



Customer

- View the average number of weeks between appointments in TOP LEFT corner of client card.
- Set permission to allow emails, SMS or letters to be sent to client via the DEFAULT tab on client card. By default the client is set to receive all, but you can specify whether Smallbiz will send to the client for advertising or appointment purposes, or both. Email, SMS & letters can be allowed individually. The clients will still come up in the searches, BUT will not be included in the mail out or SMS.
- DIAGNOSTIC sheets printed from client cards have been improved. Option to print client cards from the search function in appointment book and by manual selection though the CUSTOMER menu INCLUDNG diagnostic information. Diagnostics must be turned on first from the CUSTOMER SET UP option through PRINT OPTIONS.
- DOCUMENTS tab function has been greatly expanded. It is possible to read information out of PDF forms & insert/update your client's information within Smallbiz. It also allows storage of the documents, and display as required.
- Also in the DOCUMENTS area, is an option to allocate a document to all (or any) staff for checkout. (Rather than just to one staff only)
- See the new MARKETING tab on the client card. This displays the details of all SMS & email's sent to the client. It makes it easy to see all your communications with your clients
- BOUNCED EMAILS- a warning message will display if you select a customer whose email has bounced when previously sending emails to them. Makes it easy for staff to chase invalid emails.
- CUSTOMER EMAIL LOOK UP option has been improved to allow a double click on the displayed clients to bring up their card straight away; no need to go all the way around to the client card area to do so.



Appointment Book

- For salons with MULTIPLE SITES - Improvements have been made to the speed of switching between multiple appointment books.
- Display the AVERAGE number of weeks between a client's visits by double clicking into the appointment (to the right of the select customer button). Alternatively, right clicking on an appointment also displays the average weeks between appointments.
- The DISABLE STAFF option (when they leave) has been made more intuitive. The screen has changed so that users don't inadvertently re-active staff when checking their status. Remember that a staff member can only be de-activated from a day at the start of a week.

The screenshot displays the 'Appointment Book' software interface. It is divided into two main sections: 'Customer Details' and 'Appointment Details'.
Customer Details: Includes a 'Select Customer' button, a 'Save' button, and a grid of action buttons (Copy, Paste, Clear, Repeat, Client, Sale, Regular Booking, Exit). Fields include Title (Mr, Mrs, Miss, Other), Name (Kylie), Wearing, Phone (H: 849040, (M): 0418999999, (W): 95241472), and buttons for 'Update Customer' and 'Bookings'.
Appointment Details: Includes 'Service' and 'Resource' dropdowns, 'Staff' (Samantha), and 'Date' (3/06/2016). The time field shows '10:30 A' with large spin buttons. The duration field shows '0' with radio buttons for 'For' (selected) and 'Till', and a spin button. A 'Notes' section at the bottom has checkboxes for 'Confirmation sent but unconfirmed' and 'Appointment confirmed'.
Annotations: 'Larger Spin Buttons' points to the time and duration spin buttons. 'New For & Till options' points to the radio buttons for 'For' and 'Till'.

- The APPOINTMENT ENTRY FORM has been updated with the start time & duration fields have been considerably enlarged. The spin buttons are also much larger so that you can change the values, especially useful if you are not using a mouse (eg touch screen or cloud).
- There is also a new option to display "To Time" rather than duration, which some salons have found to be very useful.
- Improved SMS response grid to address the incidence where client name was not displayed. This was most often when a client responded to a marketing SMS, but had not had any appointments.



- New SECURITY OPTION to prevent staff from Moving or Deleting appointments, without putting in a password. Move & delete can be setup separately. If used, the MOVE restriction only applies to future dates, so you can move appointments on the current day without issue.
- New wider slide bar on main Appointment screen, especially useful if on an iPad or Mobile. It can also be made even wider through setup if you wish.
- New RED LINE INDICATOR (on the left & right of the appointment book) for the “current day” only. This was recommended by salons that have a very full book, and were therefore NOT able to see the thick black time indication line (note this black line still remains but can only fill appointment space NOT used)
- Main appointment book PAGE DISPLAY now shows alternating light blue/white time lines across the page (ie only where there are no appointment details). This makes it easier (especially if you have many staff columns) to quickly & accurately select the correct times. The “light blue” colour can also be changed to a colour of your choosing in the APPOINTMENT BOOK SET UP area.
- New option to determine the amount of time information is displayed when the cursor hovers over an appointment. Change the display time in APPOINTMENT BOOK set up area.
- Set staff as a WAITING LIST STAFF. This is intended for dummy staff, often referred to as cancellation/waiting list, to hold appointments until a spot becomes free. In APPOINTMENT BOOK set up there is an option to mark a staff member as “waiting list staff”, then by default, clients booked into that staff member will not receive SMS messages. These appointments are not included in reports & will be deleted automatically (you can specify how many days past due date this occurs).
This option prevents staff inadvertently sending out SMS reminders for clients on waiting lists.
- You can now access client cards directly from past completed appointments.
- Past appointments are now shown as “hashed” rather than white. We believe this is more distinctive and easier to see the differences.
- New security option to make appointment book READ ONLY for selected logins. For example: if you have a third terminal (say out the back store room) intended as a read only device staff to be able to see all the appointments BUT not be able to make any changes (changes only allowed at the front desk).
- New EMAIL APPOINTMENT reminders to clients.



