



The Client Profile Creation Manual



What Is A Client Profile?

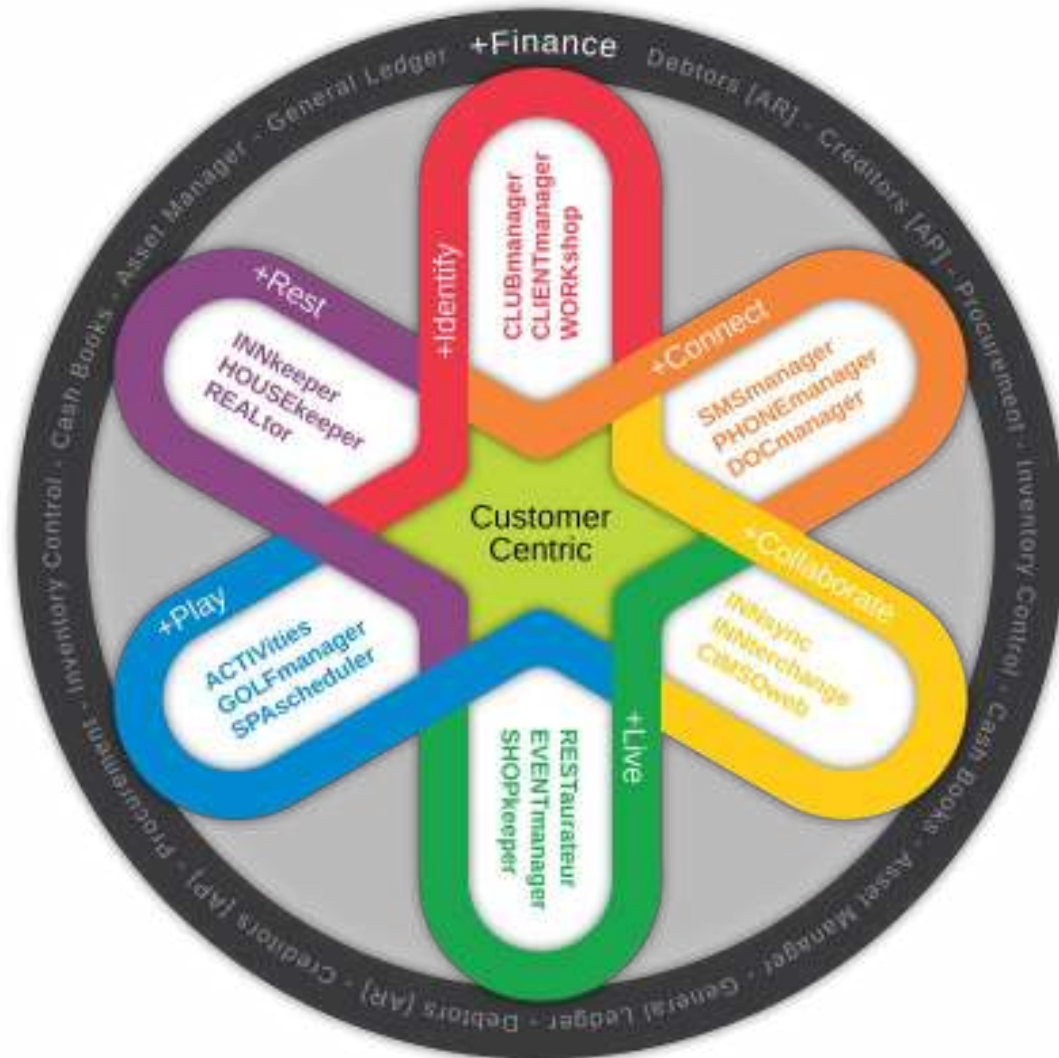
A Client Profile, is a form on the user interface to capture information which we store in a database.

Why Do We Have A Client Profile?

We have profiles for the ability to know who we have booked the unit to for the allotted time paid for. The profile is linked to the charges of services rendered to the Client.

When Do We Create A Client Profile?

We create a new client profile, when we have a new client arriving, or when creating a new trade debtor or creditor. We want to avoid duplicating profiles; to check if there is an existing client profile, we perform a Client Search (refer to the TD-SOPCRMCS Client Search manual if required)



CUSTOMER CENTRIC DESIGN

- **Identify** – CDP – customer data platform with extensive CRM
- **Connect** - Single or bulk blast e-mail, SMS, fax and snail-mail
- **Collaborate** - Local server to Web and mobile device data interchange
- **Live** - Food, Beverage and Retail points of sale with stock control and procurement
- **Play** - Schedule and manage Golf, SPA and Leisure activities
- **Rest** - Reservations, Lodging PMS, Leasing and Timeshare
- **Finance** - GAAP, IAS and IFRS financial control to balance sheet



INNkeeper CiMSO
Customer Centric Integrated Management Software

V4.1.8614276 e4dbf1a

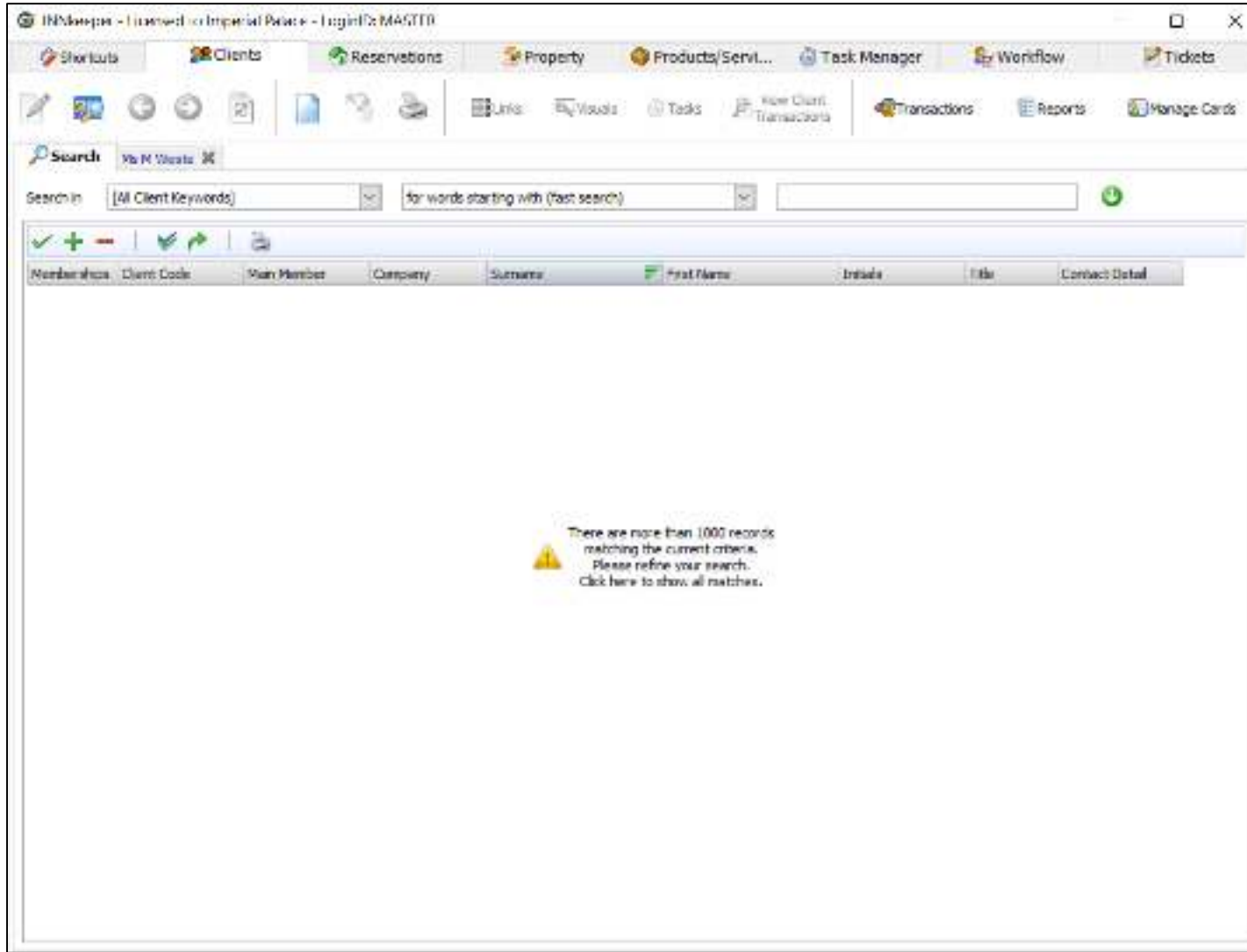
Language: English (United Kingdom) [v]
Database: CIMSODemo_V418 on vmsserver [v]
Location: MAIN Imperial Palace Rooms [v]
Login ID: master [v]
Password: []

