

Adding Clients

When you want to add clients the first thing that you want to do is click on Clients and Add New.

Clients	Inventory	Reports	Other	Utilities
Add New				F8
View, Change				Ctrl+C
Quick Lookup				
Phonetic Search				F11
Lookup by Member No				
Lookup by Email Address				
Check Membership				F12
Print TravelCard				Ctrl+T
Print Client Itinerary				
Print Client Information Sheet				
Set Pop-Up				
Client Referrals Count				
Merge Client History				
Delete Client				
Multi-Delete Client				

Now it will prompt you to add the client's first name, last name, phone number, sex, and what this client was referred by. From here you can either click add now or more.

ADD CLIENT
First Name
John
Last Name
Doe
Phone **Male Fem.**
Gender Preference
Referred By
Television

If you clicked add now it will not ask you for anymore information about this client and you will have successfully added the client. If you click more then you will be taken to the client file.

Below is a section client file. For anything that requires a date, do not put any slashes or dashes into the field. Just enter in the date as a 6 digit number and hit the enter key on your keyboard. This will auto-format the date.

<input type="checkbox"/> Inactive	<input checked="" type="radio"/> Male		
	<input type="radio"/> Female		
349	Club@ <input type="text" value="0"/>		
First Name	Last Name		
<input type="text" value="John"/>	<input type="text" value="Doe"/>		
Street Address			
<input type="text" value="3916 Sepulveda"/>			
<input type="text"/>			
City	State	Zip	
<input type="text" value="Los Angeles"/>	<input type="text" value="CA"/>	<input type="text" value="90230"/>	
First Visit	Last Visit	Birthday	Anniversary
<input type="text"/>	<input type="text"/>	<input type="text" value="01/01/06"/>	<input type="text"/>

Here is another section of the client file. Every single one of these fields is not mandatory, but is good to fill for your marketing campaign.

Attributes	Parents Name	Points Status	Main Esthetician		
<input type="text"/>	<input type="text"/>	Earned 0 Used 0 BALANCE 0	<input type="text"/> Clear		
Mailing Salutation	Driver's License	Expires	Occupation		
<input type="text" value="John"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Email Address			Referred By	Rf#	
<input type="text"/>			<input type="text"/>	<input type="text" value="0"/>	
Credit Card No.	Expires	<input type="checkbox"/> ?	<input type="checkbox"/> No Checks	Television	
<input type="text"/>	<input type="text"/>			<input type="text"/>	
GC Status	OnAcct	Series	Dial Phone	Confirm Appts By	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Email	
Phone Numbers				<input type="checkbox"/> Text Message	
<input checked="" type="radio"/> Home	<input type="text" value="800-710-3879"/>	Extn.	<input type="text"/>	Service Provider	
<input type="radio"/> Office	<input type="text"/>	Extn.	<input type="text"/>	<input type="text" value="Cell Providers"/>	
<input type="radio"/> Other	<input type="text"/>	Extn.	<input type="text"/>	Sv Dscnt	Rt Dscnt
				<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

Here are the options you can choose from in the client file.

Tracking

- For this option please see our tracking faq.

History

- This will show you all of your service and product history for a client.

Formulas

- For this option please see our formulas FAQ.

Notes

- This option will allow you to add notes to a client file.

Set Popup

- This option will allow you to add a note that will pop up each time you select the client.

Show Appts

- This will show you a client's appointments in the neat future.

Goto Appts

- This will take you to the appointment day view screen.

In-Take

- For this option please check our in-take FAQ.

Print

- This will print out the client file.

Rewards

- For this option please check our rewards FAQ.

Cancel

- This will cancel out of the client file without saving.

Accept

- This will cancel out of the client file but instead of having it not save, it will save all of your fields that you entered in.

Once filling out all the information that you want, hit the accept button and you will have successfully added a client.

Here is an example of a completed client file.

CLIENT INFORMATION FOR AMAZENA AMAZONIA

Inactive Male
 Female

6 Club@ 0

First Name Last Name
 Amazonia Amazonia Same

Street Address
 34 Warrior Way

City State Zip
 Los Angeles CA 90052

First Visit Last Visit Birthday Anniversary
 11/15/02 03/10/03 05/24/72 02/08/05

Attributes Parents Name

Mailing Salutation Driver's License Expires
 Dear Amazonia, 3POINTR 03-09-07

Email Address
 volleybally@aol.com

Credit Card No. Expires
 *****2111 11/04 ? No Checks

GC Status OnAcct Series Dial Phone

Phone Numbers
 Home (310) 636-4111 Extn.
 Work (310) 229-3647 Extn. 214
 Cell (800) 443-9286 Extn.

Points Status
 Earned 0
 Used 0
 BALANCE 0

Main Esthetician
 Persephone


Occupation
 Volleyball Player

Referred By Rf# 1
 Friend
 Hamlet, Ophelia

Confirm Appts By
 Email
 Text Message
 Service Provider
 Cell Providers

Sv Dscnt Rt Dscnt
 0.00 0.00

Photo Files
 photo

photo 

Tracking
 History
 Formulas
 Notes
 Set Poppp
 Show Appts
 Goto Appts
 In-Take
 Print
 Rewards
 Cancel
 Accept

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