



Dear Valued Customer,

Version 4.3 is now ready for download...

Bug fixes and enhancements included in this release:

- 1) **Customer Tree Sorting Fixed** – When adding new customers; previous versions were not sorting the customer list (new customers appeared at the bottom of the list). This has been fixed.
- 2) **Expense Listing Sort Date Fixed** – When sorting new expenses using the sort_date field, the expenses were sorting in alphabetic order. This has been fixed.
- 3) **Next Appointment Date on Receipts Fixed** – When customers with more than one appointment scheduled were processed in checkout, the “Next Scheduled Appointment” was not displaying the correct appointment (it was sorting dates alphabetically). This has been fixed.

Upcoming Enhancements for 2011:

- **An All New Appointment Book** – We’ve begun incorporation of a new appointment book which will enable drag and drop rescheduling, blocking out off time, easier double-booking, etc. The appointment book is the heart of the product, so expectedly, this is a BIG task.
- **Database Conversion** – We are putting critical tables (e.g., Daily Sales, Products, Expenses, etc.) into a database for reasons of resilience and performance. Again, a BIG task.
- **Vertical-specific Versions** – Some industries (aka “verticals”) have needs specific to their business. For instance, Pet Services has a need for pet histories and the ability to book a specific pet’s appointment. For this reason, we will be creating vertical-specific versions. **sbFirstDay-Pet** will be the first such branched version. There will be no cost associated with upgrading to a vertical-specific version, it will be free.
- **Multi-staff version** – This is by far the most requested enhancement and our biggest priority. It is driving the new appointment book, as well as the database conversion. There will be a nominal fee to upgrade to the multi-user version of our product (\$20 - \$40 range). We’ll update you as that day comes closer.

Download Links

Instructions: To download the latest version, you can visit our website anytime (<http://www.sbfirstday.com>) and download the latest version. The trial versions automatically convert to permanent software if you have already purchased (the license file is detected).

- **Helpful Tip #1:** Don't upgrade during a workday. Wait until you aren't rushed in the event a problem is encountered.
- **Helpful Tip #2:** Please do a **backup** prior to upgrading.

When you download a new version, none of your data is touched, only your program files; in other words you won't lose the data you've already entered.

OR...you can paste one of these links into your browser:

sbFirstDay Customers: Download from http://www.sbfirstday.com/sbFirstDay_setup.exe.

sbFirstDay Netbook Customers: Download from http://www.sbfirstday.com/sbfirstdaynetbook_setup.exe.

Previous Enhancements:

- **Appointment Reminder Seasonal Images** – sbFirstDay now ships with standard reminder images for seasons and holidays. Click the "Change Picture" button to see the images available. You can add your own to this collection, as well. **(Version 4.1)**
- **Customer Purchase History and Appointment Name/Phone updates** – When you change the customer first name, last name, or primary phone, all active appointments and sales history is now automatically updated. This prevents you from losing customer history when one of these fields change. **(Version 4.1)**
- **Unpaid Invoice Option** – You can now specify an invoice is "unpaid" as a payment option. When doing so, the receipt will show a "Balance Due" (both email and printed). There is an **Unpaid Invoices** report to show which invoices are still outstanding. To mark an invoice as "Paid" you will need to perform check out again and overwrite the old invoice with the new receipt. **(Version 4.1)**
- **Appointment Reminder Text Color** – You can now modify the appointment reminder text color. This will allow you to create appointment reminders that have a more integrated color scheme when customizing the images. **(Version 3.99)**
- **Sending Bulk Email** – You can now specify a range of customers when sending bulk email, e.g., customers 51 thru 100. This allows you to spread out your bulk email sends over a few days so that you don't

inadvertently cause your email provider to block part of your send. Most providers are beginning to set limits on how many emails you can send in a day. Gmail is currently setting a 100 email limit. **(Version 3.99)**