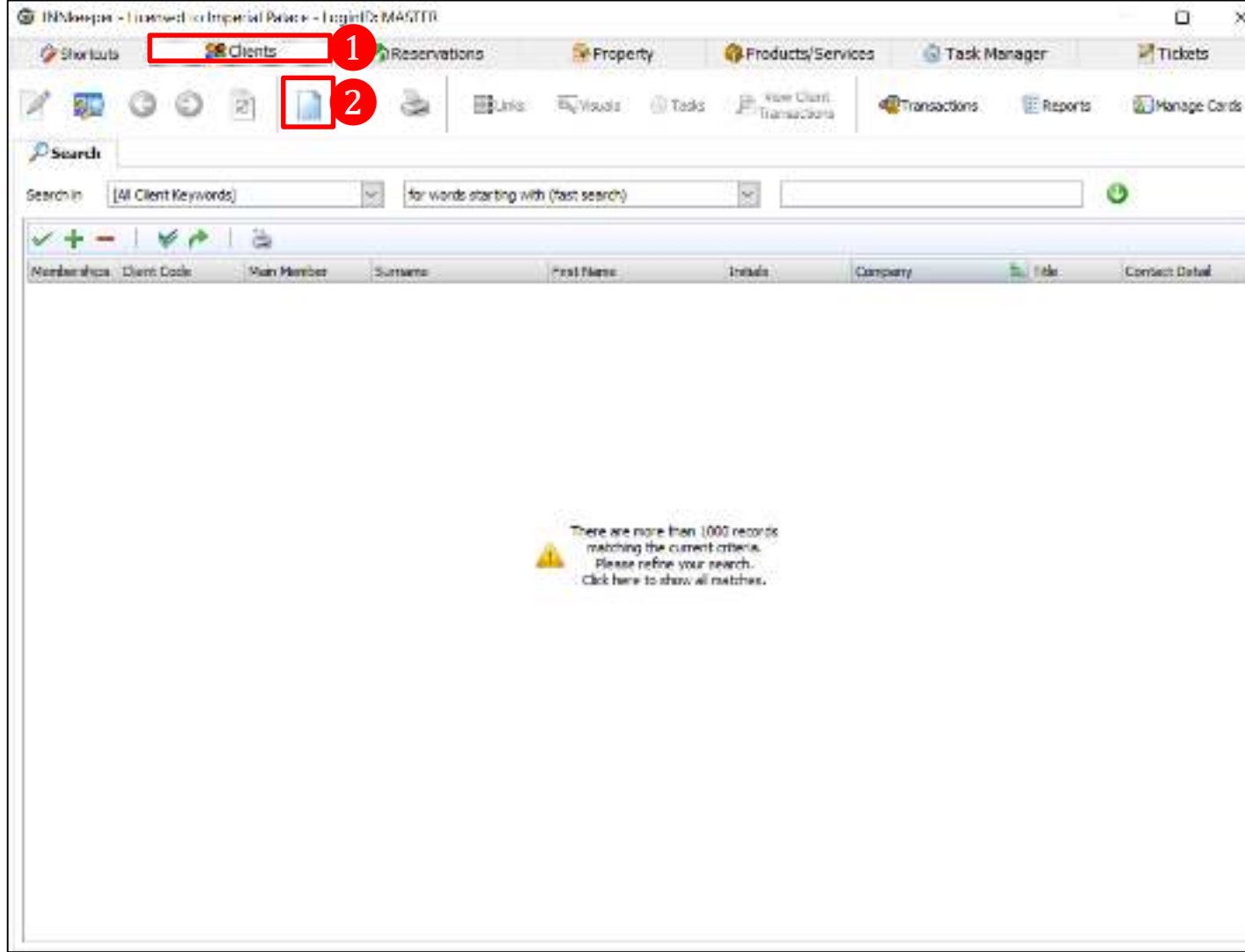
Identification Password Log In

Start your **CiMSO Menu**, select the **Administration**. Use your given **Login ID** and **Password** to log in



Once logged into Administration, You are able to navigate through the Database





Navigation: The Client Profile Creation Process

- 1 Clients tab
- 2 Select the **Add New Client** (Page glyph)



The Client Profile Creation

The Client Profile Creation Process:

Here you will be able to check if there is profile already for the client as you:

As you can see I do not have any matching profiles

1 Create a new client

2 Surname: weste, First Name: d

Type	Client Code	Main Member	Company	Surname	First Name	Given Name / Alias	Initials	Member Number	Member Join Date
3									

4 Create New Client

- 1** Create A New Client window
- 2** Fast-Search: type in the name/surname of the client
- 3** Locate & Select: in the grid no profiles has matched
- 4** Select the **Create New Client** button

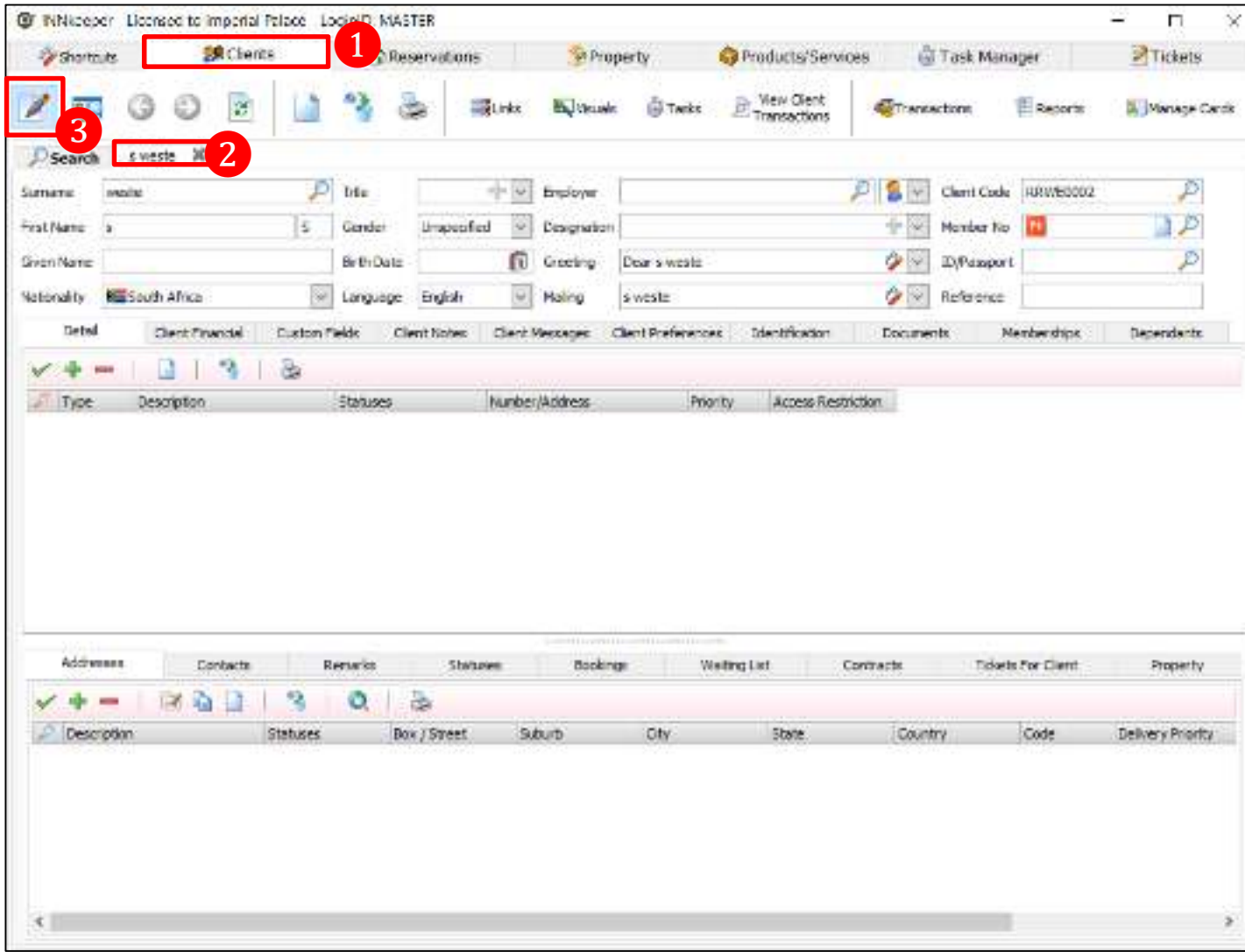


The Client Profile Creation

The Client Profile Creation Process:

Here we are going to add the information of the client:

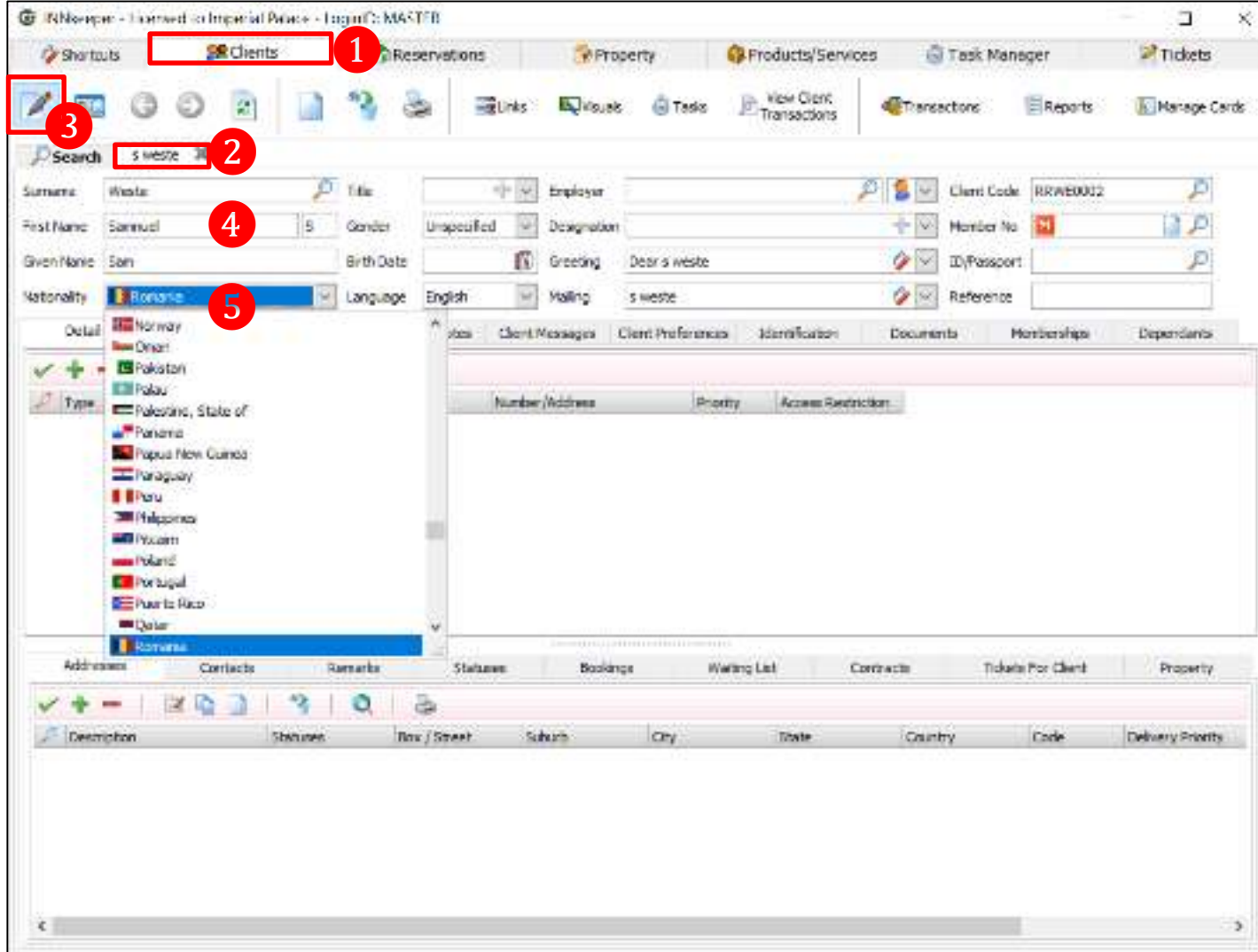
- 1 Clients tab
- 2 The **New Client Profile** tab
- 3 Select the **Edit Profile** (Page & pencil glyph)





The Client Profile Creation

The Client Profile Creation Process:



- 1 **Clients** tab
- 2 **The New Client Profile** tab
- 3 Select the **Edit Profile** (Page & pencil glyph)
- 4 **First Name**: update the name
- 5 **Nationality**: use the drop down to access the list of options



The Client Profile Creation

The Client Profile Creation Process:

1 Clients tab

2 The New Client Profile tab

3 Select the **Edit Profile** (Page & pencil glyph)

4 **First Name**: update the name

5 **Nationality**: use the drop down to access the list of options

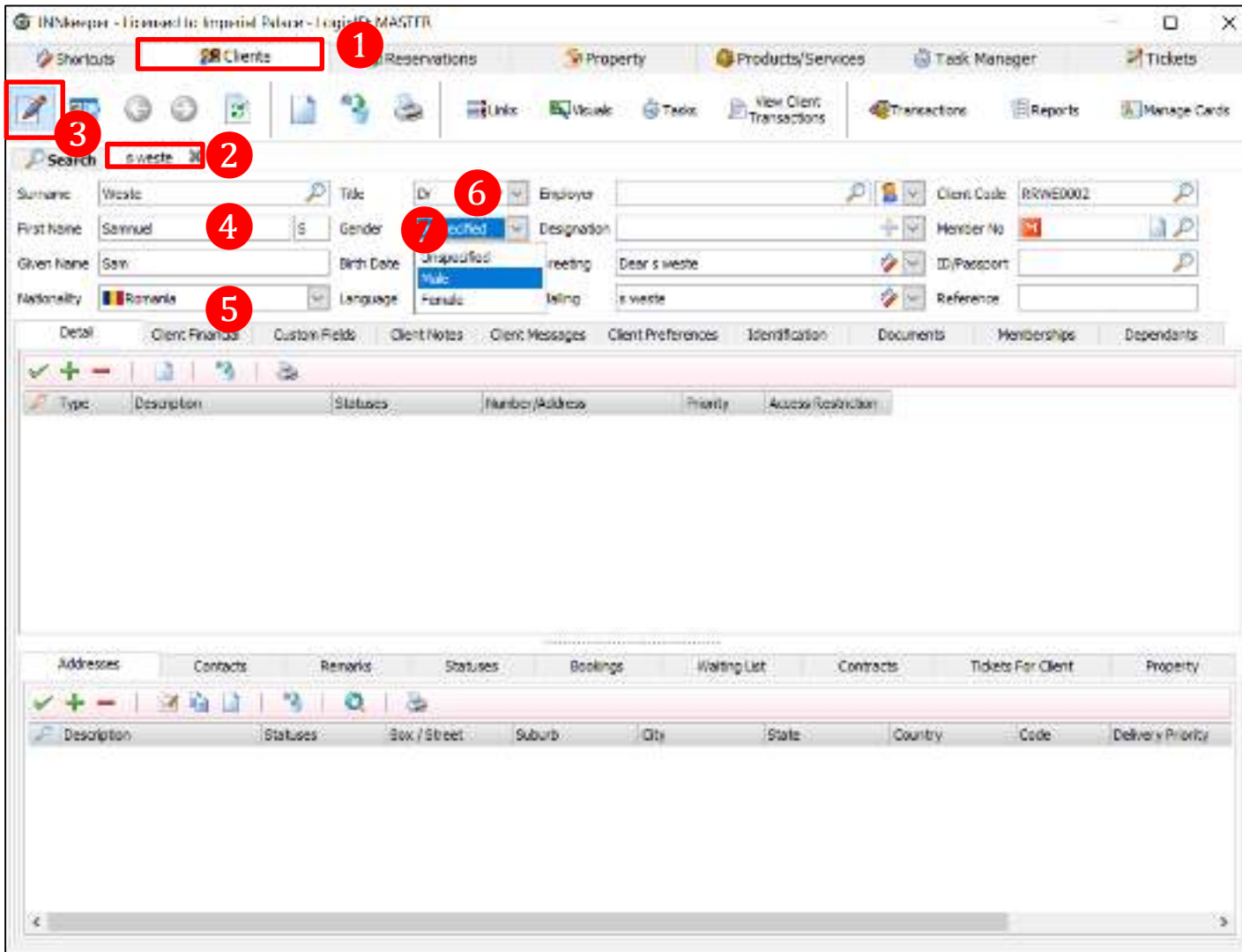
6 **Title**: use the drop down to access the list of options

- 1 **Clients** tab
- 2 **The New Client Profile** tab
- 3 Select the **Edit Profile** (Page & pencil glyph)
- 4 **First Name**: update the name
- 5 **Nationality**: use the drop down to access the list of options
- 6 **Title**: use the drop down to access the list of options



