



CLIENT RELEASE NOTES

iBookings Update March 2018

NEW TOOLS TO HELP YOU COMPLY WITH GDPR HIGHLIGHTS

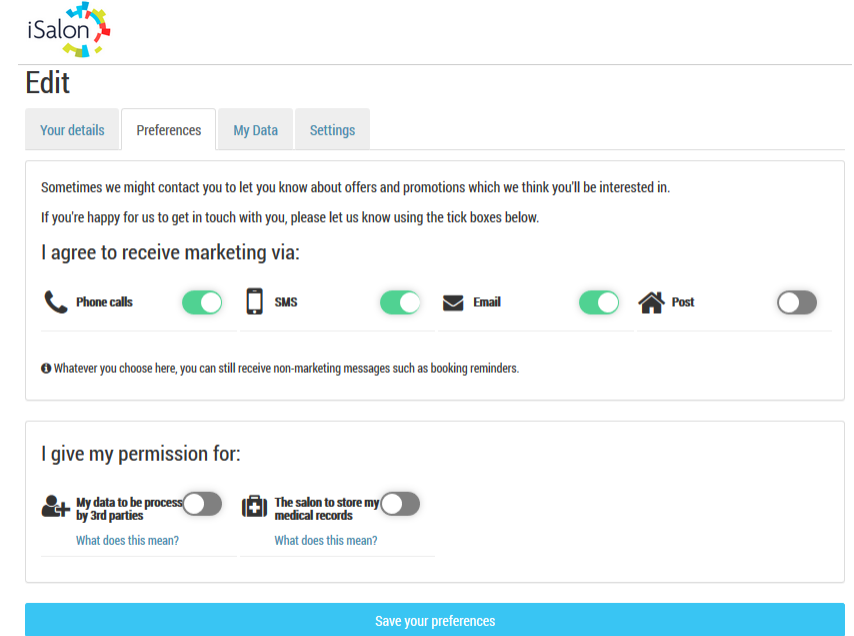
CLIENT PREFERENCES PORTAL	In versions 11.6 and later, iSalon will include a short URL in all SMS messages which leads clients to their preferences portal
CLIENT NOTES ACCESS	Clients allowed access to notes; method chosen on iBookings setup page
MARKETING OPT-IN TRACKING REPORT	This report now tracks opt-in changes made using the Client Preferences Portal
FORGET ME FUNCTION	'Forget Me' button allows clients to delete their data from iSalon

ENHANCEMENT HIGHLIGHTS

SALON CHOICE	The display for choosing a salon within a group of salons has been improved
NEW GENDER OPTION	Addition of 'Not Given' option under Gender field
CHANGE TO BOOKING CONFIRMATION EMAIL	The booking acknowledgement email that clients receive has been changed for clarity
AT A GLANCE AVAILABILITY	iBookings now shows if a Team Member is unavailable at a glance
UNAVAILABLE TEAM MEMBERS	When a Team member is not available (has no availability) – iBookings shows the salon/call centre phone number so clients can call to book an appointment
IMPROVED SALON INFORMATION PAGE	The salon info page layout has changed to show in sections to improve the layout
AMENDED WORDING	We have changed some of the wording of iBookings to make it even easier to use
ADDRESS FINDER	When clients enter their postcode, they are shown a list of corresponding addresses to choose from
FIELD ORGANISATION	We have re-ordered the client registration fields for ease of use

<p>MORE INFO</p>	<p>'More Info' links shown by each service where more information is available</p>
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SHOW ME NEW TOOLS TO HELP COMPLY WITH GDPR

<p>CLIENT PREFERENCES PORTAL</p>	<p>In versions 11.6 and later, iSalon will include a short URL in all SMS messages which leads clients to their preferences portal</p>	

CLIENT NOTES ACCESS

The Client Preferences Portal will display a 'Subject Access Request' button (called 'Request any notes held on me') by default.

A new feature has been added to the client preferences portal that allows clients to request any notes (these are their Client Notes, from the Client Record Card). The request is sent via email to the salon, and the salon have up to 1 month to fulfill this request.

Note: this can be changed in the iBookings setup portal that managers use. You can choose to show the client notes to them in their client preferences portal or give clients the option to request their notes.

You can be reminded of your admin (iBookings setup) login and passwords by referring to the email we sent you when we set your iBookings up; alternatively, you can call us on 01522 887 200 option 1.



