

MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

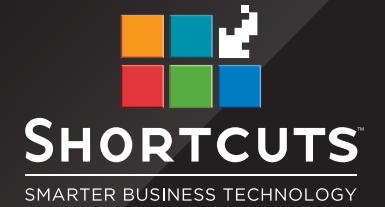
CLINIC

# GLOBAL CLIENTS

## SETTING UP AND USING GLOBAL CLIENTS

HOME & MOBILE

BEAUTY



*it suits you*

**Last updated 21 February 2017**

By Erin Lewis

Product: Global Clients

Software version no: 8.0.22.1

Document version no: 1.0

Country: Australia

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## ABOUT THIS DOCUMENT

Global Clients offers one client database for all your locations. This allow your salons to view and edit client profiles across multiple sites. This streamlines administration and saves time, whilst ensuring accurate data every time. Global Clients enables an exceptional client experience, no matter which salon the client visits.

# SETTING UP GLOBAL CLIENTS

Global Clients must be set up at each individual site in order for this feature to work.

- 1 Click on the **setup** menu.
- 2 Click on the **configuration** icon.
- 3 Click on the **general** setup menu.
- 4 Click on the **general** icon.
- 5 Tick the **multi site data sharing** box to enable Global Clients.
- 6 Click **done**.

The screenshot shows the 'General Setup' interface. On the left is a vertical navigation menu with icons for Sales, General, Security, Business, Appointment Book, Stock, Clients, Confirmation, Walkin, Roster, Visual Options, and Region. The 'General' menu item is highlighted with a red bar and a blue circle containing the number 3. The 'General' icon in the menu is also highlighted with a blue circle containing the number 4. The main content area is titled 'General Setup' and contains several sections: 'Options' with a list of checkboxes, 'Word Processor' with a dropdown menu, 'Attachments Folder' with a text input field, 'Default Club' with a dropdown menu, 'Club Expiry Warning(Days)' with a text input field, 'Minimum Entry Height' with a text input field, 'Protect logs for (Months)' with a text input field, 'Business Identifier', 'Employee Identifier', 'Employees Identifier', and 'Client Identifier' with dropdown menus, 'Default Client Gender' with a dropdown menu, 'Calendar Start Day' with a dropdown menu, 'Printing Preferences' with a table, and 'Date Range Default' with radio buttons. The 'Multi Site Data Sharing' checkbox is checked and highlighted with a blue circle containing the number 5. The 'Done' button at the bottom right is highlighted with a green checkmark and a blue circle containing the number 6. On the right side of the screen, there is a 'SHORTCUTS' panel with a clock showing 3:08 PM on Tue, 21 Feb '17, and a list of menu items: Main, Tools, Stock, Setup (highlighted with a red bar and a blue circle containing the number 1), Configuration (highlighted with a blue circle containing the number 2), Employees, Employee Groups, Capabilities, Services, Series, and Contraindications. At the bottom of the shortcuts panel, there is a user profile for Anna, Owner, with a 'Log Off' button.

# IMPORTING A CLIENT FROM ANOTHER SITE

- 1 Click on the **main** menu.
- 2 Click on the **clients** icon.
- 3 Click on the **global** button.

Select Client

Search For ...

Global 3
Delete

#BUSINESS	A	M	Y
#CLASS	B	N	Z
#EXPENSE	C	O	0
#GROUP	D	P	1
#STAFF	E	Q	2
#WALK IN	F	R	3
Adams, Chris 0455 000 555 (M)	G	S	4
Adams, Tina 0488 222 228 (M)	H	T	5
Allen, Colleen 0477999799 (M) <span style="color: red; font-weight: bold;">★</span>	I	U	6
Aloni, Dominic 0444 555 333 (M) 07 3834 3267 (H) 07 3834 3232 (W)	J	V	7
Anderson, Natalie 0433 777 333 (M)	K	W	8
Anderson, Vanessa 0422444222 (M)	L	X	9

Sort By...  
Last Name

Show Me...  
 Inactive

New

Quick

CPC

History

Card

Merge

Assistant

Appt Book

SHORTCUTS

3:33 PM  
Tue, 21 Feb '17

Main 1

Appointments

Arrivals

WalkIn Manager

Point Of Sale

Clients 2

Performance

Exit

Tools

Stock

Setup

Anna  
Owner  
Log Off

4

Enter the client's first name, last name or phone number into the **search** field. Alternatively, enter their member number into the **member number** field.

5

Click **search**.

A

Any matching results will be displayed here.

6

Select the relevant client from the search results.

7

Click the **add** button to add the selected client to your database. You will then be returned to the client list where the imported client will be automatically selected.

