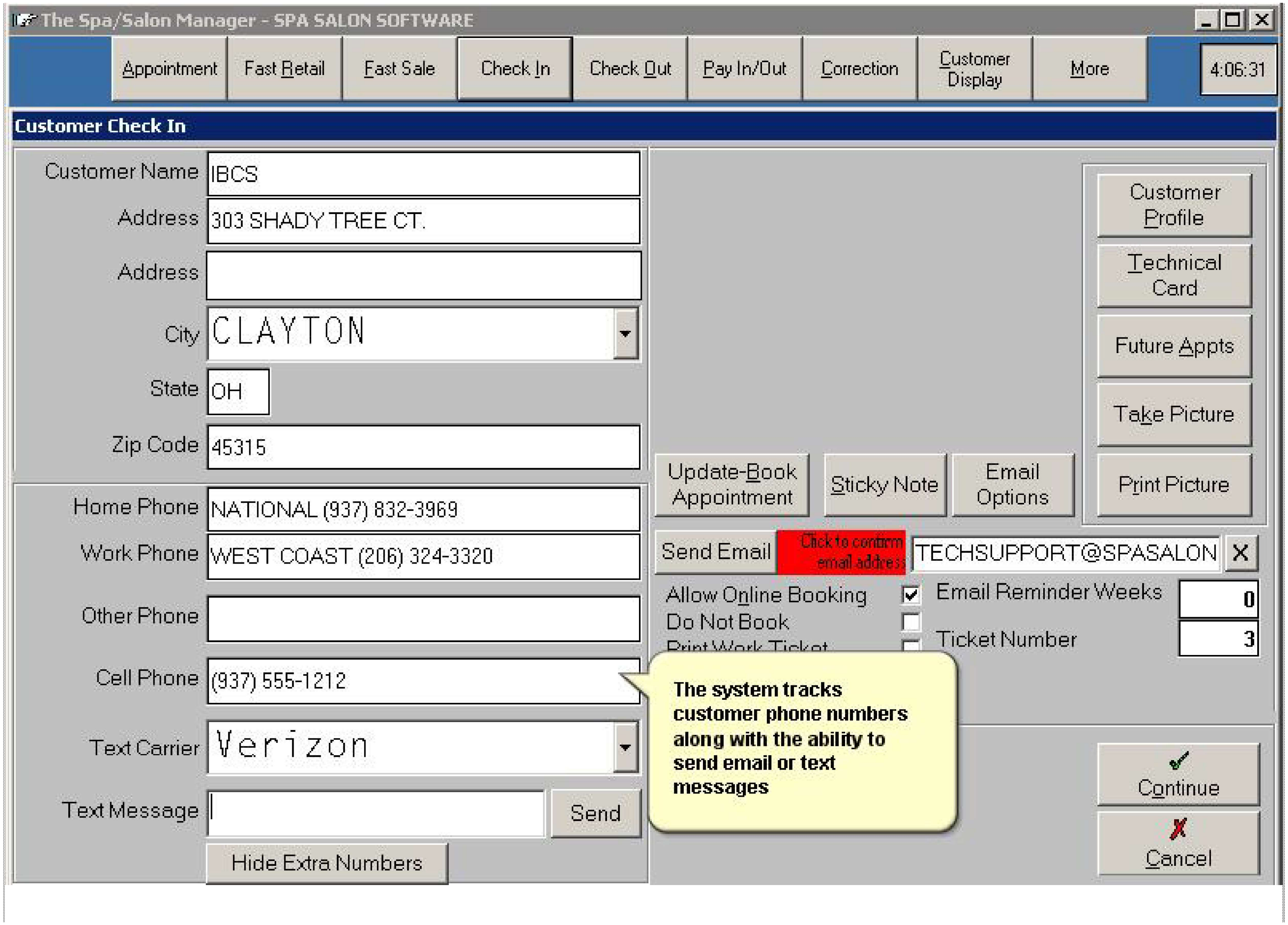
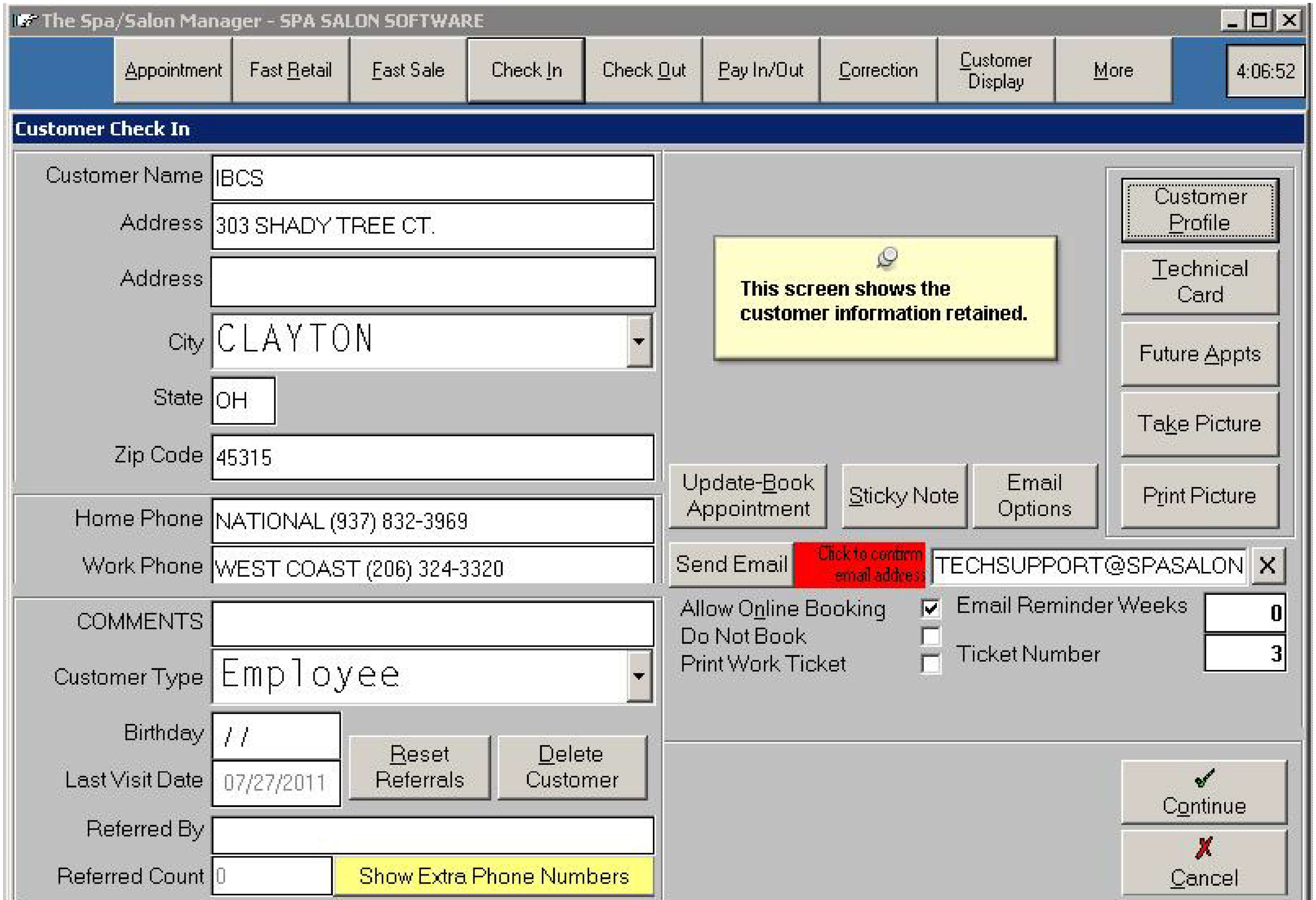
[Up] [Appointment Screen] [Fast Retail] [Fast Sale] [Check In] [Check Out] [Walk-in Customers] [Gift Certificate] [Pay In/Out]
[Correction] [Reports] [Verify Monies] [Close Day] [Backup] [Salon Use] [Inventory]

