

Edit Client Details

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SALON MANAGER

01 Introduction To Client Editing

Hello, today I'm going to show you how to edit your client's details in Salon Manager.

The screenshot displays the 'CLIENTS' section of the Salon Manager application. The interface is divided into a sidebar, a top navigation bar, and a main content area.

Sidebar (Left): Contains icons for various functions: Home, Clients, Appointments, Products, Courses, Reports, Settings, and a user profile icon.

Top Navigation Bar: Displays the client's name 'Ben Morris', phone number '0777777', and email status 'No email'. It also includes a 'Client List' button and a 'Client Record Card' button. On the right, there are links for 'Skin tests', 'Loyalty points', 'Client notes', 'Deposit', 'Marketing preferences', 'SSSL Support', and 'Log off'.

Main Content Area: The client's record card for Ben Morris is shown, featuring several key metrics and sections:

- Next Appointment:** Tue 16 Jun 2026, 10:00 to 10:45 with Daniel, Newcastle.
- Notes:** 11 June, 2026. Client notes here! (Includes a '+ New note' button).
- Alerts:** (Includes a '+ New alert' button).
- Account Balance:** £10.00 credit, £0.00 deposit taken.
- Loyalty Points:** 0 points (Includes an 'Edit' button).
- Visit Frequency:** 0 weeks.
- Average Spend:** £0.00 per visit.
- Last SMS:** No SMS message sent. (Includes a '+ Send SMS' button).
- Edit Client:** (Includes an 'Edit' button).
- Client Referrals:** Referred 0 clients.
- Course Purchases:** No courses purchased.
- Product Purchases:** No products purchased.

02 Open Client Settings

Once you've found your client's record card, we just need to click Edit Client at the bottom left. Once we click that, it will take us into the client settings.

Clients

Ben Morris
0777777
No email

Client List

Client Record Card

Client Timeline

Courses

SSSL Support

Log off

Skin tests
Edit ✎

Loyalty points
0 🏆

Client notes
None No alerts

Deposit
No deposit paid

Marketing preferences
SMS Email Phone Post

EDIT ✎

Next Appointment

Tue 16 Jun 2026
10:00 to 10:45 with Daniel
Newcastle

Notes

+ New note

11 June, 2026
Client notes here!

Alerts

+ New alert

Account Balance

£10.00 credit
£0.00 deposit taken

Loyalty Points

0 points

Edit ✎

Visit Frequency

0 weeks

Average Spend

£0.00
per visit

Last SMS

+ Send SMS

No SMS message sent.

Edit Client

Client Referrals

Referred 0 clients

Course Purchases

No courses purchased

Product Purchases

No products purchased

03 Modify Client Personal Details

On the left, you will find the client's details, including their name, contact numbers, and any email addresses you may have. On the right-hand side, their address information is displayed. Below that, additional information is provided, such as date of birth, gender, and year of birth for marketing purposes. It also includes details about any referrals and, if applicable, their membership number, assuming you have set up membership numbers in the salon.

The screenshot shows a web application interface for modifying client details. The layout includes a sidebar on the left with navigation icons and a top header with 'CLIENTS' and user options. The main content area is divided into several sections:

- Client details:** Contains fields for Title (Mr), First name (Ben), Last name (Morris), Mobile phone (0777777), Home phone, Work phone, and Email address. It also includes checkboxes for 'Opt in to phone call marketing' and 'Opt in to SMS marketing', and a toggle for 'Client has no Email'.
- Address:** Contains fields for Address line 1, Address line 2, Address line 3, and Postcode.
- Extra info:** Contains fields for Gender (Female, Male, Not given), Date of birth (Day, Month, Year), Select a year or (13 years or older, Under 13 years), How did they hear (Ben did not specify how they heard), Referred by (Ben was not referred), and Membership number.
- Settings & switches:** A section at the bottom of the main content area.

The bottom of the interface features a navigation bar with 'Delete Client', 'Back', and 'Update client' buttons. The top right corner includes 'SSSL Support' and 'Log off' links.

04 Save Client Updates

Please make any necessary updates here. After making the changes, click on Update Client located at the bottom right.

CLIENTS

Home

Edit Client

Client details

Title: Mr

First name: Ben

Last name: Morris

Mobile phone: 0777777

Opt in to phone call marketing: ☐

Opt in to SMS marketing: ☐

Home phone:

Work phone:

Email address:

Client has no Email: ☒

Address

Address line 1:

Address line 2:

Address line 3:

Postcode:

Extra info

Gender: Female Male Not given

Date of birth: Day Month Year

Select a year or: 13 years or older Under 13 years

How did they hear: Ben did not specify how they heard

Referred by: Ben was not referred

Membership number:

Settings & switches

Delete Client

Back

Update client

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