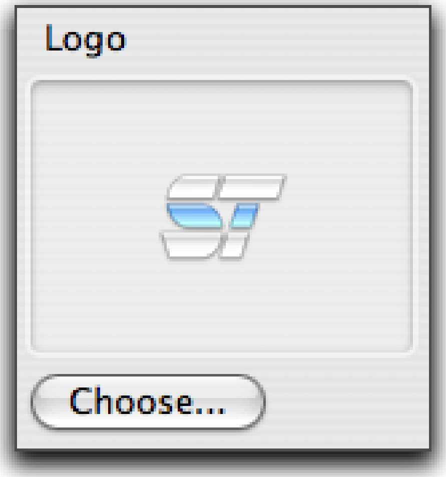
General Setup

General Setup: Company Info

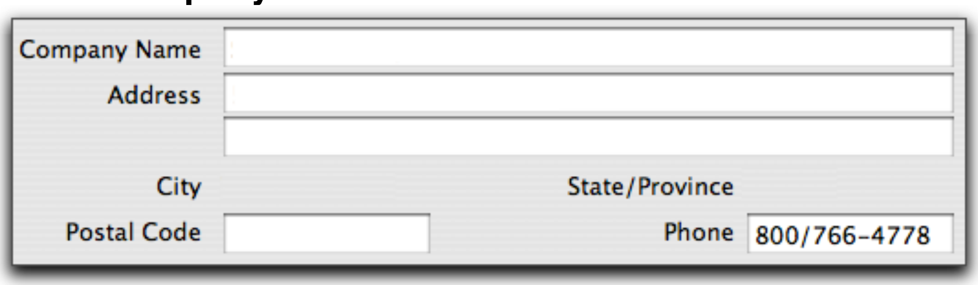
Company Logo



This logo will appear at the top of the first page of all reports. If you wish to use your own log, it must be an image of type bmp, gif, jpeg, png, ico, or tiff and should be approximately .67 inch x .67 inch square.

You may drag and drop your logo image over the ST logo, or click on the **Choose** button and use the open file sheet to find the image. Click the **Save** icon to save your logo.

Basic Company Information



Company Name
Enter the name of your company.

Address
Enter the address of your company. Please note there are 2 lines provided for the address. You may enter apartment or suite numbers on the 2^{nd} line, or leave it blank. **DO NOT** enter the city, state and postal code on this line.

Postal Code

Enter the postal code of your company. The city and state/province will appear when you tab out of this field. If you have multiple cities for this postal code, the postal code selection window will appear for you to choose the city. Choose the city and click **OK**.

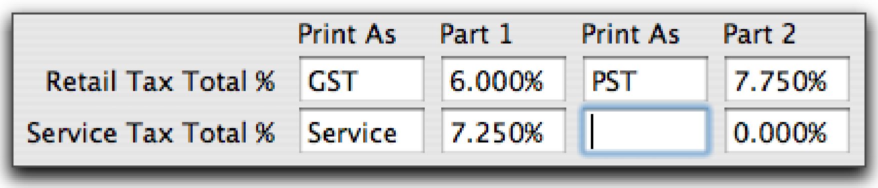
Phone

Enter the phone number of your company. Enter all 10 digits (area code + number) without any slashes or dashes. The program will enter those in the appropriate places for you once you tab out of this field.

Tax

Enter the tax number assigned by your state or province that applies to the sale of products and/or services.

Tax Names and Amounts



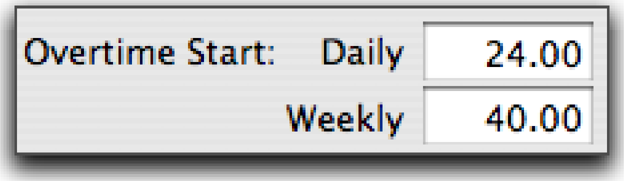
Retail Tax Total %

You may specify 2 separate retail taxes. Enter the tax descriptions in the **Print As** columns and the percentages that apply to the sale of products in the **Part 1** and **Part 2** columns. Each of these percentages may be the sum of tax rates from various government bodies. Example: 6% + 1.25% = 7.25%, which is entered as 7.25 and displayed as 7.250%.

