Report, of the Clients

Open 'Business portal'

You will see;



Click on 'Client Report'

In this Section, you will see



Here, you can find the number of 'New Customers', 'repeat', 'Non-Repeat' and 'Total' customers.

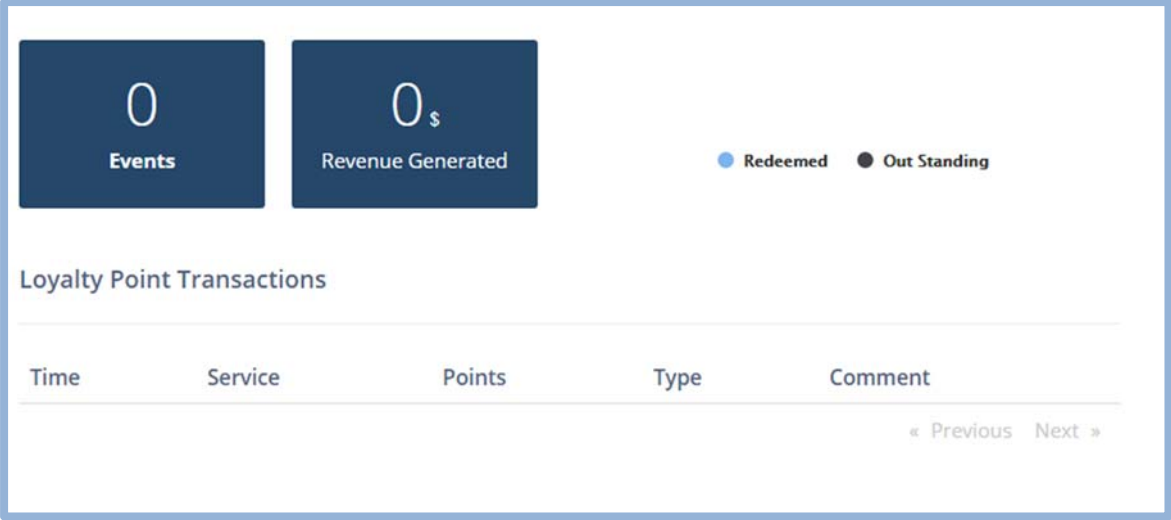
You will also see;



For having a detailed look on customers individually, you can scroll down on this page.

Click on this icon , next to the profile of 'client'.

You will see;



The screenshot displays a client profile dashboard. At the top, there are two dark blue cards: the first shows '0 Events' and the second shows '0\$ Revenue Generated'. To the right of these cards is a legend with a blue dot for 'Redeemed' and a black dot for 'Out Standing'. Below this is a section titled 'Loyalty Point Transactions' which contains a table with the following headers: 'Time', 'Service', 'Points', 'Type', and 'Comment'. At the bottom right of the table area, there are navigation links: '« Previous' and 'Next »'.

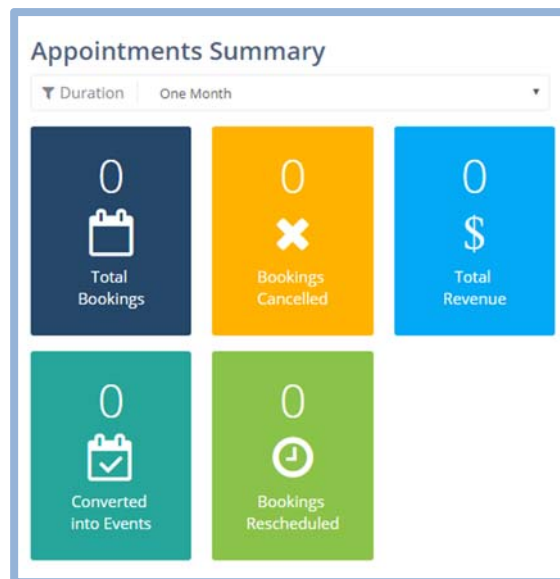
Here, you can see the number of 'Sales', 'Revenue Generated' and 'Comments'.

