SunLync Implementation Guide

The purpose of this guide is to set expectations and outline the steps required to successfully implement the SunLync software. During implementation, it is imperative that this project plan be followed. Doing so will help to ensure that the software is installed correctly, data is converted properly (if required), training is adequate, and that the final transition to go live is a success. It is our goal to make the transition as smooth as possible for you, your employees, and your customers. The entire SunLync team looks forward to working with you!

Toll Free: 866-SUNLYNC
http://www.sunlync.com
sales@sunlync.com
support@sunlync.com

Step 1 – Initiating / Planning

SunLync's Responsibility:

1. Kick off call between customer and SunLync.
   a. Review implementation process (including Implementation Guide and Technical Guide).
   b. Initial EFT discussion and PCI Compliance Review.
   c. Schedule training sessions and go-live date.
   d. If a data conversion is necessary, what data formats client can provide database in and if there is a cost for client to get backup.
   e. Discuss having a backup/disaster recovery process in place.
   f. Discuss having a test environment in place.

Customer's Responsibility:

1. Purchase, install and test hardware (*server*, *workstations* and *peripherals*, receipt printers, report printers, cash drawers, etc.). Please reference the Technical Guide for minimum requirements and compatibility.
2. Computer with SunLync installed with internet access for training sessions.
3. Create and maintain a backup process for all SunLync related data and files.
4. Create and maintain a test environment to help with training new hires, testing configuration changes to SunLync and new versions prior to releasing to your stores.

PCI Compliance and Tokenization

SunLync recommends that your business use tokens with your payment provider to store card data to keep your business PCI compliant. Tokenization is the process of exchanging credit card data for a secure token. This will reduce your PCI compliance scope and provide another level of security for the sensitive card data. Storing credit card data without tokens, even encrypted, jeopardizes your business if a data breach occurs.

Credit Card Processors that are integrated with SunLync that offer tokenization.

- Global Payments Integrated (formerly Cayan) (Genius Solution) – Direct integration with SunLync - Call 800-774-6462 (Option 1) Web: https://www.globalpaymentsintegrated.com/ (Genius Device Required for Compliance)

- SlimCD – Direct integration with SunLync – Call (877) 475-4623 Web: http://www.slimcd.com (card reader (not the mobile reader) from SlimCD required for compliance: https://slimcd.com/hardware/)

Step 2 – Installation

SunLync's Responsibility

1. Install the SunLync database.

Customer's Responsibility

1. Download and Install SunLync and Crystal Reports
2. Install MySQL

Step 3 – Training Session #1 (Employees, Equipment & Inventory)

SunLync's Responsibility

1. Provide training on Users, Equipment, and Inventory.

Session 1 - Training
Log In
▪ Initial Set-Up Log In (Log in as Setup User)
Employees
▪ Insert an Employee
- Demographics Tab
- Store Affiliation Tab
Create New Store
▪ Run New Store Guide if multi-salon operation
Equipment
▪ Manufacturers
- Insert, Edit, and Delete a Manufacturer
▪ Equipment Categories
- Insert Equipment Categories
▪ Equipment Control
- Insert an Equipment Type and Walk-In Pricing
▪ Store Equipment
- Insert Equipment Records
▪ Repairs/Maintenance
- Insert Repair/Maintenance Records
▪ Floor Plan Design
- Select Room Number
- Associate Available Equipment
- Verify Timer Address Matches Room Number
Inventory
▪ Suppliers
- Insert, Edit, and Delete a Supplier
▪ Retail Categories
- Insert, Edit, and Delete a Retail Category
- Insert Retail Category Discounts
- Configure Bundle Discounts
- Configure E-Lync Reorder Recipients
▪ Inventory Maintenance (Inventory Control)
- Insert a Product

- Create Product Pricing, Commission, Discounts, Sales Tax, and Add-On Bundle Categories
▪ Inventory Maintenance (Store Inventory)
- Insert Reorder Point
- Insert Reorder Quantity
- Explanation of Purchase Orders (Creating, Printing, and Receiving Purchase Orders)

Customer's Responsibility

1. Complete configuring Users, Equipment, and Inventory.

Session 1 - Configuration
Configuration of Employees (Demographics Tab and Store Affiliation Tab only)
Configuration of Equipment and Floor Plan(s)
Configuration of Inventory Types

