

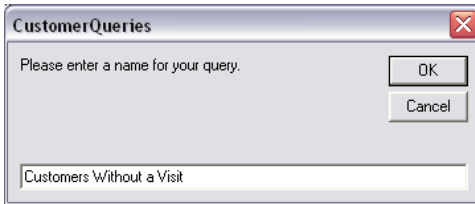
# without a visit query

Find all customers without a visit in a particular time frame.

## Adding the Query

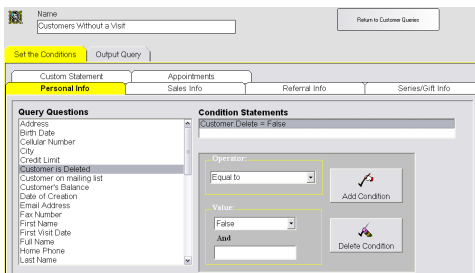
*This query will generate a list of your clients who have had a visit but have not been back within a certain amount of days.*

1. From the SalonBiz®/SpaBiz® menu bar, click on the Communications icon (Envelope).
2. Click on the Queries button.
3. Click the Add button.
4. Type in the name of the query.
5. Click the OK button.

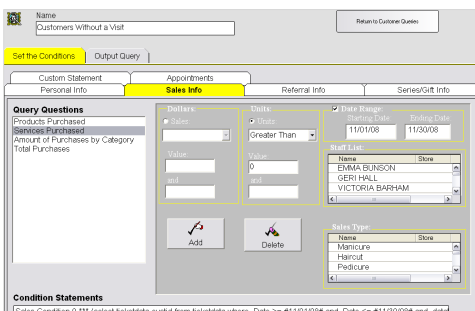


## Set the Conditions

1. In the Personal Info tab, highlight by clicking once on Customer is Deleted in the Query Questions field.
2. Select Equal to in the Operator drop down menu.
3. Select False in the Value drop down menu.
4. Click the Add Condition button. You should see the condition in the box under Condition Statements. *Adding this condition will eliminate those clients who have been previously deleted from your database from the list.*



5. Click the Sales Info tab.
  6. Highlight by clicking once on Services Purchased in the Query Questions field.
  7. Click in the Units field (you will see a black dot). Note: You should select units over dollars in most situations because of discounts.
  8. Select Greater Than in the Units drop down menu.
  9. Type in "0" zero in the Value field. *This will indicate that the client has been one or more times.*
  10. Place a check in the Date range box. Note: It is easiest to highlight over the entire date range and then type in your new date.
- ❖ The following are three of the most common date range examples for this condition statement. Assuming today's date is February 1, 2007.
- *You would like to find your clients that have not been back to your location in last three months (90 days).*



- You would like to find your clients that have not been back to your location in last six months (180 days).
  - Using February 1<sup>st</sup> as an example, you will count back six months from February. Your beginning date will be the first day of that month, August 1<sup>st</sup>.
  - For the ending date in the range you will count six months from the current month and enter in the last day of that month. For this example you would enter August 31<sup>st</sup>.
- You would like to find your February clients that have not been back to your location in the past year (365 days).
  - If today is February 1, 2009, you will enter a beginning date of the same month one years ago. Your beginning date will be February 1, 2008.
  - Your ending date in the range would be the end of the month February 28, 2008.

11. Click the Add button. You should see the condition in the box under Condition Statements. Adding this condition will give you a list of all of your clients that have been in at least once during the time frame.

12. Remaining in the Sales Info tab, highlight by clicking once on Services Purchased in the Query Questions field.

13. In the Units field, click on the Units circle, you should see a black dot.

14. In the Units drop down menu, select Equal to.

15. Type in "0" zero in the Value field. This will indicate all clients that have not purchased a service during the above date range.

16. Place a check in the Date Range box. Note: It is easiest to highlight over the entire date range and then type in your new date.

❖ For is condition, the beginning date will be the day after the ending date from the date range in the previous condition. The ending date in this condition will always be today's date.

- If you used the example for 90 days above. Again, assuming that today's date is February 1, 2009.
  - You would enter December 1, 2008 as the beginning date range (the day immediately following the ending date you have already entered for the date they visited your location).
  - The ending date in the range will always be today's date in this condition statement (you would enter 02/01/09 for this example).



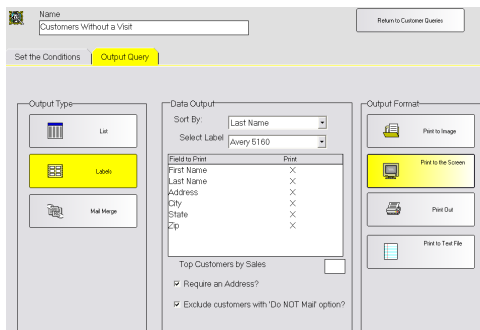
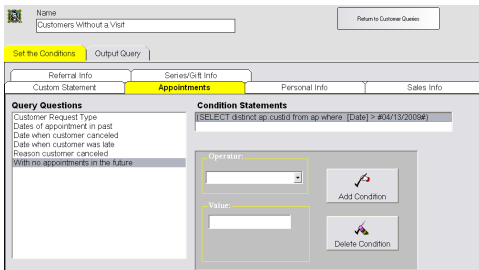
- If you used the example for 180 days above.
  - You would enter September 1, 2008 as the beginning date range (the day immediately following the ending date you have already entered for the date they visited your location).
  - The ending date in the range will always be today's date in this condition statement (you would enter 02/01/09 for this example).
- If you used the example for 365 days above.
  - You would enter March 1, 2008 as the beginning date range
  - The ending date in the range will always be today's date in this condition statement (you would enter 02/01/09 for this example).

17. Click the Add button. You should see both of the conditions in the box under Condition Statements.

18. Click on the Appointments tab.

19. Highlight by clicking once on With no appointments in the future in the Query Questions field.

20. Click the Add Condition button.



## Output Query

1. Click the Output Query tab.
2. Select the desired output in the Output Type field by clicking once on the box. The box will be highlighted yellow.
3. If you are printing labels, select a label from the drop down menu.
  - If you are planning on mailing to the list place a check in the box Require an Address?
  - If you are planning on mailing to the list place a check in the box Exclude customers with 'Do NOT mail' option?
4. In the Field to Print box, double click on the fields you wish to print. There should be an "X" in the Print column.
5. Select by clicking once on the desired output in the Output Format field. Until you familiarize yourself with queries it is good practice to print to the screen. This allows you to check that you have properly set the conditions without wasting paper or labels.