Edit

Your details

Preferences

My Data

Settings

Personal Details

We are storing the following personal data for you. You can change some of this on the 'Your details' tab on this page. If you would like to query or change anything else, please get in touch with the salon directly.

Cutters

Mr. Rikki Tronson (No gender provided) DOB: 9/10/1900

Occupation: None recorded

the house

☎ 0123456789

a street

☎ 07123456789

in a town

✉ rikki.tronson@i-

CV37 6GR

salonsoftware.co.uk

Request any notes held on me

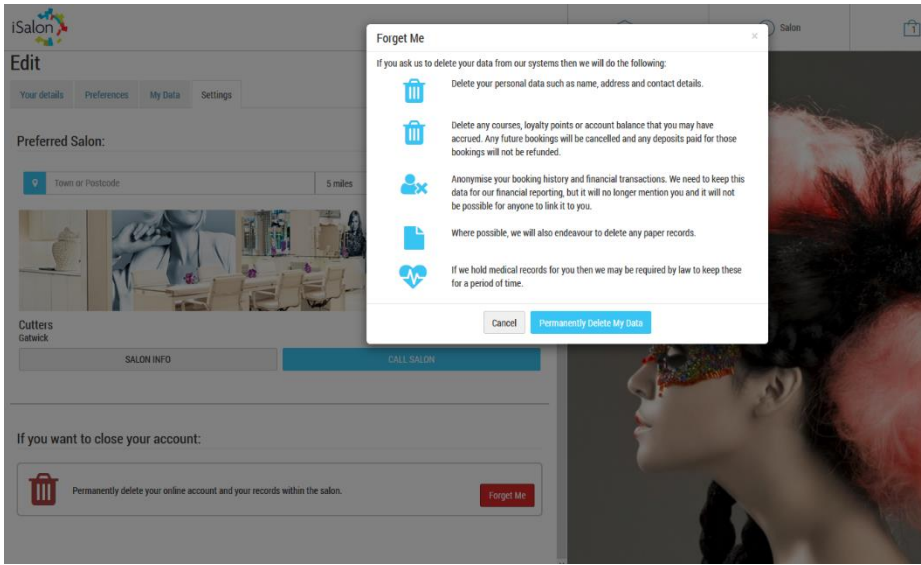
Send me a copy

Client Notes

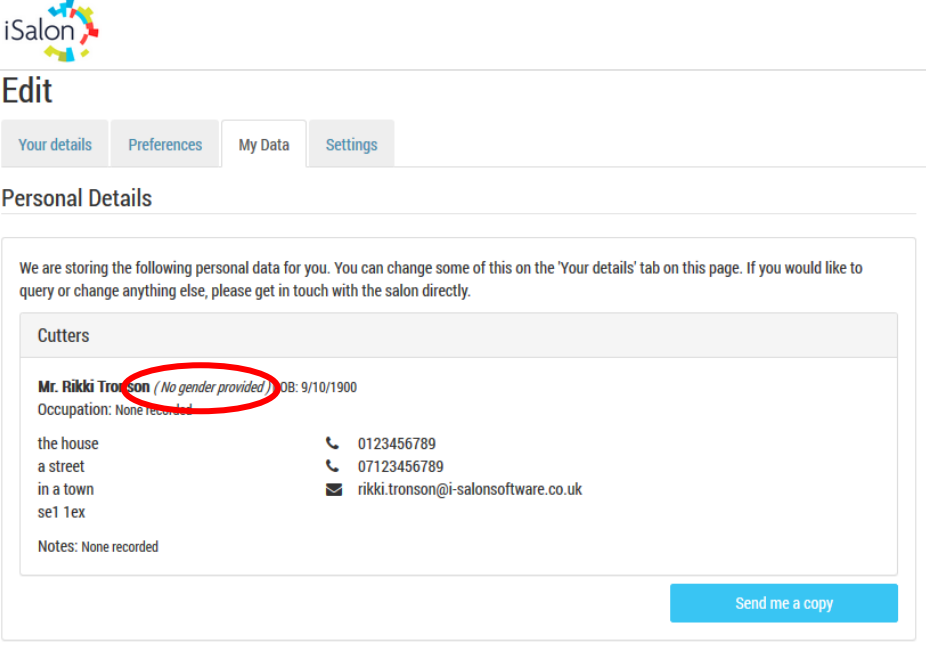
Client notes requests

- Allow clients to view the notes that you hold on them via the iBookings website.
- Allow clients to send you a request for a copy of the notes that you hold on them.
- ⓘ You are obliged to fulfill any such requests within 1 month.

