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QuickSale[®]

By Charge Anywhere[®]

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Salon Reservation System

User Manual

Version 1.0

Table of Contents

1. Getting Started - Enable Salon System
2. Technician Management
 - 2.1 Add Technician
 - 2.2 Edit Technician - Services
 - 2.3 Edit Technician - Commission Items
 - 2.4 Edit Technician - Schedule
 - 2.5 Technician Photo & Gender
 - 2.6 Reorder & Manage Technicians
3. Reservation Calendar
 - 3.1 Calendar Overview
 - 3.2 Create a Reservation
 - 3.3 Create a Walk-in
 - 3.4 Manage Reservation Status
 - 3.5 Edit / Move / Delete Reservation
 - 3.6 Group & Link Reservations
 - 3.7 Recurring Reservations
4. Salon Settings Reference
 - 4.1 Reservation Flow Settings
 - 4.2 Display & Visibility Settings
 - 4.3 Technician & Scheduling Settings
 - 4.4 Commission & Reports Settings
 - 4.5 Waiting List & Queue Settings
 - 4.6 SMS Notification Settings
 - 4.7 Custom Tags
 - 4.8 Appearance & Colors

1. Getting Started - Enable Salon System

Before using any salon features, you must turn on the master switch:

1. Go to Admin > Settings > Salon Setting
2. Turn on "Assign Salon Tech" — this is the master switch for the entire Salon Technician system
3. Click Save

Once enabled, you will see the Salon Reservation calendar and Technician Management options in your admin menu.

2. Technician Management

Navigate to Admin > Technician to manage your technicians. The page shows a summary at the top: Total technicians, Active count, and Inactive count.

2.1 Add Technician

4. Click the "Add Technician" button (top right)
5. A modal window will appear showing all available users (employees who are not yet assigned as technicians)
6. Use the search box to filter by name or username
7. Check the box next to one or more users you want to add
8. Click "ADD SELECTED"

 *Only existing system users can be added as technicians. Create the user account first if needed.*

2.2 Edit Technician - Services

After adding a technician, click the Edit (pencil) icon on their card. The edit page has three tabs. The first tab is Services.

Adding Services:

9. Click "Add Service" button
10. A modal shows all available services grouped by category
11. Use the search bar to filter, or check "select all" for an entire category



12. Check individual services as needed

13. Click "ADD SELECTED"

Configuring Each Service:

Field	Description
Price	Shown for reference (read-only, set in item management)
Duration	How many minutes the service takes (can differ per technician)
Commission Type	Choose: Percentage (%), Fixed (\$), or No Pay
Commission Value	The commission amount (hidden if "No Pay" is selected)

Batch Apply Commission:

Use the toolbar at the top to quickly apply the same commission type and value to multiple services at once. Select the type (% / \$ / No Pay), enter the value, and click Apply.

+ ADD SERVICE 13 services

Batch: % ▾ Value APPLY

2.3 Edit Technician - Commission Items

 *Prerequisite: The "Commission Item" setting must be enabled in Salon Settings.*

The second tab is Commission Items. These are special items (like product sales or tips) that:

- Have 0 minute duration — they don't take up time on the calendar
- Still count toward commission calculations

The interface is identical to the Services tab — add items, set commission type/value, and remove as needed.

2.4 Edit Technician - Schedule

The third tab is Schedule, where you set each technician's weekly working hours.



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Setting Individual Days:

For each day (Monday through Sunday):

- Set Start Time (dropdown, 30-minute intervals from 00:00 to 23:30)
- Set End Time (dropdown, same options)
- Check "Day Off" to mark the day as non-working

Batch Apply (Quick Setup):

14. Choose Start Time and End Time
15. Optionally check "Day Off"
16. Click individual day buttons (Mon–Sun), or use quick buttons: Weekdays (Mon–Fri), Weekend (Sat–Sun), All (all 7 days)
17. Click "Apply"

Apply to Multiple Days

START: 09:00 END: 18:00 ☐ Day Off

Apply to: Mon Tue Wed Thu Fri Sat Sun Weekdays Weekend All **APPLY**

Example: To set Mon–Fri 9:00 AM to 6:00 PM with weekends off:

18. Set Start = 09:00, End = 18:00, click Weekdays, click Apply
19. Check "Day Off", click Weekend, click Apply

 Click "Save" at the bottom after making any changes. If you navigate away with unsaved changes, a warning will prompt you to save or discard.

2.5 Technician Photo & Gender

Upload Photo:

On the Edit page, click the avatar/photo area at the top to upload a photo. The photo will be shown on the calendar and technician lists.

Set Gender:

 Prerequisite: Enable "Show Tech Gender" in Salon Settings.



