

View And Filter Client History

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SALON MANAGER

01 Open Client Timeline

Hello, today I'm going to show you how to view the client's history in Salon Manager from their client record card. Once you're in the client's record card that you wish to view, you just need to click client timeline on the left hand side here.

The screenshot displays the 'CLIENTS' section of the Salon Manager interface. On the left, a vertical sidebar contains icons for 'Client List', 'Client Record Card', 'Client Timeline', and 'Courses'. The main area shows the record card for 'Ben Morris' (0777777, No email). At the top right of the main area are links for 'Skin tests', 'Loyalty points', 'Client notes', 'Deposit', 'SSSL Support', and 'Log off'. The record card itself 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, Edit), 'Visit Frequency' (0 weeks), 'Average Spend' (£0.00 per visit), 'Last SMS' (No SMS message sent, + Send SMS), 'Edit Client', 'Client Referrals' (Referred 0 clients), 'Course Purchases' (No courses purchased), and 'Product Purchases' (No products purchased).

Section	Details
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 Edit
Visit Frequency	0 weeks
Average Spend	£0.00 per visit
Last SMS	No SMS message sent + Send SMS
Edit Client	
Client Referrals	Referred 0 clients
Course Purchases	No courses purchased
Product Purchases	No products purchased

02 Filter Client History Views

What this will do is bring you into a section with the client's entire history. We can see down the left hand side we have bookings, bills, courses, retail, notes, alerts, text messages and emails. We can also use these sliders to filter what we wish to see as well. If I slide all of these off and leave bills on, then I will only see the bills.

The screenshot displays a software interface for managing client history. On the left, a vertical sidebar contains a list of filters: Bookings, Bills, Courses, Retail, Notes, Alerts, SMS, and Emails. Each filter has a toggle switch. The main area shows a timeline of events for a client named Ben Morris. The timeline is divided into three sections by dates: 29 December, 2026, 25 December, 2026, and 22 December, 2026. Each section contains a booking card. The booking cards are titled 'Booking' and 'Newcastle'. The first booking card shows 'Booked via Salon Manager' at 10:00 for 'Neck And Shoulders' with 'Daniel', booked by Ben Morris. The second booking card shows 'Booked via Salon Manager' at 14:15 for 'Sunbed' with 'Daniel', and at 14:45 for 'Manicure' with 'Daniel', both booked by Ben Morris. The interface also includes a top navigation bar with options like 'Client List', 'Client Record Card', and 'Client Timeline'. On the right side, there are buttons for 'Add note' and 'Add alert', and a 'Marketing preferences' section with checkboxes for SMS, Email, Phone, and Post.

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