		<p>Personal Details</p> <p>We are storing the following personal data for you. You can change some of this on the 'Your details' tab on this page. If you would like to query or change anything else, please get in touch with the salon directly.</p> <p>Cutters</p> <p>Mr. Rikki Tronson (No gender provided) DOB: 9/10/1900 Occupation: None recorded</p> <p>the house ☎ 0123456789 a street ☎ 07123456789 in a town ✉ rikki.tronson@i-salonssoftware.co.uk sp1 1AA</p> <p>Notes: None recorded</p> <p>Send me a copy</p>																																																																																											
<p>MARKETING OPT-IN TRACKING REPORT</p>	<p>This report now tracks opt-in changes made using the Client Preferences Portal.</p> <p>The new 'Marketing Opt-in Tracking' report in iSalon includes any changes to opt-ins that the client has made online in their iBookings 'My Account' page (Client Preferences Portal). You will know the client changed it as the last column will say 'iBookings 3' (iSalon shown in the example here, showing they made changes in local iSalon not online).</p>	<p>Marketing Opt-in Tracking 30 January 2018 - 30 January 2018 Inclusive Test Salon (Cutter)</p> <table border="1"> <thead> <tr> <th>Client</th> <th>Postcode</th> <th>Marketing opt-in</th> <th>Did the client opt-in?</th> <th>Date of change</th> <th>Changed By</th> <th>Where was the change made?</th> </tr> </thead> <tbody> <tr> <td>X XXX</td> <td></td> <td>Agreed to any third-party data processing</td> <td>Yes</td> <td>30/01/2018 14:03:39</td> <td>Christopher Bbb</td> <td>iSalon</td> </tr> <tr> <td>X XXX</td> <td></td> <td>Agreed to storage of medical records</td> <td>Yes</td> <td>30/01/2018 14:03:39</td> <td>Christopher Bbb</td> <td>iSalon</td> </tr> <tr> <td>X XXX</td> <td></td> <td>Opt-in to email marketing</td> <td>Yes</td> <td>30/01/2018 14:03:39</td> <td>Christopher Bbb</td> <td>iSalon</td> </tr> <tr> <td>X XXX</td> <td></td> <td>Opt-in to phone calls</td> <td>Yes</td> <td>30/01/2018 14:03:39</td> <td>Christopher Bbb</td> <td>iSalon</td> </tr> <tr> <td>X XXX</td> <td></td> <td>Opt-in to postal marketing</td> <td>Yes</td> <td>30/01/2018 14:03:39</td> <td>Christopher Bbb</td> <td>iSalon</td> </tr> <tr> <td>X XXX</td> <td></td> <td>Opt-in to SMS messages</td> <td>Yes</td> <td>30/01/2018 14:03:39</td> <td>Christopher Bbb</td> <td>iSalon</td> </tr> <tr> <td colspan="2"></td> <td>Overall SMS marketing opt-in</td> <td></td> <td>0.00%</td> <td colspan="2"></td> </tr> <tr> <td colspan="2"></td> <td>Overall Email marketing opt-in</td> <td></td> <td>0.00%</td> <td colspan="2"></td> </tr> <tr> <td colspan="2"></td> <td>Overall postal marketing opt-in</td> <td></td> <td>0.00%</td> <td colspan="2"></td> </tr> <tr> <td colspan="2"></td> <td>Overall phone call marketing opt-in</td> <td></td> <td>0.00%</td> <td colspan="2"></td> </tr> <tr> <td colspan="2"></td> <td>Overall third-party data processing agreement</td> <td></td> <td>0.00%</td> <td colspan="2"></td> </tr> <tr> <td colspan="2"></td> <td>Overall medical records storage agreement</td> <td></td> <td>0.00%</td> <td colspan="2"></td> </tr> </tbody> </table>	Client	Postcode	Marketing opt-in	Did the client opt-in?	Date of change	Changed By	Where was the change made?	X XXX		Agreed to any third-party data processing	Yes	30/01/2018 14:03:39	Christopher Bbb	iSalon	X XXX		Agreed to storage of medical records	Yes	30/01/2018 14:03:39	Christopher Bbb	iSalon	X XXX		Opt-in to email marketing	Yes	30/01/2018 14:03:39	Christopher Bbb	iSalon	X XXX		Opt-in to phone calls	Yes	30/01/2018 14:03:39	Christopher Bbb	iSalon	X XXX		Opt-in to postal marketing	Yes	30/01/2018 14:03:39	Christopher Bbb	iSalon	X XXX		Opt-in to SMS messages	Yes	30/01/2018 14:03:39	Christopher Bbb	iSalon			Overall SMS marketing opt-in		0.00%					Overall Email marketing opt-in		0.00%					Overall postal marketing opt-in		0.00%					Overall phone call marketing opt-in		0.00%					Overall third-party data processing agreement		0.00%					Overall medical records storage agreement		0.00%		
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<p>FORGET ME FUNCTION</p>	<p>'Forget Me' button allows clients to delete their data from iSalon.</p> <p>A pop-up will explain exactly what data will be deleted.</p> <p>We have a new warning list on the popup to say that any future bookings will be deleted, and any deposits paid for those bookings will be lost and will not be refunded.</p>	

