

overdue customer calls

Use this tool as a strategic and organized way of retaining your valuable customers.

Default Settings

Customer

Answer Here: Save Answer

Questions	Answer
Label for User Defined Field3	Beverage ...
Label for User Defined Field4	Relaxation ...
Number of days to consider customer overdue?	90
Number of days to warn of cust's birthday?	7
Number of minutes before late?	10
Number of Referrals to compensate or thank cust?	3
Number of times before "Late" message appears?	3
Prompt Customer has a Balance?	Yes
Prompt if Customer address is not complete?	Yes

Explanation of setting:
Determines the number of days allowed to pass before a customer is considered overdue for a visit or an appointment.

Reset to Blueprint Default Return to Previous Screen

Determine Your Default Setting

1. From the SalonBiz®/SpaBiz® menu bar, click on the Blueprints icon.
2. Click the Customer button.
3. Click the Set Default Settings button.
4. Scroll down and highlight the question by clicking once "Number of days to consider customer overdue?"
5. In the box provided above, type in your desired amount of days.
6. Click the Save Answer button.
7. Click the Return to Previous Screen button.

Customer	Phone	Birth	Last Visit	Next Visit	Reason
AMY ADAMS	(111)111-1111	1/22/2009	3/21/2009	4/20/2009	No Appt.
ANDY ADAMS		3/11/2009	3/11/2009	3/11/2009	No Appt.
BRIAN ADAMS	(202)222-2222	3/11/2009	3/11/2009	4/20/2009	No Appt.
CAROL SMITH		4/12/2009	4/12/2009	4/20/2009	No Appt.
DAVID SMITH		5/13/2009	5/13/2009	4/20/2009	No Appt.
FRANK THOMPSON		4/12/2009	4/12/2009	4/12/2009	No Appt.
GARY SMITH		3/23/2009	3/23/2009	4/20/2009	No Appt.
JANE ADAMS	(111)111-1111	5/14/2009	5/14/2009	4/20/2009	No Appt.
JOHN ADAMS		12/18/2008	3/18/2009	4/20/2009	No Appt.
LISA ADAMS	(111)111-1111	12/11/2007	3/11/2009	4/20/2009	No Appt.
MARK ADAMS		5/14/2008	2/20/2009	4/20/2009	No Appt.
NANCY ADAMS	(111)111-1111	12/11/2008	1/21/2009	4/20/2009	No Appt.
PAUL ADAMS	(111)111-1111	3/21/2009	3/21/2009	4/12/2009	No Appt.
AMY SMITH	(202)222-4444	3/22/2009	3/22/2009	4/12/2009	No Appt.

View List: Overdue Cust Call Back Filter by: Not Called View It Print List

Label: Avery 5160 Print Labels View Cust Cust Hist Called WordBz Queries EMail Center

With No Future Appt.

Creating a Call List

1. From the SalonBiz®/SpaBiz® menu bar, click on the Communications icon (Envelope).
2. In the View List drop down menu, select Overdue Cust Call Back.
3. In the Filter by drop down menu, select Not Called. You may choose to sort your call list by date.
4. Place a check in the With No Future Appt box.

Customer Sales History

Customer Name: Amy Adams Print Return to Previous Screen

Account & Cards		Arrivals	Referrals	Promo Credits
Products	Services	Gift Certificates	Series	
	Date	Staff	Service	Price
	1/22/2009	Get	Facial \$90	100.00
	1/22/2009	Get	Massage \$90	100.00
	3/11/2009	Jane	Massage \$90	100.00
	3/23/2009	Brian	Massage	20.00

Total Service: 370.00 YTD Service: 370.00

Call Back

1. Select by either double clicking on the customer name you wish to call from the list or highlight it by clicking once and then click on the View It button.
2. From the Customer Sales History screen, you have all of the necessary information you need to call the customer and remind them that they are overdue.
3. Click the Return to Previous Screen button.
4. Once a customer has been called simply click on the Called button.
5. The overdue customer will then be automatically removed from the list.

