



CLIENT RELEASE NOTES

V11.6

HIGHLIGHTS

CLIENT RECORD CARD CHANGES	From 25 th May 2018, opt-in preferences will need to be recorded using opt-in features, the old 'Exclude from Marketing' tick box will no longer be available as per GDPR (see 'Show Me' section , page 4)
TEAM MEMBER FINGER PRINT CONSENT	Once GDPR is enforced (25 th May 2018), businesses must obtain consent to store individuals' fingerprints
iTEXT	As of this version of iSalon, SMS messages may only be sent using iText
GDPR ON CLIENT DETAILS REPORT	Client details print out now includes opt-in information
STOCK FRACTIONS	When reconciling stock, fractions entered as decimal numbers will be saved as such

RECORD CARD CHANGES TRACKED	iSalon now tracks changes made to client record cards in its back-end database. This is not something that customers will be able to access without help from support
MARKETING SELECTION	Opt-in options are now shown in marketing query results
OPT-IN ESSENTIAL SMS	A new Marketing Essentials button added called 'All clients who have not yet opted-in to marketing'
OPT-OUT CLIENTS	As per GDPR, as of 25 th May 2018 you will no longer be able to include opted-out clients in automated marketing queries
MARKETING AGE	As of 25 th May 2018, you will no longer be able to market to any client whose age shows them to be under 13, or if 'Client is over 13 is not ticked'
DELETING (FORGETTING) CLIENTS MANUALLY	From version 11.6, iSalon has the facility to delete client & team member records entirely, you will no longer be able to archive clients as per GDPR
ARCHIVED CLIENTS DELETED UPON UPGRADE	Any clients who have been archived will automatically be deleted once a salon upgrades to V11.6
AUTOMATIC TIMED DELETION OF CLIENTS	Configuration setup to automatically delete clients who haven't visited for 'X' number of years
SHOW CREDIT CARD DETAILS	'Show Credit Card Details' tick box has now been removed from Configuration as per GDPR
OPT-IN SITE ADDED TO SMS MESSAGES	Each SMS message sent will now contain the opt-in website address as per GDPR

REPORT ON OPT-IN CHANGES	There's a new report which allows you to track opt-in changes
APPOINTMENT DRAGGING GRAPHIC	A fix has been issued for the trailing drag graphic experience by some users
'EMAIL LINK TO PERSONAL DETAILS' BUTTON IN CLIENT RECORD CARD	Sends a link out to the client which leads to the Personal Details Portal where clients can change their preferences
NEW ISALON HUB	New iSalon Hub launched
PREVENT MARKETING TO CHILDREN	If the client has a birth date that shows they are under 13, or they are not ticked in their record for 'Client is 13 or over' then they will not be marketed to from enforcement date 25/8/18.
3rd GENDER OPTION	There is now a 3 rd gender option 'Not Given' that can be used as a default and an alternative to 'Male' or 'Female'

SHOW ME

<p>CLIENT RECORD CARD CHANGES</p>	<p>As of 25th May 2018, the client record 'Exclude from marketing' disappears from iSalon. The opt-in tick boxes remain untouched.</p>	

TEAM MEMBER FINGER PRINT CONSENT

A new tick box on setup/master files/team members screen, called "Consent given by team member to store fingerprints". Without this ticked, finger prints cannot be stored. Existing ones will continue to work however as they were obtained before consent was required. Therefore, the team member record can only record fingerprints if you have ticked the config box.

SETUP:

SETUP A TEAM MEMBER:

General	Commission	Notes	Targets	Skills	Skills +	Ind Skills	i-Bookings
Name	Cathy					Start Date	04/03/2008
Button Name	Cathy					End Date	28/01/2014
Phone Number						Do Not Book After	<input type="checkbox"/> 01/01/2000
Address	X					Picture	
Price Level	Salon Designer						
Security Level	Level 9						
Holiday	<input type="checkbox"/>	Clock Number	<input type="text"/>				
Mobile Number	<input type="text"/>						
Appointment Book Active	<input checked="" type="checkbox"/>					Appointment Book	Appointment
Till Active	<input checked="" type="checkbox"/>					Pin Number	16
Consent given by Team Member to store finger prints	<input type="checkbox"/>					Employee Number	<input type="text"/>

Buttons: Cancel, Print, Save

OPT-IN ESSENTIAL SMS

A new Marketing Essentials button added called 'All clients who have not yet opted-in to marketing'. When used, this uses the following default criteria:

- 1) Include opted out clients - unticked (tick box at the top of the search query, default is unticked)
- 2) Client has a mobile number
- 3) Client visited in last 12 months
- 4) Client has NOT opted in to SMS

This new Marketing Essentials filter only shows until 24/5/18, then it is no longer required because

MARKETING ESSENTIALS MODE:

Choose a marketing selection type and then press "Run this Selection":

