

CLIENT MANAGEMENT

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OVERVIEW

The client module is primarily used to hold client details, preferences and other attributes. It is also a centralised reference point for purchases, reminders and history notes. The following chapter describes the functions of each of the client module tabs.

Personal Tab

The personal tab is where client personal details are maintained and where account information can be viewed.

The screenshot shows a software window titled 'Joanne Bloggs (Client # 1/38598)'. The 'Personal' tab is selected. The form contains the following data:

- Personal:** Title/Gnd: Mrs., Female; First Name: Joanne; Last Name: Bloggs; Known As: (empty); Co Name: (empty); DOB: 01/01/1980; Status: Active.
- Contact:** Work: 09 123 3456; Home: 09 123 4567; Fax: 09 123 4567; Mobile: 0274512149; Email: joanne@bloggs.com; Web: (empty).
- Postal:** St Num: 123; Street: Raines Ave; Suburb: Papakura; City: AUCKLAND; Post Code: 0622.
- Delivery:** Distance: (empty) km; Care of: (empty).
- Financial Summary:**

3 Mth +	\$0.00
2 Mth	\$0.00
1 Mth	\$0.00
Current	\$121.65
Total	\$121.65
Open	\$460.67
Total	\$582.32
- Due Reminders Table:**

Reminder	Date	Status	Sf	Action	Name
4 Week Reminder	18/02/2012	Due	AC		Joanne Bloggs

Fig. 2 - 1

Title	The title used to address the client. E.g. Mr, Ms etc..
Gnd	The client gender. If Female is selected a pink border will appear around the client record while a blue border will appear for males.
Last Name	The clients family name
First Name	The client first name.
Known As	An alias or other name that may be used to identify the client (e.g. her first name may be Anne but she is known as Annie). This is then available in the marketing module as a mail merge variable.
Co Name	The name of the company. This is used if the client is a company and not an individual.
DOB	Client Date of Birth. (The year does not need to be included)

Status	The status field should be set to 'Active' as long as the client still actively deals with the business. When this is set to 'Inactive' you will no longer be able to see the client record in normal searches. You would normally set a client to 'Inactive' in cases where the client has ceased dealing with your business.
Contact Numbers	These are the contact numbers for the client. The numbers do not have to be in any particular format but it is advisable to enter them in such a way that they can easily be read, with the corresponding area codes. Provision is made for up to four phone numbers; work, home, fax and cell phone.
Work	Client's work phone number.
Home	Client's home phone number.
Fax	Client's Facsimile number.
Celluar	Client's mobile number.
Email	This is the client's preferred e-mail address. This is displayed in a purple colour, which signifies that you can automatically send an e-mail just by double-clicking on the address.
Web	The client's web address. This can be used in a similar manner to the e-mail option. Double-clicking it activates your preferred web browser (e.g. internet explorer) and goes straight to the client's website.
Address Details	<p>This section is subdivided into two tabs allowing you to enter the postal and delivery address.</p> <p>Postal: This is the address for all posted mail for the client or company.</p> <p>Delivery: This is the address where all parcels or packages will be delivered for the client or company.</p> <p>NOTE: The delivery address is used on shipping labels when specified.</p>
St Num	Enter only the street number of location or, if the client uses post office boxes then enter the post office box details in the format "PO Box NNN".
Street	Refers to the street name. You can either type it in, or select it from the drop-down list provided. This option is disabled when a PO box is used in the street number field.
Suburb	Refers to the suburb name. You can either type it in, or select it from the drop-down list provided. Suburbs are linked to Cities so when you select the suburb it will automatically choose the City.
City	Refers to the city name. The city is automatically entered when the suburb is chosen.
Post Code	Refers to the Post code for that addresses area.
Distance	This is how far a client is located from the business. Enter the figure in kilometres. This piece of information is particularly useful when billing for a job that was performed at the client

	<p>site. Hairlink^{SQL} will automatically calculate how much the client would be charged for mileage based on the distance provided.</p>
Care Of	<p>The care of field refers to the postal location of the customer if the customer's postal address is the same as their business postal address or within a company department, for example, To: John Smith Care of Marketing Department</p>
Account Balance	<p>The account balance gives users a quick overview of the status of the client account. These figures are dynamically updated by bills made to the client and show balances for the current, 30, 60, and 90 day periods.</p> <p>To the right of the 'Total' field is the ellipsis button. Clicking this button will open the 'Account Reconciliation' screen view a more detailed view of the client account. You can switch between months using the 'Previous Month' and 'Next Month' buttons.</p> <p>The Account Balance also shows a total for unfinished bills. The ellipsis button next to these will show you the transactions that make up these totals</p>
Due Reminders	<p>This section displays a list of reminders that are due for that client.</p>
Intelligent Notes	<p>The 'Ctrl+N' notes button is used to create notes that are related to the client. These notes can be manipulated to pop up at predetermined stages or screens in Hairlink^{SQL}. The notes can be used to remind a staff member to do something or provide them with more information. The notes can also be set up to print out on a client's histories, receipts, statements etc.</p>

More Tab

The **'More'** tab contains further fields for recording client information and assigning clients to groups and categories with the system.

Fig. 2 - 2

User Code	An abbreviation or short code used to identify the client. It is normally created by the system but it can be modified to suit your preference.
Pref Staff	The staff member the client prefers to see. You can manually select this or it will be automatically populated when the client see's the same staff member consecutively and there is a service on the bill.
Batch Code	This option is used during statement printing. It is a code that is used to group certain clients together when printing statements. For example, you may want to send out a newsletter to all VIP clients with their statements. By marking VIP clients with a "VIP" batch code, all these statements will print out together – making it easier to slip a newsletter into the envelope for these clients.
Recall	This is an indicator that states whether the client would like to receive recall reminder prompts at billing. This is normally set to 'Yes' , but can be set to 'No' if the client does not want to be issued with recall reminders.
Group	You can set up groups such as VIP, Makeup or Newsletter and assign to a client which are then used to identify a type of client with a coloured flag in the diary, bills and searches. See

	Manual Client groups section later on in this chapter.
Family	Not Applicable
Category 1/2/3/4	The client categories group the clients for reporting purposes. A client can only belong to one group in each category.
Syndicate	Not Applicable
Referral	The referral fields relate to how the client found out about your business. You can select from different referral types that are created by users. This information is particularly handy for allocating advertising budgets.
Referral	The existing client on the Hairlink ^{SQL} database that referred the new client to the business
Referral Type	This relates to how the client was referred to the business. For example, if they were referred to your business from a friend, newspaper, TV etc...
Referral Date	This relates to the date the referral was made which is updated automatically when the referral details are entered.
Belongs To	If you are running Hairlink ^{SQL} in multi-branch or company mode, this setting states which branch / company they belong to
To PDA	Not Applicable
Web Access	This option refers to whether the client can access their client information on the web. Please contact CFL for more information on integrating Hairlink ^{SQL} with your website.

Marketing Tab

The Marketing Tab is useful for setting up any marketing information that is relevant to the client. Information in the Marketing tab is useful for customer relations, for example, to identify a client as a VIP.