Reports that are based on Appointments

To Generate a Report based on the appointments,

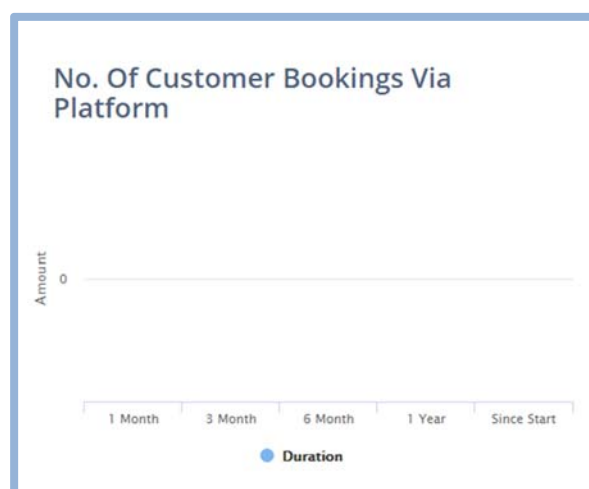
Click on 'Appointment reports' tab of the 'Reports' page

You will see;



From this 'Summary' it becomes easier to generate a report for the Appointments

Next, to this, you will see;



This shows the 'No. of bookings via platform'

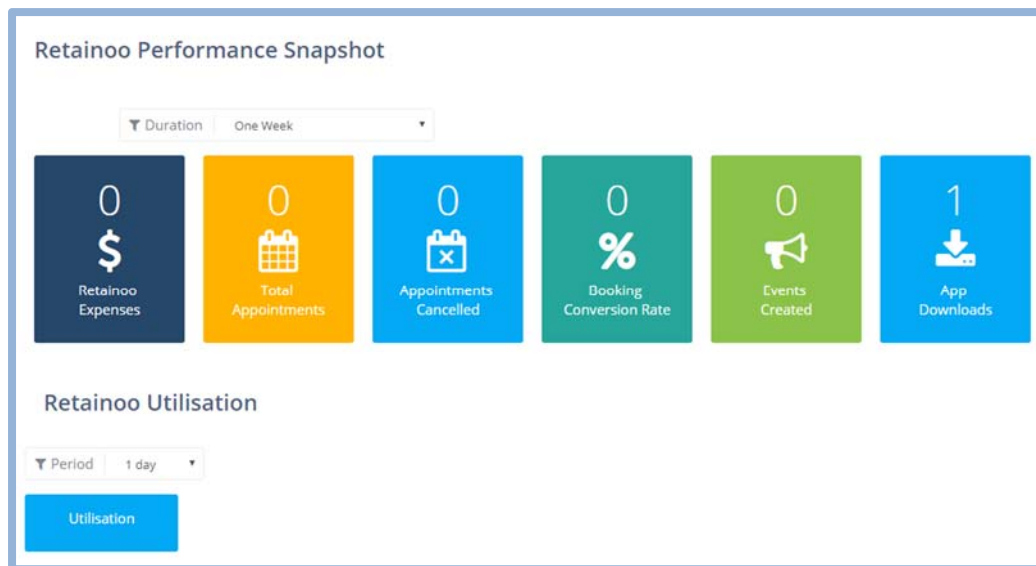
These entire statistics will give you an edge when you are generating a report.

Creating a Performance Report

To create 'performance Report' based on Retainoo.

Open the 'Performance report' tab on the business portal's 'Reports' page.

You will see;



Here, you will have the exact stats of 'Performance of your Salon' using the Platform.

Further, you can even see the 'Utilisation' of Retainoo.

Through all this, you can create a detailed report of the performance of your Salon based on Retainoo's platform.

Financial Report

You can create 'Financial reports'

For that;

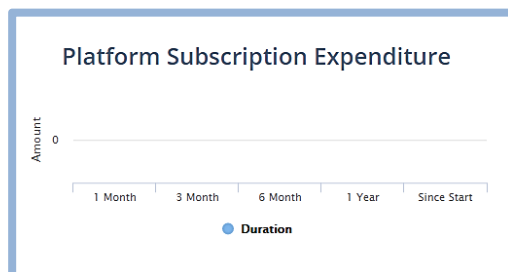
Open 'Financial Reports' tab of the business portal's 'Reports' page.