All Clients

All Clients who have not yet opted-in to marketing

New Clients last week

Lost Clients in the last 6 months with mobile numbers

Lost Clients in the last 12 months with mobile numbers

Clients with email addresses

Clients who have not bought Retail

Clients who have not had a Technical Service

i This marketing selection is for:

All clients in the customer database

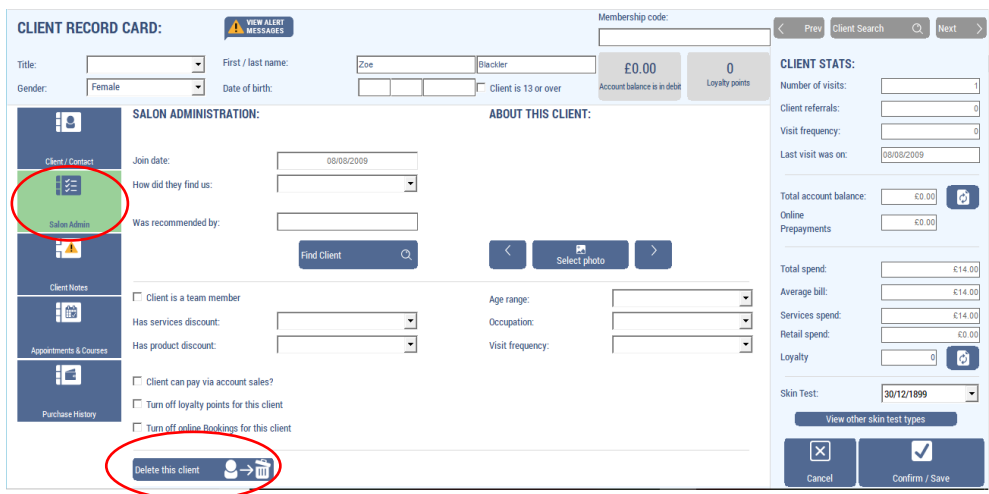
All above selections will exclude clients that have been set to exclude mail

you are no longer legally allowed to ask these people to opt-in after that date.
 Additionally, a new template has been added that when added to the SMS message, reads as follows: "Hi #Firstname#, new laws are coming to help you protect and manage your data."

- Using the client record/Salon Admin page.
 This will delete the client record, leaving iSalon in this state:
- 1) Client record will not be seen in client lists
 - 2) Till Review bills will be there, but client will be called 'Deleted Client'
 - 3) Bookings (completed & incomplete) will be removed, including previous bookings
 - 4) The client's balance and points will be deleted
 - 5) Reports that would normally show the client name will instead show as the name 'deleted client'
 - 6) Standby list entries will be removed
 - 7) Client will not be seen in Arrival Q
 - 8) If the client was in the till screen, they will be removed from the bill
 - 9) Client will be removed from In Salon
 - 10) Marketing will not pick up the client

If a client is deleted by the user, then the backup is restored, it will automatically delete the client again.

DELETING (FORGETTING) CLIENTS MANUALLY



<p>ARCHIVED CLIENTS DELETED UPON UPGRADE</p>	<p>Any client that is already archived before the upgrade will be 'deleted' when it upgrades your database – i.e. lose their details and change name to Deleted Client. That will always happen, so we don't have 'archived' clients with details that the salon can access</p>	
<p>AUTOMATIC TIMED DELETION OF CLIENTS</p>	<p>The auto-delete after 'X' years in Setup>Config will delete people who:</p> <ul style="list-style-type: none"> a) haven't visited for 'X' years b) and also have no future bookings c) and were also created more than 'X' years ago. <p>The auto-deletion won't happen unless you turn it on by putting a number in Setup>Config (default is 0 which is off).</p> <p>The trigger: Deletion will happen shortly after iSalon is started and every 24 hours after that if iSalon is left on, however if iSalon is just restarted it will do it again. You will need to have clients synced with the API for it to happen though: iSalon Support can check this for you if you're unsure if your clients are synced with the API.</p>	<p>The screenshot shows the 'SETUP: I-SALON CONFIGURATION' window with various tabs. The 'People' tab is active. Under the 'Clients' section, the 'Delete inactive clients after' field is set to 0 years and is circled in red. Other settings include 'Team Members' (split commission enabled), 'Time & Attendance' (system disabled), and 'Client Opt-in Permissions' (all marketing and storage options checked).</p>