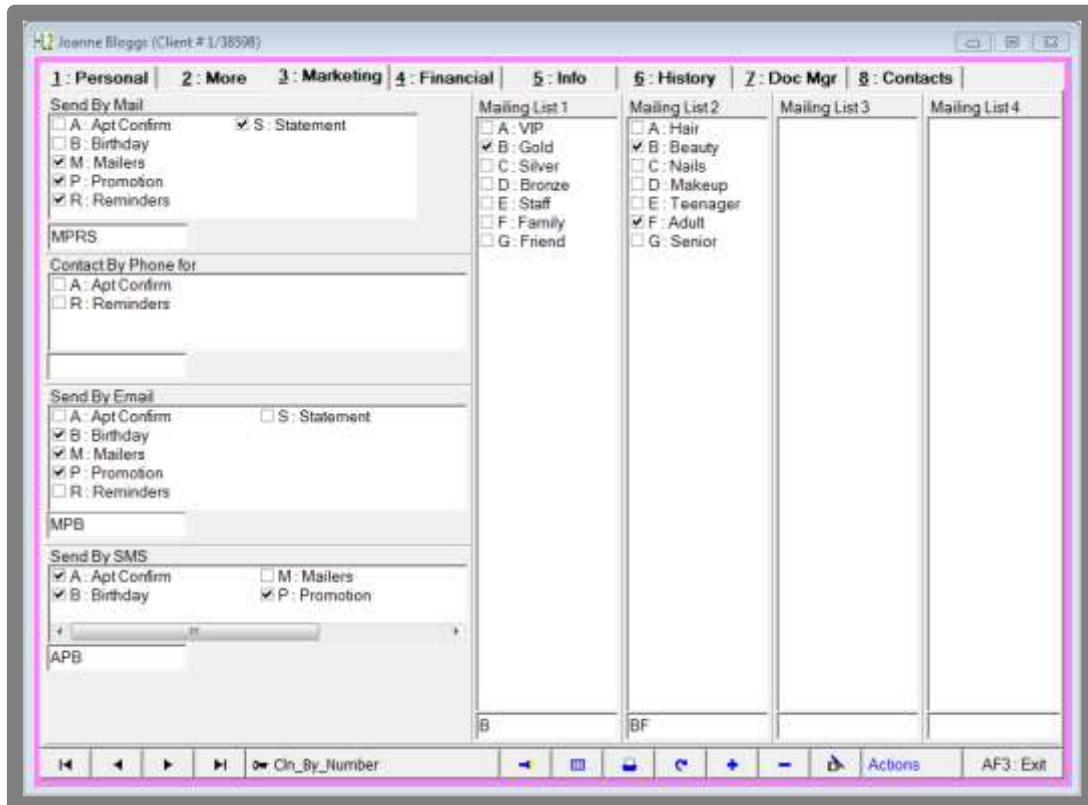


Fig. 2 - 3

Send By Mail	Click in the check boxes to identify the information the client would like to receive through the post.
Contact By Phone	Click in the check boxes to identify the information for which the client would like telephone contact.
Send By Email	Click on the check boxes to identify the information the client would like to receive via email.
Send SMS	Click on the check boxes to identify the information the client would like to receive via SMS.
Mailing List 1/2/3/4	This is used for sending mail outs to clients. You can use the mailing list to group common clients together. You can customise the name of each entry in the Mailing Lists to your preference. At the bottom of the column, is a list of the mailing lists that this client is subscribed to.

Financial Tab

The Financial tab displays the financial settings and discounts that relate to a particular client.

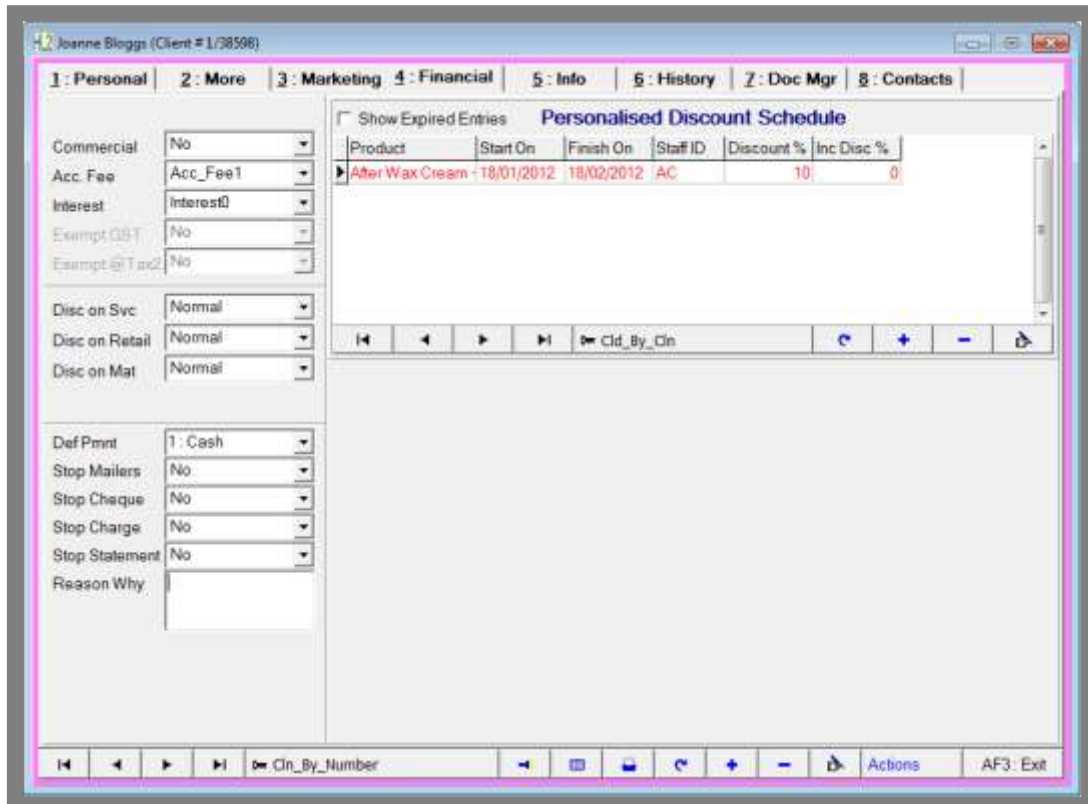


Fig. 2 - 4

Commercial	N/A
Acc. Fee	Allows you to select the account fees that will be used on a client's account. These fees can be manually edited by the user in 'Setup' .
Interest	Allows you to specify the type of interest that the client will incur on their account. Again, interest settings can be manually edited by the user in 'Setup' .
Exempt GST	Indicates whether the client is to be exempted from GST or not. You may not be able to edit this setting, as it is dependent on settings selected in Setup.
Exempt @Tax2	This indicates whether the client is to be exempted from Tax2 or not. You may not be able to edit this setting, as it is dependent on settings selected in 'Setup' .
Disc on Svc	The group the client is assigned to for receiving discounts on services
Disc on Retail	The group the client is assigned to for receiving discounts on retail
Disc on Mat	The group the client is assigned to for receiving discounts on materials

Def Pmnt	You can choose a default payment method that will be automatically selected when finishing a bill for this client.
Stop Mailers	Normally set to 'No' but set this to 'Yes' if you want a client to stop being sent mailers from the 'Bulk Mailers' module.
Stop Cheque	Normally set to 'No' but set it to 'Yes' if you want to stop a client from using cheques as a method of payment. A prompt will appear to warn you when you try to select 'Cheque' and it will ask you to choose another payment method.
Stop Charge	Normally set to 'No' but change to 'Yes' if you want to stop a client from charging a bill to their account.
Stop Statement	Normally set to 'No' but set it to 'Yes' if you will not be sending statements to this client.
Reason Why	Enter a reason why you have selected 'Yes' to any of the stoppages above. This is for your own reference.
Personalised Discount Schedule	In the personalised discount schedule you are able to give one-off discounts to a client on a number of services and retail products which are only active for a specified date range. For example you could give one client a 10% discount on "After Wax Cream" which is valid until the end of the month.

Info Tab

The info tab shows you accounting information for sales, bonus points and incentive discounts for a client. This tab shows both up-to-date as well as historical information. You can view a client's account status, sales analysis and bonus points as well as incentive discounts just by clicking on the appropriate button.

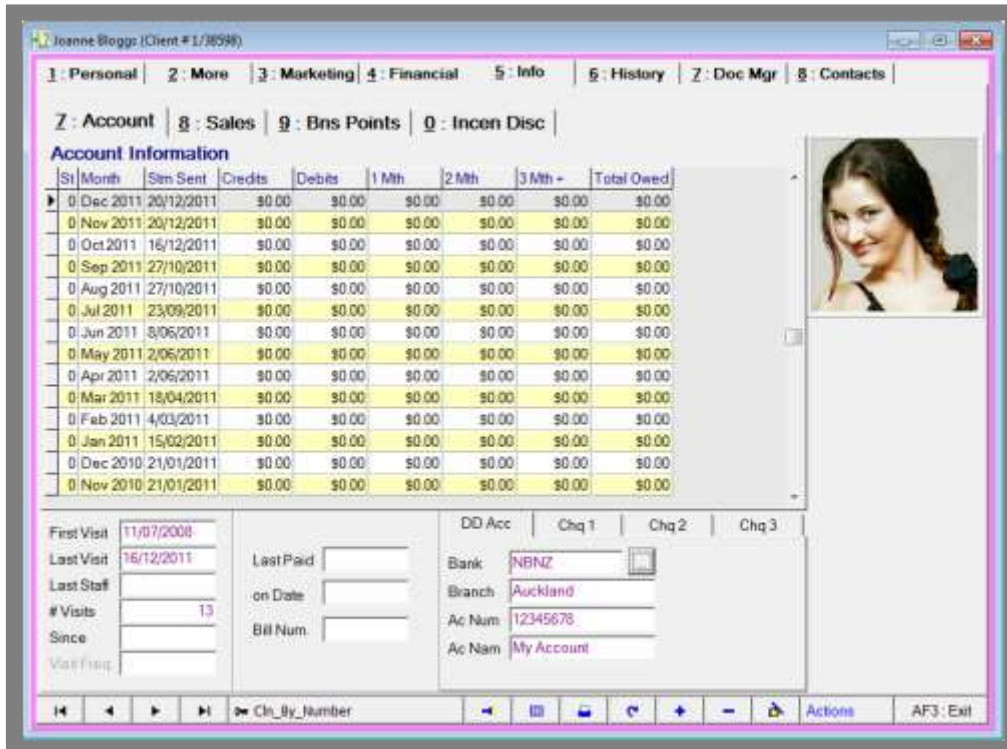


Fig. 2 - 5

Account Tab

The Account tab displays the amounts owed to your business by a client. The amounts are aged into monthly figures so you can easily determine how much a client is in arrears.

