## FRONT DESK PROCEDURES

This is a reference document for the development of front desk procedures. You may add or remove items according to your salon/spa requirements.

### End of Day Balance:

Once the last client has left settle EFTPOS and finalise accounts. Check that all sales have been processed via the POS/Business Management Software Program.

### Float:

$200 total – around $50 in coin (5c and 10c kept to a minimum) and $150 notes.

### Takings:

* Count the remaining cash, record the amount.
* The cash is then “placed in the safe/given to the owner.”
* EFTPOS reconciliation: “fill in what applies to your machine.”
* Print End of Day reports “fill in what applies to your POS.”

### End of Day Balance Sheet

* Trading Summary
* Discount report
* Daily Breakdown – Business (Treatments/Product etc.)

|  |  |
| --- | --- |
| **Tally totals** |  |
| **Add** | CASH (takings) |
|  | EFTPOS (add another line if more than one terminal  |
|  | Mastercard/Visa |
|  | AMEX (If accepted) |
| **TOTAL**  | $ (should equal amount on End of Day Balance Sheet Report) |

### Transaction Breakdown

### Therapist Sheets:

Print first thing in the morning to capture any cancellations. All therapist to complete their own day sheet.

### Client CPC’s for Following Day:

Print off all Client History’s for either following days clients or the first group of clients attending the salon.

### Confirmations

All appointments must be confirmed, if there is no response to SMS message, clients must be contacted by phone or email. Most POS are automatic for this procedure, check they have been sent each day.

### Gift Certificates: *“fill in what applies to your POS”*

* In POS select client name for the purchase
* Select the staff member selling the voucher.
* Select the amount to go on certificate and select payment method and end the sale.
* Record the gift certificate number on certificate (i.e., 0011 - ???)
* Fill out certificate including valid dates (XX months from sale)

### Paying by Gift Certificate: *“fill in what applies to your POS”:*

* In POS, bring clients bill to screen as usual and check the bill is complete.
* Select the gift certificate/voucher from payment method – select the certificate number/enter the certificate number.
* Enter payment for any outstanding amount through payment method and end the sale.

### Booking Fees:

* Booking fees are taken from:
* All new clients.
* Inactive clients who have not visited us for 12 months.
* Clients with a history of no shows or late cancellations.
* For all treatments that are 60 minutes and/or longer.
* A booking fee is not refundable if a client; cancels in under 24hrs of booking, if an appointment is rescheduled due to lateness (15mins), or if the client no-shows.
* These conditions must be explained before accepting booking, refer to script. A booking fee is $ XX or a XX% of the service

### Taking a booking fee *“fill in what applies to your POS”:*

* Go to POS – select client (top left) – type in name – select.
* Click on employee – select business – then account
* Click on the price box – change amount (i.e.: $50/$100)
* Select payment method (bottom left, i.e., Amex/visa/cash etc.)
* End sale

### Redeeming a booking fee “fill in what applies to your POS”:

* Go to POS – select client from list, check for green symbol with credit amount (top right of screen)
* Click on account (book symbol - bottom left of screen)
* Enter deposit amount ($50)
* Enter remaining amount owing in payment method boxes (bottom left i.e.: Amex/visa/cash/EFTpos) – balance should be $0 - end sale.

### Refunding a booking fee “fill in what applies to your POS”:

* Go to POS – select client (top left) – click on employee.
* Click on price box – enter amount – select from payment method how the deposit will be refunded (i.e.: credit/cash) – end sale.

### Booking fee - Dishonour: “fill in what applies to your POS”:

* Go to POS – select client (top left) – click on employee – select business – sundry – account dishonour - click on price box – change amount – select account from payment method – end sale.

### Air conditioners:

If doors are open air con must be turned off or on fan setting only (this helps to circulate air in salon) to prevent them from burning out and wasting electricity.

### Opening the Salon:

* Unlock first door.
* Go straight to alarm – enter code then enter (if applicable).
* Turn on lights & music.
* Float in till
* Count and check any needs for change.
* Check phone messages and emails.
* Check that all staff have arrived on time, ensure all staff are setting up salon/spa before clients arrive.

