

Enable Client Account Balance Payments

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SALON MANAGER

01 Introduce Client Payment Feature

Hello today I'm going to show you how to allow a client to pay via their account balance in Salon Manager.

The screenshot displays the 'CLIENTS' section of the Salon Manager interface. The client profile for Ben Morris is shown, including contact details and a list of services. The main content area is divided into several sections:

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

The interface includes a sidebar with navigation icons and a top bar with user information and settings.

02 Edit Client Settings

Once we have found the client we want to update the setting for, we just need to go and click edit client at the bottom left.

The screenshot displays a web application interface for managing clients. The top navigation bar includes 'CLIENTS', 'Client List', 'Client Record Card', 'Client Timeline', and 'Courses'. The main content area shows details for a client named Ben Morris (0777777, No email). The interface is divided into several sections:

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

The right sidebar contains links for 'Skin tests', 'Loyalty points', 'Client notes', 'Deposit', 'SSSL Support', and 'Log off'. The 'Marketing preferences' section shows status for SMS, Email, Phone, and Post.

03 Access Payment Settings

This will load us into the client settings page. If we scroll down to the settings and switches section, here we can use Can Pay via account sales here.

CLIENTS

Home

Edit Client

Client details

Title

First name *

Last name *

Mobile phone *

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

did not specify how they heard

Referred by

was not referred

Membership number

Settings & switches

Delete Client

Back

Update client

04 Enable Account Balance Payment

Toggling this on and clicking update client to allow a client to pay via their account balance. This means that they can potentially go into a debt.

CLIENTS

Home

Edit Client

Opt in to phone call marketing ☐

Opt in to SMS marketing ☐

Home phone

Work phone

Email address

Client has no Email ☒

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

Exclude from SMS service messages ☐

Booking reminder notice period (days)

Can pay by account sales ☒

Extra booking time (minutes)

Disable loyalty points ☐

Disable online bookings ☐

Services Discounts

Products Discounts

Delete Client

Back

Update client

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