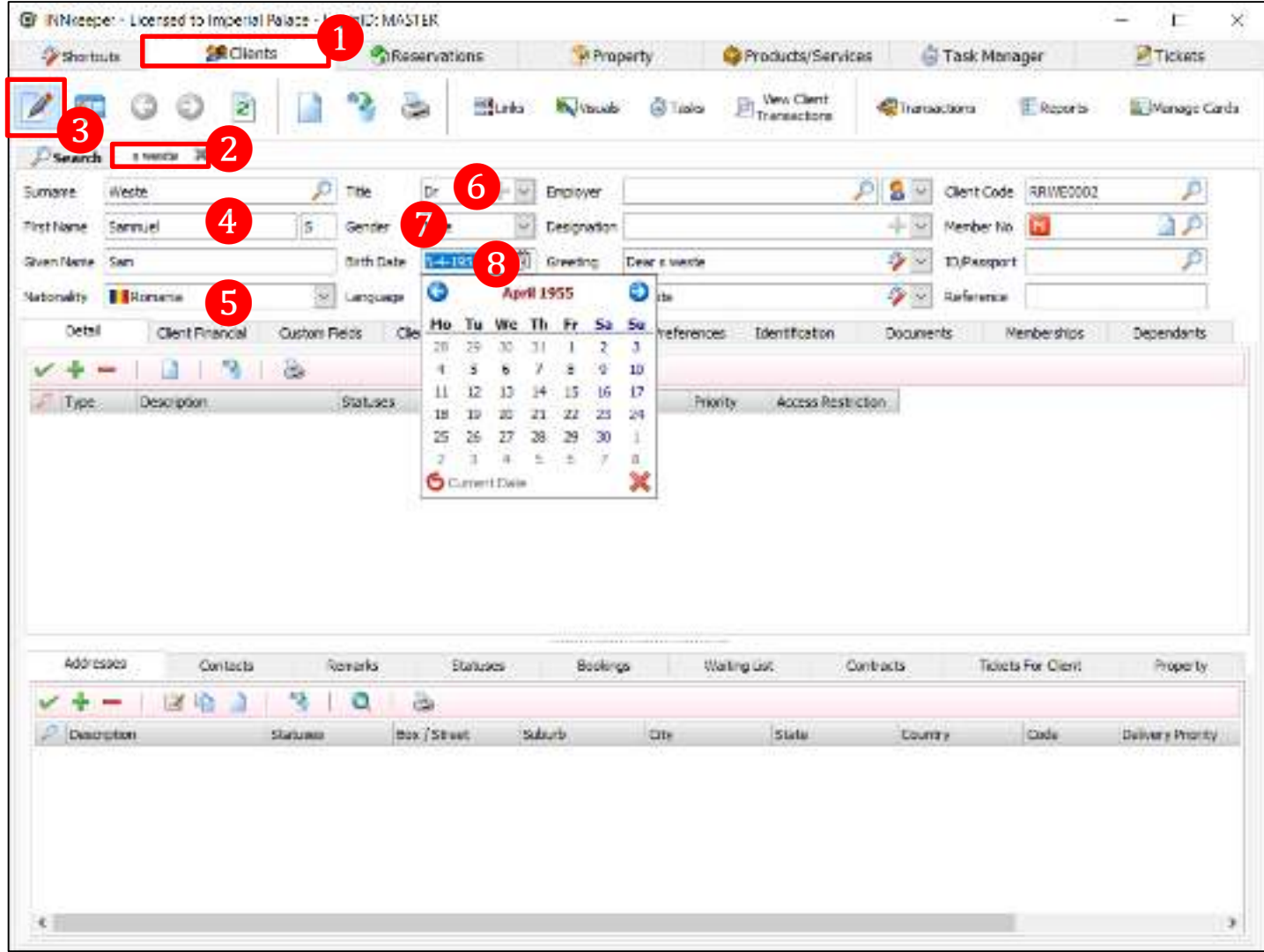
The Client Profile Creation

The Client Profile Creation Process:



- 1 **Clients** tab
- 2 The **New Client Profile** tab
- 3 Select the **Edit Profile** (Page & pencil glyph)
- 4 **First Name**: update the name
- 5 **Nationality**: use the drop down to access the list of options
- 6 **Title**: use the drop down to access the list of options
- 7 **Gender**: use the drop down to access the list of options

The Client Profile Creation Process:



- 1 Clients tab
- 2 The **New Client Profile** tab
- 3 Select the **Edit Profile** (Page & pencil glyph)
- 4 **First Name**: update the name
- 5 **Nationality**: use the drop down to access the list of options
- 6 **Title**: use the drop down to access the list of options
- 7 **Gender**: use the drop down to access the list of options
- 8 **Birth Date**: use the drop down to access the calendar



The Client Profile Creation

The Client Profile Creation Process:

- 1 **Clients** tab
- 2 **The New Client Profile** tab
- 3 Select the **Edit Profile** (Page & pencil glyph)
- 4 **First Name**: update the name
- 5 **Nationality**: use the drop down to access the list of options
- 6 **Title**: use the drop down to access the list of options
- 7 **Gender**: use the drop down to access the list of options
- 8 **Birth Date**: use the drop down to access the calendar
- 9 **Language**: use the drop down to access the list of options



The Client Profile Creation Process:

1 Clients

2 New Client Profile

3 Edit Profile

4 First Name

5 Nationality

6 Title

7 Gender

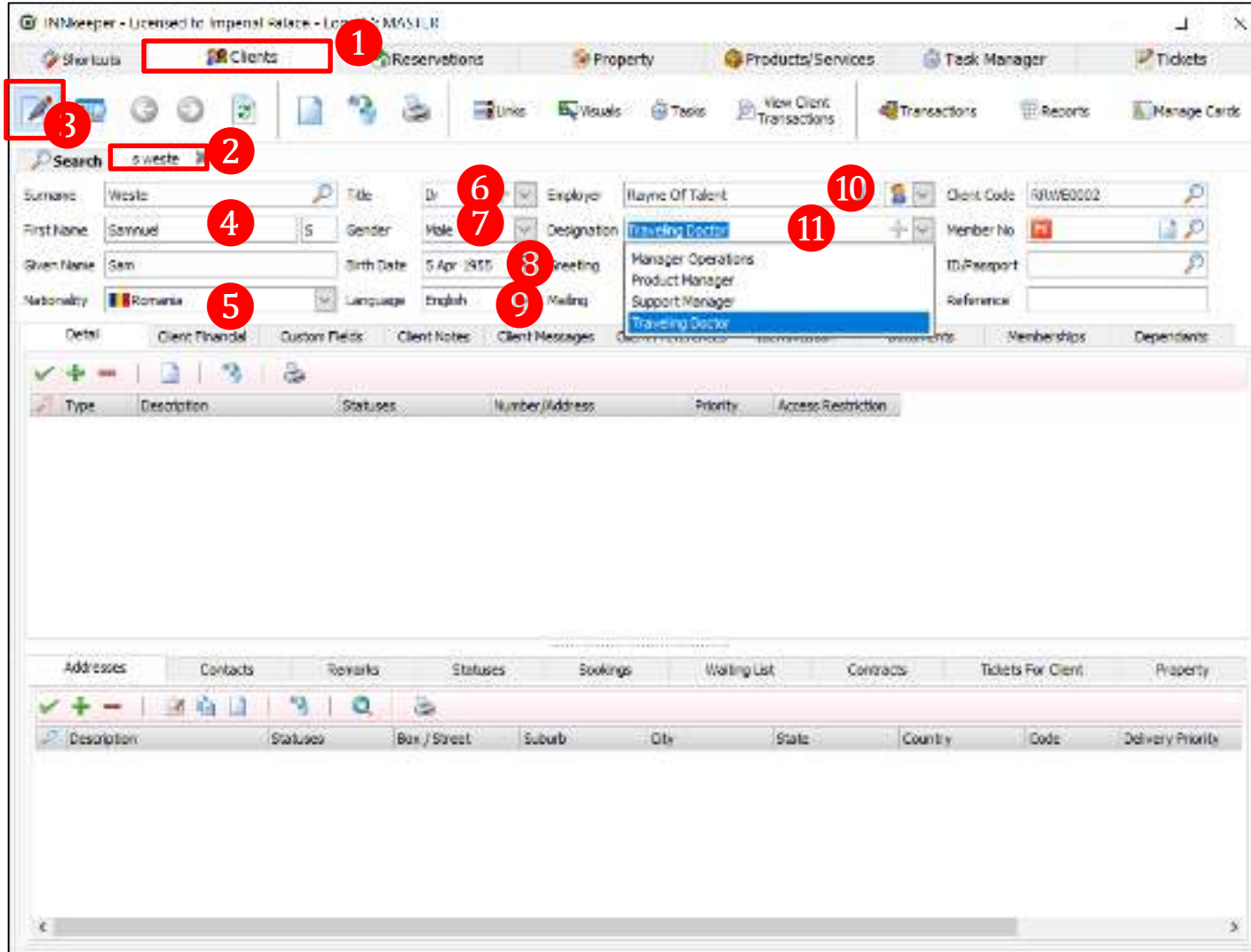
8 Birth Date

9 Language

10 Employer

- 1 **Clients** tab
- 2 **The New Client Profile** tab
- 3 Select the **Edit Profile** (Page & pencil glyph)
- 4 **First Name**: update the name
- 5 **Nationality**: use the drop down to access the list of options
- 6 **Title**: use the drop down to access the list of options
- 7 **Gender**: use the drop down to access the list of options
- 8 **Birth Date**: use the drop down to access the calendar
- 9 **Language**: use the drop down to access the list of options
- 10 **Employer**: type in the details, then select the drop down for individual or company