You will see;



This Section gives details of 'Revenue Recorded on Platform'

Next, you will see;



This section gives information about 'Platform subscription Expenditure'.

You can also scroll down, to see 'Revenue per day'.



The form has two input fields: "Start Date" with the value "08-Feb-2019" and "End Date" with the value "10-Mar-2019". To the right of the "End Date" field is a green "Search" button. Below the input fields, the text "Revenue Per Day" is displayed.

Select 'Start' and 'End' date.

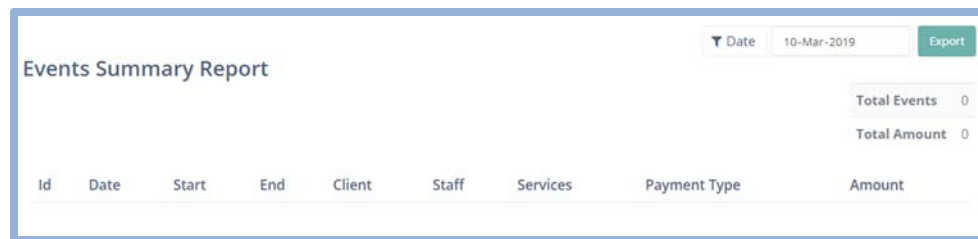
Press 'Search', Revenue Per day' will be displayed below.

Report of the Transactions made.

To make a report on 'Transactions Made'

Open 'Transactions Reports' tab of business portal's 'Reports' page.

You will see;



Events Summary Report										
								▼ Date	10-Mar-2019	Export
								Total Events	0	
								Total Amount	0	
Table Header										
Id	Date	Start	End	Client	Staff	Services	Payment Type	Amount		

All the transactions made, based on 'Sales' will be displayed below this section.

You can use them to make accurate reports about the 'Transactions History' of your Salon through the Platform.

Texting from the App & In-App notifications and emails

Need to get in touch? See how you can send a message to your Clients from the App.

Getting in touch with your clients was not this easy before.

With Retainoo Salon's App, you can send messages to your clients by just a simple click of a button.

You have two options;

1. Send a message to a specific Client.
2. Broadcast message to All Clients.

To send messages to a specific client of the Salon,

Open 'Salon's App'

At the top right corner, next to the Salon's Name you will see;



Click on the 'Messages' icon, at the left

A new tab will appear, below the 'Broadcast' option; you will see your list of clients.

Select the specific client you want to message.

Type your message and press 'Send'

Your message will be sent to the client.

Broadcasting message to all the clients through the salon App

To broadcast messages to all the clients of the Salon,

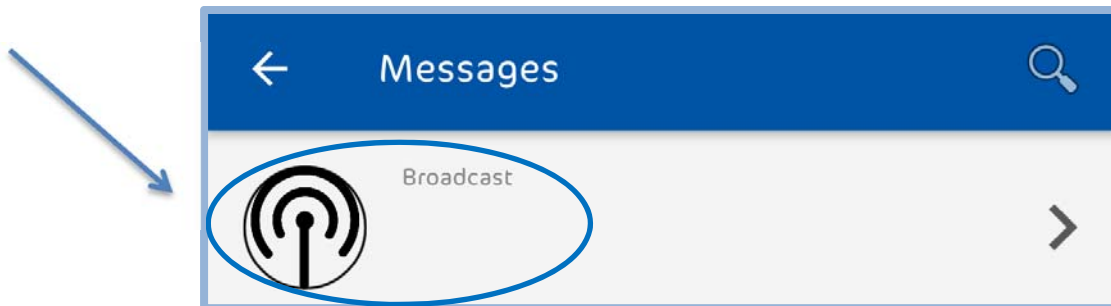
Open the 'Salon's App'

At the top right corner, next to the Salon's Name you will see;



Click on the 'Messages' icon, at the left

You will see;



Click on 'Broadcast'

Type your message and click 'send'.

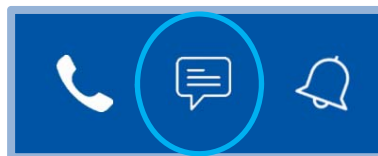
This way, your message will be sent to all your clients.

How the Clients can send a text.