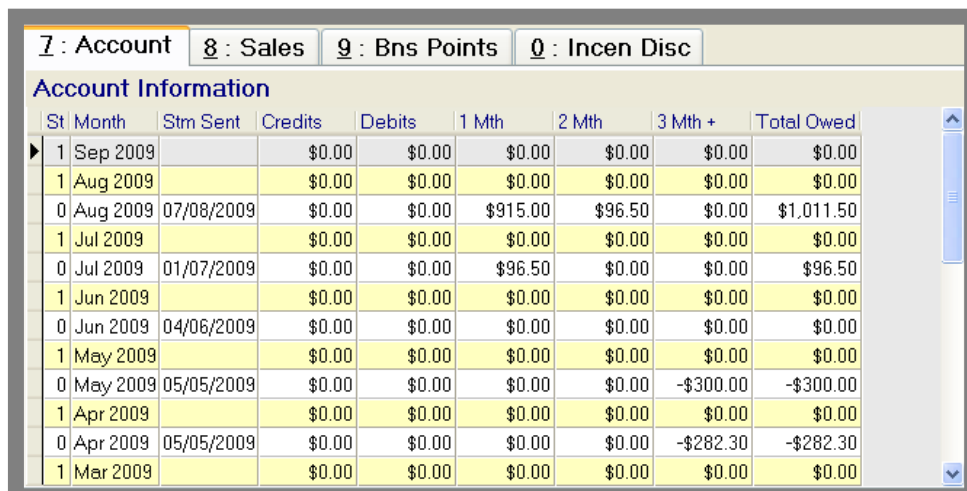


Fig. 2 - 6

Sales Tab

This displays the sales history for clients for each month since the first sale. The figures are then broken down into sales for services and other sales (i.e. Sales of products that are not services). To complement these figures actual profits made on service sales, other sales and totals for both are displayed.

7 : Account		8 : Sales		9 : Bns Points		0 : Incen Disc	
Sales Information (Excluding Tax)							
St	Month	Sales Tot	Sales Svc	Sales Othr	Profit Total	Profit Svc	Profit Othr
1	Sep 2009	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
1	Aug 2009	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
0	Aug 2009	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
1	Jul 2009	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
0	Jul 2009	\$1,008.86	\$93.32	\$915.54	\$991.11	\$93.32	\$897.79
1	Jun 2009	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
0	Jun 2009	\$169.64	\$36.49	\$133.15	-\$30.63	-\$63.51	\$32.88
1	May 2009	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
0	May 2009	\$624.21	\$71.20	\$553.01	\$338.74	\$71.20	\$267.54
1	Apr 2009	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
0	Apr 2009	\$1,620.30	\$197.35	\$1,422.95	\$1,027.25	\$97.35	\$929.90
1	Mar 2009	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Fig. 2 - 7

Bns Points Tab

This shows the number of bonus points that a client has accrued through having services performed or by purchasing products. It details each transaction where bonus points were used or gained.

7 : Account		8 : Sales		9 : Bns Points		0 : Incen Disc	
Bonus Points							
Bill #	Date	Gained	Used	Available	Expiry	Referral	
# 1/230810	28/09/2009	549	0	549	28/10/2009		
# 1/230811	25/08/2009	0	273	-273	25/09/2009		
# 1/230772	14/08/2009	39	0	39	14/09/2009		
# 1/230757	10/08/2009	716	755	-39	10/09/2009		
# 1/230756	10/08/2009	716	0	716	10/09/2009		
# 1/230753	10/08/2009	39	0	39	10/09/2009		
# 1/230762	06/08/2009	39	0	39	06/09/2009		
# 1/230761	06/08/2009	156	0	156	06/09/2009		
# 1/230760	06/08/2009	39	716	-677	06/09/2009		
# 1/229278	23/04/2009	0	500	-500	23/05/2009		
Total Available				549			

Fig. 2 - 8

Incen Disc Tab

This displays the incentive discounts that a client received as a result of paying on time. You can specify a “pay-by” date and set up a discount in ‘Setup’ that becomes effective if a client pays their account by that date.

7 : Account 8 : Sales 9 : Bns Points 0 : Incen Disc					
Incentive Discount Statistics					
St	Month	ID Offered for Next Mth	ID Available This Mth	ID Taken This Mth	
▶ 1	Sep 2009	\$7.78	\$0.00	\$0.00	
1	Aug 2009	\$12.00	\$0.00	\$0.00	
0	Aug 2009	\$0.00	\$0.00	\$0.00	
1	Jul 2009	\$7.78	\$0.00	\$0.00	
0	Jul 2009	\$0.00	\$0.00	\$0.00	
1	Jun 2009	\$0.00	\$0.00	\$0.00	
0	Jun 2009	\$0.00	\$12.00	\$0.00	
1	May 2009	\$12.00	\$0.00	\$0.00	
0	May 2009	\$0.00	\$12.00	\$0.00	
1	Apr 2009	\$12.00	\$0.00	\$0.00	
0	Apr 2009	\$0.00	\$3.54	\$0.00	
1	Mar 2009	\$3.54	\$0.00	\$0.00	

Fig. 2 - 9

The bottom of the Info tab displays information about the client visits to the business and the last payment on their account. It also stores any cheque and direct debit details.

First Visit	22/01/2007	Last Paid	357.6	DD Acc	Chq 1	Chq 2	Chq 3
Last Visit	28/09/2009		on Date	22/05/2009	Bank	BNZ	...
Last Staff			Bill Num.	1/230257	Branch	Cambridge	
# Visits	97				Ac Num	123456780000	
Since	22/01/2007				Ac Nam	A Bloggs	
Visit Freq.							

Fig. 2 - 10

First Visit	This is the date of a client's very first visit or the very first time a client dealt with the business.
Last Visit	The last time a client visited the business.
Last Staff	The last staff member that dealt with the client.
# Visits	The total number of visits a client has made.
Since	This displays the start date for the number of visits recorded.
Visit Freq	
Last Paid	Displays the amount that was last paid on a client's account.
On Date	The date on which the amount displayed above was paid.
Bill Num	The invoice number that details the last payment.
Direct Debit and Cheque Details	This section displays a client's direct debit and cheque details. Each client can have up to three different cheque accounts and one direct debit account stored on the system.

To enter new cheque details click on the ellipsis button. This will open a new window prompting you to enter the details.

Edit Bank Details

Bank: Bank of New Zealand

Branch: Cambridge

Account No: 123456780000

Account Name: A Bloggs

**The account number is combination of 8 digits of account number and 4 digits of Suffix.
If you enter less than the maximum, ZERO will be added automatically.**

ESC : Cancel F12 : Save

Fig. 2 - 11

History Tab

The history tab is split into three more tabs that displays purchase history for a client.

8: Bills Tab

The '8: Bill' tab is split into two sections. The top section displays a summary of all bills while the bottom section lists all the items that are on the bill selected in the top section. Double-clicking on a bill in the top section will open up the bill for viewing.