- **Select Customer by First Name** - When sorting the **Customer** list by first name, you couldn't type the first few letters of the first name into the **Customer dropdown list** to search for them. Now you can. **(Version 3.96)**
- **Sort Customer List by First Name** – a checkbox on the Customer tab now allows you to sort by customers' first name instead of the default last name. **(Version 3.95)**
- **Appointment Reminders Preferred Method** – sbFirstDay will automatically determine which type of reminder to send out (email or SMS text), based upon the preference you set for each customer. The preference is set in the SMS Text window (open this window by clicking the SMS Text button on the Customer tab). **(Version 3.8)**
- **SOAP Notes** – A new window for SOAP Notes is now accessible from the main appointment book and from the Customer tab. There is right-click functionality on the window that allows you to insert a new SOAP block. If opened from the Appointment Book, the service will automatically populate the Action (A) section of the notes. **(Version 3.7)**
- **Search-click Navigation** – Clicking on a listing in the Find Appointment window will now take you to that appointment in the main appointment book. **(Version 3.7)**
- **SMS Text Messaging** – You can now send SMS Text messages and reminders to a customer's cell phone. You will need to set up their SMS text capabilities using the **SMS Text** button on the Customers tab. Watch the video for complete details. **(Version 3.6)**
- **A Customer Notes History Report** – All of the historical notes you've maintained can now be reported. **(Version 3.5)**
- **The Inventory Re-order Report** – This allows you to report only those inventory items that need to be re-ordered (items which have fallen below their reorder point) **(Version 3.5)**
- **The Pre-book Statistics Report** – You'll find that your revenue will increase and your customer base will solidify if you encourage your customers to book a next appointment prior to Check Out. This report shows the percentage of sales volume associated with pre-booked customers. **(Version 3.5)**
- **A Multi-Day Appointments Report** – The Appointments Report now allows you to report multiple days **(Version 3.5)**
- **Find Appointments Button on At-A-Glance Window** – You no longer need to close the **At-A-Glance** window to search for customer appointments. **(Version 3.5)**

- **The new Expenses tab** – This new interface should make Expenses easier and faster to enter. The Category and Subcategories are now much easier to create, as well. There is a brand new video which explains it all. **(Version 3.4)**
- **The Customer Referral Source field** – This allows you to track how customers heard about you so that you can see which advertising dollars are paying off. There is a **Sales Summary by Referral Source** report to accompany the change **(Version 3.4)**
- **The ability to select a customer for Retail Purchases** – This allows you to track products that existing customers buy without having to book a service. **(Version 3.3)**
- **A receipt email queue** – This allows you to email receipts later when an internet connection is available. Click on the Queue button from the Invoice Preview window to save the receipt into the queue. Then from the Send Promotional Email window, click on the Send Queued Receipts button. **(Version 3.3)**
- **Multiple Payment Types** – You can now enter two payment types during Check Out. This feature was at the top of our “**most requested**” list. It resulted in 3000 extra lines of code, which is why it took so long. It affects how reports are calculated, how daily sales are stored and how receipts are generated (both email and printed). **(Version 3.2 beta)**
- **Customer Quick Entry** - You can now enter customers using the same spreadsheet style of interface that was introduced for Products. **(Version 3.11, but previously unannounced)**
- **Product Quick Entry** – This window has undergone a complete rewrite and now behaves very much like a spreadsheet. You can select a row and drag/copy it down. There is right-click functionality to copy/paste/delete. There are filters for most columns that allow you to display only the rows you want to see (e.g., you can filter for a particular brand, vendor, product type, etc.). You can also sort most columns. You can also export to an Excel spreadsheet (even if you don't have Excel). This spreadsheet can be opened by free spreadsheet programs (e.g. Open Office). There is also an auto-complete feature (shown below) that will assist you in entering previously entered values. You can also filter back bar (non-resale) items from showing up in Check Out. **(Version 3.0)**
- **Receipt Designer** – This new tab in the Setup Tools window allows you to customize both the printed and emailed versions of the receipt. You can set up your receipts to print on the narrow 3-inch printers. You can also customize your emailed to receipts, i.e., you can change the text of the receipt itself...even have it in Spanish! You also have 4 color-schemes to choose from (red, blue, gold, green) **(Version 2.9)**
- **Customer Sales Detail Report** – This new report allows you to print off a customer's purchase history. It shows services, products, discounts, promotions **(Version 2.9)**

