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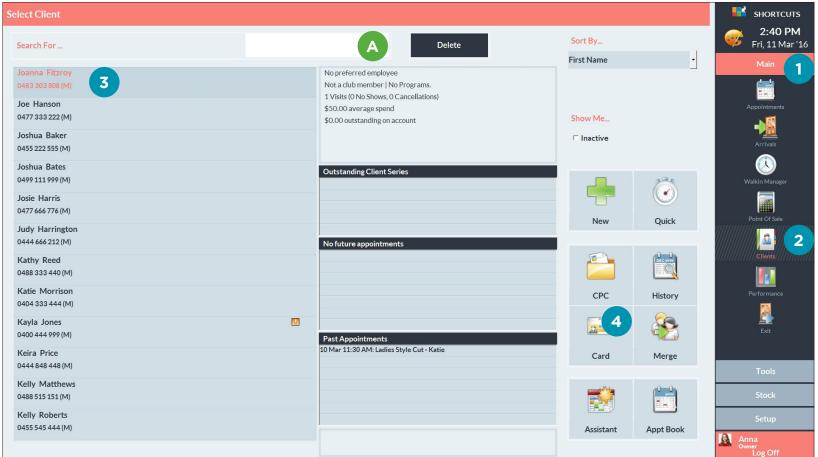
ABOUT THIS DOCUMENT

Recording each client's contact details is extremely important for marketing purposes. The more client data you record, the more accurately you'll be able to target your marketing campaigns.

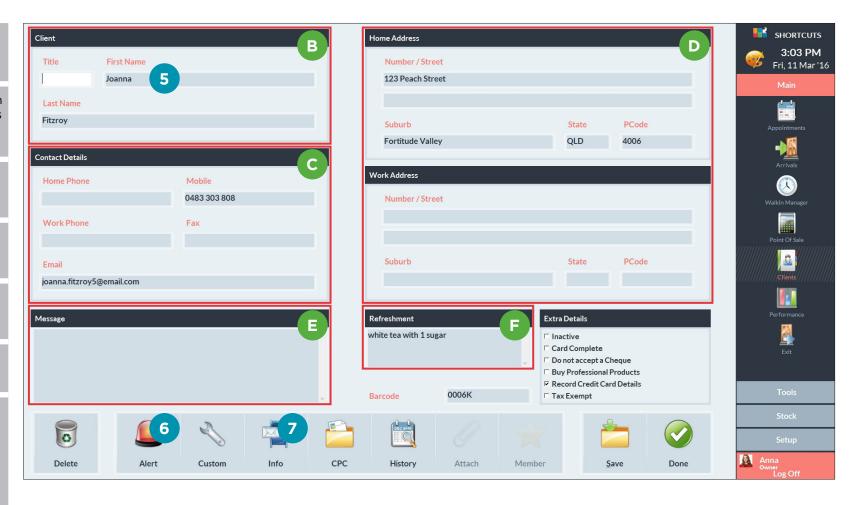
The Shortcuts client card allows you to record not only your clients' contact details, but everything from their preferred employee, to who referred them to the business. Access to these details will enable you to send personalised email and SMS campaigns that will resonate with your audience.

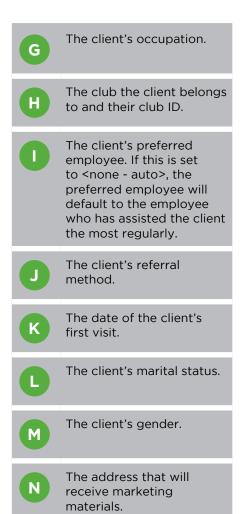
ENTERING DETAILS IN A CLIENT CARD





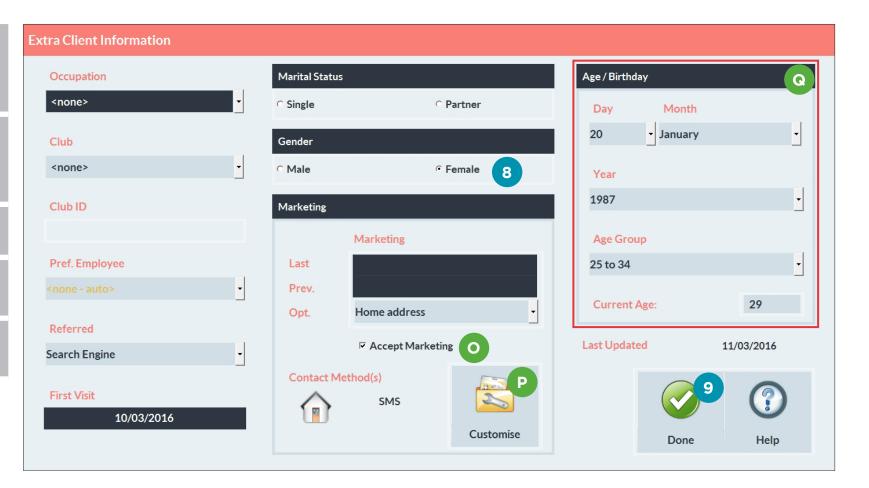
- B The client section is used to enter the client's title, first name and last name.
- The contact details section is used to enter the client's phone numbers, fax and email.
- The address section is used to enter the client's home and work address.
- The message section is used to enter any further information.
- The refreshment section is used to enter the client's preferred refreshment.
- 5 Enter the client's details into the appropriate fields.
- If you need to enter an alert message about the client (e.g. if they have an allergy), click the **alert** button and enter the message. The alert message will then be shown on the client dashboard.
- 7 Click on the **info** button to open the extra client information window.