Clients can communicate with the Salon, just with the click of a button,

Open the client's app.

At the top right corner of the screen you will see;



All you need to do, you have to click that 'Messages' icon in the middle.

From there you can send texts to the Salon and Enquire about all your concerns.


If you want to make a call instead, click on the 'Phone' icon.



This makes it a lot simple to keep in touch, like never before.

Managing In-App notifications

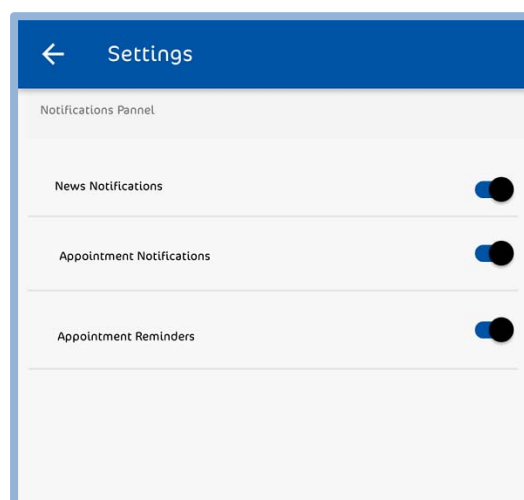
With Retainoo app, you will get notified about every action that concerns you.

To manage your In-App notifications, click on  a menu panel will appear.



Click on 'Settings'

You will see;



From here, you can easily toggle the switch for Turing on or off any of the notifications.

User Access

User-based Roles Management,

Retainoo provide multiple user based roles for management;

People can interact with Retainoo Platform based on those roles;

There are 'Four' user-based roles in Retainoo;

1. Owner/Admin.
2. Manager.
3. Sr. Stylist.
4. Jr. Stylist.

You can see the 'Rights of administration' according to those roles below

Rights of Administration According to the Roles

Following are the Rights of Administration According to the roles;

Owner/admin

This user has the rights to access, each and everything on the 'Business Portal' and 'Salons App'

Manager

This user has the rights to access the platform through 'Salon's App' only,

- This user can manage 'Appointments'.
- Create 'Sales'.
- See 'Staff Profiles'
- Add 'Promotions'.
- See 'Salon's News'
- Manage and update 'Staff roster'
- Add 'Clients'
- Interact with 'Clients'
- See 'Client's profiles'

Senior Stylist

This user has the rights to access the platform through 'Salon's App' only,

- This user can manage 'Appointments'.
- Create 'Sales'
- See 'Salon's News'
- Add 'Clients'
- Interact with 'Clients'
- See 'Client's profiles'

Junior Stylist

This user has the rights to access the platform through 'Salon's App' only,

- This user can manage 'Appointments'.
- Create 'Sales'
- See 'Salon's News'
- Add 'Clients'
- Interact with 'Clients'
- See 'Client's profiles'

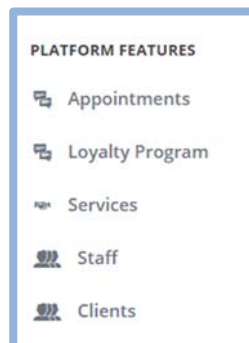
The rights of the Stylists are the same.

Assigning a staff member the Role of a Manager

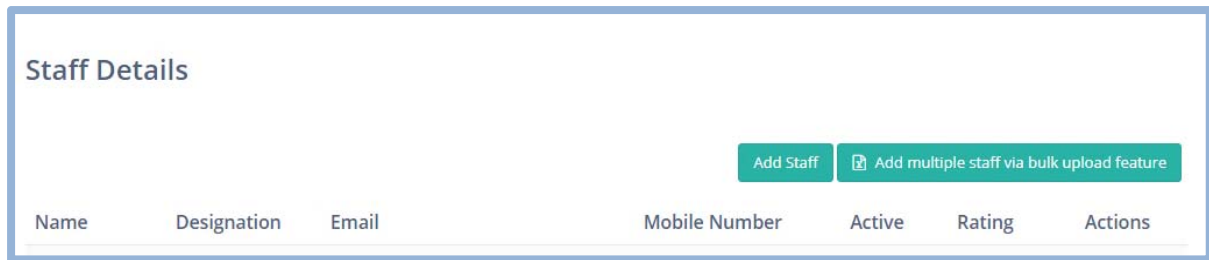
To assign the role of a 'Manager' to a 'Staff Member'

Admin can open 'Business portal'

In the left menu panel just scroll down, click on 'Staff'.