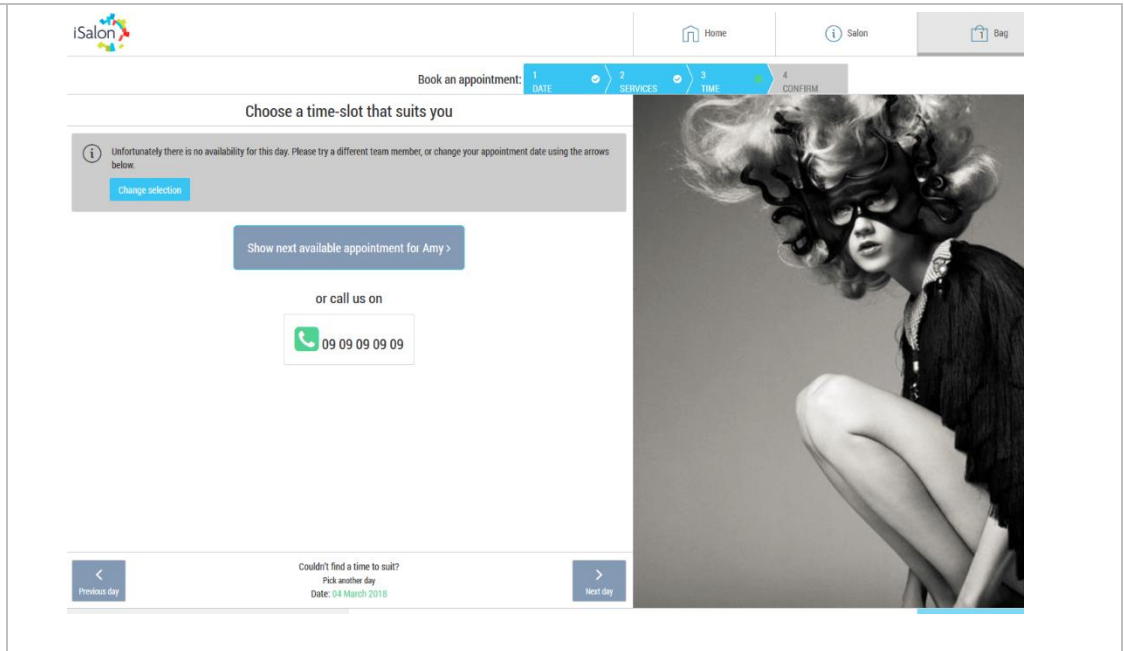
SHOW ME ENHANCEMENTS

<p>NEW GENDER OPTION</p>	<p>Addition of 'Not Given' option under Gender field in iSalon will show in iBookings</p>	
<p>CHANGE TO BOOKING CONFIRMATION EMAIL</p>	<p>The booking acknowledgement email that clients receive has been changed for clarity;</p> <p>Clients are sent a 'Booking Acknowledgement' email, and then a 'Booking Confirmation' email.</p> <p>In 'Booking Acknowledgement' email we have the following changes:</p>	

