

adding / editing customers

Follow these simple steps to add new customers and edit existing customers.

Adding A New Customer

1. From the SalonBiz®/SpaBiz® menu bar, click on the File Drawer icon.
2. Click the Add button.
3. Type in the customer's first and last name.
4. Place a check in the Do Not include customer in mailings! box if the customer does not wish to receive mailings from you.
5. Type in the customer's address, city, state and zip code.
6. Type in the customer's telephone number. It is always good to get at least two contact numbers for each client.
7. Type in the customer's email address.
8. In the Number to Contact Client drop down menu, select a default reason from the list.
9. In the Personal field select from the Sex drop down menu. Note: the system defaults to Female.
10. Type in the customer's birthday.
11. Select from the drop down menu Referred By.
12. Choose a primary staff member if applicable. This can always be added later.
13. Type in any customer note necessary in the Note field. If you would like to have this note pop up when this customer file is accessed place a check in the Pop-up Note field.
14. Click the Add New button.

Add New Customer

First Name: Bob, Last Name: Ranelis, Referred By: Customer

Address: 123 Any Street, City, State: ST, Zip Code: 12233

Telephone Information: Home Phone: (208)111-1111, Mobile: (208)222-2222, Work Phone, Ext., Fax

Personal: Sex: Male, Drivers License Number, Birthday: 7/20, Credit Card Number

Referred By: Customer, Robert Riley, Hall

Primary Staff: Kirsten Hall, KIKI, Kirsten Hall

Note: Pop-up Note?

Number to contact client? EMail

Add New, Cancel Add

Editing A Customer File

1. From the SalonBiz®/SpaBiz® menu bar, click on the File Drawer icon.
2. Type in the customer's name.
3. Click the Search button. Note: you may also search by the customer's phone number. Type in the phone number area code first no spaces.
4. Double click on the name to view. Or highlight the name and click the Edit button.
5. The customer information file will appear. From this screen you can make any changes necessary, or simply view the information.

Editing A Customer File

Address & Information: First Name: Bob, Last Name: Ranelis, Address: 123 Any Street, City, State: ST, Zip Code: 12233

Personal Info: Sex: Male, Birthday: 7/20, Credit Card Number

Services: Primary Staff: Kirsten Hall

Formulas, Pictures, Custom Info

WebBooking Logon: UserID, Password

All Open Aps, Customer History, Ticket History, Standing Aps

Customer Support 800.809.2802

Our Customer Support team is ready to assist you.



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