Num	Type	Dis_Date	Acc_State	Inv_State	STotal	GST	Total	Complaint	Dis_Time	Err_Type	Paid_C
# 1/140384	RCT	16/12/2011	ClnUpdtd	SklUpdtd	86.43	12.97	\$99.40		13.06		16/12/2011
# 1/140383	INV	16/12/2011	ClnUpdtd	SklUpdtd	105.78	15.87	\$121.65		13.04		16/12/2011
# 1/140366	RCT	4/10/2011	Open	Open	26.67	4	\$30.67				
# 1/140354	RCT	22/08/2011	Aged	SklUpdtd	126.43	18.97	\$145.40	Mini Pedicure	14.21		22/08/2011
# 1/140336	RCT	13/06/2011	Aged	SklUpdtd	40	6	\$46.00	Mini Pedicure	12.30		13/06/2011
# 1/140242	RCT	26/11/2010	Aged	SklUpdtd	132.44	19.87	\$152.31	Amex New 2 Hour	13.49		
# 1/140210	RCT	22/07/2010	Open	Open							
# 1/140200	CRD	4/06/2010	Aged	SklUpdtd	100	0	\$100.00		15.35		4/06/2010
# 1/140199	DBT	4/06/2010	Aged	SklUpdtd	100	0	\$100.00		15.26		4/06/2010
# 1/140155	RCT	21/04/2010	Aged	SklUpdtd	88	11	\$99.00		12.42		21/04/2010
# 1/140154	RCT	21/04/2010	Aged	SklUpdtd	88	11	\$99.00		12.33		21/04/2010
# 1/140153	RCT	21/04/2010	Aged	SklUpdtd	26.27	3.28	\$29.55		12.18		21/04/2010

Qty	Type	Description	Price (Ex)	GST	Price (Incl.)	Staff	Subject No.	Product No.	Store	Itm No.	Class
1	S	Consultation	\$26.67	4	\$30.67	AC	38598	4634	1	1	S

Fig. 2 - 12

9: Transactions Tab

The '9:Transactions' tab allows you to search for specific transactions using the filters provided. You are able to search for transactions in a certain date range, by a particular staff member, for transactions that used a certain product, category of products or class of products.

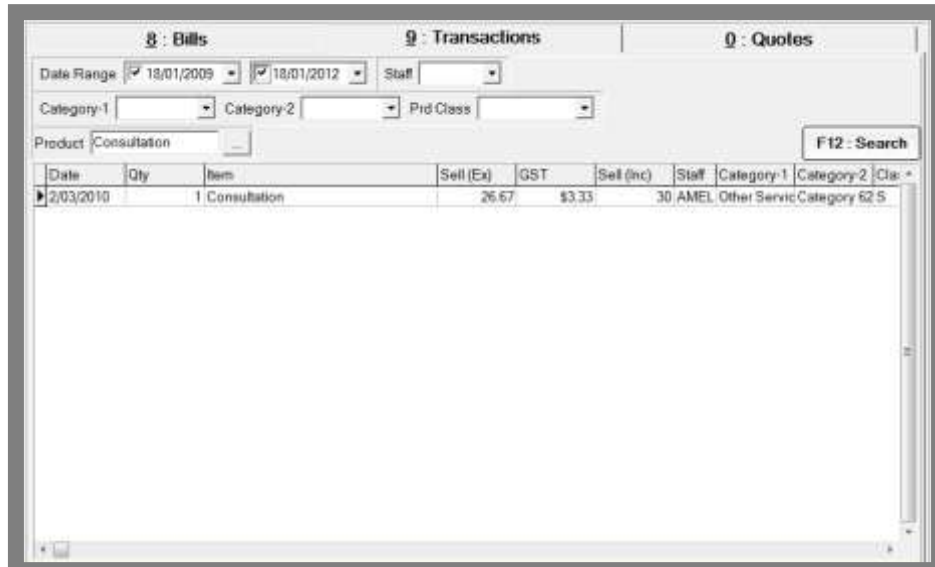


Fig. 2 - 13

8: Quotes Tab

The '8: Quotes' tab is split into two sections. The top section displays a summary of all quotes and estimates while the bottom section lists all the items that are on the quote or estimate selected in the top section. Double-clicking on a quote or estimate in the top section will open up the quote or estimate for viewing.

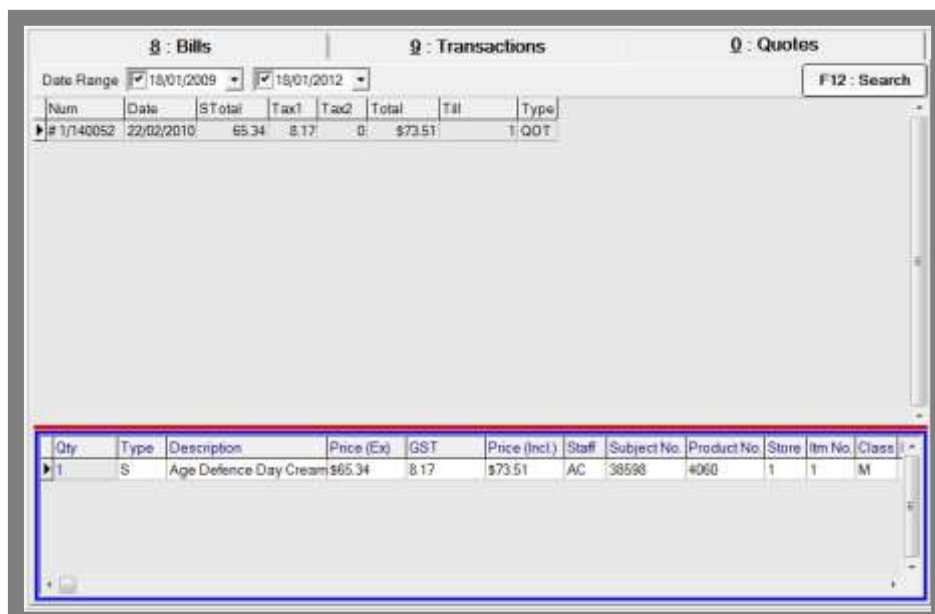


Fig. 2 - 14

Document Manager

The document manager is used for recording any communication that you have with your client - for example any important emails, faxes or phone conversations.

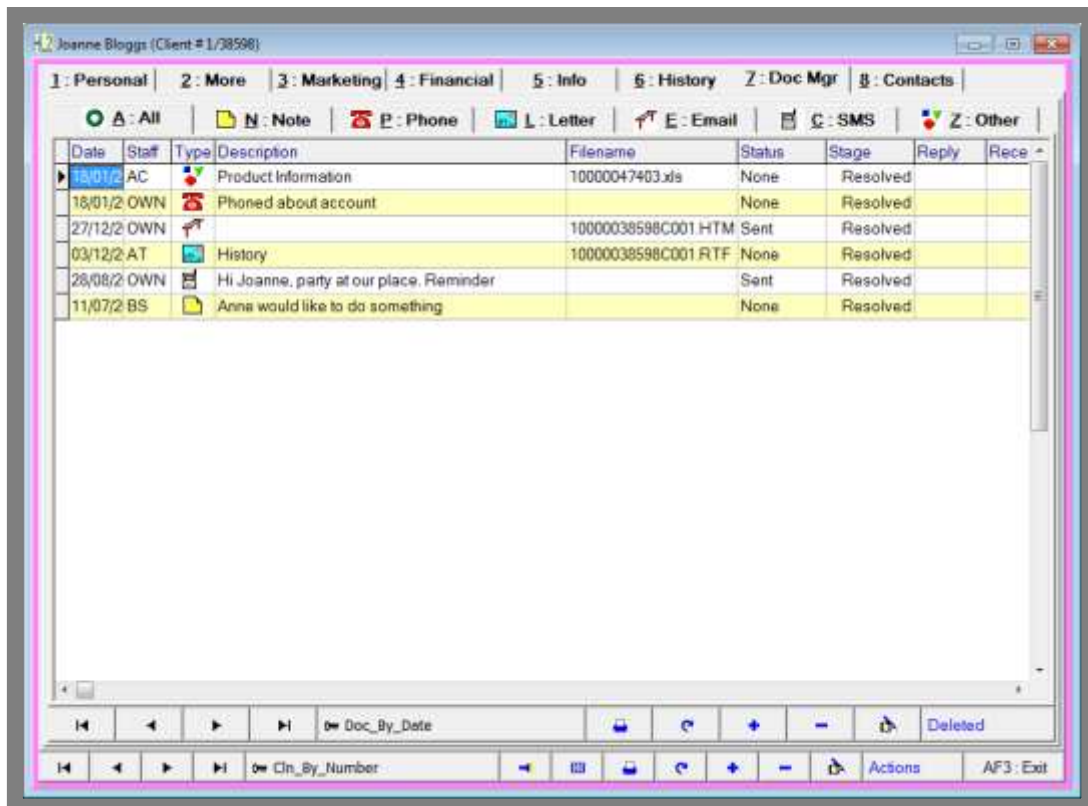


Fig. 2 - 15

The document manager is split into seven different sections or document types. In each tab you can record a different piece of communication the business had with the client. All communication is saved so you can look back to see what contact you have had with a client. The communication types are listed below.