	<p>The subject line has been changed to: "<salon name> - Your booking is awaiting confirmation from the salon"</p> <p>The title in the email (just underneath the logo) has been changed to: "Your booking is awaiting confirmation from the salon"</p> <p>In the grid, the text in line with the exclamation mark symbol has been made bold: "Your appointment is now awaiting confirmation from the Salon. We'll let you know as soon as that has been done."</p>	
<p>AT A GLANCE AVAILABILITY</p>	<p>iBookings now shows if a Team Member is unavailable at a glance.</p> <p>If the Team Member name is clicked on; a display message explains they are unavailable.</p>	

UNAVAILABLE TEAM MEMBERS

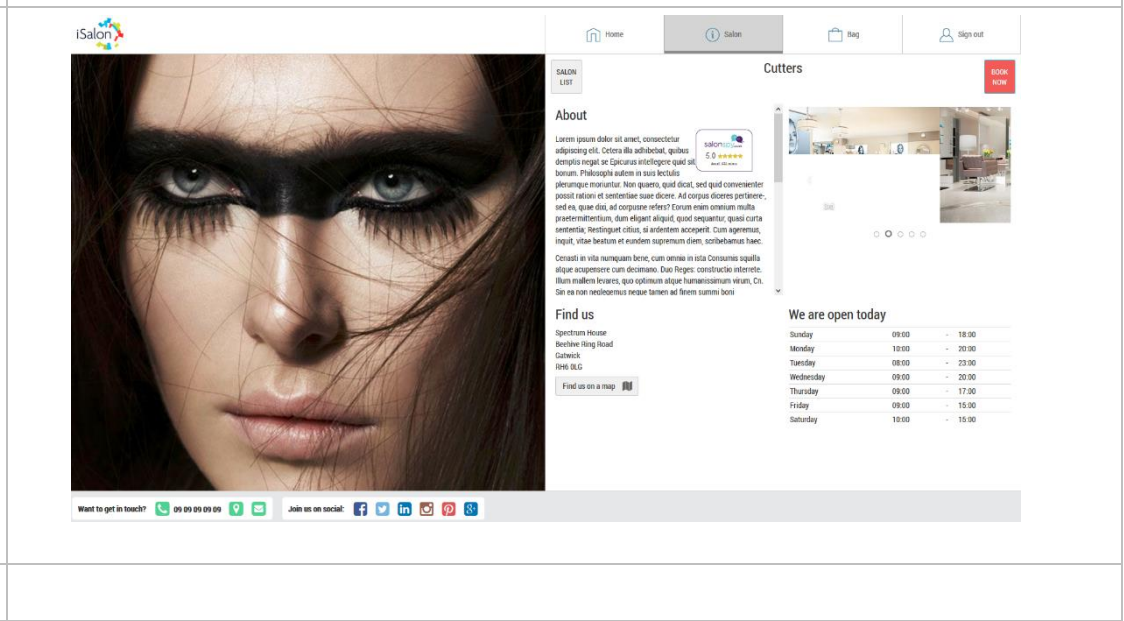
When a Team member is not available (has no availability) – iBookings shows the salon/call centre phone number so clients can call to book an appointment



IMPROVED SALON INFORMATION PAGE

The salon info page layout has changed to show in sections to improve the layout.

NOTE: Tablets, laptops, desktops and other full screen devices will get this new view, but mobile phones will still get the tabbed view due to screen space.



<p>AMENDED WORDING</p>	<p>Changes to the salon logo shown top left of screen, and various word terms:</p> <ol style="list-style-type: none"> 1) when clicking the logo, it opens a new window and takes us to the salon's website 2) Wording Change 'Website' tab name to "Go to <website url>" 3) top-right 'Set up an account' changed to 'New user?' 4) 'my account' wording has been changed to 'sign in' 5) 'log out' changed to 'sign out', 	
<p>ADDRESS FINDER</p>	<p>We have added a new Find Address button to the 'Register Via Email' and 'Edit Details pages' in iBookings (when users are creating an account for iBookings, or are editing their existing account details in iBookings). It looks at the postcode entered and displays a list of matching addresses.</p>	

FIELD REORGANISATION	On iBookings, the client registration fields have been reordered as follows: First name Surname DATE OF BIRTH (Added) Mobile phone Postcode Email Password Confirm password	
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