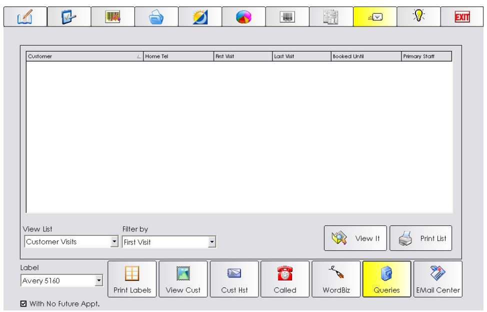
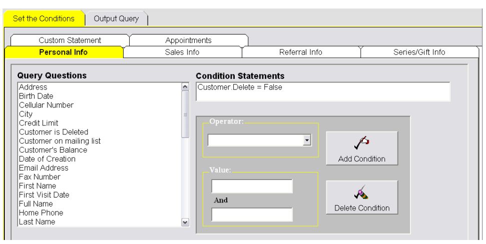
general query information

Use this as a general knowledge guide to help you navigate customer queries.



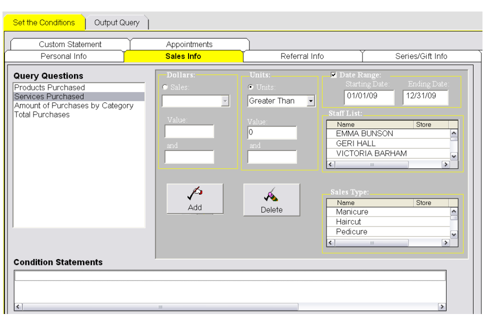
Customer Queries

1. From the SalonBiz®/SpaBiz® menu bar, click on the Communications icon (Envelope).
2. Click on the Queries button.
3. When you start customer queries, you may select which location's customer base you would like to query (multiple locations only).
4. The results of your query will contain customers who originated from the location(s) specified and that met the conditions.



Personal Info

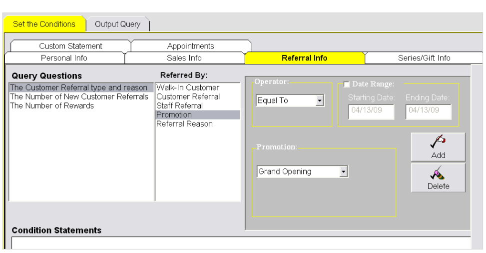
1. Select a condition from the Query Questions list.
2. Select the operator from the Operator drop down menu and enter a value.
3. Click the add button.
4. If you need to delete the condition statement, simply highlight the statement by clicking once, and then click the Delete Condition button.
   - A great example in this tab is to add a condition that will eliminate those clients who have been previously deleted from your database from the output. Do this by clicking once on Customer is Deleted in the Query Questions field. Then, select Equal to in the Operator drop down menu, and then select False in the Value drop down menu, then finally, click the Add button.



Sales Info

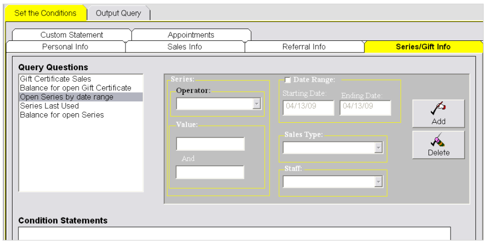
1. Choose one of the Options in the Query Questions list. If you wish to query sales in general – for instance, if you do not wish to specify either product or service sales only- then you will not select a query question at all.
2. Select either the Dollars or Units condition. Choose an operator from the drop down menu. Enter a Value.
3. Additionally, you may choose to further refine your query by adding one of the other conditions:
   - Date Range
   - Staff (the staff who sold the product or service)
   - Sales Type (which product or service was sold)
4. When you finish selecting conditions for your query click the Add button.
5. A new feature of Customer Queries is the ability to do a "Not In" query. This allows you to query customers who have purchased one item (product or service) or category of items but not another item or category of items.