- A: All
- N: Note
- P: Phone
- L: Letter
- E: Email
- C: SMS
- Z: Other

Contacts

The 'Contacts' tab on the client record is where you can record additional contacts. This is especially useful for farms or studs where there are multiple contacts in the business. Each contact needs to be assigned a position which can be assigned in **'Pick List Setup'**.

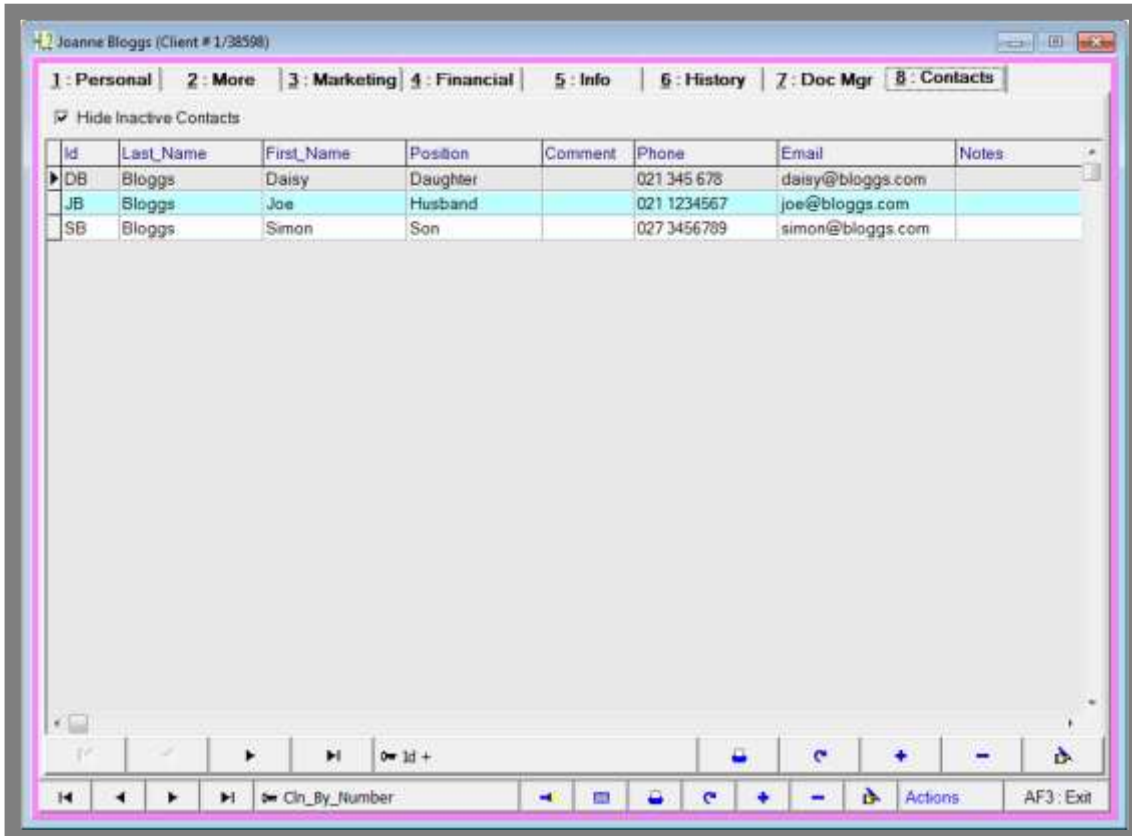


Fig. 2 - 16

SEARCH FUNCTION

The client search function is used in many areas of the program, for example when making appointments, making bills or simply looking up client details. Regardless of what you are doing, when searching for a client the same search options and dialogue boxes are used.

How to Perform a Basic Client Search

1. Click on the **'Client'** button.
2. This will display the **'Client Search Window'**.
3. Enter the first few letters of the last name, first name or company name of the client you are searching for.
4. Click **'F12: Search'** to begin the search.
5. The search results are now displayed. To navigate through the list use the keyboard cursor keys (the up and down arrows) or use the scroll bar at the right hand side of the window.
6. To make a selection double-click on a line in the results window, or, using the keyboard, press the **'F12'** key on the line you wish to select.

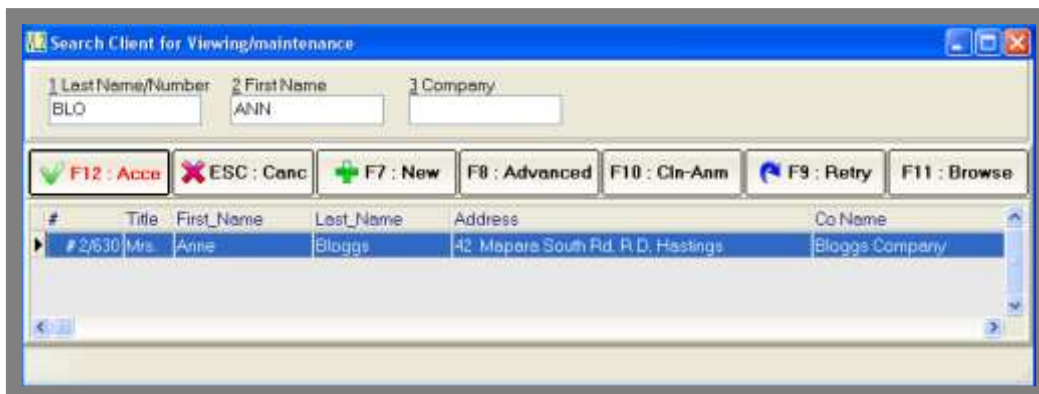


Fig. 2 - 17

Using Advanced Search options

If you cannot find the client you need, or if there are too many results to search through, you can narrow your search by using the advanced search function.

1. Click on the **'Client'** button.
2. This will display the **'Client Search Window'**.
3. Click on the **'F8: Advanced'** button.
4. The **'Advanced Search Form'** will now open.
5. This form provides more options for you to search by, such as the client number, user code, status and phone number.
6. Select the client and choose **'F12: Accept'** to open the client record.

Advanced Search Fields Overview

Number	The client number as assigned by Hairlink ^{SQL} .
Last Name	The clients Last name.
First Name	The clients first name.
Company	The company name.
User Code	Alternative user defined search code.
Clnt Status	Defines whether client is active or inactive.
DOB (dd/mm)	Clients date of birth excluding year
Amt Owing	Searches for clients with an amount owing on their last statement between the specified values.
Notes	Allows users to search for keywords or phrases in the intelligent notes attached to clients records.
Phone	Searches all phones numbers. E.g. Home, work, fax and cellular.
Email Address	Searches by email address.
Street No/Box	Find clients with a particular street or PO box number.
Street	Find all clients having the selected street in the address.
Suburb	Find all clients having the selected suburb in the address.
City	Find all clients having the selected city in the address.
Belongs To	Find clients belonging to a particular branch.
Syndicates Only	Find only syndicate clients.
Group Man	Searches for clients in the selected manual group
Group Sales	Searches for clients in the selected sales group
Contains	The 'Contains' fields provide a word within a word search on selected fields. For example, if 'Contains' is checked and you do a first name search for Anne, the system will find

'Anne', 'Joanne' and 'Joe and Anne'. If 'Contains' was unchecked it would only find 'Anne'.



TIP: You may set up your preferred method of search under [Options | Setup | Client | 1: Options tab | Search Dialog](#) | then select 'Simple' or 'Advanced' from the drop down list.

#	Title	First_Name	Last_Name	Co Name	User Code	Status	Home_Ph
# 1/11800		Joanna	Bloggs		JBING	A	
# 1/38598	Mrs.	Joanne	Bloggs		BLOGGS	A	09 123 4567
# 1/9913	Mr.	Joe	Bloggs			A	

Fig. 2 - 18

How to Enter a New Client

1. Click on the 'Client' button.
2. The 'Client Search' window will open.
3. Click on the 'F7: New' button to enter a new client.

