

View And Manage Client Courses

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SALON MANAGER

01 View Client Courses

Hello, today I'm going to show you how to view clients courses in their client record card in Salon Manager.

The screenshot displays the 'CLIENTS' section of the Salon Manager interface. The client record card for Ben Morris is shown, featuring a sidebar with navigation options like Client List, Client Record Card, Client Timeline, and Courses. The main content area includes a 'Next Appointment' section with details for a session on Tue 16 Jun 2026. Below this are several summary cards: Account Balance (£10.00 credit), Loyalty Points (42 points), Visit Frequency (0 weeks), and Average Spend (£420.00 per visit). A 'Notes' section allows for adding new notes, and an 'Alerts' section is available for setting new alerts. The bottom row contains sections for 'Last SMS', 'Course Purchases' (showing a Full Body Massage), and 'Product Purchases'.

CLIENTS

Ben Morris
0777777
No email

Next Appointment [Print](#)

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

Notes [Print](#) [+ New note](#)

11 June, 2026
Client notes here!

Alerts [+ New alert](#)

Account Balance
£10.00 credit
£0.00 deposit taken

Loyalty Points
42 points [Edit](#)

Visit Frequency
0 weeks

Average Spend
£420.00 per visit

Last SMS [+ Send SMS](#)

No SMS message sent.

Edit Client

Client Referrals
Referred 0 clients

Course Purchases
Full Body Massage1
6 out of 6 services remaining
Newcastle

Product Purchases
No products purchased

02 Open Client Courses Tab

Once you've found the client whose courses you wish to look at, you just need to click courses on the left hand side menu.

The screenshot displays the 'CLIENTS' dashboard for a client named Ben Morris. The dashboard is organized into several sections:

- Client Information:** Ben Morris, 0777777, No email. Includes an 'EDIT' button.
- Next Appointment:** Tue 16 Jun 2026, 10:00 to 10:45 with Daniel, Newcastle. Includes a 'Print' button.
- Notes:** 11 June, 2026, Client notes here! Includes 'Print' and '+ New note' buttons.
- Alerts:** Includes a '+ New alert' button.
- Account Balance:** £10.00 credit, £0.00 deposit taken.
- Loyalty Points:** 42 points. Includes an 'Edit' button.
- Visit Frequency:** 0 weeks.
- Average Spend:** £420.00 per visit.
- Last SMS:** No SMS message sent. Includes a '+ Send SMS' button.
- Edit Client:** A button to edit the client's information.
- Client Referrals:** Referred 0 clients.
- Course Purchases:** Full Body Massage1, 6 out of 6 services remaining, Newcastle.
- Product Purchases:** No products purchased.

The left sidebar contains navigation options: Client List, Client Record Card, Client Timeline, Courses, and a bottom section with various icons. The top right corner includes a 'Log off' button and a 'Marketing preferences' section with checkboxes for SMS, Email, Phone, and Post.

03 Review And Edit Course Details

This will load us into a page where we can see their current courses at the top. We're able to change the expiry date if we need to extend this, and any past courses will show down here at the bottom.

The screenshot shows a web application interface for managing client courses. On the left is a vertical sidebar with a red header labeled 'CLIENTS' and a list of icons for navigation. The main content area is divided into two sections: 'Current Courses' and 'Past Courses'. The 'Current Courses' section displays a card for 'Full Body Massage1' with 6 units remaining, expiring on 16 June, 2027. The 'Past Courses' section shows a message: 'Ben Morris has no previous courses.' At the top right, there is a header bar with client information (Ben Morris, 0777777, No email) and a table of status indicators for various features like Skin tests, Loyalty points, Client notes, Deposit, and Marketing preferences.

Client	Ben Morris	0777777	No email	Skin tests	Loyalty points	Client notes	Deposit	Marketing preferences
EDIT	✗	42	Notes: No alerts	No deposit paid	SMS: ✗	Email: ✗	Phone: ✗	Post: ✓

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