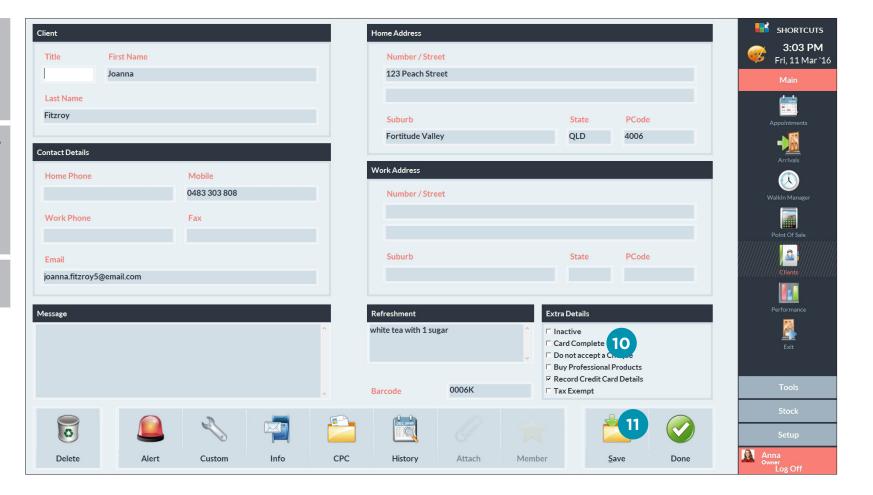


- You can uncheck the 'accept marketing' box if the client does not wish to receive electronic marketing.
- The customise button can be used to change the client's preferred method of receiving appointment confirmations.
- The client's birthday and age.
- Input the client's details into the appropriate sections.
- Click **done** when you are finished using the extra client information window.



- Once you have filled in all the details you wish to store in the client card, tick the 'card complete' box in the bottom right corner.
- On the appointment book, any clients who have an incomplete card will have a blue information icon on their appointment.

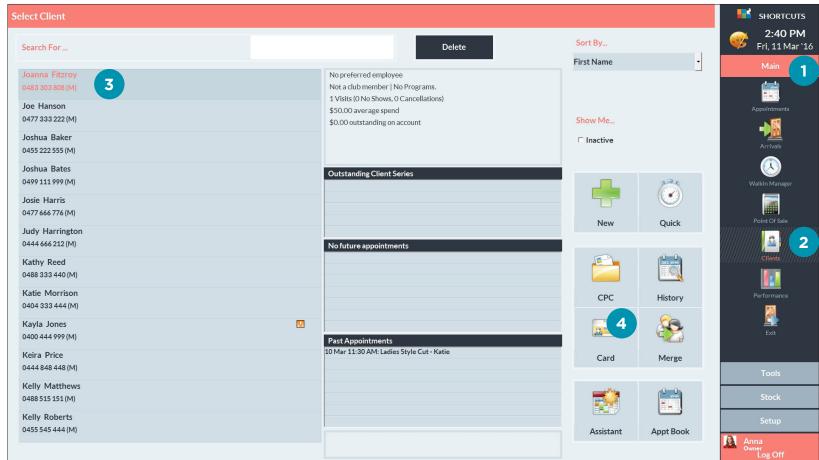
 Once you have completed a client card, the icon will disappear.
- Click **save** to save your changes.