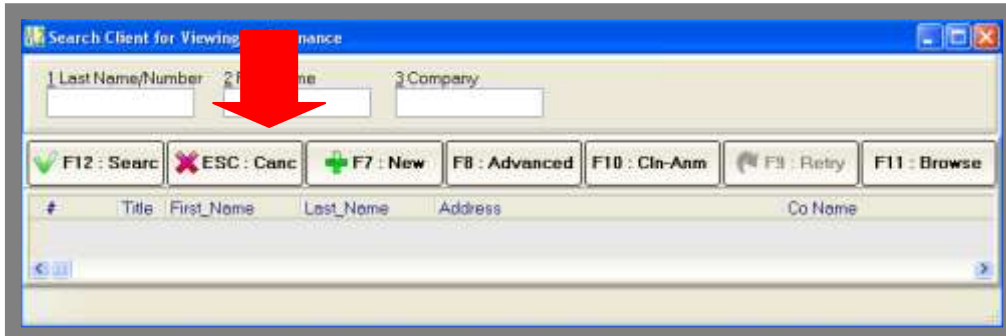


Fig. 2 - 19

4. The 'Client Profile' window will open. Select the client profile you wish to use.

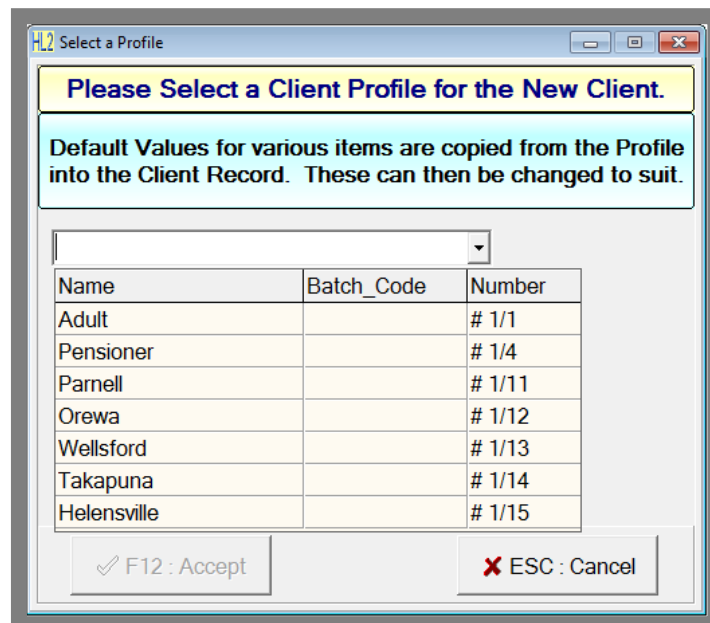


Fig. 2 - 20



TIP: Client Profiles enter some default information when creating new clients. Each profile can enter different information which is configured by users. This makes client entry faster and also helps stop mistakes being made.

5. A 'New Client Record' will open. Enter the new client details onto the form.
6. Click on the tick button to save.

HOW TO CHANGE CLIENT DETAILS

1. Click on the **'Client'** button.
2. Search for the client whose details you wish to edit.
3. Open the client record.
4. Edit the details you wish to change or add.
5. If you are unable to edit the details click on the **'Edit'** button on the bottom of the client window.
6. Once the client details have been modified save the changes by clicking on the tick in the bottom right hand corner.

The screenshot shows a software interface for client management. The window title is "Joanne Bloggs (Client # 1/38590)". The interface is divided into several sections:

- Personal:** Title/Gnd (Mrs), Gender (Female), First Name (Joanne), Last Name (Bloggs), Co Name, DOB (01/01/1980), Status (Active).
- Work:** Work (09 123 3456), Home (09 123 4567), Fax (09 123 4567), Mobile (0274512149), Email (joanne@bloggs.com), Web.
- Postal:** St Num (123), Street (Raines Ave), Suburb (Papakura), City (AUCKLAND), Post Code (0622), Distance, Care of.
- Delivery:** A photo of Joanne Bloggs.
- Financial:** A table showing payment terms: 3 Mth + (\$0.00), 2 Mth (\$0.00), 1 Mth (\$0.00), Current (\$121.65), Total (\$121.65), Open (\$460.67), and a grand Total (\$582.32).
- Due Reminders:** A table with columns: Reminder, Date, Status, Stf, Action, Name. It shows a "4 Week Reminder" on 18/02/2012, Status "Due", Stf "AC", and Name "Joanne Bloggs".

At the bottom right of the window, there is a checkmark icon and an "X" icon, both highlighted by a red arrow. The text "Ctrl+N" is visible next to the checkmark icon.

Fig. 2 - 19

STREET, SUBURB & CITY MANAGEMENT

Adding a New Street

Street names in Hairlink^{SQL} are stored in a database. As a new street is added it gets added to the existing list. To add a new street to the list follow the steps below.

1. Create a new client or open an existing client record.
2. Start typing the new street name into the street field.
3. A prompt will appear. **'Street name not found add 'new street' to the database'**.
4. Select **'Yes'** to add a new street.
5. The **'Adding a New Street'** window will open.
6. Check the street name is correct and click **'F12: Save'** to add the new street.

Editing an Existing Street

If there is a street in the system that has been spelt incorrectly or is no longer active, you can edit it through **'Pick List Setup'**.



NOTE: Every client that is currently linked to this street will change to the new name as well

1. Go to the **'Options'** then **'Pick Lists Setup'**.
2. Select **'Client'** and double click **'Street'**.
3. The Street Pick List will open. Double click on the street you wish to edit.
4. The Street Details window will open.
5. Edit the name of the street.
6. If the Street is not currently linked to any client records you will be able to mark it as inactive as well.



NOTE: If you wish to mark it as inactive and clients are still linked to that street you will need to find those clients and change their street address first.

7. Click **'F12: Save'** to save the street.

Adding a New Suburb & City

Suburbs and Cities in Hairlink^{SQL} are stored in a database and linked together. As a new suburb you are also prompted for a city and they are added to the existing list. To add a new suburb and city to the list follow the steps below.

1. Create a new client or open an existing client record.
2. Start typing the new suburb name into the suburb field.
3. A prompt will appear. **'Suburb name not found add 'new suburb' to the database'**.
4. Select **'Yes'** to add a new suburb and city.
5. The **'Adding New Record'** window will open.
6. Check the suburb name is correct and the city that it is in.
7. Click **'F12: Save'** to add the new suburb and city combination.

Editing an Existing Suburb and City

If there is a suburb and city in the system that has been spelt incorrectly or is no longer active, you can edit it through **'Pick List Setup'**.



NOTE: Every client that is currently linked to this suburb and city will change to the new name as well.

1. Go to the **'Options'** then **'Pick Lists Setup'**.
2. Select **'Client'** and double click **'Suburb & City'**.
3. The Street Pick List will open. Double click on the street you wish to edit.
4. The Suburb and City window will open.
5. Edit the name of the suburb and / or city.
6. If the Suburb and City is not currently linked to any client records you will be able to mark it as inactive as well.



NOTE: If you wish to mark it as inactive and clients are still linked to that suburb and city you will need to find those clients and change their address first.

7. Click **'F12: Save'** to save the suburb and city.

Address Formats When Printing

Hairlink^{SQL} allows you to choose from a number of address formats that will be automatically used when printing address labels, statements, tax invoices or tax receipts. To change these settings go to [Options | Setup | Client | Address Formats](#).

Address Format 0: (C/O line irrelevant)

In this format the address on the statement will be displayed in one of two ways depending on the presence of the “*Company Name*” field. If the company name is present, it will be displayed; otherwise the “*Client Name*” will be used for the address.

Company Name Present	Company Name Blank
Company Name Address	Client Name Address

Address Format 1: (C/O line irrelevant)

In this format the address on the statement will be displayed in one of three ways depending on the presence of the “*Company Name*” and the “*Client Name*” fields. If both these fields are present, then both will be displayed. If the “*Company Name*” field is blank, then the “*Client Name*” would be displayed and vice-versa.

Company Name and Client Name Present	Company Name Blank	Client Name Blank
Company Name Attn Client Name Address	Client Name Address	Company Name Address

Address Format 2: (C/O line relevant)

- Case 1: C/O field present (NOT Blank)

The address format on the statement will be displayed in one of two ways depending on the presence of the “*Client Name*” field. If the client name is present, it will be displayed and if the client name is blank, then the “*Company Name*” will be used instead.

Client Name Present	Client Name Blank
Client Name C/O Address	Company Name C/O Address

- Case 2: C/O field blank

In a situation where address Format 2 is used and the C/o field is **blank**, then the address on the statement will be displayed in one of three ways depending on the presence of the “*Client Name*” and “*Company Name*” fields. If both the client and company name fields are present, then both will be displayed on the statement. If the client name field is blank, then the company name will be displayed and vice-versa.