- On the Edit page, choose None, Male (♂), or Female (♀)
- Gender icons will appear on the calendar next to the technician's name
- A gender filter becomes available on the calendar view

Avatar Color:

Choose a background color for the technician's initials avatar (used when no photo is uploaded).

2.6 Reorder & Manage Technicians

Action	How
Reorder	Drag the handle on the left side of each technician card to reorder them on the calendar
Toggle Status	Click the power icon to toggle between Active and Inactive. Inactive technicians do not appear on the calendar
Delete	Click the trash icon to remove a technician (soft delete)
Copy Services	Click the "Copy Services" button (top bar) to copy all service assignments from one technician to another

Batch Copy Services

Select a source technician, then choose one or more target technicians to copy services to. This will **replace all existing services** of the target technicians.

Copy: ☒ Services ☐ Schedule ☐ Items

3. Reservation Calendar

Navigate to Admin > Salon Reservation to access the calendar.

3.1 Calendar Overview

The calendar displays:

- Columns — One column per active technician (ordered by display order or clock-in time)
- Rows — Time slots based on your configured interval (default 15 minutes)
- Date Navigation — Switch between dates using arrows or date picker

Each reservation card shows:

- Customer name
- Service name(s)
- Time range
- Status (color-coded)
- Duration (if "Show Duration" is enabled)

3.2 Create a Reservation

Method 1 — Click on Calendar:

20. Click an empty time slot under a technician's column
21. A booking form appears (popup or side panel, depending on settings)
22. Fill in: Customer Name (required), Phone (required for Reservation), Email (if enabled),
Services, Date & Time
23. Click "Book" to create

Method 2 — Quick Book (if enabled):

24. If "Quick Book Type Step" is enabled, you first choose Walk-in or Reservation
25. Enter customer name and phone
26. Then select services

3.3 Create a Walk-in

Walk-ins are for customers who arrive without an appointment:

27. Create a reservation and set the type to Walk-in
28. If "Walk-in Auto Start" is enabled, the service starts immediately and a POS order is automatically created
29. If "Walk-in Phone Required" is enabled, phone number is mandatory even for walk-ins

3.4 Manage Reservation Status

Each reservation goes through a status lifecycle:

Pending → Confirmed → In Progress → Completed

Other statuses: Cancelled, No Show

To change status, click on a reservation card to open its details, then use the status buttons:

Button	Action
Confirm	Mark reservation as confirmed
Start	Begin the service (creates a POS order if configured)
Complete	Mark service as done
Cancel	Cancel the reservation
No Show	Mark customer as did not arrive



3.5 Edit / Move / Delete Reservation

Edit: Click on a reservation card, modify customer info, services, time, or technician, then click Save.

Move (Drag & Drop): Drag a reservation card to a different time slot or different technician column. The system will update the time and/or technician assignment automatically.

Delete: Click on a reservation card, click the Delete button, and confirm.

 *If "Allow Edit Completed" is enabled, you can edit completed reservations (limited to customer name/phone and same-price service swaps).*

3.6 Group & Link Reservations

Linking lets you associate multiple reservations together (e.g., a couple booking together):

- Select reservations and use the Link function
- Linked reservations can be viewed and managed together
- If "Link Auto Combine" is enabled, their POS orders are automatically combined
- To unlink, select a linked reservation and choose Unlink

3.7 Recurring Reservations

 *Prerequisite: Enable "Recurring Reservations" in Salon Settings. Only available for Reservation type (not Walk-in).*

When creating or editing a reservation:

30. Enable the Recurring option
31. Choose frequency: Weekly, Biweekly, or Monthly
32. Set the number of occurrences
33. The system creates multiple reservations at the specified intervals

4. Salon Settings Reference

Navigate to Admin > Settings > Salon Setting to configure all options below.

4.1 Reservation Flow Settings

Setting	Default	Description
Default Type: Reservation	OFF	When creating new bookings, default to Reservation instead of Walk-in
Walk-in Auto Start	OFF	Automatically start service and create a POS order for Walk-ins
Walk-in Phone Required	OFF	Require phone number for Walk-in bookings
Quick Book Type Step	OFF	Show a type selection step (Walk-in/Reservation) with name/phone input before choosing services
Service Menu Panel	OFF	Show services in a side panel instead of a popup when clicking a time slot
↳ Panel Direction	Left	Choose Left or Right for the side panel
↳ Simple Mode	OFF	Single-click to select and book immediately (one service at a time)
Show Email Field	OFF	Display email input field in the booking form
Recurring Reservations	OFF	Allow creating repeating reservations (weekly/biweekly/monthly)
Link Auto Combine	OFF	Automatically combine POS orders when reservations are linked
Disable Combine on Combine Pay	OFF	Hide the combine button during combine pay to prevent

		accidental merging
Time Slot Interval	15 min	Calendar grid interval: 5, 10, 15, 20, or 30 minutes