- STAFF ROSTER report has been upgraded. Now even easier to see over a period, when staff are rostered on and off; including times. Simpler to plan staffing resources.



Vouchers

- There is now an option to EMAIL A VOUCHER to a client. This can be for a new voucher, an old one or to replace a lost voucher. It can be used for salon & internet sold vouchers. Similar to the online voucher, an email template needs to be setup with the voucher graphics
- New select option in the VOUCHER REPORTS area for a search based on when a voucher was purchased... expired or not. For example: search for all vouchers that have unused value and purchased 3 months ago.
- Using the new VOUCHER REPORT option, above, the results can be entered into the marketing area (with voucher numbers & amounts). This provides the option to email or SMS these clients For example: saying they have an outstanding voucher (number 123 value \$75) that will expire in 2 weeks.... please call to ... etc

On-Line

- The online gift voucher & appointment booking programs now automatically adjust the layout & look of display if the client connects to them from a mobile device. When the client reaches the PayPal payment area they will be redirected to the appropriate PayPal site (mobile or Webpage).
- The online vouchers now allow for up to 300 character messages, providing more scope for personalization.
- You can now put helpful client messages into the online booking system. For example: "for health fund clients, please use the VIP section and insert you membership number as password."
- Improved the way a client is identified when making online appointments or Gift Vouchers. So that when the sale/appointment appears in your salon system, the correct client is listed.
Smallbiz now attempts to find clients by 1. Email address 2. Phone number 3. Client name
We are getting significantly more correct client identifications this way.



Wages

- Easily email payslips directly to your staff each pay period.
- Wages slips now include the superfund details
- Options for salary sacrifice and staff voluntary (after tax) super payments to be recorded
- Smallbiz can now create a SUPERSTREAM compliant file for submission to your Super Clearing House. This file is compliant with SuperStream Alternative File Format (SAFF) v1.0 Specification (Subject to the scope of Smallbiz operations for a salon environment (NB we don't use defined benefits schemes). You can of course, just look the information up in Smallbiz & type directly into you super clearing house software. This makes it a lot easier if you have a number of staff.

Reports

- There is a new report area for SMS/emails. This area allow you to select (and see what was sent in SMS) to clients based on :- Date sent, date received (for return SMS) mobile sent to. This can also be qualified by Appointment SMS/Marketing SMS/Marketing Email.
- This makes it very easy to see what was sent to whom & when. This ties in well with the new page on the client card detailing all marketing sent to the selected client.
- There is a new Client Average Bookings in Period report. This graph report breaks out the number of client vs the number of weeks between visits to the salon ... i.e. 10 client every 2 weeks, 25 every 3 weeks, 65 every 4 weeks etc.
- After many requests, it is no possible to print the demographics report on customers. The demographics report now also has a "and selected in marketing" option. This greatly increases the scope of the report. For instance, select all the new clients this year in marketing, then do the demographics report showing \$ spent vs say age !
- One of the most often used reports.. "Extended Averages Report" has been improved You can now exclude appointment details from the report. This can dramatically increase the speed (but drop the amount of detail). This also enables you to do staff (or shop) average reports over time, with a breakout each week..eg show staff Samantha's average details by week for the last 12 months
- In the Staff Sales Item Report, we have added an option to EXCLUDE zero price sales. This is useful if you have promotional \$0 sales, but don't want them included in the report.
- The Packages Status report has been dramatically improved. The information is very concise, detailed and more clearly laid out. The report runs substantially quicker as well.



Sales

- There is now an option to email a till docket to a client. Easily used from the normal sales screen when you click the "Options" button.
- When a client is selected in sales, it now displays in the top right corner the average number of weeks between their visits. This is calculated over 12 months, but can be changed
- Improved the Print written Pre-Sales option. This can be used to give quotes to clients.
- Tied down and removed a random error in sales which said "Incorrect Staff Number", when this was not the case. This was generally to do with sales on hold.