Step 4 – Training Session #2 (Parameters)

SunLync's Responsibility

1. Provide training on Parameters.

Session 2 - Training
Parameters
▪ Store Parameters
- Demographics Tab
- Point of Sale Tab
- Commissions
- Discounts
- Refunds
- Tanning
- Tax
- Receipts
- Customer
- Reports
- Security
- E-Lync
- Documents
- Peripherals
- Inventory
- Regulations

- Tanning
- Waiver
- Biometrics
- Gift Certificates/Cards
- Offline Utility
- EFT
- Credit Card Processing
- Points/Credits
- Employees
- Account Ledger
- Appointments
▪ Payment Types
▪ Skin Types
▪ Reasons
▪ Appointment Types
▪ Points/Credit Settings
▪ SunLync Desktop Settings
▪ Customer Issues Settings
▪ Management Report Settings
▪ New Store Guide
▪ Required Fields
▪ Auto-populate City/State
▪ POS Sort Options
▪ Documents
- Back Office / Configuration of Documents
▪ Email and Texting
- Configure E-mail setting
- Configure Employee Alerts
- Configure EFT Rejections
- Configure Integrated Marketing (optional)
▪ Genius Payment Types (if applicable)
- Configure Point of Sale payment types
- Configure EFT payment types
▪ Info Portal Management
- Review use of Info Portal Management and Controller Info
▪ Install / Start SunLync Mail Service

Customer's Responsibility:

1. Complete configuring Parameters.

Session 2 - Configuration
Configuration of Store Parameters for all stores
Configuration of Reason Codes
Configuration of Appointment Types

Configuration of Auto Populate City/State

Step 5 – Training Session #3 (Packages and Non-EFT Memberships)

SunLync's Responsibility:

1. Provide training on Promotions Part 1

Session 3 - Training
Package Categories
- Insert a Package Category
- Check-In Required Option
Packages
- Insert a Package (Session, Minute, or Credit Units)
- Package Retail Discounts
- Insert Package Rules
- Associate Equipment with Package
- Create Merge Options for Packages
- Affiliate Package with a Store
Points Package
- Insert a Points Package
Membership Categories
- Insert a Membership Category
- Check-In Required Option
Non-EFT Membership
- Insert a Non- EFT Membership
- Membership Upgrades/Downgrades
- Membership Retail Discounts
- Insert Membership Rules
- Associate Equipment with Membership
- Affiliate Membership with Stores

Customer's Responsibility:

1. Complete configuring Promotions Part 1.

Session 3 - Configuration
Configuration of Packages
Configuration of Non-EFT Memberships

Step 6 – Training Session #4 (EFT Memberships, Combos, Promotions, Gift Certificate Maintenance, Custom Services)

SunLync's Responsibility:

1. Provide training on Promotions Part 2

Session 4 - Training
EFT Setup
▪ EFT Setup
- Configure EFT Parameters
▪ EFT Providers
- Insert Provider(s)
▪ EFT Draw Days
- Insert Draw Day(s)
▪ Deductions
- Configure Deduction Types
EFT Membership
- Insert an EFT Membership
- Membership Upgrades/Downgrades
- EFT Information Tab
- EFT Information (Page 2) Tab
- EFT Information (Page 3) Tab
- Freeze Fees Exemption from Tax
- EFT Contract Tab
- Store Affiliation Tab
Combos
- Insert, Build and Attach a Combination
Promotions
- Insert Promotion(s)
Gift Certificate Maintenance
- Overview of Gift Certificate Maintenance
- Optional SlimCD Electronic Gift Card set up
Custom Services
- Insert Custom Service(s)

Customer's Responsibility:

1. Complete configuring Promotions Part 2.

Session 4 - Configuration
Configuration of EFT memberships, if applicable
Configuration of Combos

Configuration of Promotions
Configuration of Custom Services

Step 7 – Test Data Conversion (if applicable)

Standard Information Converted

- Customer Demographics
  - o Name
  - o Address
  - o Skin Type
  - o Gender
  - o Email
  - o Lead information
  - o Notes
- Transaction History
  - o Products and Services Purchased
  - o Tanning History
- Account Ledger Balance (including prepays)
- Reward units (ex. Points or Bonus Bucks)
- EFT Information
- Active Services
  - o Mapping of packages and memberships to those services configured in SunLync Select

Depending on the software type being converted and the features used. Not all the above-listed information will be available. Any other information that is requested to be converted into SunLync Select will be considered a non-standard conversion. Quotations for custom work will be provided upon request.