The priorities are:

* Salon floor vacuum
* General hygiene checked.
* Treatment rooms prepared.
* Other areas of salon/spa prepared.
* Reception presentation checked.
* Team presentation is checked.
* Laundry attended to.
* Refreshments prepared.

### Closing the Salon:

* Turn off air conditioning units (Check temp & fan are set for following day)
* Check all doors and windows are locked.
* Check all lights off.
* Music off at stereo
* Check all power points are turned off (double check wax pots)
* Activate alarm.
* Lock main door.

### Promotions and Discounts:

Many salons offer discounts or marketing; these may include the following written conditions, to ensure the promotion does not affect profit.

### Birthday Offer for Client: (Offer is…)

* Valid for (time frame) from date offer or email was sent.
* Not transferable
* Not redeemable for cash, other services, or products
* Not valid with any other offer i.e.: student etc.
* Must present email (or offer) to redeem.

### Welcome to (Salon Name) – New client:

(Put offer here)

* Valid for 6 weeks from date of first visit
* Not transferable
* Not redeemable for cash, other services, or products
* Not valid with any other offer i.e.: student etc.
* Must present email (or offer) to redeem.

### We Miss You:

(Put offer here) e.g., 20% off a visit etc.

* Not applicable for retail
* Valid for 1month from date email (or offer) was sent.
* Not transferable
* Not redeemable for cash, other services, or products
* Not valid with any other offer i.e.: student etc.
* Must present email (or offer) to redeem.

### Recommended a New Client:

(Put offer here)

* Valid for 1month from date email was sent.
* Not transferable
* Not redeemable for cash, other services, or products
* Not valid with any other offer i.e.: forum/student etc.
* Must present email to redeem.

Corporate Company Discounts - Partner companies you offer a discounted service to employees or members.

(Put your offer here)

* Not applicable to retail
* Must provide proof of employment.
* Employment must be current – must be checked each visit by phoning company.
* Not transferable
* Not redeemable for cash, other services, or products
* Not valid with any other offer i.e., student, birthday offers, etc.

### Students

* Discount that applies.
* Not valid after 5pm or on Saturday
* Not applicable on specified treatments
* Not transferable
* Not redeemable for cash, other services, or products
* Not valid with any other offer i.e., forum/we miss you etc.
* Must show current student ID.

Family and Friends: *(By Permission of the Salon Owner Only).*

* Not applicable to retail
* Not transferable
* Not redeemable for cash, other services, or products
* Not valid with any other offer i.e., student, birthday offers or discounts etc.

### Staff:

* Nominate what services/treatments and how frequently.
* XXX% off retail
* Valid for current staff only
* Not transferable
* Not redeemable for cash, other services, or products
* Not valid with any already discounted stock

### Bookings:

* Ask for name first - so you can check alerts/history.
* Ask what service they require – so you can search for appropriate time/therapist.
* Confirm contact numbers.
* Always identify whom you are booking – even if you have to ask them to repeat, spell or check by phone numbers – this saves incorrect bookings and a bigger problem later.

## Scripts:

### Answering a call:

“Hi, thank you for calling (Salon Name) This is (Your Name).”

### Taking a deposit:

For new clients: “To be able to process your appointment I will need to take a booking fee of ($XX AMOUNT), but this will come off your final account. The conditions are, if you No Show or Cancel within 24 hours of the appointment or are more than 15 minutes late you will lose your booking fee.”

* “How would you like to pay for that? (Amex, Visa, MasterCard)”
* Do transaction and process with day’s takings. Client’s receipt should be kept in a DESK DIARY on the DATE OF THEIR VISIT.
* “Tag” the new client’s app with “Booking Fee Taken”.

### For Serial No Shows:

The script should be the same, if they question the booking fee; your script is “As we have a history of No Show with you in order to process your app, I need to take a booking fee……”

* Tag a “No Show” Client with booking fee taken.