The Client Profile Creation Process:

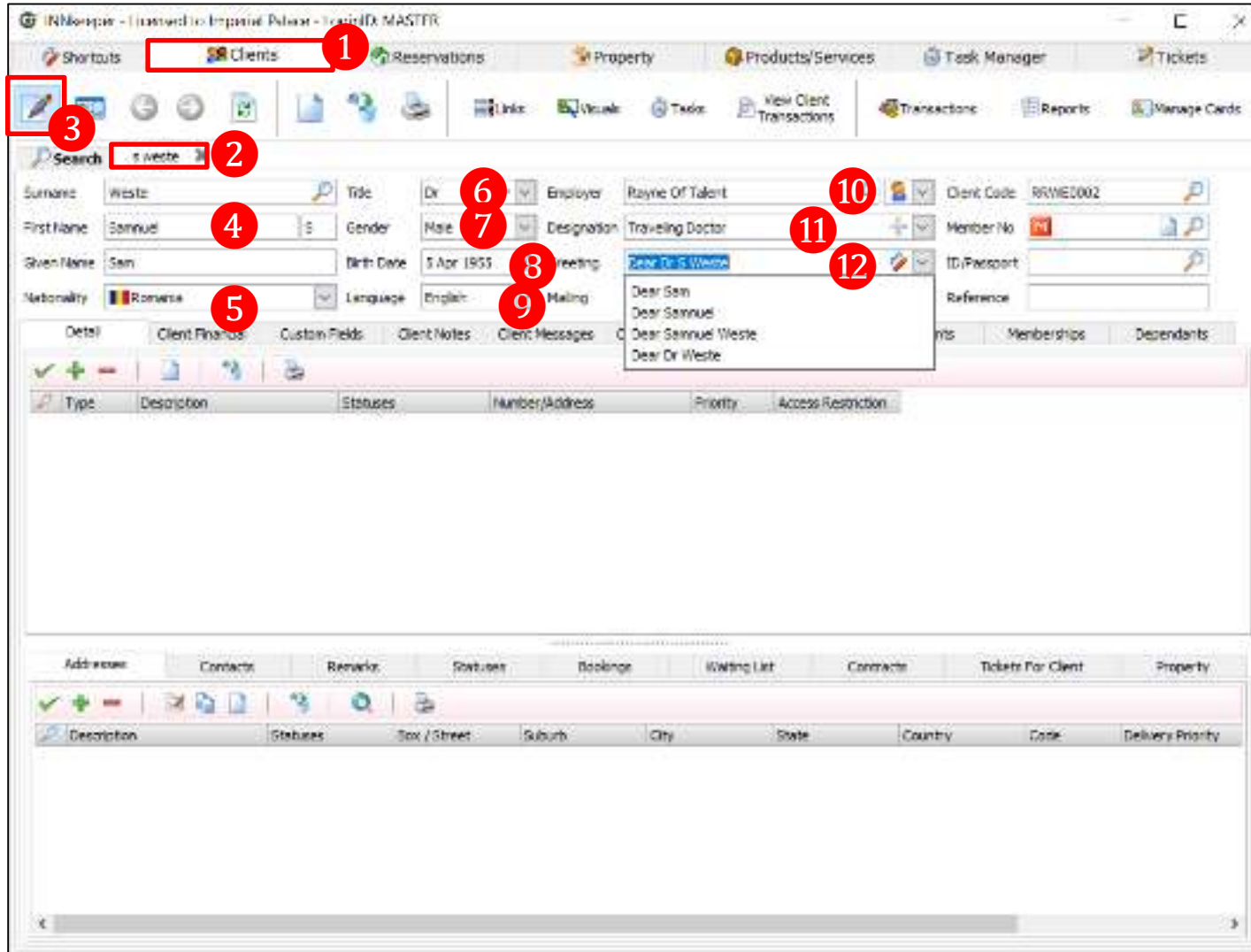


- ① **Clients** tab
- ② The **New Client Profile** tab
- ③ Select the **Edit Profile** (Page & pencil glyph)
- ④ **First Name**: update the name
- ⑤ **Nationality**:
- ⑥ **Title**:
- ⑦ **Gender**:
- ⑧ **Birth Date**:
- ⑨ **Language**:
- ⑩ **Employer**: type in the details, then select the drop down for individual or company
- ⑪ **Designation**: type in the details

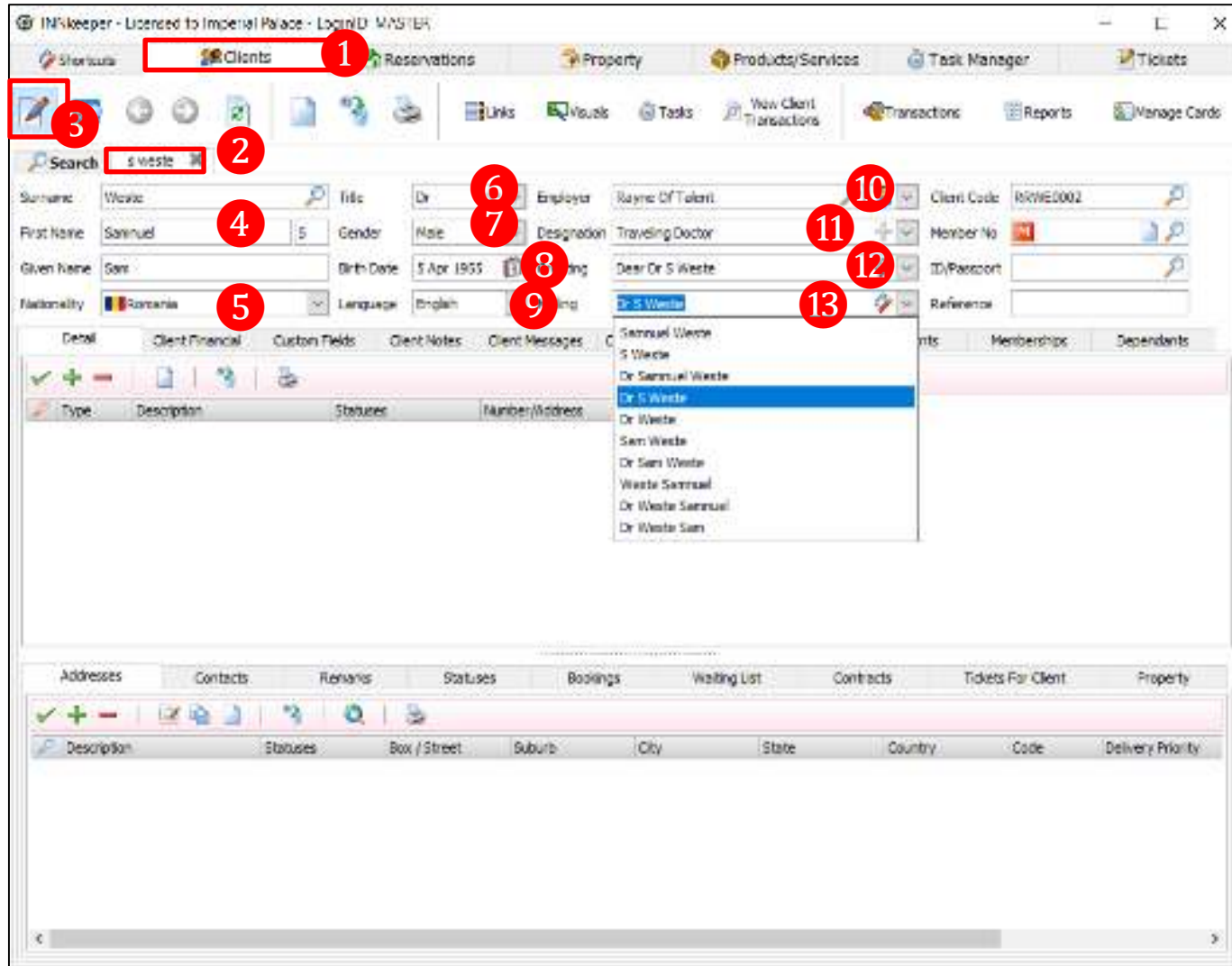


The Client Profile Creation

The Client Profile Creation Process:

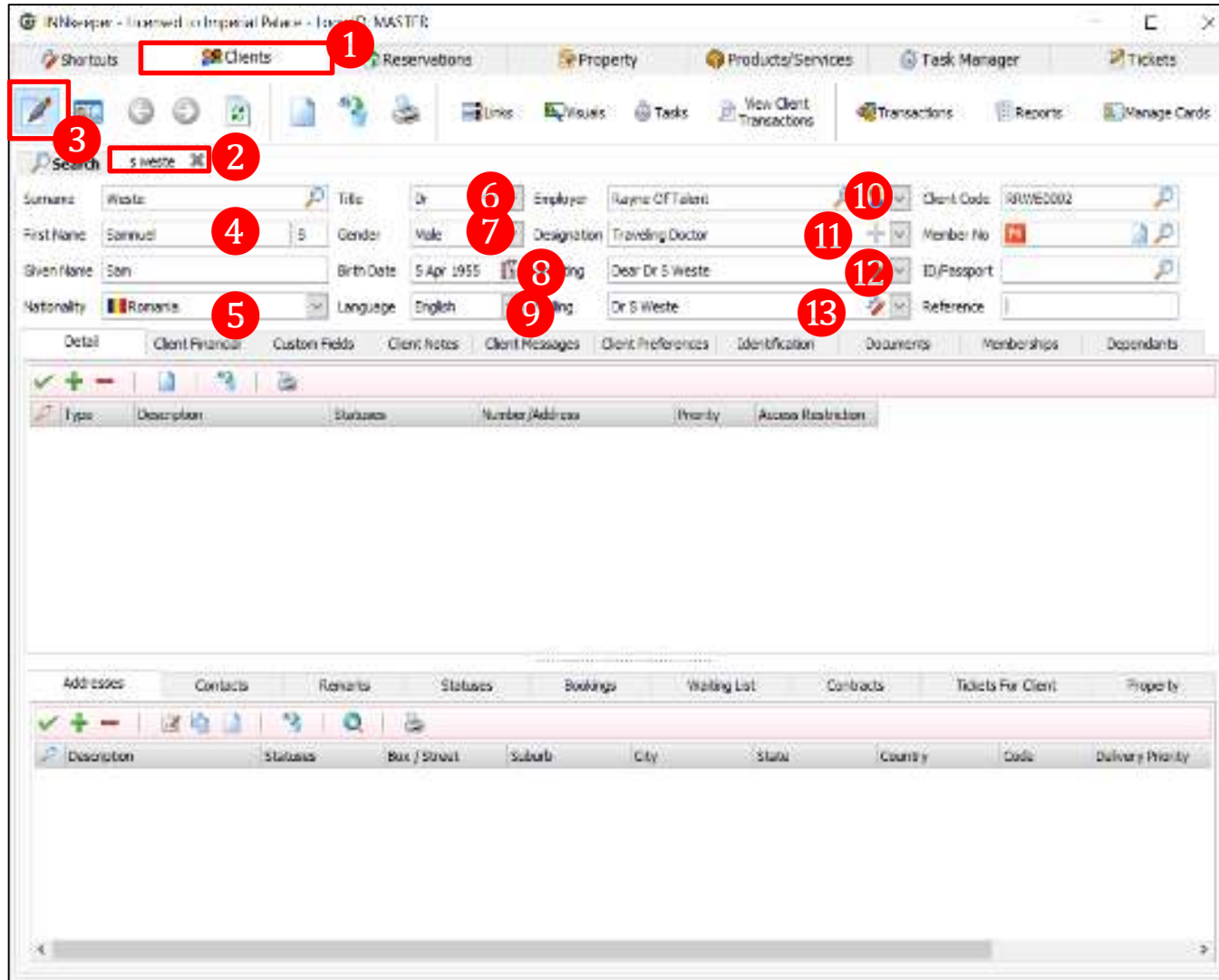


- 1 **Clients** tab
- 2 The **New Client Profile** tab
- 3 Select the **Edit Profile** (Page & pencil glyph)
- 4 **First Name**: update the name
- 5 **Nationality**:
- 6 **Title**:
- 7 **Gender**:
- 8 **Birth Date**:
- 9 **Language**:
- 10 **Employer**: type in the details, then select the drop down for individual or company
- 11 **Designation**: type in the details
- 12 **Greeting**: use the Auto-Select (wand like glyph) this will select a greeting,



The Client Profile Creation Process:

- 1 **Clients** tab
- 2 **The New Client Profile** tab
- 3 Select the **Edit Profile** (Page & pencil glyph)
- 4 **First Name**: update the name
- 5 **Nationality**:
- 6 **Title**:
- 7 **Gender**:
- 8 **Birth Date**:
- 9 **Language**:
- 10 **Employer**:
- 11 **Designation**: type in the details
- 12 **Greeting**: use the Auto-Select (wand like glyph) this will select a greeting
- 13 **Mailing**: use the Auto-Select (wand like glyph) this will select a greeting

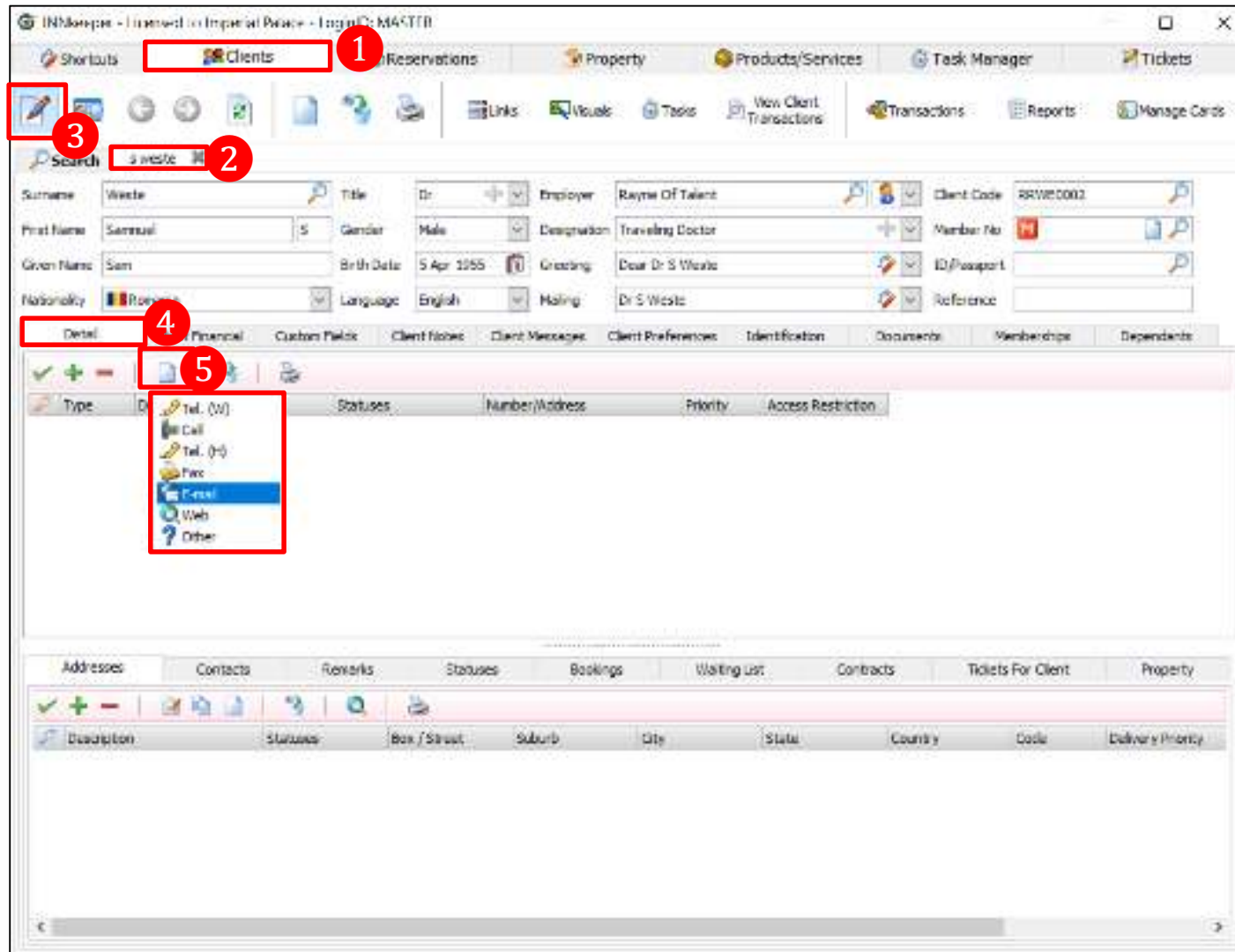


The Client Profile Creation Process:

- 1 **Clients** tab
- 2 The **New Client Profile** tab
- 3 Select the **Edit Profile** (Page & pencil glyph)
- 4 **First Name**: update the name
- 5 **Nationality**:
- 6 **Title**:
- 7 **Gender**:
- 8 **Birth Date**:
- 9 **Language**:
- 10 **Employer**
- 11 **Designation**: type in the details
- 12 **Greeting**: use the Auto-Select (wand like glyph) this will select a greeting
- 13 **Mailing**: use the Auto-Select (wand like glyph) this will select a greeting



The Client Profile Creation Process:



- 1 Clients tab
- 2 The **New Client Profile** tab
- 3 **Edit Client Profile** (page glyph)
- 4 **Details** subtab
- 5 Select the **New Address** (page glyph) to access the hidden menu. Select the relevant option:

- Tel (W)
- Cell
- Tel (H)
- Fax
- Email
- Web
- Other



The Client Profile Creation Process:

- 1 Clients tab
- 2 The New Client Profile tab
- 3 Edit Client Profile (page glyph)
- 4 Details subtab
- 5 Addresses subtab
- 6 Select the New Address (page glyph)

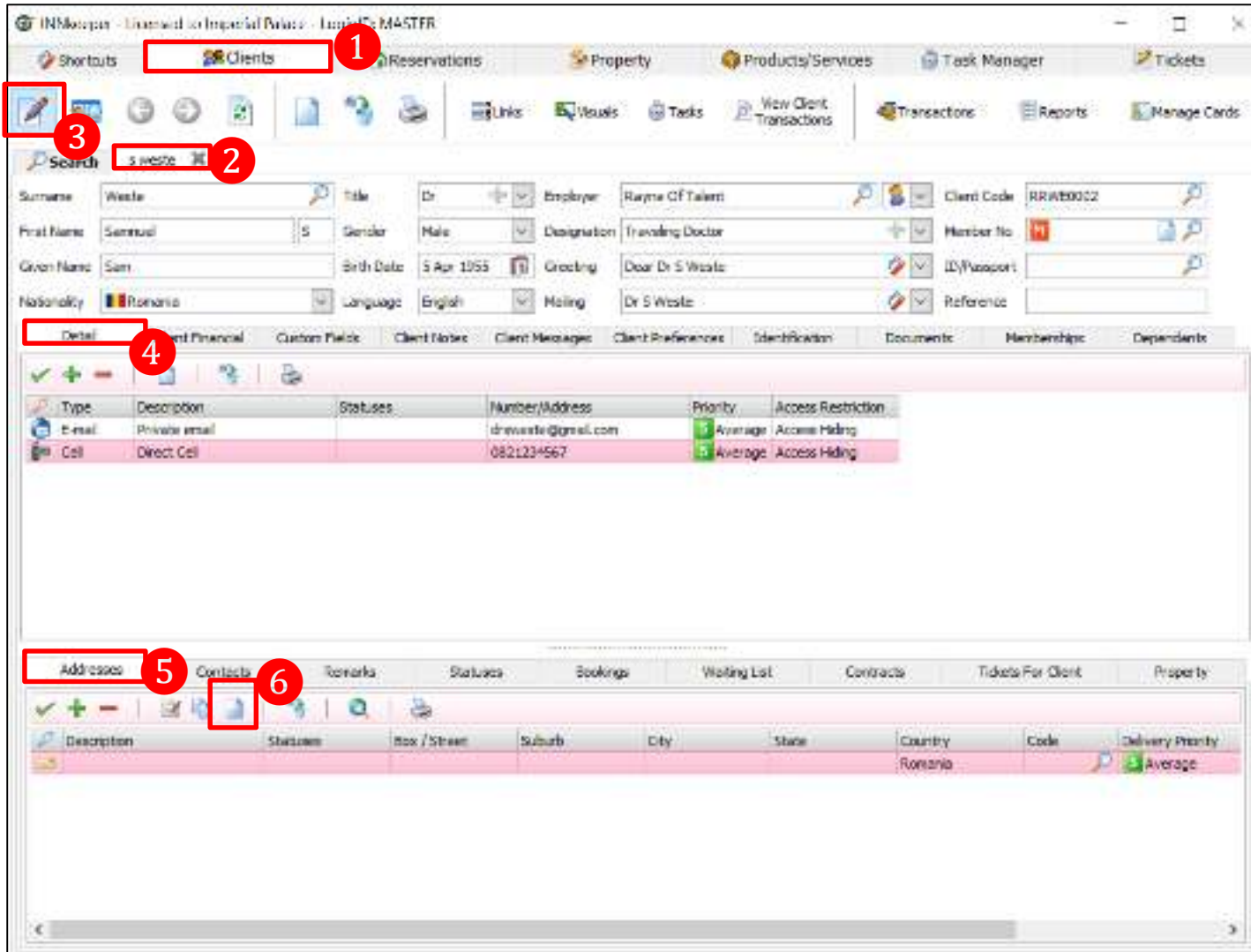
The screenshot displays the CLIENTmanager software interface. The top menu bar shows the 'Clients' tab selected (1). Below the menu is a toolbar with various icons, including 'New Client Profile' (2) and 'Edit Client Profile' (3). The main area shows a client profile for 'Dr. Semuel Wicak' with details like 'Title: Dr.', 'Employer: Rayne CF Talent', and 'Client Code: RRWB0002'. Below the client details is a subtab menu with 'Details' selected (4). Under 'Details', the 'Addresses' subtab is active (5), showing a table of addresses. The 'Direct Cell' address is selected (6).

Type	Description	Statuses	Number/Address	Priority	Access Restriction
E-mail	Private email		dr.wicak@gmail.com	Average	Access Hiding
Cell	Direct Cell		0821234567	Average	Access Hiding

Description	Statuses	Box / Street	Suburb	City	State	Country	Code	Delivery Priority
						Romania		Average

The Client Profile Creation Process:

- 1 Clients tab
- 2 The New Client Profile tab
- 3 Edit Client Profile (page glyph)
- 4 Details subtab
- 5 Addresses subtab
- 6 Select the New Address (page glyph)



The screenshot shows the CLIENTmanager software interface. The top navigation bar includes tabs for 'Shortcuts', 'Clients', 'Reservations', 'Property', 'Products/Services', 'Task Manager', and 'Tickets'. The 'Clients' tab is highlighted with a red box and the number 1. Below the navigation bar is a toolbar with various icons, including a pencil icon for editing, highlighted with a red box and the number 3. The main form area contains fields for client details such as 'Surname', 'First Name', 'Given Name', 'Nationality', 'Title', 'Gender', 'Employer', 'Designation', 'Client Code', 'Member No', 'Birth Date', 'Greeting', 'Mailing', and 'Reference'. Below the form is a subtab area with 'Details', 'Financial', 'Custom Fields', 'Client Notes', 'Client Messages', 'Client Preferences', 'Identification', 'Documents', 'Memberships', and 'Dependents'. The 'Details' subtab is highlighted with a red box and the number 4. Below the subtab area is a table with columns for 'Type', 'Description', 'Statuses', 'Number/Address', 'Priority', and 'Access Restriction'. The table contains two rows: 'E-mail' and 'Cell'. Below the table is another subtab area with 'Addresses', 'Contacts', 'Remarks', 'Statuses', 'Bookings', 'Waiting List', 'Contracts', 'Tickets For Client', and 'Property'. The 'Addresses' subtab is highlighted with a red box and the number 5. Below the subtab area is a table with columns for 'Description', 'Statuses', 'Box / Street', 'Suburb', 'City', 'State', 'Country', 'Code', and 'Delivery Priority'. The table contains one row with 'Romania' in the 'Country' column. The 'New Address' page glyph is highlighted with a red box and the number 6.



The Client Profile Creation

The Client Profile Creation Process:

The screenshot displays the CLIENTmanager interface for creating a client profile. The 'Clients' tab is active, showing a form for a client named Samuel Weite. The 'Addresses' subtab is selected, and a 'New Address' button is highlighted. The address form includes fields for Description, Statuses, Box / Street, Suburb, City, State, Country, and Code. A red bracket groups these fields under the number 9.