Please note that encrypted data cannot be converted.

SunLync's Responsibility:

1. Schedule data retrieval of both the current software and the newly created SunLync database.
2. Create and send Service Mapping Forms.
3. Review how to complete Service Mapping Forms and provide instructional documentation.
4. Run test conversion.
5. Verify test conversion.

Customer's Responsibility:

1. Provide data from current software and access to SunLync database.
2. Complete and return Services Mapping Form.

Step 8 – Training Session #5 and Data Conversion Verification (if applicable)

SunLync's Responsibility:

1. Provide training POS Part 1.
2. Create test database for POS training and data conversion verification (if applicable).
3. Provide test conversion verification check list.

Session 5 – Training
Point Of Sale
▪ Create Training Database
▪ Connect to Training Database
▪ Open T-server and Explanation of Functionality
▪ Log In/Log Out
▪ Clock In/Clock Out
▪ Unlocking POS – Cashier Session
▪ Customer Search
▪ Customer Insert
▪ Tan on a Walk-In Tan
- Tan Button (Regulated Tan)
- Other Tan Button (Un-regulated Tan)
▪ Check-In on a Membership
▪ Check-In on a Package
▪ Selling a Product
- Products Button
- Product Scan Button
- Change Quantity Button
▪ Selling a Package
▪ Selling a Membership (Non-EFT Membership)
▪ Selling a Membership (EFT Membership)
▪ Selling a Points Package (if applicable)
▪ Selling an Upgrade to a Package or Membership
- Upgrade Button
▪ Giving a Courtesy Tan
▪ Selling a Gift Certificate
▪ Using the Remove Item Button
▪ Applying a POS Discount
▪ Pay On Account
▪ Process the Sale
- Make Payment Button
▪ Store Credit
▪ Refund a Sale
▪ Void a Sale

▪ Pay Outs
▪ Open Cash Drawer
▪ Modify a Tan Session
▪ Floor Plan/Room Detail Screen
▪ Tan Line (designed to be used on one workstation only)
▪ Room List
▪ Tanning & Sales History
▪ Memberships Tab
▪ Packages Tab
▪ Courtesy Tans Tab
▪ Comments Tab
▪ Docs Tab
▪ Update Button
- Demographics Tab
- EFT Information Tab
- Packages/Memberships Tab
- Customer History Tab
- Account Ledger Tab
- Comments Tab
- Documents Tab
- Promotions Tab
- AAC Payments Tab (if applicable)
▪ POS Activity History
▪ Customer Messages
▪ Suspend/Recall

Customer's Responsibility:

1. Keep a running list of configuration items that need to be adjusted in the "live" SunLync database.
2. Verify accuracy of test conversion (if applicable) using test conversion check list and practice POS functionality.

Session 5 – Validate
Verify accuracy of test conversion (if applicable)
Practice using Point of Sale

Step 9 – Training Session #6 and Data Conversion Verification (if applicable)

SunLync's Responsibility:

1. Provide training on POS.

Session 6 – Training
Point Of Sale
▪ Modify Receipts Option
▪ History Mode
▪ Count/Drop Process
- Daily Drawer Figures
▪ Reports
▪ Help
- SunLync Help
- Remote Connection
- About...
▪ E-Lync
▪ Employee Security
- Review of Employee Security Templates
▪ Timecards
- Time Card Adjustment
- Time Card Approval
- Employee Hours Report
▪ Documents
- POS / Documents
▪ Biometrics (if applicable)
- Back Office / Configuration of Customer and Employee
▪ SunLync Desktop
- POS / SunLync Desktop
▪ Connect to SunLync Database

Customer's Responsibility:

1. Keep a running list of configuration items that need to be adjusted in the SunLync.
2. Verify accuracy of test conversion (if applicable) using test conversion checklist and practice POS functionality.