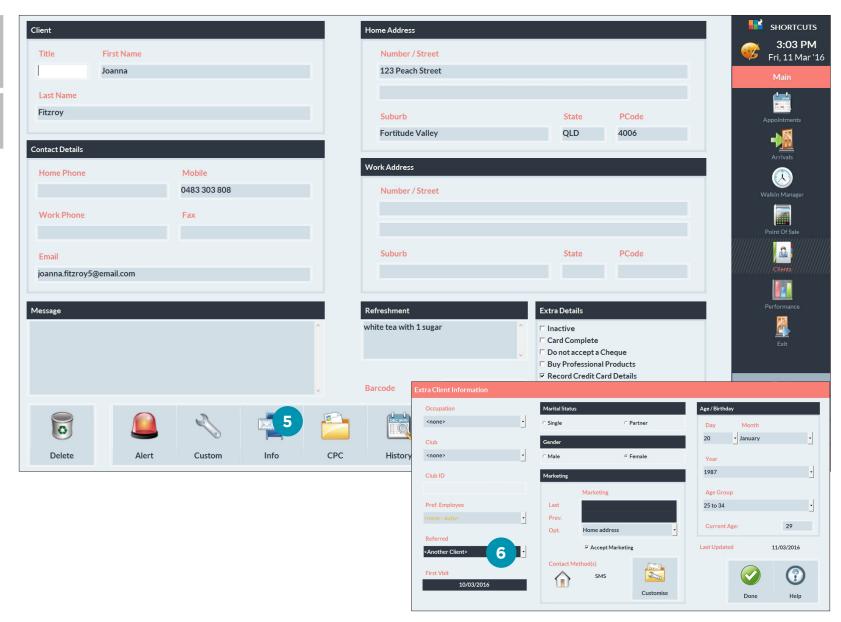
ASSOCIATING CLIENT REFERRALS

If a client was referred to the business by another client, you can specify which client referred them in the client card.



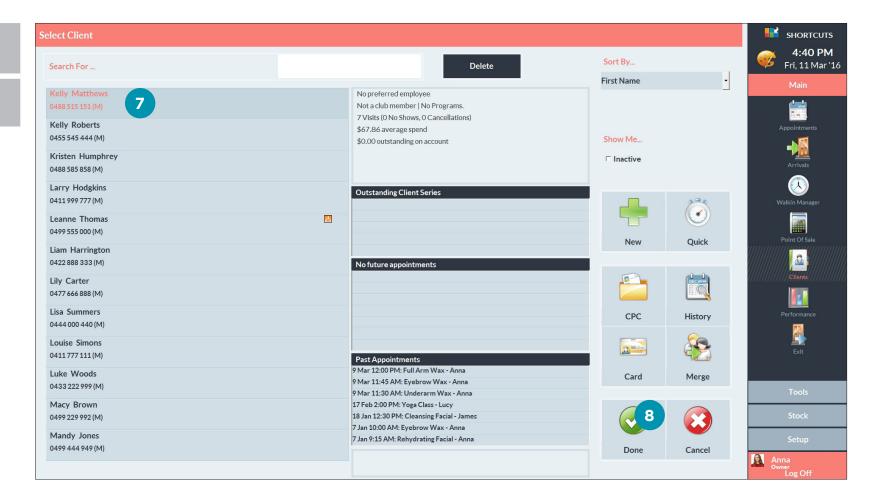


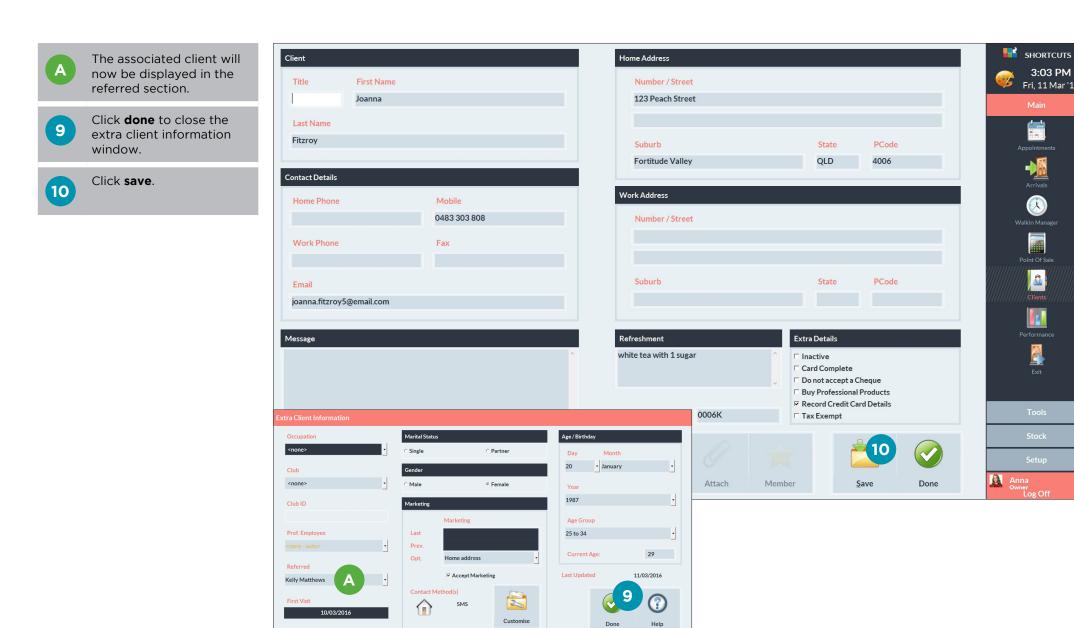
- Click on the **info** button at the bottom of the screen to open the extra client information window.
- 6 Click on the referred dropdown menu and select <another client>.



7 Select the client who referred this client.

Click done.





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