Global Client Look Up

Enter first name, last name, phone number or member number

Search ... Douglas Member Number... Search

Name	Email	Phone Numbers	DOB	Address	No. of Visits
Douglas, Aaron Last visited Peppermint Park - Newstead (9 Nov 2016)	client123@email.com	0404440004 (M)			1
Douglas, Katrina Last visited Peppermint Park - Ashgrove (21 Feb 2017)		0466777115 (M)			2
Douglas, Mariana Last visited Peppermint Park - Ashgrove (21 Feb 2017)		0499332114 (M)			1

+ Add
✓ Done

SHORTCUTS

3:35 PM  
Tue, 21 Feb '17

Main

- Appointments
- Arrivals
- Walkin Manager
- Point Of Sale
- Clients
- Performance
- Exit

Tools

Stock

Setup

Anna  
Owner  
Log Off

# VIEWING CLIENT HISTORY FROM ANOTHER SITE

- 1 Click on the **main** menu.
- 2 Click on the **clients** icon.
- 3 Select the relevant client.
- 4 Click on **history**.

Select Client

Search For ... DOUGLAS

Global Delete

Sort By... Last Name

Show Me...  Inactive

New Quick

CPC History

Card Merge

Assistant Appt Book

Douglas, Aaron 0404440004 (M)	A	M	Y
Douglas, Katrina 0466777115 (M)	B	N	Z
Douglas, Mariana 0499332114 (M)	C	O	0
	D	P	1
	E	Q	2
	F	R	3
	G	S	4
	H	T	5
	I	U	6
	J	V	7
	K	W	8
	L	X	9

SHORTCUTS

4:18 PM  
Tue, 21 Feb '17

Main

Appointments

Arrivals

WalkIn Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna  
Owner  
Log Off

**5** Tick the **include history from other sites** box to view the client's history from other sites they've visited.

**A** The client's history from other sites will then be displayed with the site's name beside the date.

**!** When you exit the history screen, the **include history from other sites** option will be automatically deselected. You will need to tick this option each time you view a client's history to include history from other sites.

**6** Click on the **history totals** tab if you want to view the client's total spend for other sites.

History for Aaron Douglas

History List	History Totals <b>6</b>	Points
- Tue 16 Aug 2016		
Cash \$40.00		\$40.00
Katie	Mens Cuts Mens Clipper Cut	\$20.00
Katie	Mens Cuts Cut Throat Shave	\$20.00
- Wed 13 Jul 2016		
Peppermint Park - Newstead <b>A</b>		\$143.10
(Unspecified)	MoistureMax Conditioner 200ml	\$23.10
(Unspecified)	Barber clipper cut	\$60.00
(Unspecified)	Cutthroat shave	\$60.00
- Fri 8 Jul 2016		
Cash \$20.00 EFTPOS \$40.00 \$60.00		
Anna	Mens Cuts Mens Clipper Cut	\$20.00
Anna	Body Treatments Body Scrub	\$40.00
- Thu 7 Jul 2016		
MasterCard \$1,707.71		\$1,707.71
Katie	Facial Cleansing Facial	\$40.00

Visit Notes (1)    Clinic Notes (1)

- Notes

- Visit Date - Mon 11 Jan 2016

Anna - Tuesday, 21 February 2017 2:52 PM
 

- Medium tan 10%

Show only date with notes
  Include history from other sites **5**

Treatment

Print

Help

Visit Details

Done

SHORTCUTS    4:10 PM    Tue, 21 Feb '17

Main

Appointments

Arrivals

WalkIn Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna Owner    Log Off



**7** Double click to expand the **other sites** section.

**B** The client's total spend for the other sites they have visited will then be displayed.

History for Aaron Douglas

History List	History Totals	Points
• Sales		\$2,465.58
• Discount		\$40.53
• Outstanding Account		\$0.00
• Visits		18
• Rebookings		2
• Clients Referred	0	\$0.00
• Average Spend		\$136.04
• Booking Prepayments		\$0.00
• Outstanding Series		0
- Other Sites <b>7</b>		\$143.10
• Peppermint Park - Newstead	\$143.10 <b>B</b>	

Visit Notes (1) Clinic Notes (1)

- Notes

- Visit Date - Mon 11 Jan 2016

- Anna - Tuesday, 21 February 2017 2:52 PM

- Medium tan 10%

Show only date with notes  Include history from other sites

Employee Service Date Range New Edit View

Print Visit Details Treatment Help Done

SHORTCUTS  
4:40 PM  
Tue, 21 Feb '17

Main  
Tools  
Stock  
Setup

Configuration  
Employees  
Employee Groups  
Capabilities  
Services  
Series  
Contraindications

Anna Owner  
Log Off



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*it suits you*

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HAIR | BEAUTY | CLINIC | SPA | BARBER | WALKIN | SCHOOL | MULTI-SITE