- **Email Improvements** - You can now send emails to multiple recipients. Additionally, emailing multiple recipients is 400% faster. Additionally, an auto-signature picks up your name, business, and tag line text information from the Setup Tools Window. **(Version 2.8)**
- **Right-click "Send Email" from any appointment booking window** – you can now just right-click on an appointment in the main appointment book and in the At-a-Glance window to send an email to the customer. **(Version 2.8)**
- **Prepaid Payment Type Added to Sales Detail Report** – Prepaid is especially handy if you sell packages (e.g., 10-Pack of Massage Appointments). **(Version 2.8)**
- **Emailing Receipts and Bulk Email Fixed** - Approx 30% of our customers haven't been able to email receipts or send bulk emails due to a port blocking issue. This is now resolved. If you have had difficulty with any email aspect of sbFirstDay, this version is for you **(Version 2.7)**
- **A new and improved receipt** – A new embedded html receipt now replaces the original attachment text receipt (with the Thanks promotion). The Thanks promotion is no longer necessary. **(Version 2.7)**
- **Future Appointment Booking Reminder** – In the Check Out window, you will now see a flag that tells you when the customer's next appointment is. If you haven't booked the appointment, the flag will tell you that too! Soon, there will be a report that shows the percentage of Check Outs had a next appointment booked. **(Version 2.6)**
- **Automatic corrupted record fixes** – Should your **appointments, customer, or daily sales** records become corrupted while attempting to "Save", an automatic mechanism will now restore from a temporary copy (created automatically by sbFirstDay prior to the Save starts). If you are kicked out of sbFirstDay before the automatic restore has a chance to restore the temporary copy, the file(s) will be restored upon your next attempt to open the software. **(Version 2.5)**
- **Check Out EFT/POS payment method type** – A new payment type called "EFT/POS" has been added to the Check Out window, allowing you to reference "Electronic Funds Transfer/Point of Sale" payment tracking. **(Version 2.5)**
- **Customer Comments** – there is now a "Customer Comments" field on the Customers tab for putting information important to you about a customer. **(Version 2.42)**
- **Tag Line Text** – The tag line text has been added to appointment reminders. Previously, it only appeared on new promotional emails and receipts. **(Version 2.42)**
- **The ability to save receipts** – there is now a "Save" button on the Print Invoice window that will allow you to save receipts. Handy if you don't have an internet connection or printer at the salon, but can email your receipts from home each evening. **(Version 2.4)**
- **Checkout window** – there is now a button to view a customer's purchase history. This allows you to easily find out what you charged the customer for last (for those special customers). **(Version 2.2)**

- **Expenses tab** – There is now a button to create a duplicate expense entry. This saves you from having to type the description over again for repetitive entries. Just change the date and/or amount. **(Version 2.2)**
- **Expenses tab** – You can now export your expenses to Excel. **(Version 2.2)**
- The ability to store unlimited customer pictures from the Customers tab. **(version 2.1)**
- The ability to check out a customer from the At-a-Glance window. **(version 2.0)**
- An easy way to share data with other instances of sbFirstDay. **(version 2.0)**
- A redesigned Appointments report. **(version 2.0)**
- The ability to click on the date header of an **At-a-Glance** appointment list and quickly navigate to the main appointment book for the date clicked **(version 1.97)**
- A Netbook version of the software **(version 1.96)**
- Send appointment reminders for an entire day from the right-click menu on the appointment book **(version 1.94)**
- Customer birthday report **(version 1.94)**
- Customizable start times for the appointment book **(version 1.92)**
- Customizable splash screen (have your own company splash screen display every time you bring up sbFirstDay™)
- Customizable appointment book start time **(version 1.92)**
- 5-Day At a Glance Window **(version 1.91)**
- Cosmetic changes
- Free upgrades for life to any new versions of sbFirstDay™ (upgrade policy is retroactive to the first customer)

Code Freeze – In effect

From time to time, we will halt further changes to sbFirstDay for 6 months. This allows time for bugs to surface and for the product to stabilize. Beginning April 30, 2010, we will be entering our first code freeze. This will last until 12/1/2010. During this time, we will be releasing **bug fix versions only**...no new functionality.

sbFirstDay User Forum:

sbFirstDay User Forum (click 'Forum Tools' to post a message)

Control Panel Search Logout

Message Board Welcome, [itdayusa](#)
You last visited Today at 02:24 PM
[Private Messages](#): 0 Unread

Pending email confirmation: 0 members
Pending event approval: 0 events

Forum Tools ▾ New Topic

<input type="checkbox"/>	<input type="checkbox"/>	Message Subject	Author	Views	Replies	Last Post	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	A good free image editor for promotional images	MattG	2	0	Today at 02:16 PM by MattG	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Appointment Reminder Tips	itdayusa	5	0	Today at 11:54 AM by itdayusa	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	How to double book an appointment in sbFirstDay	itdayusa	3	0	Today at 11:47 AM by itdayusa	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Why use Google's Gmail with sbFirstDay?	itdayusa	8	0	Today at 11:33 AM by itdayusa	<input checked="" type="checkbox"/>

Checked Threads: -- Select -- ▾ New Topic

The sbFirstDay User Forum is now live and ready for use. You can access it at <http://forums.sbfirstday.com>. You can access it from a link at the bottom of <http://www.sbfirstday.com>, as well. You'll just need to register (free). Note: Password is "hello" (we had to lock it down to keep spammers out)

Using the forum, you can:

- Submit questions to the user community to find out answers to questions you have.
- Post replies to questions submitted by other users.
- Subscribe to the forum to have all submissions automatically forwarded to your email (your email address remains private)