<p>OPT-IN SITE ADDED TO SMS MESSAGES</p>	<p>There's a new setting in iSalon SMS Message Centre > Settings page which allows you to add a title for the short URL which is the link to your opt-in site.</p> <p>This title and the short URL is appended to ANY text message (but won't send on the SalonSpy text messages) and is included on booking reminders.</p> <p>You can use this message feature to give the short URL a meaning, i.e. 'Manage Your Preferences Here.'</p> <p>These characters will count toward your message length.</p> <p>The short URL takes the client to their opt-in settings and details of their bill/financial history with the salon (client's online portal).</p>	<p>CLIENT MARKETING:</p> <p>SMS MESSAGE CENTRE SETTINGS:</p> <p>Default Message Centre Page [dropdown]</p> <p>SMS Client Preferences Text [Manage preferences] <i>At the end of every SMS message, we will show this text along with the clients preferences URL, eg: isalon.co/cza</i></p> <p>SMS BOOKING REMINDER SETTINGS:</p> <p>Do Not Send Booking Reminders <input checked="" type="radio"/> Select Booking Reminder Template [Booking Reminder Template]</p> <p>Send Automatic Daily Booking Reminders <input type="radio"/> Last Sent: [button]</p> <p>Send Booking Reminders With Cashup <input type="radio"/> [Send Booking Reminders Now]</p> <p>Default Booking Reminder Notice Period [1] Days</p> <p>Time To Automatically Send Messages [11:32]</p> <p>GENERAL AUTOMATIC SMS MESSAGE SETTINGS:</p> <p>Auto Send Text Messages From This Machine <input type="checkbox"/> Disable Automatic Messages Hourly Retry <input type="checkbox"/></p> <p>[Cancel] [Save]</p>

OPT-IN CHANGES REPORT

A new report (Menu>Reports>Client Reports>Marketing Opt-in Tracking) that will show when opt-ins had been changed, along with full details.

The report is date selectable, and shows:

- the client names
- the opt in that had been changed
- the date and time that the opt-in had changed
- who was logged in at the time that the opt-in had been changed
- whether the opt-in had changed while using iSalon or had been changed by the client from their portal settings.
- whether the opt-in had been activated, or whether it had been deactivated

Client	Postcode	Marketing opt-in	Did the client opt-in?	Date of change	Changed By	Where was the change made?
Asia Abbas	CF23 5NW	Opt-in to email marketing	Yes	14/02/2018 14:38:52	iSalon	
Asia Abbas	CF23 5NW	Opt-in to SMS messages	Yes	14/02/2018 14:38:52	iSalon	
Child ?	1	Opt-in to phone calls	Yes	22/02/2018 12:17:49	iSalon	
Child ?	1	Opt-in to postal marketing	Yes	22/02/2018 12:17:49	iSalon	
Child ?	1	Opt-in to SMS messages	Yes	22/02/2018 12:17:49	iSalon	
Claire Bloodworth	CF	Opt-in to email marketing	Yes	14/02/2018 14:54:04	iSalon	
Claire Bloodworth	CF	Opt-in to SMS messages	Yes	14/02/2018 14:54:04	iSalon	
Lynne Blockley	CF09090909090	Opt-in to email marketing	Yes	14/02/2018 14:54:29	iSalon	
Lynne Blockley	CF09090909090	Opt-in to SMS messages	Yes	14/02/2018 14:54:29	iSalon	
Ruth Ab leuin	CF23 5BD	Opt-in to email marketing	Yes	14/02/2018 14:38:28	iSalon	
Ruth Ab leuin	CF23 5BD	Opt-in to SMS messages	Yes	14/02/2018 14:38:28	iSalon	
Overall SMS marketing opt-in		0.12%				
Overall Email marketing opt-in		0.46%				

APPOINTMENT DRAGGING GRAPHIC

There is a new switch in Setup > Config > Appointments to allow the user to switch to a different dragging icon when moving appointments. this resolves the graphical issues seen on some machines. Note: when you set the option, you need to save and exit iSalon then go back in, for the change to be seen.

SETUP: SETUP I-SALON CONFIGURATION

Your Salon | Opening Times | Settings | Interface | 3rd Party | Till | Pricebook | Receipts

Appointments | Tech Notes | People | Loyalty | Reports

Appointment Book Settings:

i-Salon's first day of the week is: Monday

Mid week price change: (None)

Number of days to keep appointments:

Default time slots duration: 15 minutes

Default time block grid duration: 0 minutes

Clients In Salon refresh period: 120 seconds

Enable appointment overlap check.

Appointment Book displays a grid.

Appointment Book is zoomed in as default.

Appointment Book tooltips DONT include client contact details.

Use Appointment Builder to book Packages.

Use alternative appointment dragging graphics

Redo, Rebooking & Recommend-a-friend Discount Settings:

Recommend-a-friend discount. } Apply discount to services only.

Rebooking discount.

Rebooking discount is set as:

Redo discount is set as:

Cancel Save

<p>'EMAIL LINK TO PERSONAL DETAILS' BUTTON IN CLIENT RECORD CARD</p>	<p>In the client record card there is a new button that allows the user to send an email to the client which contains a link to their personal details portal. If the client has no email, then the button shows a message to say that it cannot be done due to the missing email.</p>	
<p>NEW ISALON HUB</p>	<p>The new iSalon Hub has been launched where you can purchase SMS credits, Training, other consumables and get in touch with Support. The Hub also has useful links to free guides, how-to videos, blog entries, and this year's Marketing Planner.</p>	