



Smallbiz Upgrades June2016- June 2017

Customer

- New security options for changing of client details. When you use the "Change Cust Details pg 1,2,3,4,5" option by default now, it will not allow changes for pages 2 & 3. You can use a new security option to change this in the "Logins & user access permissions" area. (eg staff "NO", manager "YES"). This was implemented due to a number of salons inadvertently deleting large amounts of details from client's card. It can be a very powerful area, but also dangerous. This option allows staff to still change client names (the most often used facility) whilst restricting other changes.

Even when this option is allowed, there is now also a max of 10 lines that can be removed in one attempt. Previously, we believe staff inadvertently "selected all" without realising, and with dire consequences.

- The documents & photos options can now work across multisites. ie each site (computer) can see and use the documents & photos saved from any other site. This means computers within a network at the salon OR across multiple connected sites. This is especially useful where clients swap between shops (within the same chain).
- In a multisite situation, the documents tab will now automatically check & download the latest master version of a document (if available) ie a new master document will automatically propagate between your shops and computers.
- All the available document options are now available in the desktop program, similar to the Smallbiz APP option ..ie sign document, flatten document, colour code the documents status.
- View &/or Print 1 to 4 photos from client card at one time. This is especially useful for showing before & after situations to a client. You select two photos to be displayed side by side (or 4) and then print for the client if required. Available in the Images Tab on the client card



Appointment Book

- There is now a new “class bookings” system within the Smallbiz appointment book. What we mean here is that you can create a new “type” of appointment called a “class” appointment. Into these appointments you can book many clients. You can specify a minimum & maximum number of participants. All the normal features like SMS reminders, regular bookings etc also apply. It is obviously useful for a number of Gyms, schools etc that use Smallbiz, but also for salons that run training/information nights etc.
- Online bookings can also now be made into the “class” situations. So if you were running a promotion night, you could ask customers to register online ?
- For iPad use in a cloud environment, we have a new appointment book optimisation switch. This switch will change general operation on the bookings page to better suite iPad operation. Using an iPad we have found some of the finer control actions (that can be done with a mouse) are not possible (or problematic) when using your finger. Eg graphically adjusting the length of an appointment, double clicking etc. This option will enforce single click operation on the main appointment book screen. So when you touch an appointment, it will immediately display the booking information (previously you had to double click). In this situation you can easily use the up/down arrow options to adjust the start/ and or length of an appointment. Previously (ie without the new iPad setting) you positioned the mouse on the bottom line of an appointment and “dragged” it down to lengthen an appointment.
- Multistep appointment manipulation has been improved to be similar to single appointments.
- The time format of outgoing SMS reminders has been changed from 24 hour time to AM/pm eg 18:00 to 6pm.
- The appointment Booking \$ report has been improved. As well as giving the \$ pre booked over a period it also now shows the % time booked.
- Previously if you forwarded the appointment book to a date that had NO layin for staff, it just appeared blank. Smallbiz now displays a message “No staff lay in” to avoid confusion.



- From user requests, we have added a new option that displays whether or not a client has future appointments booked when an appointment is taken to the till. This should prompt staff to improve re-bookings. By default this option is turned ON. You can turn it off if you wish.

The screenshot shows a software interface with two main sections: 'Customer Details' and 'Appointment Details'.
In the 'Customer Details' section, there is a 'Select Customer' button, a title selection (Mr, Mrs, Miss, Other), and name fields containing 'Hanedy' and 'Cadet'. There are also phone number fields and buttons for 'Update Customer' and 'Bookings'.
The 'Appointment Details' section shows a service dropdown set to 'PERM ACID LONG/ME', a staff member 'Donnal', and a time slot of '02:30'.
A modal window titled 'Smallbiz6432' is overlaid on the appointment details, with a red border around the text 'Client has NO future appointment.' and an 'OK' button at the bottom right.

- To reduce confusion (especially in multi-user salons) when an appointment is “cut” to be moved to another location, the location it is cut from is marked in “gray”, until the cut appointment is successfully pasted to its new location. This came about where staff cut an appointment, then had a 5 minute conversation with the client before deciding where to “paste” it, whilst someone on another terminal couldn’t understand why they could not use the “cut from” location. If someone tries to make a new appointment to that spot. Smallbiz will say “there is a temporary appointment here ..try again later” rather than the previous “insufficient time”. Please note that a “Cut” appointment stays in the database where it was until it is successfully “pasted” to the new location.
- Similarly to the above point, when you move an appointment to the “temp” column. It is not “actually” moved until it is successfully placed in its new position. The “greying” facility will also apply in this situation. The “temp” column is not intended as a long term holding position. It is meant to be transitory & short term.



- Smallbiz now shows the colour code for an appointment when you right click on an appointment. Eg. for pay on day, prepaid, package appointment. You previously had to click into the appointment to get these details.