Client Name Present	Client Name Blank	Company Name Blank
Company Name Attn Client Name Address	Company Name Address	Client Name Address

REFERRAL MANAGEMENT

How to Create Referral Types

The referral list, by default, is populated with two types of referrals. They are 'None' and 'REWARD CLIENT'. Follow the steps below to enter your own referral types.

1. Go to the 'Options' menu then click on 'Setup'.
1. When setup has loaded click on the 'Client' button and go to the '5: Referrals' tab.
2. On the right hand side of the page is a list of referral names. You can now add to this list or edit the types already entered.
3. If you have selected 'Reward Client'; the existing client who referred the new client can receive bonus points on the new client first visit. The existing client can receive a flat rate or they can receive points depending on how much the new client spends.

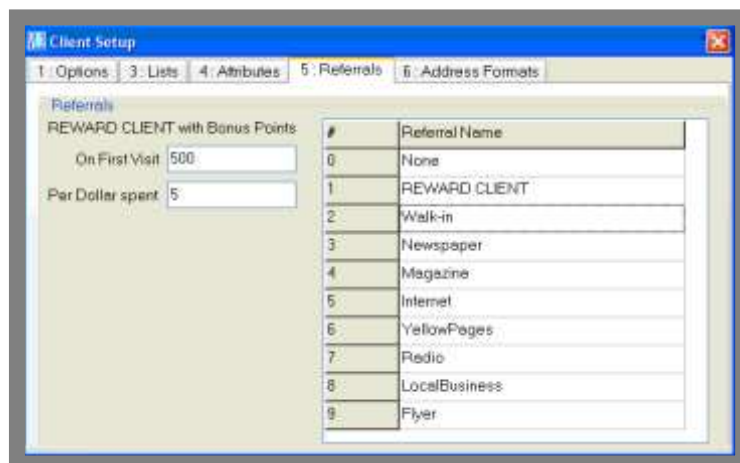


Fig. 2 - 20

How to Set how a Client was Referred

1. Open a client record and click on the 'More' tab.
2. Click on the ellipsis button next to the referral field to add in referral details.
3. The referral window will open. Select how the client was referred to your business from the 'Referral Type' Pick List.
4. If the referral was from another client, you can select the referring client in the 'Referred By' field.
5. Click 'F12: OK' to save and exit.

MAILING LIST MANAGEMENT

Adding a New Mailing List Group

1. Go to 'Options' and then 'Setup'.
2. Once setup has loaded up click on the client button.
3. Select the '3: Lists' tab.
4. Enter your Mailing List by typing in one of the available fields.

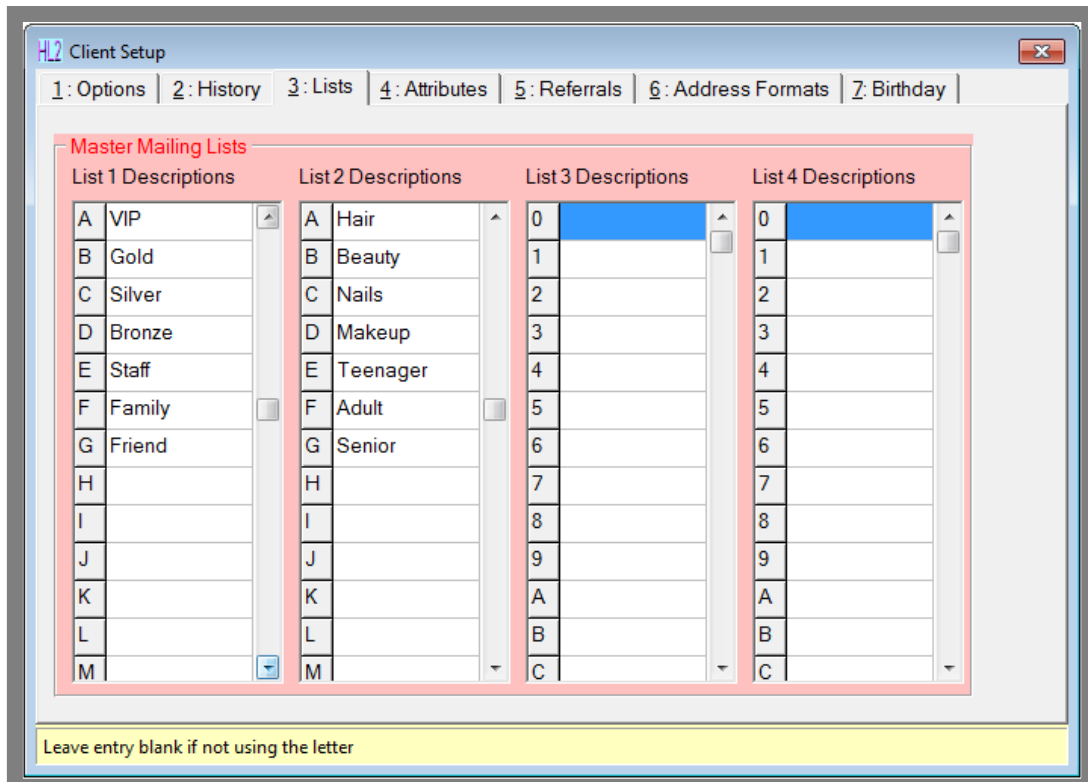


Fig. 2 - 21

CLIENT GROUPS AND FLAGS

Hairlink^{SQL} allows users to assign clients to groups which are identified by coloured flags or coins on diary appointments, client search windows, the billing screen, as well as the client record.

There are two types of groups. The Manual Client Groups will be in the shape of a flag with varying colours. These flags are assigned individually by the user on the client record. The Automatic Client Group will be in the shape of a coin with varying colours. These flags are assigned automatically by Hairlink^{SQL} based on criteria set by the user for all clients.

Manual Client Group Flags

You can assign flags of different colours to client groups. These flags will appear on diary appointments, client search windows, on the billing screen, as well as the client record. This allows you to quickly determine what group the client belongs to. For example you could have green flags for breeders, silver flags for staff members and blue flags for bonus points members. The flag will also appear when performing client searches making it easy to tell which “Joe Bloggs” is the Gold Member.

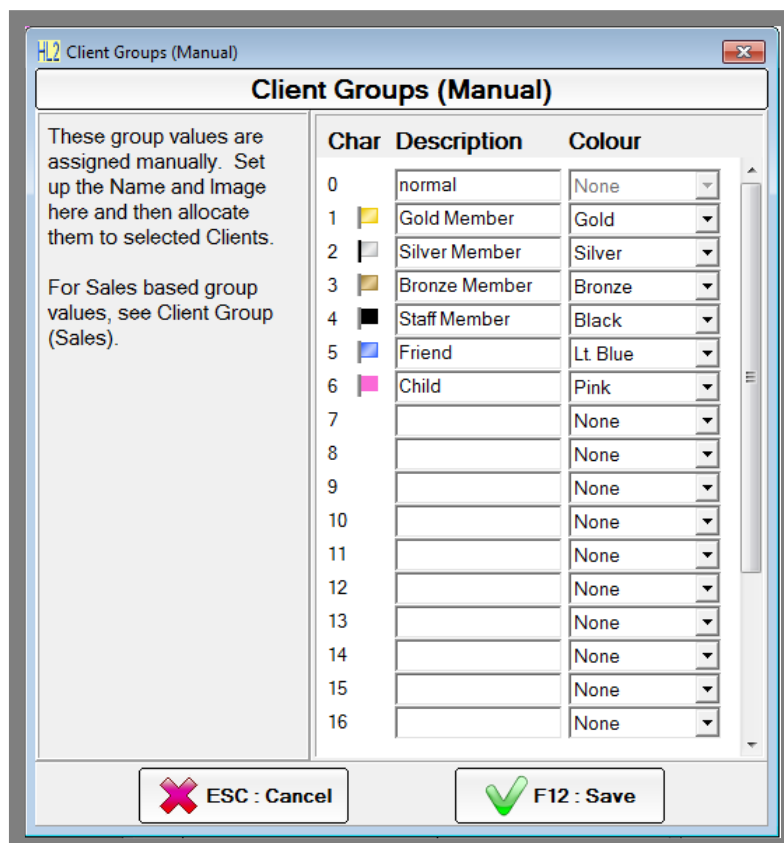


Fig. 2 - 22

Setting up a New Manual Client Group Flag

1. Go to **'Options'** and then select **'Picklist Setup'**.
2. Click on **'Client'** and then **'Group (Manual)'**.
3. The **'Client Groups (Manual)'** window will open.
4. To add a new group enter a new group name in one of the **'Name'** fields that is blank field and select a colour from the **'Colour'** menu.