Check In

Customer Check In is accessed from the top of the Main Menu or by clicking on the client's name in the appointment book. The Check In screen allows you to enter the client's information with address information along with referral information. The system automatically completes the city name, state and zip code if they are entered into the maintenance section of the program.


The Spa/Salon Manager - SPA SALON SOFTWARE
Appointment
Fast Retail
Fast Sale
Check In
Check Out
Pay In/Out
Correction
Customer Display
More
4:06:31
Customer Check In
Customer Name
IBCS
Address
303 SHADY TREE CT.
Address
City
CLAYTON
State
OH
Zip Code
45315
Home Phone
NATIONAL (937) 832-3969
Work Phone
WEST COAST (206) 324-3320
Other Phone
Cell Phone
(937) 555-1212
Text Carrier
Verizon
Text Message
Send
Hide Extra Numbers
Customer Profile
Technical Card
Future Appts
Take Picture
Print Picture
Update-Book Appointment
Sticky Note
Email Options
Send Email
Click to confirm email address
TECHSUPPORT@SPASALON
Allow Online Booking
Do Not Book
Email Reminder Weeks
0
Ticket Number
3
The system tracks customer phone numbers along with the ability to send email or text messages
Continue
Cancel



Customer Names - How do I enter them?

Customer names are entered using last name followed by first name, the first and last name should be separated by either a space or a comma, but not both.

Phone Number Search

To search by phone number, the number must be entered in the following format (937) 555-1212. Partial phone number searches are supported by entering just the area code followed by the three digit exchange. Please note: The parenthesis are required to search by phone number.

Email Search

To search by email address you must enter the email address in the customer name prompt and include the ampersand @ sign. Near spellings are shown on the screen to help you find the correct email address. This feature is useful if you get a piece of mail returned to you without the customer's name.

City Searching

As a city name is entered, the system automatically searches to match the city name to known names stored and displays the progress while typing. To accept the city found, click the tab or enter key. The state is automatically displayed and if the city has a unique zip code, the zip information is also completed. City, State and Zip code information is setup under Maintenance, City Zip.

Phone Information

Customer Phone information allows the customer's home and work number to be saved. In addition, you can type extra information past the phone number such as Do Not Confirm, Call After 10:00 AM or DO NOT BOOK. This allows you to notate the phone number with additional information in which can aid in customer relations. By clicking on or tabbing to the home phone or work phone you will also be able to store an extra phone number and a cell phone number. You can send a text to the customer from the Customer Display screen. For customers that do not want text messages you can select No Text Messages for the Carrier. Clicking on or tabbing to the Home Phone or Work Phone number will bring the rest of the numbers to the front on the screen while clicking/tabbing elsewhere will send the extra information to the back. You can also switch between the extra numbers and the other information with the Show/Hide Extra Phone Numbers buttons.

Customer Comments

Provides a private area for comments regarding the customer that do not display on the customer's Work Ticket unless specified under Maintenance. This feature is useful to record driver's license information or comments that you want the receptionist to see when checking in the customer.

Email Information

Tracking of Email Information allows the system to send Email reminders for confirmations and mass mailings. Entering the email information should be in the format as Name@Aol.com When confirming appointments the system asks if you'd prefer to Email the customer. Email is a fast, convenient and time efficient manner to communicate with your customers.

Advertisement

The Advertisement information is shown for new customers only. This allows you to track how new customers were attracted to your business. By tracking the advertisement information you can determine where your advertisement dollars should be focused. See Request for existing customers.

Request

The Request information allows you to track existing customers to determine whether the customer asked for a specific employee or for a particular service. This can be useful to determine which customers can be moved when an employee is sick or requested by another customer.

Ticket Number

Originally the Ticket Number was used to track to the green ticket pads from yesteryear. Some salons utilize the ticket pads, but most allow the computer to assign the Ticket Number automatically. The Ticket Number does not affect the program operation, it is used solely to track to a paper system.

Take Picture

The Take Picture option is designed to work with the small egg shaped cameras made popular by the internet. A picture of the customer can be associated with their name and shown at Customer Check In or pictures can be taken and stored with the Hair technical cards.

Print Picture

Print Picture provides a way to print the pictures captured in the computer.

Technical Cards

Technical Cards allows the computer to store detailed information on the customer regarding their hair, color, perm, nail and miscellaneous information. The customer can have multiple technical cards and the system displays them in order from the most recent to oldest. Technical Cards are invaluable when an employee is sick and the customer requires that a service be performed for a special occasion.

Customer Profile

The Customer Profile provides a list of the services and retail items showing the date, service or retail name along with the price charged. If a customer wants to know when their last service was done, Customer Profile is the right selection.

Delete Customer

The Delete Customer removes the customer's information from the system. All information is removed including mailing information and technical cards. If you want to change the customer's name do NOT use Delete Customer, instead click on the customer's name and make the appropriate changes.

Merging Customers

To merge two customer names together type in the incorrect spelling under Check In or Customer Display. Click on the name and correct it to the proper spelling. When you click Continue the computer will prompt you to determine if you want the two names merged together.

Stored CC

This section allows X-Charge/Accelerated Payments customers to store a credit card on file without that credit card being visible to everyone. You can then used these stored credit cards to pay for future credit card sales without re-swiping the card.

Click on the buttons below to continue this tutorial.

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