Service Tax Total %

You may specify 2 separate service taxes. Enter the tax descriptions in the **Print As** columns and the percentages that apply to the sale of services in the **Part 1** and **Part 2** columns. Each of these percentages may be the sum of tax rates from various government bodies. Example: 6% + 1.00% = 7.00%, which is entered as 7.00 and displayed as 7.000%.

Overtime



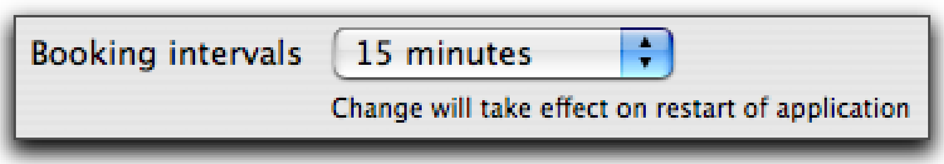
Start: Daily

Enter the number of hours in which you pay overtime on a daily basis. Enter 24 if you do not pay overtime on a daily basis. Example: If you enter 8 in this field, an employee working 10 hours on a particular day will get 2 hours of overtime, even if that is the only day they work during the pay period. NOTE: Leaving this field blank will cause all hours worked to be overtime. If you have “nothing” in the field, then anything worked over “nothing” will be considered overtime.

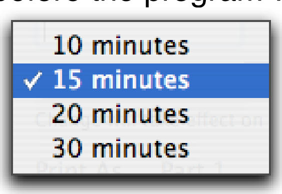
Start: Weekly

Enter the number of hours in which you pay overtime on a weekly basis. Enter 168 if you do not pay overtime on a weekly basis. Example: If you enter 40 in this field, an employee working 42 hours in any one pay week will get 2 hours of overtime for the pay period. A pay week is 7 days and each 7 days thereafter. This 7-day period begins on a Sunday and ends on a Saturday. If you pay weekly overtime, you must be sure your pay period will meet this criteria.

Booking Intervals



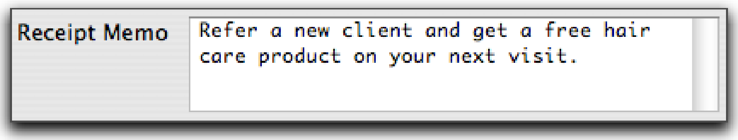
Using the popup menu, you can choose between 10, 15, 20, and 30 minutes. If you decide to change the amount showing, you must quit STX and re-launch before the program will detect that you have made that change.



Booking Intervals is how the Appointment Calendar will be laid out for you on the time grid. If, for example, you have it set to be on the 20 minutes, the Appointment Calendar time grid will show 8:00, 8:20, 8:40, 9:00, and so on. Each time grid will be on the 20 minutes.

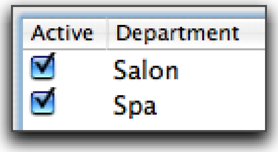
A standard appointment book is usually broken down into 15 minute intervals. However, STX allows you to customize the time intervals. Whatever you choose to set this to, you must make sure your service times can be divisible by that number. For example, if you have this set to 20 minutes, your service times must be divisible by 20 and should be set for 20, 40, 60, 80, etc. minutes. A service set to take 45 minutes will not look right on the appointment book if the **Booking intervals** is set to 20 minutes, because 45 is not divisible by 20.

Receipt Memo



Enter the text you would like to appear at the bottom of the client receipt that is generated when the client checks out and pays. You may change this text as often as you desire. Consider marketing ideas for this message.

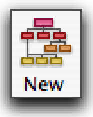
General Setup: Departments



Purpose

Departments may be used to segment your business for accounting, booking, client mailings, marketing, payroll and reports. You must create at least one department.

Adding a Department



Click on this icon in the toolbar. Enter the name of the department and click on the **Save** icon. **Note: Department names must be unique**.

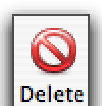
Changing a Department

Double-click a department name and make changes using standard text editing techniques. Once your changes are complete, click the **Save** icon to save the changes.