You will see;



Here, you will see 'Staff members' profiles list

Next to 'Staff Member's profile' you will see;



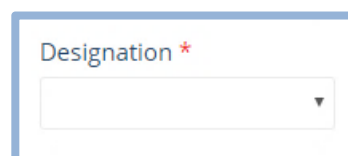
And, if you click on 'pencil icon' you will be able to edit your Staff member's profile.

You will see;

Click on 'Designation'

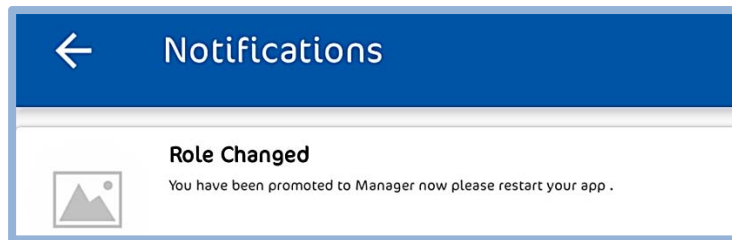
A drop-down menu will appear.

Select the 'Manager' from the list



This way your selected Staff member will be Promoted to a manager.

The staff member will get a 'Notification on App'




When the 'App' is restarted the App view will change from Sr. Stylist to 'Manager'.

Change your Password through the App.

Just in case any of the users of Retainoo needs to change their password.

They can reset it right from the app.

Click on , scroll down to bottom.

Click on 'Reset Password'

You will see;

A screenshot of the Retainoo app's password reset screen. At the top, there is the Retainoo logo with the tagline "RETENTION TICKETS". Below the logo, there are three input fields: "Old Password", "New Password", and "Re-enter Password". Each input field has a small eye icon to its right, indicating a toggle for password visibility. At the bottom of the screen, there is a blue button labeled "Reset".

Change your password here.

Press 'Reset'

Password will be successfully changed.

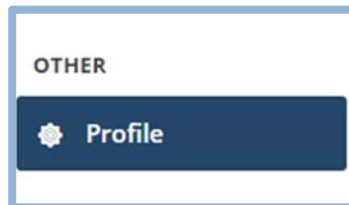
Account and Subscriptions

Managing Subscriptions, Invoices and Details

For managing 'Subscriptions', 'invoices' and 'Details';

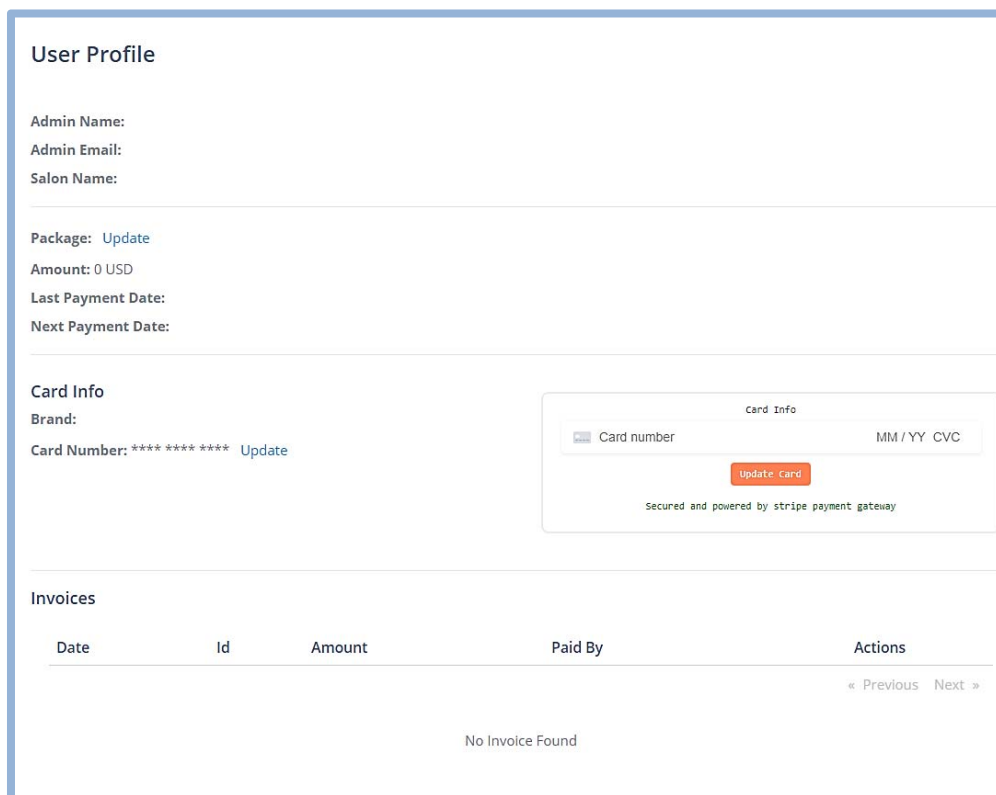
Open 'Business Portal'