4.2 Display & Visibility Settings

Setting	Default	Description
Show Service Duration	OFF	Display duration (e.g., "60 min") on calendar reservation cards
Hide Completed Orders	OFF	Hide completed reservations from the calendar
Hide Cancelled Orders	OFF	Hide cancelled reservations from the calendar
Allow Edit Completed Order	OFF	Allow editing completed reservations (name, phone, same-price service swap only)
Show Tech Gender	OFF	Display gender icons on calendar headers and enable gender filter

4.3 Technician & Scheduling Settings

Setting	Default	Description
Sort by Clockin Order	OFF	Sort technician columns by clock-in time instead of display order
^L Disable Unclockin Techs	OFF	Show technicians who haven't clocked in as disabled (like Day Off). Requires "Sort by Clockin Order" ON

4.4 Commission & Reports Settings

Setting	Default	Description
Turn Tool	OFF	Show Turn Tool button — grid view of each technician's reservations with status/bonus indicators
Job Rotation Amount	(empty)	Dollar amount for Turn calculation (e.g., 50, 75, 100). Leave empty to disable
Bonus Limit	(empty)	Order amount threshold for Turn Tool bonus indicator. Leave empty to disable
Commission Report	OFF	Show commission report button and commission info in the side panel
Commission Item	OFF	Enable commission items for technicians — 0 min duration, don't occupy calendar time

4.5 Waiting List & Queue Settings

Setting	Default	Description
Waiting List	OFF	Enable check-in-only feature. Customers check in first, staff assigns service later
Waiting Queue Display	OFF	Show queue position information to customers after they check in
^L SMS Queue Notification	OFF	Send SMS with queue position. Requires "Waiting Queue Display" and "SMS Notifications"

		both ON
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4.6 SMS Notification Settings

Enable "SMS Notifications" to activate SMS features. Once enabled, you can configure 8 SMS templates:

Template	When It Sends
Appointment Created	When a new reservation is booked
Appointment Confirmed	When a reservation status changes to Confirmed
Reminder (24h)	24 hours before the appointment
Reminder (2h)	2 hours before the appointment
Rescheduled	When the appointment date/time is changed
Cancelled	When the appointment is cancelled
Completed	When the service is marked as completed
No Show	When marked as no-show

Available template tags:

Tag	Replaced With
{Client Name}	Customer's name
{Store Name}	Your store name
{Date}	Appointment date
{Time}	Appointment time
{Technician}	Assigned technician's name

Character Limits: Standard characters (English): 160 chars/SMS. Unicode characters (Chinese, emoji): 70 chars/SMS.

4.7 Custom Tags

Custom tags let you add quick labels to customer profiles for notes and categorization.

Setup:

34. Enable "Custom Tags" in Salon Settings
35. Click "Add Tag"
36. Enter a Tag Name (e.g., "VIP", "Allergy", "Birthday")
37. Choose an Icon from 16 available options (star, cake, warning, loyalty, etc.)
38. Click Save

Usage:

- When viewing or editing a reservation, you can add tags to the customer
- Tags appear on the customer's profile and reservation details
- You can see usage counts for each tag and delete unused tags

4.8 Appearance & Colors

Theme Color:

Choose the overall color theme for the reservation system. Preset options: Blue Grey (default), Blue, Purple, Red, Green, Orange. Or set a custom color using the color picker.

Calendar Background:

Choose the calendar background color. Preset options: White (default), Light Grey, Blue Grey, Light Green, Light Blue, Light Pink, Light Yellow, Light Purple.

Status Colors:

Customize the color for each reservation status:

Status	Default Color
Pending	Orange (#FF9800)
Confirmed	Teal (#00897B)
In Progress	Blue (#1E88E5)

Completed	Green (#4CAF50)
Cancelled	Grey (#9E9E9E)
No Show	Purple (#9C27B0)

Category Colors:

- Enable "Category Colors" to color reservation cards by their service category instead of status.
- Assign a custom color to each service category.
- Set "No color" for categories that should use the default status coloring.

Quick Start Checklist

Follow these steps to get your salon reservation system running:

- ☐ **Step 1:** Enable "Assign Salon Tech" in Salon Settings
- ☐ **Step 2:** Add technicians from your existing user list
- ☐ **Step 3:** For each technician, assign their services and set durations/commissions
- ☐ **Step 4:** Set each technician's weekly schedule (working hours and days off)
- ☐ **Step 5:** Configure your preferred Time Slot Interval (5/10/15/20/30 min)
- ☐ **Step 6:** Customize appearance (theme color, status colors) if desired
- ☐ **Step 7:** Enable optional features as needed (SMS, Waiting List, Commission Report, etc.)
- ☐ **Step 8:** Start booking reservations on the calendar!