This screenshot shows a portion of an appointment book with a right-click context menu open over a pink appointment. The menu includes options like SALE, CLIENT, Cut, Copy, Paste, DELETE, SMS, and Bookings. A red box highlights the 'SALE' option, and a red arrow points to the 'Pre-paid Appt' label in the menu's details pane.

This screenshot shows a different appointment in the book with a right-click context menu open. A red box highlights the 'SALE' option, and a red arrow points to the 'Normal Appt' label in the menu's details pane.

- There are new navigation options on appointment book. As well as day & week forward/backward buttons, we have added previous & next day selected. This was suggested to speed up situations where a client is considering a number of arbitrary dates for appointments. Eg next Tuesday, then Thursday or the following Monday .. then wants to step backwards & forwards through them. This enables an easy forward/ backward click through the dates recently selected without having to continually use the calander.

This screenshot shows the navigation toolbar of the appointment book. It includes buttons for 'Weekly', '15 Mins', and 'Fit All'. Navigation buttons include a double-up arrow (circled in red), left and right arrows, a date field showing '26/06/2017', and a double-down arrow (circled in red). Below these are buttons for 'Today', '4 Weeks', and '6 Weeks', along with 'Search' and 'Exit' buttons.



On-Line

- New options to allow clients using on line appointment bookings to book into class appointments
- We have added a new option that allows you to dynamically change the page titles and captions of Submit/Reset button for the Appointment & GiftVoucher web pages.
- You can now specify a day of the week where on-line appointment CANNOT be made eg Sundays. You can also specify one off dates eg ANZAC day, Easter etc where appointments cannot be made
- Online appointment book now allows clients to select services by department (eg colours, or facials) as well as the current complete alphabetical listing. You can also specify within the appointment book online setup, what the default method is.

Appointment Book Settings - General Settings

General Setup | Booking Preference 1 | Booking Preference 2 | Booking Preference 3 | Bad Customer/Appointment Setup | Appointment Maint

Use Smallbiz online booking system

Maximum advance booking day allow: 90 days Advance booking hour before appointment du 24 hours

Payment time out interval 10 minutes (minimum 10 minutes)

Reject booking if a client's reference cod: IV has been set as A

Staff that can be booked via web (leave blank for z: [Annie,Donna,Geoff]

Service listed by: By alphabet By department

- Online bookings can now be made into class appointments. Eg a gym has a 10-11 class. Clients can now book online into this class (up to the participant limit). Only client already in the Smallbiz database can do this.
- There is now a new option to specify a prompt when making a payment for an online appointment.
 - eg Deposit is non refundable if 24 hrs notice of cancellation is not made
 - Please specify health fund membership number in special requirements.
 - etc



SBIZ APP

The Smallbiz client information app can be used in store on an iPad, iPhone, Android Tablet or Phone to take/view photos or to view/fill out any client forms you may have. It then updates existing client information, creates new clients cards and stores the document and/or photo as required onto the Smallbiz client card.

Smallbiz needs a specially created pdf “form” documents, that are setup to communicate information with the Smallbiz program. This document can be designed to your specific needs & branding and include “fields” where the client answers questions, writes information or signs. eg Name & address, do you have any medical conditions, signature for consent to treatment etc. These documents are most often based on current questionnaires/ permission forms you may give your client now. You can have many different forms available (for different situations) to select & use.

For an existing client, the name/ address, phone numbers etc fields would already be pre-populated by Smallbiz and the saved results updating the main Smallbiz database. For a new client once the form is filled, Smallbiz creates a new client card for you. These forms can be viewed on the “Documents” tab from within Smallbiz at any time, or via the app.

The app can also be used to upload/view photos to Smallbiz of your clients. This saves the back and forth process of saving your images to your computer then loading them into Smallbiz. You can use this feature from a phone or Tablet or iPad whatever is more convenient.

- An extra variable has been made available for the pdf interactive forms. In particular you can now have a question to specify whether the client agrees to marketing sms & emails. When the client fills this out (on an iPad for instance) the results directly updates into their Smallbiz client Smallbiz.
- A new option has been added to allow multisign. ie where a client / or doctor / or therapist, is in a document, where they may have to sign in multiple places. If turned on; when they sign in one place, the app will ask if you wish the signature copied to the other positions. Legally we are not so sure about this, however the option is now there to use if you see fit. By default it is turned OFF



Stock

- New option to allow merging of stock lines eg merge code 11456 to 10488. In this situation code 11456 will be deleted, but all history will go onto 10488, including sales & invoicing. Normally this would be used where staff have inadvertently added a stockline in twice.