Scroll down the left menu panel.



Click on 'Profile'

You will see;

A screenshot of a 'User Profile' page. The page is divided into several sections: 'User Profile' with fields for Admin Name, Admin Email, and Salon Name; 'Package' information including Package, Amount (0 USD), Last Payment Date, and Next Payment Date; 'Card Info' section with Brand, Card Number (masked with asterisks), and an 'Update Card' button; and an 'Invoices' table with columns for Date, Id, Amount, Paid By, and Actions. The table is currently empty, showing 'No Invoice Found' and navigation links for 'Previous' and 'Next'.

This section contains 'Admin's Profile', 'Subscriptions', 'Payment Info' and 'Invoices'

These are all discussed below separately in details.

Viewing Admins Profile

To view admin's profile, you click on 'profile' in the left menu panel of the portal.

The first thing you will see is the 'Admin's profile'



A rectangular box with a blue border containing the following text:

User Profile

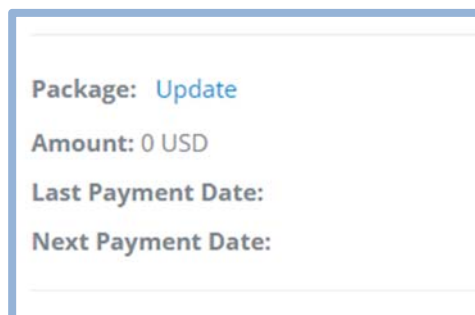
Admin Name:
Admin Email:
Salon Name:

This will show Admin's 'Name', 'Email' and 'Salon's Name'

Changing or Upgrading Subscription

If you want to change or upgrade your subscription;

You can see right below the Admin's profile,



A rectangular box with a blue border containing the following text:

Package: Update

Amount: 0 USD

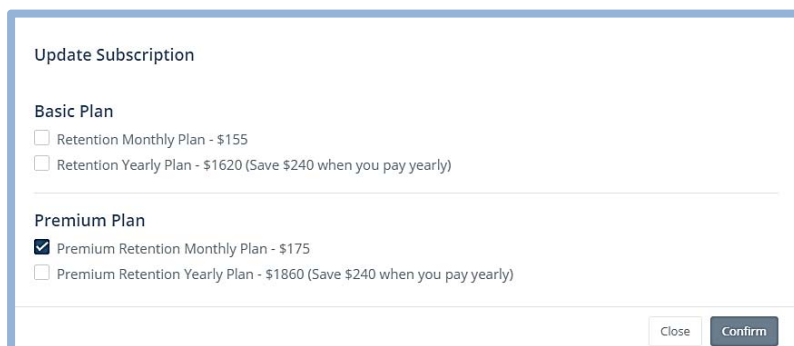
Last Payment Date:

Next Payment Date:

This shows your 'Package details'.