Making a Department Active/Inactive

Click to check or uncheck the **Active** checkbox in front of the department's name and click the **Save** icon. Unchecked departments will only appear in the department list when the **Show Inactive** checkbox is checked.

Removing a Department



Highlight a department you wish to remove and click the **Delete** icon in the toolbar. Click the **Save** icon to save the changes. Note: You may not delete a department that is currently being used by data. Make the department **Inactive** as an alternative.

Rearranging Departments

Click on a department name, hold down the mouse button and drag the department to a new position in the list. This order is used when displaying departments and determines the printing order in reports.

General Setup: Gift Certificate Templates

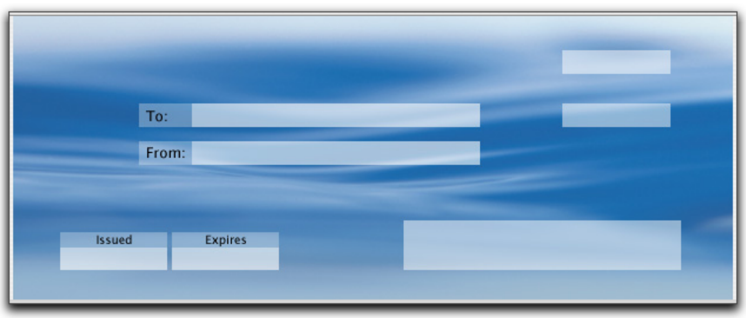
Purpose

Gift Certificate templates are created to allow you to print your own gift certificates. You may choose a template to print when you sell a gift certificate in client visits.

Template Background Images

Background images may be bmp, gif, jpeg, png, ico or tiff image types. You can create them using a variety of available image editors for Mac OS X.

Keep in mind that your image size determines your gift certificate size. If you wish to print stubs along with your gift certificates, the image must include enough space to allow for the stubs.

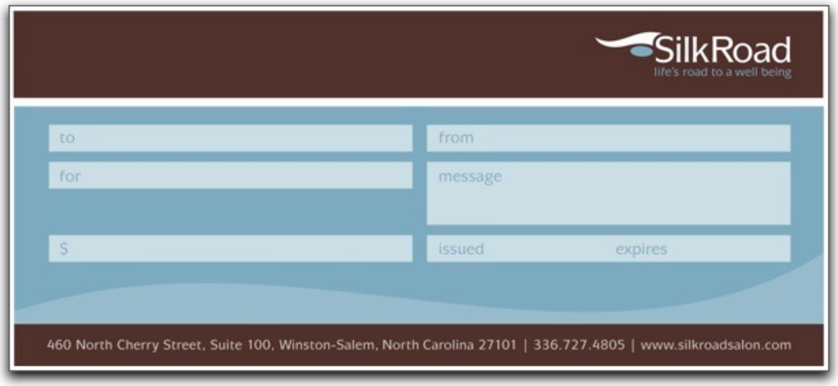


If you wish to have field labels appear on your gift certificate, you will need to add and position those on your background image. You will only be able to enter ***Data Fields*** on the template. Without a label, you may not know what each field means when the gift certificate is printed. The above image has the labels as a part of the background.

Any custom gift certificate should use an image dimension that is within 612x261 pixels (8.5 x 4 inches) so that it will display and print correctly. If an existing certificate has an image that exceeds these limits, it will be necessary to create a new template in STX with a resized version of the image. It is a good idea to have a background image that includes your name and address or your company logo so the receiver of the gift certificate will know where it came from and where it can be used.

You can create a gift certificate background image in any graphic or drawing application. If you are using Microsoft Word to create the background image, you can take a screen shot of the final image by using the keyboard command of Command (Apple) - Shift - 4. Once the screen shot is taken, it will be named Picture #.png on your desktop, so be sure to rename it something appropriate for future use. Screen shots are automatically formatted in the necessary RGB format. NOTE: If you find you need help creating the background images, please contact the manufacturer of the program you are using.

A note about creating a background image for the gift certificate template: STX allows you to add different fields to the template. There are 2 examples of gift certificate images below. Remember, these are just the background images before they are imported into STX and before the fields are actually added.