Reports

- NDIS report. A report has been added for salons to report to NDIS about client interaction with the salon. It gives the transaction dates & details plus files notes for a selected client in date range.
- New report - Customer Retention II. Specify date range & retention period. Report gives a graph per month for people who were in in that month and returned for a sale within the retention days (default 90). You can also finesse this by selection subgroups of clients. Specify ALL clients or those selected in marketing. Eg select in marketing all new clients for the year, then get a report showing the retention %
- Updated customer retention I You can specify ALL CLIENTS or ONLY consider those selected in Marketing. So you can do retention rates for say new clients for the year; only clients that have been sent SMS promotions; clients that have been coming to salon for say 2 or 3 years ... etc..
- New Dashboard report. This report involves a snapshot of 4 different report groups. The idea of this “dash board report” is to give you a quick over view of the salon performance on one screen. Each report can be done in more depth & options individually.
All are over 15 months, with monthly breakouts.
 - The first shows service & retail takings for the shop.
 - The second gives Average sales (for services & retail) plus client visits (service & retail).
 - The third is from the appointment book, giving % booked plus rebooking %.
 - The last is a simple customer retention. After being in the salon during the nominated month, how many returned within 90 days.There are options available.
- The option to “only consider”, “clients currently selected in Marketing” has been added to a number of reports: Customer \$ spent report, Customer average booking report, Department/stockline report/graph.



Sales

- New option in multi site environments to allow/specify specific staff availability per site, rather than all.
- Fixed an issue with sequential sale_no for each sale not always being consistent
- There is a new option for written sales. You can specify a line of text to be included on ALL invoices. Eg banking details, terms & conditions etc
- Improved package setup and customer package report. Smallbiz is now better at disallowing inconsistent or illogical package setups. Salons had previously (and inadvertently) setup inconsistent package parameters.
- There is now a new option in the setup of compulsory sales Questions area. You can now specify a “rebook now” question for the completion of a sale. By selecting the appropriate tick box in the setup; when this is used by staff at the till, Smallbiz will automatically redirect to the appointment book.

Wages

- Upgraded group certificate area to allow the creation of a file that could be sent to the ATO Portal
- A new get latest tax parameters option has been added. Previously, if a salon didn't have the latest program, you could only download the specific tax parameters listed. This way, independent of the program you have, you can get the latest (assuming you are advantage club members).



Marketing

- Easy client removals from selection lists. If you have a list of clients selected in marketing, you can now select a group of consecutive lines and delete them in one go. You use standard windows methodology (ie click first line, go to last line required, hold down shift key & click again). Select remove client. Previously this had to be done individually.
- There is a new search (in multishop situations) that allows for home shop search.
- Improvements to the SMS area to cater for clients where their mobile number has an international code eg +6148.... Or just 61418.... Instead of 0418.....
- Better customer identification on return SMS. Cases where the client does NOT have any appointments (or never did). This generally occurs where marketing has been sent, and the client sends a return SMS comment.
- The log area now give better tracking of auto marketing. It lets you know if/when it attempts to send marketing, if anyone meet the criteria and whether they were sent successfully.

General

- A procedural upgrade to the underlying system that Smallbiz is written on. From XE8 to XE10.2 This ensures that Smallbiz is upto date.
- Smallbiz upgrade files are now electronically signed with SHA256 encryption. This will remove some windows issues about the authorship & verification of legitimate update files from Smallbiz. You can right click on Smallbiz.exe to see that it was from Smallbiz and is verified.



- Smallbiz can now offer downloadable system disks. Charges still apply, but it allows a quicker turn around if
 - a. salons lose their system Disk
 - b. the current system disk is too old.
 - c. Time is of the essence; eg the salon computer has crashed / been stolen / affected by a new virus and requires a complete new reload of Smallbiz

Mailed System disks are still available.

The cost of these services depends primarily on the time frame given to provide them. Ie the less time the higher cost

Downloadable system disks can be saved on USB or burned to CD and used at a later date.

- The Gift Voucher ledger and Debtors ledger area has been simplified for easier use.
- The system log options have been substantially increased/improved. This is especially suited for tracking automatic functions. Eg autobackup, automarketing, auto sms etc. This enables the salon to see when these functions ran, whether they were successful, or what happened if it didn't run. Eg that the marketing wasn't sent because staff clicked CANCEL, or couldn't get an internet connection, or there were no customer selectedetc. This option also now records changes to security levels
- Time of day access control. You can now setup day & times that each user can/ cannot access Smallbiz. Eg no access for staff between 8am & 8pm Monday, Tuesday, Wednesday, Friday. But 8am to 10pm Thursday and 7am till 5pm Saturday .. no access Sundays etc This can be setup separately for each user type ... staff, manager etc
- New warning for salons using the autobackup to Smallbiz option. A warning will now display if more than 1 scheduled backup does not get sent. This is normally caused by the computer not being left on or no working internet connection available. This lets you, the salon user know that it has not completed properly.