

Search And View Client Records

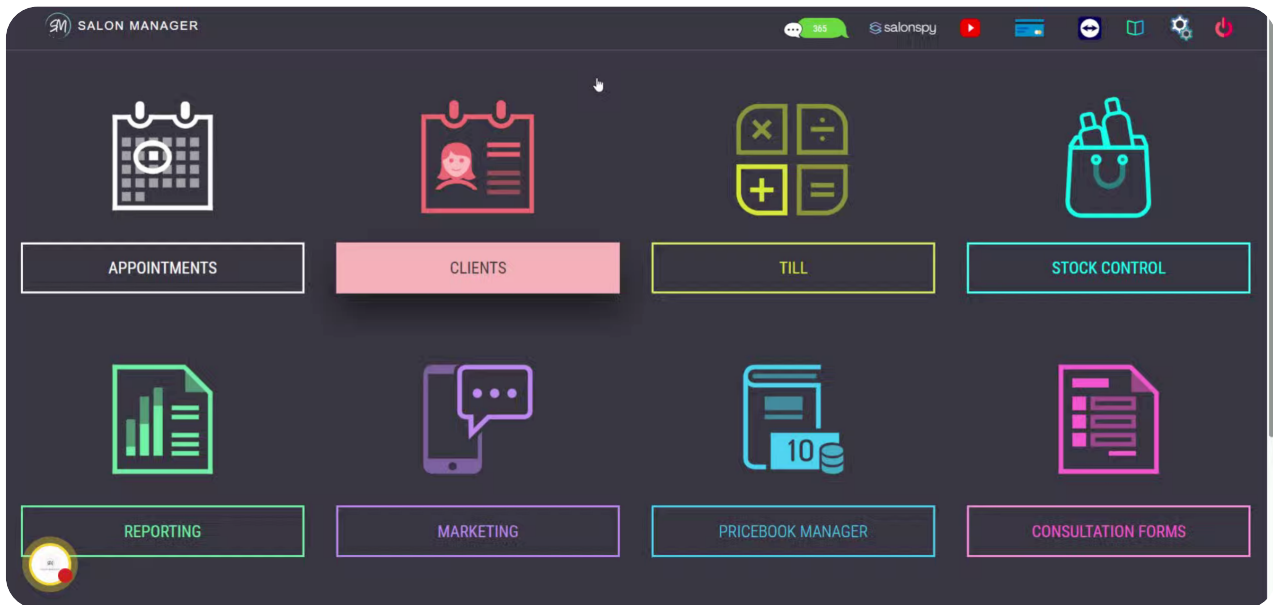
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SALON MANAGER

01 Open Clients Menu

Hello, today I'm going to show you how to search for a client's record card in Salon Manager. From the main menu, we can click the Clients option here.



02 Enter Client Search Criteria

This will load up the client module. We can search for a client in here by their first name, their surname, their phone number, or their email address.

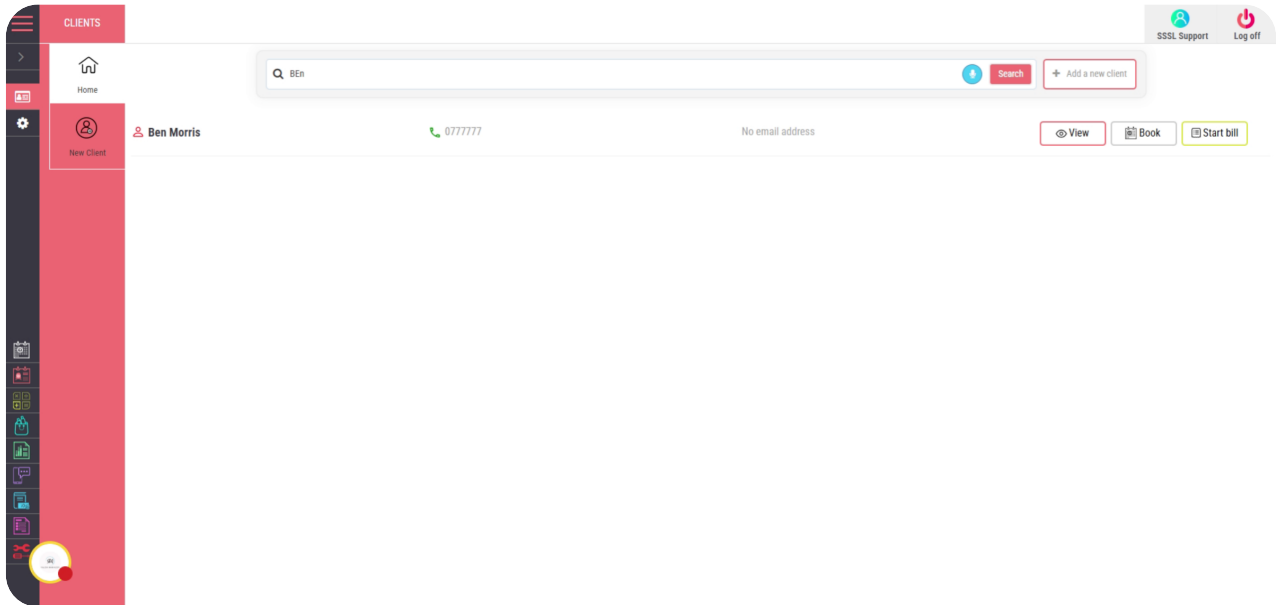
The screenshot displays the 'CLIENTS' module dashboard. At the top, there is a search bar with the placeholder text 'Search by name, phone or email' and a 'Search' button. To the right of the search bar is a '+ Add a new client' button. The dashboard features six data cards, each with a title, an icon, a large number '0', and a brief description:

- Clients**: Includes an 'Export Clients' button.
- Clients with a birthday**: The number of clients who have a birthday in the next 7 days.
- Lost clients**: The number of clients who visited in the last year but have not been back in the last 3 months.
- Clients booked in today**: The number of clients who have a booking today.
- Clients with courses**: The number of clients who have a course with an outstanding balance.
- Clients who need a skin test**: The number of clients who have a booking in the next 7 days but do not have a recorded skin test.

The interface includes a left-hand navigation menu with icons for Home, New Client, and various other functions. The top right corner contains 'SSSL Support' and 'Log off' links.

03 View Client Record

Once you've searched for a client and you have found them in your list, click view at the right of their name to go in to their record card.



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