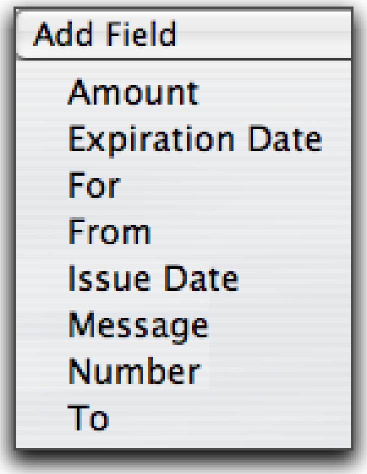
Notice how it has the "to", "for", "from" etc. words in a lighter color. That is actually part of the image before it was brought into STX. Once it is in STX, then the appropriate fields are added to the corresponding "field labels".

Here is another template used by Innovations Salon & Day Spa in New York. The picture of the house is actually the building the salon/spa is in.

Adding a Gift Certificate Template

Click on this icon in the toolbar and use the open file sheet to find the location of your image. Enter the name of the template and click the **Save** icon to save the new template. **Note: Template names must be unique.**

Adding Fields and Images to a Template



Click on the **Add Field** popup menu to reveal the field list. Click on the field you wish to add and the field will appear on the template. You may move and/or resize the field to fit your needs. You may also format the text using the **Format** menu, located in the main menu bar. Repeat this procedure for each field you wish to add to the template.

If you wish to print a stub, you will have to add most fields twice, one for the gift certificate and the other for the stub. When you are finished adding fields, click the **Save** icon to save the changes.

You may also drag and drop images of types bmp, gif, jpeg, png, ico or tiff onto your gift certificate template. When you are finished adding images, click the **Save** icon to save the changes.

Changing a Gift Certificate Template

Double-click a template name to change the name using standard text editing techniques**.** You may also format the text in the text fields by using the **Format** menu located in the main menu bar. Click the **Save** icon when you have completed your changes.

Making a Gift Certificate Template Active/Inactive

Click to check or uncheck the **Active** checkbox in front of the template's name. Click the **Save** icon to save the changes. Unchecked templates will only appear in the template list when the **Show Inactive** checkbox is checked.

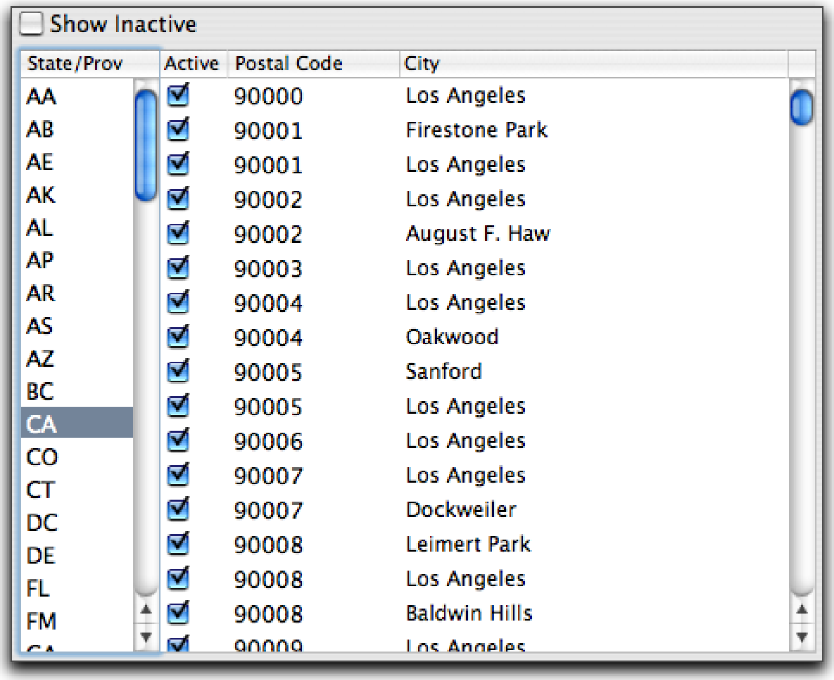
Removing a Template

Highlight the template you wish to remove and click the **Delete** icon in the toolbar. Click the **Save** icon to save the changes. Note: You may not delete a template that is currently being used by data. Make the template inactive as an alternative.