To change or upgrade it Click on 'Update'

You will see;



A rectangular box with a blue border containing the following text:

Update Subscription

Basic Plan

Retention Monthly Plan - \$155

Retention Yearly Plan - \$1620 (Save \$240 when you pay yearly)

Premium Plan

Premium Retention Monthly Plan - \$175

Premium Retention Yearly Plan - \$1860 (Save \$240 when you pay yearly)

Close Confirm

Choose from the given options and press 'Confirm'

Your Subscription will be upgraded or downgraded as per your requirement.

Changing Payment Methods

Below the Subscriptions, you will see your selected payment method.

Card Info

Brand:

Card Number: **** * Update

Click on 'Update'

Card Info

Card number MM / YY CVC

Update Card

Secured and powered by stripe payment gateway

Here, you can Enter your 'Credentials' and press 'Update Card'

Your payment method will be successfully changed.

Invoice History.

At the last of this page, you will see the complete history of your 'Invoices'

Invoices				
Date	Id	Amount	Paid By	Actions
« Previous Next »				
No Invoice Found				

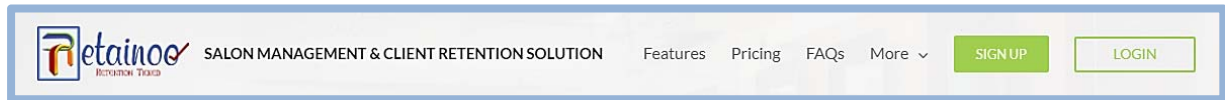
Cancelling Subscription

You can 'Cancel' your subscription by contacting 'Support', Retainoo support will provide you best assistance regarding this.

Support

Have Some Questions? Read FAQs Here.

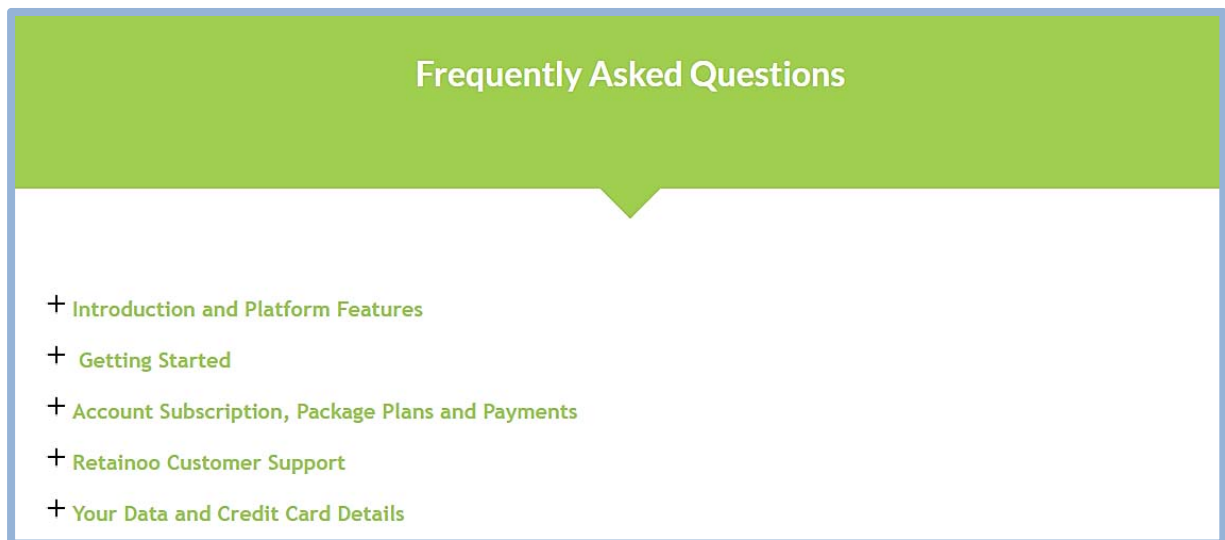
If you have any questions you can just go to; www.retainoo.com.



You will see the above menu bar.

Click on 'FAQs'

You will see this;



Click on any of the '+' next to your required topic.

You will see relevant questions for that, Select the one you are looking for.


Your concerns will be answered here.

In case, you have any problem you can contact 'Support' at any time to get help by

[Email: support@retainoo.com](mailto:support@retainoo.com).

[Tel: +61 1800 228 215](tel:+611800228215)

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.