Assigning a Manual Client Group Flags to Clients

1. Search for and open a client record.
2. Click on the **'More'** tab.
3. Select a new group from the **'Group'** menu list.



TIP: You can also set the group to be assigned to client profiles under **Options | Pick Lists | Client | Profiles**. This way new clients will automatically have the correct group selected when created.

NOTE: You can select up to 16 manual client groups.

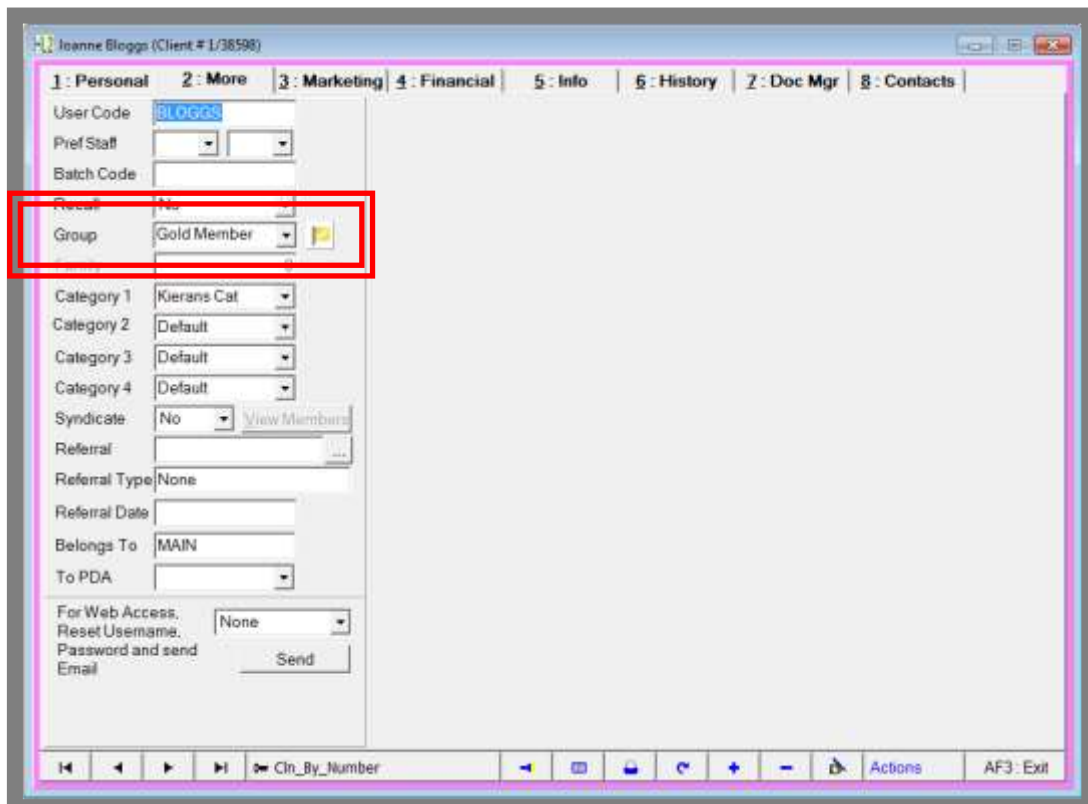


Fig. 2 - 23

Automatic Client Groups

Clients can be automatically “graded” and applied to special client groups based on their sales figures. For example, you could create a client group called “Silver Client” that would contain all clients that have spent between \$500 and \$2000 in a predefined period. Using these groups allows you to quickly know who your biggest spenders are. You can also choose to calculate only from profit and/or for services only if you wish to exclude retail sales.

Selecting the number of visits can solve the problem of large single purchases. A client might spend over \$500 on a single treatment but that doesn’t necessarily mean they should belong in the Bronze Client group as they may not intend to come back regularly at all. Setting the visits to 5 means they need to have come in at least 5 times in the chosen period and also spent an amount that is in one of the ranges specified.

Client Groups (Automatic)

Last run on Thu 21 Jan 2010 at 12:11 am taking 21 sec.

These Group values are assigned automatically, based on Sales. Set up names, image and dollar values here.

Feature Enabled

Assignment is by Sales by default. You can select to do it by Profit.

Use Profit

Assignment is by Total Sales by default. You can select to do it by Services Only.

Use Services Only

Select number of visits the Sales are to be looked at. Set to 0 to ignore visits.

0

Select number of months the Sales are to be looked at. Set to 0 to ignore months.

12

Char	Description	Colour	Sales From	Sales To
0	None	None	\$0	\$0
1	Gold Client	Gold	\$5000	\$1000000
2	Silver Client	Silver	\$2000	\$5000
3	Bronze Client	Bronze	\$500	\$2000
4	Casual Client	Lt. Blue	\$0	\$500
5		None	\$0	\$0
6		None	\$0	\$0
7		None	\$0	\$0
8		None	\$0	\$0
9		None	\$0	\$0
10		None	\$0	\$0
11		None	\$0	\$0
12		None	\$0	\$0
13		None	\$0	\$0
14		None	\$0	\$0
15		None	\$0	\$0
16		None	\$0	\$0

Item 0 is the default and should be called None

ESC : Cancel

F12 : Save

Fig. 2 - 24

Setting up a New Manual Client Group Flag

1. Go to **'Options'** and then select **'Picklist Setup'**.
2. Click on **'Client'** and then **'Group (Automatic)'**.
3. The **'Client Groups (Automatic)'** window will open.
4. To add a new group enter a new group name in one of the **'Name'** fields that is blank field and select a colour from the **'Colour'** menu.
5. Select the criteria that you would like clients to be assigned to this group by.
6. Hairlink^{SQL} will now check your client's spending overnight and updates them to the correct groups.



NOTE: Ensure that your Hairlink^{SQL} Background Processor is left running overnight otherwise this will be performed when it is first started in the morning.

NOTE: You can force recalculation by clicking on the client's group icon on their client record, this will take any sales from today into effect.

SETTING UP CLIENT CATEGORIES

Categories group clients, products or suppliers together for reporting purposes. Common categories for clients could include makeup, beauty or hair. You can then generate a report for a particular category to see their sales figures or profitability. See below for instructions on creating a new category.

1. Click on the **'Options'** menu and select **'Picklists Setup'**.
2. Expand the client, product or supplier menu depending on what type of category you are setting up.
3. Double-click on category 1 or 2. If you are creating a product category you have an extra three categories to choose from.
4. If you are creating a new category click on the red plus button at the bottom of the form. (If you are editing a category name just click on the name with the mouse and type in the new name.)
5. A blank line will be added at the bottom of the grid. Type in the name of the category and click on the red plus button to save.
6. When creating a new client, product or supplier record or when editing an existing record you should now be able to assign that record to a category.

SETTING UP CLIENT PROFILES

When a new client or product is added to your database, a profile is requested. Examples include Adult, Member, etc. The profile acts like a template and is there so that users in your business do not have to make decisions on a number of client configurations when setting up new client or product records. These settings include what mailing list they will be automatically subscribed to, the report category that they will be assigned to, the discount levels that they will be given or the batch group they will go to for statements. You can create new client profiles with pre-set criteria and train your staff to select the correct ones when adding new clients. This 'standardisation' within your organisation will benefit the business as data entry will be faster and more accurate as a number of options will not have to be selected each time a new record is added to the database.

1. Click on the **'Options'** menu and select **'Picklists Setup'**.
2. Expand the client or product or menu depending on what type of profile you are setting up.
3. Double-click on profile. And the client profile form will open.
4. To edit an existing profile double-click on the profile name. To create a new profile click on the red plus button at the bottom of the screen.
5. The client or product profile form will open. Select the options you wish to use in the profile. Depending on the profile selected a number of different options will be available.
6. Once you have set the fields for the profile click on the **'Accept'** button to save and exit.

ADDING CLIENT NOTES

The notes system is used to display pop-up or printed notes at various user defined stages in Hairlink^{SQL}. For example, you can automate the system to display a note when a bill is made for a particular client. These notes may be prompts to advise staff of important information they need to know about a client while billing or making an appointment. Notes can be added for clients, products, staff members and suppliers. The process for adding these reminders however is the same throughout the program. Please refer to the Notes Chapter for more information.