Sorting Gift Certificate Templates

You may sort your template list by clicking on the **Active** or **Template** headers using standard sorting techniques.

General Setup: Postal Codes



Purpose

Postal Codes save time by automatically entering the city and state/province wherever you enter an address in STX. **Postal Codes** for the United States and Canada have been pre-loaded into the database for you.

Adding a Postal Code

Highlight a **State/Province** and click the **New** icon in the toolbar. Enter the new Postal Code, press tab, enter the City name, and click the **Save** icon to save the new Postal Code. **Note: You may enter multiple cities for any single Postal Code**.

Changing a Postal Code

Double-click on a **Postal Code** or **City** and make the changes necessary by using standard text editing techniques. Once your changes are complete, click the **Save** icon to save the changes.

Making a Postal Code Active/Inactive

Click to check or uncheck the **Active** checkbox in front of the **Postal Code** and click the **Save** icon. Unchecked postal codes will only appear in the **Postal Code** list when the **Show Inactive** checkbox is checked.

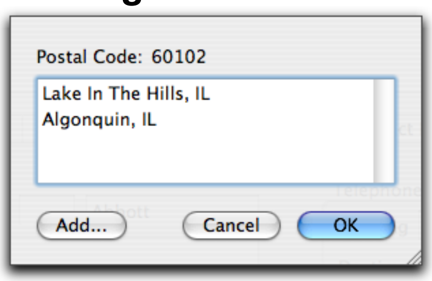
Removing a Postal Code

Highlight the **Postal Code** you wish to remove and click the **Delete** icon in the toolbar. Click the **Save** icon to save the changes. Note: You may not delete a **Postal Code** that is currently being used by any data. Make the **Postal Code** inactive as an alternative.

Sorting Postal Codes

You may sort your **Postal Codes** list by clicking on the **Active**, **Postal Code**, or **City** headers using standard sorting techniques.

Working with Postal Codes



This window will appear if you enter a **Postal Code** with multiple cities in an address. Select the correct city and click **OK**. If you made an error or your city is not listed, click on **Cancel.** If you wish to add an additional city to a **Postal Code**, see Adding a Postal Code.

General Setup: Company Hours

Purpose

Company Hours control the starting and ending times in the appointment book and enforce the times that the Appointment Builder will return as available for booking. The appointment book will display columns from one hour before the open time to one hour past the close time. Individual employee hours will override these times if they start before the company opens or end after the company closes. However, the Appointment Builder will not return any available times outside the range of the Company Hours.

Regular Hours

Regular Hours

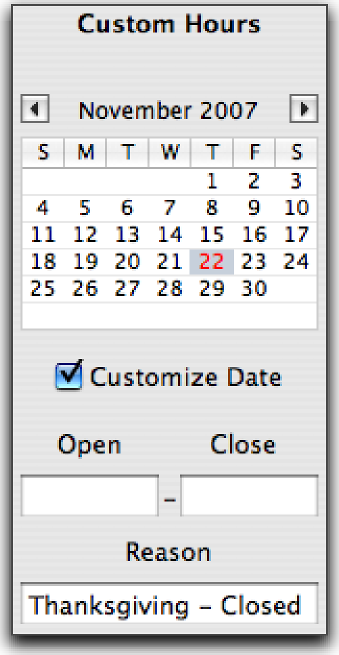
	Open		Close
Sun:	9:00 AM	–	8:00 PM
Mon:	9:00 AM	–	8:00 PM
Tue:	9:00 AM	–	8:00 PM
Wed:	9:00 AM	–	8:00 PM
Thu:	9:00 AM	–	8:00 PM
Fri:	9:00 AM	–	8:00 PM
Sat:	9:00 AM	–	8:00 PM

Enter the **Open** and **Close** times for each day you are open during a normal week. Leave the times blank on the days you are closed. These times are when your doors are unlocked for business. When you are finished, click the **Save** icon to save the changes.