Marketing

- Smallbiz now records on the individual client card when they have been sent emails or an SMS. This is very handy and easy to confirm if a client did receive a message or email. Especially when they say.."No I didn't get that offer ...etc ..."
- There are now easy options to exclude clients from marketing. Just mark their client card. Whenever you do a selection, there are new columns that show each client's permission status. The new columns called AllowEmail, AllowSMS.
- There are new options/upgrades when you have a list of selected clients. By default, Smallbiz won't attempt to send to a client that does not have a mobile/email; however it still show them in the list (so you can see who doesn't have details on their card). Similarly, for permissions (you can see them but it will not send to them). There is an enhanced button for (in the case of SMS) to remove clients that "Don't have a mobile AND do not have permissions). You can then get an accurate count of who you can send to.
- There is now an extra column in the selection list called 'Sent'. This option is useful in situations where you have less than great internet quality. When you are sending (email or SMS) it marks each one as sent as it goes. If you have to restart sending at any stage, Smallbiz will (by default) not send again to those so marked. Some salons do use this differently though; they manually set these for clients they don't want to send to, rather than removing the clients from the list.
If you do another selection (for any criteria) this column is reset.



- You can now highlight up to 10 consecutive rows in the selection list (shift+select) and use the delete client button to delete them all. You do not have to do it individually. This makes it a great deal quicker to remove multiple clients from the list.
- The point's selection speed has been dramatically improved.
- There are now new options for flexibility in points marketing. When /if you use the points maintenance area to adjust points on the client card (say double points or delete points) for a period or day of week; you can now also specify "and currently selected in marketing" This means for instance that you could in marketing select all your VIP's then in the points area double JUST their points. Similarly..select all NEW clients for the month ...then double JUST their points.
- For those of you sending over 1000 emails or SMS at a time... There is now a substantial reduction of time necessary to send.

There are 2 new searches available for Email & SMS. You can select everyone sent by date & time. For example: select all the clients sent an email between 10.30am and 11.00am on Thursday 15/6/2016. This could be for a follow up message, or to make sure you don't send to them by using the [AND NOT] option to deselect anyone you have already sent to.

- Two new searches. Select by "Grouped with" or "Referred by". This allows you to be more specific for referrals.
- There is now an option to "Update a stored search". Previously you would have to delete it and put it back in again completely from scratch.

Stock

- The incoming stock program has been streamlined for easier use. One instance being the stock search screen now automatically displays if you type in a supplier code that does not exist.
- A new option to move stock no longer wanted into an "OLD STOCK" supplier. It removes the original supplier and any departments exclusively used by that supplier. The client history is maintained. The stock invoice history is deleted. It is envisaged that this "OLD STOCK" supplier will contain many old stock lines from multiple suppliers. This option can also be selectively run for just one department.



General

- We have a new Smallbiz data server plus an extra server for cloud users providing for redundancies & and an even more reliable service.
- The maximum backup size to our server has also been increased from 20M to 30M. This will help those larger salons pushing the boundaries.
- New database connection speed test available in Smallbiz(for internet database users) Great to check if your internet connection speed is affecting performance ALSO new option to display internal IP addresses which will make things substantially easier in a network environment.
- We have changed the BACKUP facility slightly. Previously Smallbiz stored the last location backed up to and displayed that location the next time you went to do a backup ...to make things easier. There have been however, a number of situations where this is “very” misleading and dangerous.

We now require you to actively select where you wish the backup to go EACH TIME. Unfortunately, Windows can change drive designators; someone may do a temporary backup to the hard drive (and other situations). We were finding, that the next person doing a backup (often with less skills) just assumed “Smallbiz” knew where it was supposed to go. It doesn't and can't; and in a number of situations, lead to the backup going to an unsafe area.

The backup has also been changed to display its size on completion. This reduces issues if the user can see that the backup is very small or zero, when it shouldn't be. Another useful indicator to see the backup is good.

- New Smallbiz REGISTRATION option. There could be a difficulty if a salon re-loaded Smallbiz from one computer to another over the weekend. This works all OK for a blank system (giving 30 days to register) but when you restored live data, it required an immediate registration (which would not be available over a weekend). There is now a “once only” 2 day bypass, which allows you to get to the next working day before having to register again. This has proven to be useful as well with the innocuous win10 upgrades that have run automatically overnight (say Friday) leaving salons with no access on the Saturday, because of the changed registration details.
- We have added a number of new warnings if you attempt to CHANGE STAFF NAMES. You can do it, but it is strongly NOT RECOMMENDED to reuse old staff numbers for new staff.
- A substantial UPGRADE to the backend of the Smallbiz system has been completed. This ensures that the Smallbiz program continues to be dynamic and continues to develop and grow going into the future.



- The Smallbiz UPDATE procedure has been changed to avoid security issues with later versions of windows & anti-virus software. This has reduced any potential issues in getting the latest versions of Smallbiz.