Session 6 – Validate
Verify accuracy of test conversion (if applicable)
Practice using Point of Sale
Adjust Security Templates
Configure SunLync Desktop
Configure Documents
Adjust necessary setup items identified during training

Step 10 – Pilot Data Conversion (if applicable) / Parallel Session

SunLync's Responsibility:

1. Obtain a recent copy of customer's current software data and SunLync database.
2. Create and verify pilot conversion or create new pilot database for running parallel.
3. Provide pilot plan and instruction on methods for completing a successful parallel session.

Customer's Responsibility:

1. Verify pilot conversion (or pilot database) by running parallel by processing transactions in current software as normal and repeat same transaction in the SunLync software.
   a. Verifying the converted data is accurate.
   b. Ensuring that employees are trained and are ready for the transition to SunLync.
   c. Ensuring that all database settings are accurate.

Step 11 – Go Live Preparation!

SunLync's Responsibility:

1. Complete Go Live Checklist with customer.

Customer's Responsibility:

1. Complete the Go Live Checklist with SunLync.
2. Return signed Pilot Approval Form.

Go Live Checklist
Timers
▪ Configure and Test Timers with SunLync Select
▪ Register T-Server
Peripherals
▪ Configure and Test Peripherals with SunLync Select
Store Inventory
▪ Review of Starting Inventory Balance Utility
Lamp Usage
▪ Insert Current Lamp Usage for each Equipment Record
- Lamp Change Options
- Starting Usage
- Expected Life
Equipment Usage
▪ Insert Equipment Usage for each Equipment Record
SunLync Offline Utility
▪ Select Stores for Offline Utility Download
▪ Download Data for Offline Utility
- Initial Download of Data

- Configuration and education of the Offline Utility Download Utility
▪ Operation of SunLync Offline Utility
▪ Offline Utility Reports
Database Backup
▪ Review the importance of backing up the MySQL Database
SlimCD Setup
▪ Enable Tokenization
▪ SlimCD – Back Office
- Review Credit Card Transactions Tab
- Review SlimCD Settings Tab
- Review Test CC Swipe/SlimCD Connection Tab
▪ CC Processing Parameters
- Review POS Card Processing Type Settings
- Review SlimCD Credentials Settings
Cayan Setup
▪ Enable Tokenization
▪ GPI – Back Office
- Review Credit Card Transactions Tab
- Review Cayan Settings Tab
- Review Test CC Swipe/Cayan Connection Tab
▪ CC Processing Parameters
- Review POS Card Processing Type Settings
- Review GPI Credentials Settings
- Enable Genius Device
▪ Genius Payment Types Parameters
- Review Point of Sale Payment Types
- Review EFT Payment Types
EFT Processing
▪ Review of EFT Main Transaction Processing Screen
- Review Batch Details Screen
- Review Create New Batch, Reverse Batch, Submit Batch, Resubmit Batch, Import Batch, Post Open Batch
- Review Print Options Screen
Schedule time to walk customer through their first EFT draft
- Create Batch
- View Batch Details Screen Review
- Review Transaction Update, Approve Open Transactions, Update Amount, and View Membership History
- Submit Batch Review
- Resubmit Batch Review
- Post/ Import Batch Review
- Review Print Options Screen

Step 12 – GO LIVE and Final Conversion (if applicable)

SunLync's Responsibility:

1. Obtain a recent copy of customer's current software data (if applicable).
2. Verify that the workstation(s) and server are set with the correct date and time.
3. Run final conversion (if applicable).
4. Verify final conversion (if applicable).
5. Disable MySQL permissions on pilot database.
6. Point to live SunLync database.
7. Deploy customer to technical support.

Customer's Responsibility:

1. Start using SunLync Select and stop using old software.
2. Return signed Project Completion Form

Your salon(s) is now deployed from a status of implementation to support. Your implementation project manager is no longer the primary contact for the salon(s).

Please direct any technical support inquiries to the SunLync support team that can be reached via phone at 866-786-5962 Option 1 or via email at support@sunlync.com.

Please note that technical support and assistance is available during the following times:

Gold Support: Monday through Friday - 8am - 6pm EST

Platinum Support: Monday through Friday - 8am - 9pm EST
                           Saturday & Sunday - 10am - 4pm EST