Options for Entering Times

8:15 AM:	815	815a	8:15	8:15a	0815
9:00 AM:	9	9a	9:00	9:00a	0900
Noon:	12	12p	12:00	12:00p	1200
3:00 PM:		3p		3:00p	1500
6:45 PM:		645p		6:45p	1845
Midnight:	0	12a		12:00a	

Customizing Company Hours



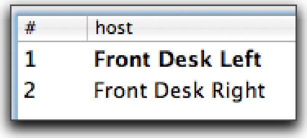
Once you have entered the **Regular Hours**, they will apply to any days that are not customized. You may customize a day by highlighting the day on the calendar and checking the **Customize Date** checkbox. **Note: This checkbox will not be active for the current or past dates.**

Enter the new **Open** and **Close** times, or clear the times that appear if you will be closed. Optionally, you may enter the reason for changing the hours. **Note: This reason will not appear on the appointment calendar**. Click the **Save** icon to save the changes.

Changing Company Hours

If you are going to change the company business hours at some point in the future, you should customize each day up to the date of when the change takes effect. For instance, starting after the first of next year, the hours the company will be open are going to change. Go ahead and change the **Regular Hours** to reflect the change, but also customize each date between "now" and when the change will take effect. Click the **Save** icon to save the changes.

General Setup: Cash Drawers



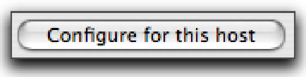
Purpose

You need to define a separate **Cash Drawer** for each computer that will be recording transactions in order to close the drawer with the *Cash Counting* sheet. These cash drawers do not have to be real, physical drawers. They can be virtual drawers, but each computer recording transactions must have a drawer configured.

Adding a Cash Drawer

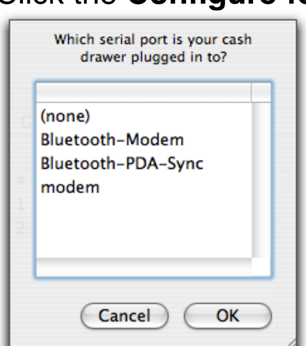
Click this icon in the toolbar. Optionally, enter a descriptive name in the **Host** column and press the *Tab* key on the keyboard.

Configuring a Cash Drawer



Highlight the name of the drawer you wish to configure for the computer you are currently working on. Note: You must configure the appropriate drawer while on the appropriate computer. For instance, if you are going to configure the **Cash Drawer** for the Front Desk Right computer, you MUST be on the Front Desk Right computer when configuring the drawer.

Click the **Configure for this host** button. The following sheet will appear.



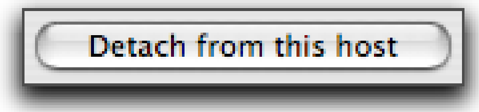
Select which port, if any, that connects the **Cash Drawer** to the computer and click the **OK** button.

If you have a USB **Cash Drawer** connected to the computer, you will see a USB option listed. Choose the USB option and click the **OK** button.

If you do not have a physical **Cash Drawer** connected, but you are setting up for a *Virtual Cash Drawer*, click the **(none)** option and click the **OK** button.

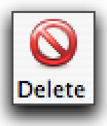
Click the **Save** icon to save the changes.

Detaching a Cash Drawer



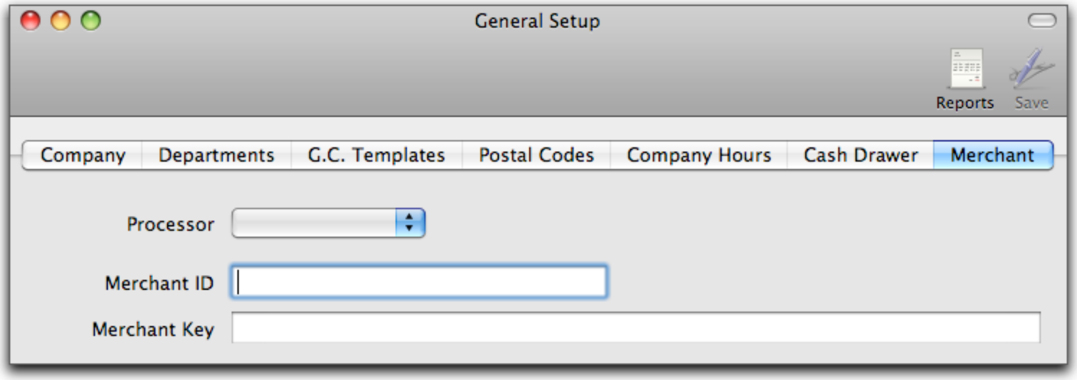
Click the **Detach from this host** button and click on the **Save** icon to save the changes.