- As an example, we will set up a query to tell us which customers have purchased services in the Haircuts, but not Color. You will add 2 Conditions under the Sales Info tab. The first condition will state which item, service or service category the customer *did* purchase. The second condition will state which item the customer has *not* purchased.
- Click on Amount of Purchases by Category in the Query Questions field.
- Select the Units button (you may also use Dollars) and choose Greater Than from the Operator drop down menu.
- Enter a value. Since we want to see anyone who has purchased at least one service in the Hair Cuts category, we will select 0. This indicates that anyone purchasing more than 0 services will come up in the query.
- Select the Category. First check the Services check box above the Sales Type box. This will generate the Service Category list in the box below. Select the Haircuts category. Note: You can select multiple categories.
- If you wish to set a date range you may check the Date Range check box and set a range.
- Click Add to add the conditions to the query.
- Now we will set up the second condition for the service that the customer did *not* receive.
- Click on Amount of Purchases by Category in the Query Questions field.
- Set the Units Equal To 0. This will indicate that the customer has purchased 0 services in the Color category.
- Choose the category that the customer *did not* receive (ex: Color).
- Click Add when you are finished setting any additional options such as staff or date range.



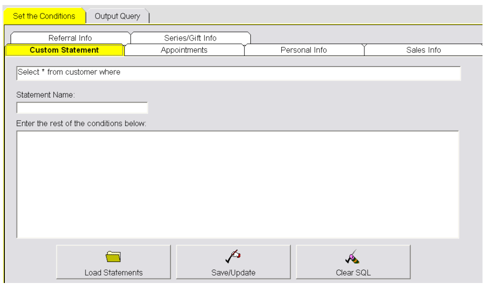
Referral and Reward Info

1. In the Referral Info tab, you have the ability to use the following Query Questions:
   - Referral Type and Reason
   - Number New Customer Referrals for the Customer
   - Number of Rewards



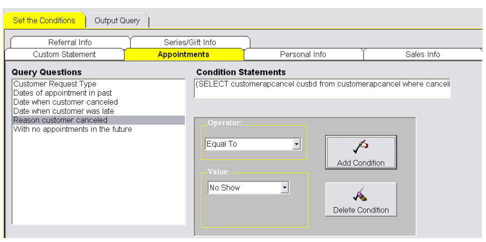
Series and Gift Certificate Info

1. In the Series/Gift Info tab, you may query customers based on their series and gift sales or balance. Options available in this screen are:
    - Gift Certificate Sales
    - Balance for Open Gift Certificate
    - Open Series By Date Range
    - Series Last Used
    - Balance for Open Series
2. You may further refine these queries by Staff, Date Range or Sales Type.



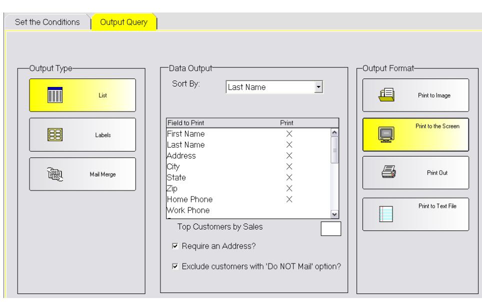
Custom Statement Info

1. In the Custom Statement tab, our Support Team may create a customized query condition for you.



Appointment Info

1. In the Appointments tab, you may query customers based on their appointment history. Options available in this screen are:
    - Customer Request Type
    - Dates of appointment in the past
    - Date when customer canceled
    - Date when customer was late
    - Reason customer canceled
    - With no appointments in the future



Output

1. The output tab is where you set up the output format for your query.
    - Select the desired output in the Output Type field by clicking once on the box. The box will be highlighted yellow.
    - If you are printing labels, select a label from the drop down menu.
    - In the Field to Print box, double click on the fields you wish to print. There should be an “X” in the Print column.
    - If you are planning on mailing something to the list, place a check in the box Require an Address?
    - If you are planning on mailing something to the list, place a check in the box Exclude customers with ‘Do NOT mail’ option?
    - Select by clicking once on the desired out put in the Output Format field. Until you get familiar with queries it is good practice to print to the screen to check that you have properly set the conditions.
2. All queries can be exported to a text file in either label or text format.