



## Smallbiz Upgrades March 2012- Feb 2013

- New easy to use Email Marketing

Due to an increasing demand for email, and many many problems with security trying to send direct through the email client on your own computer we decided to get an external email platform. The problem was that viruses and security made it very difficult for smallbiz to talk directly to outlook and/or the many other email programs in use. A point of interest is that this is exactly what viruses, spammers and other nefarious programs want to do. Virus detection programs also try to stop this. So it was taking significant time to determine the methods and settings to allow it on your computers. This varied with each operating system (XP, VISTA, Win7, Win8) the different versions of email program (at least 6) and the many different virus protect programs (at least 10). Needless to say this was not supportable.

So we have selected the EmailMyClient (EMC) email platform to send our emails. We have been closely working with their programmers so that smallbiz talks directly to their platform to send emails without you having to send any files (or even leave smallbiz). Within Smallbiz, you can also just click a button and you are taken automatically taken to the EMC web site AND logged into your account.

Some of the features

- Once an email is setup, you can send from smallbiz without leaving smallbiz. Just select the customers you want, select the email template (which smallbiz gets from EMC and click send. Easy peasy
- Click the "Create Edit View Emails" button in marketing, and you will be automatically logged into your own web account at EMC.
- The emails are sent in HTML (NOT as attachments). So you can have images/letterheads
- The quality and professionalism of the outgoing emails is far superior to standard text ones.
- You can easily & quickly send 10 or 1000 emails.
- You can copy/view the many standard templates we have and use them free of charge
- Using the inbuilt HTML editor, you can copy/change the wording/images in the standard templates for your own use.
- You can easily change the "offer" each time you send a promotion with control of fonts, size colour, style, position etc
- You can create your own templates including images, using the inbuilt HTML editor.
- You can merge into individual emails the clients name and other details from smallbiz.
- You can get your own letterheads/ templates made by us or anyone with the skills.
- You can log directly into EMC from any web page( with user name & password). But you cannot get at the client details....they stay in smallbiz.



-You can get your graphic designer/marketing people to log directly into EMC and setup your templates for you. You then can log in from the shop and see/test what they have done. No sending files backwards and forwards. They tell you when it is ready, you then just look, test & use.

-You can (and we recommend) sending test emails, to see how it looks (within minutes).

-You can time delay promotions..ie put the promotion in and say send at 3am the next morning (all from within smallbiz)

-You can send newsletters using our templates

-You can add links to your website, email replies, facebook links, twitter links etc within your email.

-The new AutoMarket facilities in smallbiz allow you to automatically select customers & send the selected emails to them...eg birthday, new client, lapsed client etc.

#### The disadvantages

- It costs. Currently 6c per email. Based on the quickly increase in use, we expect this rate to drop fairly quickly as our volumes increase.
- You only pay for what you send. There are no monthly or yearly fees
- Our primary consideration was to be EASY to use. Yes it may cost you \$30 to send 500 emails; however the time you will save and the ease of doing it (especially if don't have , or want to learn extensive computer skills) , we feel is certainly worthwhile.
- There are no problems with the number of emails sent (most free email systems limit you to 30 or so every 15 minutes), virus protection software on your computer (stopping you connecting to your email by program), different problems with different operating systems (XP,Vista,win7,win8 etc)
- You can do this all for free using your normal email system...and we can show you how to go about it; however you will need skills, patience, accuracy and HTML skills.

- Email tracking

Smallbiz now tracks when (and which) email was sent to clients.

- New Email & SMS tracking Report

The new report is in "REPORTS | SMS & Email Report". This allows you to get reports on Appointment Book SMS, Marketing SMS and Emails. When sent, to whom and in the case of SMS the messages. For Appointment SMS it also shows customer replies.

- Email Reports

The new email systems allows you to easily email any reports to a pre authorised number of email addresses. You can if you want, also setup smallbiz to automatically email selected reports at 2am each morning. Obviously smallbiz would have to be left on for this to happen.

- Email stock orders

In conjunction with the new email system, you can use smallbiz to create a stock order and then email that order direct to your stock supplier. Just click on the email order button at the bottom in the create purchase order section. (some setup is required..you need to enter the supplier email address & your account number with them for each supplier)



- Dramatically improved client photos

There is a whole new upgraded client photos /images section. It is on the client card.

When you go into this page, a list of thumbnails displays to make it easy to see the image you want. You can quickly look thru all images Double click on it and you will get it in Full screen

- You can now enlarge the image even further.
  - Click "original resolution" to show the image in its original resolution...you can arrow around it if it is larger than the screen resolution (often the case).
  - Use the zoom in/out options if not in original resolution mode.
  - Rotate image
  - Put notes over the image with pointers to where it was applied. On an image, add say an injection icon and set the pointer to the exact spot on the face. Write notes in the text box of the icon...."injected 5mls of XYZ"
  - Create one standard face diagram and use that instead of an actual photo of a client. Have many standard images for whatever situations you use
  - Store an image of each customers cut/colour/style at you salon.
  - For multi site salons, we can now even store your images on smallbiz web servers and these can then be viewed from any of the salons in your group...
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- Customer Medicare number option

We are getting an increasing number of doctors, cos-medical professionals using our systems. We now have an option to use the membership number as the client Medicare number. This is switched on in the customer setup area and replaces membership number with Medicare number. It then prints on client invoices.