Removing a Cash Drawer



Highlight the **Cash Drawer** you wish to remove and click the **Delete** button in the toolbar. Click the **Save** icon to save the changes. Note: You may not delete a **Cash Drawer** that is currently being used by data. Detach the **Cash Drawer** from the corresponding computer as an alternative.

General Setup: Merchant

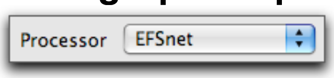


Purpose

STX processes credit cards directly through the program with the help of a high-speed Internet connection. You must have a merchant account with First Data (EFSnet) and also purchased the credit card processing module before you will be allowed to process credit cards electronically through STX.

For information on obtaining credit card processing information, or for an application form to open a new merchant account, please contact our Sales team at 800.766.4778 or by emailing sales@STXSoftware.com.

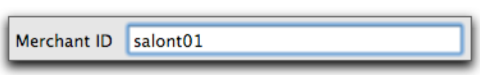
Setting Up Company Merchant Account Information



Set the **Processor** popup menu to **EFSnet**. Leave this screen open and go to the email from First Data with your new account information.

NOTE: The information in the below screens are for a TEST account and in no way reflect your company merchant information. The TEST information is used to show how the formatting of the information will be similar to your own merchant information.

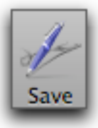
Highlight the **Store ID** from the email and go to the *Edit* menu to select the **Copy** option.



In STX, click inside the **Merchant ID** field and go to the *Edit* menu to select the **Paste** option. This will place the Store ID information into the Merchant ID field in STX.

Go back to the email from First Data. Highlight the **Store Key** from the email and go to the *Edit* menu to select the **Copy** option.

In STX, click inside the **Merchant Key** field and go to the *Edit* menu to select the **Paste** option. This will place the Store Key information into the Merchant Key field in STX, but it will display as a string of bullet points instead of the string of numbers and letters as shown on the First Data email.



Click **Save** to save the merchant account information.

General Setup: Change Owner Password

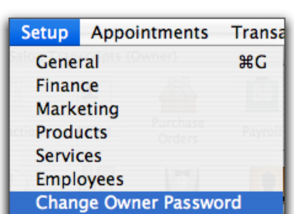
Important Notes

You must change your owner's password immediately after your first login to STX to prevent other people from logging in and accessing all parts of your program.

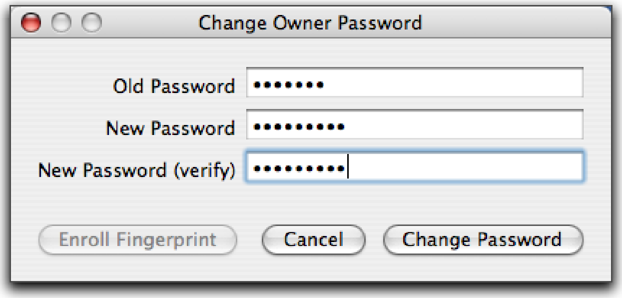
It is very important that no one other than the owner know the owner's password. Another person could login with and change the owner's password, thereby locking the real owner out of the program. If you suspect that another person knows your password, change it immediately.

Passwords should not be easily guessed. Do not use family names, birthdays, tax numbers, etc. The best passwords are a combination of letters and numbers and should be at least 6 characters long.

Change Owner Password



To change your Owner password, either click the **Password** icon in the **Setup** toolbar, or pull down the **Setup** menu and select **Change Owner Password**.



Enter the **Old Password**, enter the **New Password**, then enter the **New Password (verify)** to verify the change.

Click the **Change Password** button to make the change. Click **Cancel** to abort the change.

If you have purchased the *Biometric Security* module, click **Enroll Fingerprint** to gain owner access through the touch of a finger.

Please contact your Sales Account Manager at 800.766.4778 for more information regarding the *Biometric Security* module and how it relates to STX.