- Restrict information on Sales page of client card

There is an option in Customer setup, "Only show sales between xx/xx/xxxx to yy/yy/yyyy"

This can be useful for security, but also where, at the end of a financial year you want to print histories for a number of clients only for the financial year. You just set this option, print from the customer sales page, reset the option.

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- Improved SMS response

There was an issue where (only for a new clients first appointment reminder) the client received the sms reminder and responded before smallbiz had a chance to inform our sms server..(ie within seconds). This has now been improved.

- Pre-paid appointments can now be used if you have “staff determined Gift Voucher numbers”

The pre-paid appointment system uses gift vouchers (in the background) to balance the cash register. Previously, this would only work if you had selected “auto GV numbering”. This has now been changed to work with staff entered GV numbers. We recommend that you call us before using this, so that we can set up your auto GV numbers accordingly.

- Appointment book reports

The appointment reports for Bookings/transactions have been improved to allow for easier reading. This is especially where an appointment has been moved around significantly.

- New Appointment search Option

This is found when you use the “search” button from the main appointment screen, then Staff and then select the day. Previously it just displayed in date/time order. Whilst the default hasn't changed, a new check box has been added to put the list into Staff/date/time order. This allows you to print the client cards out with all of each staff's clients together making it easier to allocated the client cards

- Improved staff Deactivation

In the appointment book, the staff deactivation has been improved. It is more intuitive.

- Improved web booking options

When a client logs on to book online they can now select

- Any staff or one in particular. If they select one, only the services they can do will appear)
- More than one service at a time

Smallbiz will then look to see where all the services selected can fit. Eg facial & ½ leg wax

Smallbiz now allows you to specify NO payment required if

- You have the clients email in you system
- the client has the password you give them
- any one at all
- you can also now set a reference code on a clients card...and they will not be able to book online

The smallbiz system has now be reconfigured to allow payment via PayPal. It is very quick and easy to set an account up (in comparison with the banks), you do not have to sign up for a guaranteed period (like the banks) and you do not have account keeping fees (like the banks). It works out to be more cost effective to use PayPal instead of banks up to approx \$5000 turnover per month.

If you have a web site, a booking system can be setup quickly

Even if you do not have a web site, we can set you up your online bookings



- AutoMarketing

This new feature allows you to set smallbiz up to automatically select customers and send them an SMS or email at a pre-determined time & frequency.

- Each morning at 9:45 select customers with a birthday and send an SMS saying happy birthday
- Every Monday morning at 10:10, select new client from the week before and send a “welcome to our salon” email
- Each Tuesday at 9:15 select all clients that have had a “whatever” service or product and send an email information sheet about it.
- Every 4 weeks, select all the clients that have not been in for 3 to 4 months a “we miss you” email.
- Every 6 weeks send an sms to male students (that have not booked) that it is time for their next cut .. and mention the Monday/Tuesday/Wednesday cut specials.

You can use this option as little or as much as you think will be effective with your customers

- New marketing search How Referred

There is now a new option to search by How Referred. Ie select customers that were referred by Say “Letterbox Drop”

- New marketing search by future service

In marketing, there is now a new option to search for future appointments by a single (or select a couple). Previously you could search for services within a department, or all services

- SMS Marketing send limit

By default, we have limited the maximum number of SMS messages that can be sent from marketing AT ONE TIME. You can change this limit.

**Once the first group of 1000 is sent, you can just click to send the next 1000 ..and so on.** This was put in place because a number of salons were getting internet problem in the middle of sending large numbers of SMS. They would then not know what had and hadn't been sent. Generally this happened when the internet dropped in and out.

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- Staff and Wages setup

To simplify things the staff & wages setup screens have been re-arranged to make things simpler. The staffs name setup is now on a simple screen by itself. To setup wages, you now go to a separate option.

- New Wages option to salary sacrifice

There is now a methodology to do salary sacrifice. Not for the faint hearted

- The wages system now has descriptions for tax scales

In wages, previously the selection of the tax scale selection for staff only had the tax department scale type. It now has a description, which allows easier selection

- Email wages slips to staff

In conjunction with the new email system, you can now tick a box and smallbiz will email each staff member their wages slip. There is a new field in the staff setup area that allows you to put in their personal email address. This is similar to the system where you now print the slips for each staff.

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- New log section

We have a new area that reports on events. This can be for the following

- Login/outs. See when your system was logged into or out of, by user type.
- Backups. When they were done and were they successful. This relates to manual backups, autobackups to smallbiz plus or automatically generated ones onto your computer
- AutoMarketing. When did an automarketing campaign attempt to send, what number it was, what type was it, was it successful, did staff stop it.
- Autoreports. When did an autoreport run..was it successful in sending

- Improved Period Department Report

Previously, if you selected a Department, when the report ran, you would just get the TOTAL for that department. Now however, you can select one (or more) master department, and all the department that goes to makeup that master department will show their individual totals per staff member and on a shop basis. Eg Beauty->Facials->Waxing->Electrolysis->Tinting etc or Hair->Cuts->Colours->Upstyles etc