Type	Description	Statuses	Number/Address	Priority	Access Restriction
Email	Private email		droweite@gmail.com	Average	Access Hiding
Cell	Direct Cell		0021234567	Average	Access Hiding

Description	Statuses	Box / Street	Suburb	City	State	Country	Code	Delivery Priority
Residential	Physical	1 ABC Street	Albot	Suffax	West	Romania	15870	Average

- 1 Clients tab
- 2 The **New Client Profile** tab
- 3 **Edit Client Profile** (page glyph)
- 4 **Details** subtab
- 5 **Addresses** subtab
- 6 Select the **New Address** (page glyph)
- 7 **Description** column: the Description
- 8 **Statuses** column: selected Status
- 9 **Box / Street; Suburb; City, State, Country; Code** columns: type in the address corresponding to the columns



The Client Profile Creation Process:

- 1 Clients tab
- 2 The New Client Profile tab
- 3 Edit Client Profile (page glyph)
- 4 Details subtab
- 5 Contacts subtab
- 6 Select the New Contact (Page glyph)

INMoept - Logged In Imperial Patient - Logged MASTER

Shortcuts Clients Reservations Property Products/Services Task Manager Tickets

Search Dr S Weste

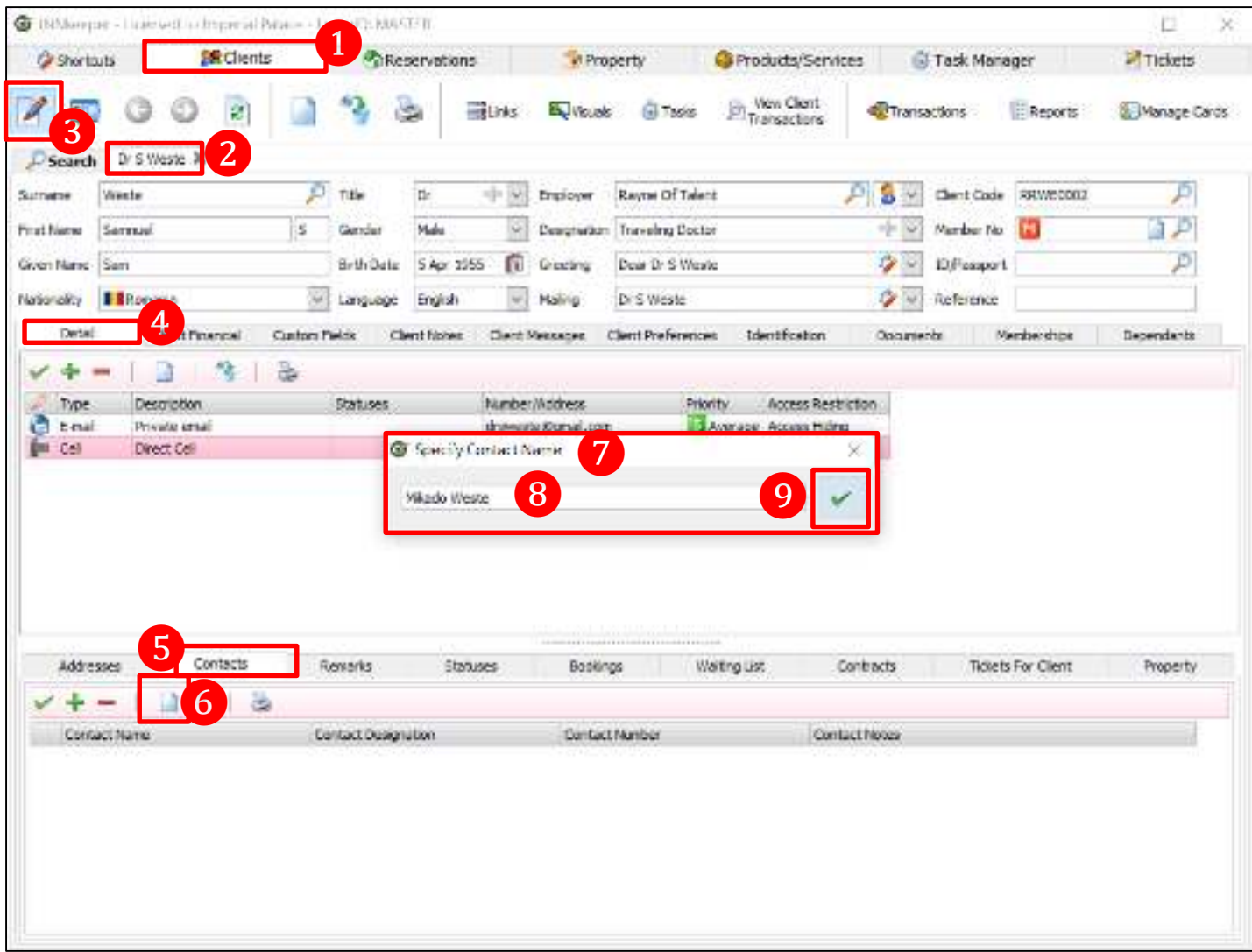
Surname: Weste Title: Dr Employer: Rayne OFTalent Client Code: RRWE0002
First Name: Samuel Gender: Male Designation: Traveling Doctor Member No:
Given Name: Sam Birth Date: 5 Apr 1955 Greeting: Dear Dr S Weste ID/Passport:
Nationality: Romania Language: English Mailing: Dr S Weste Reference:

Detail Financial Custom Fields Client Notes Client Messages Client Preferences Identification Documents Memberships Dependents

Type	Description	Statuses	Number/Address	Priority	Access Restriction
Email	Private email		drweste@gmail.com	Average	Access Hiding
Cell	Direct Cell		0621234567	Average	Access Hiding

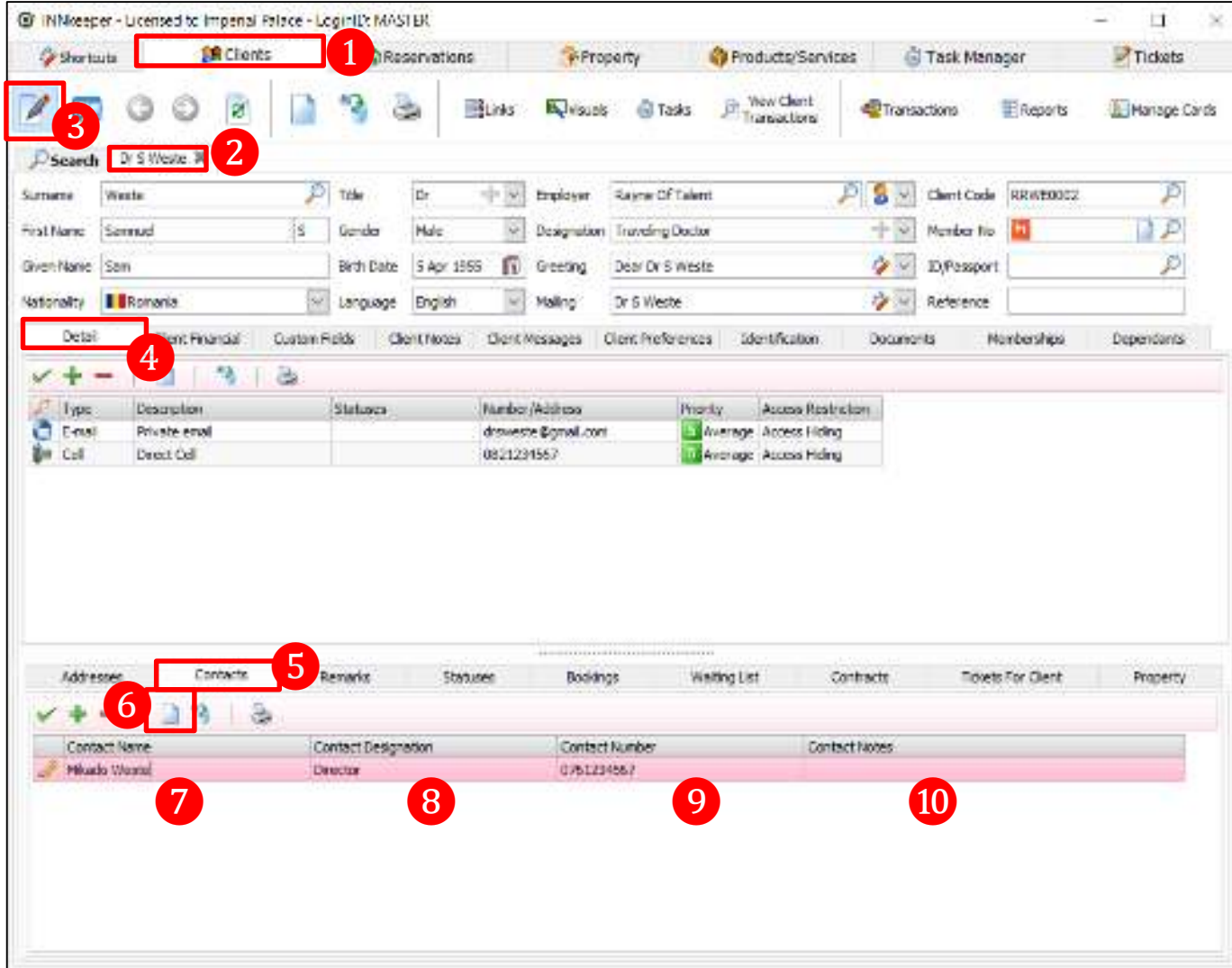
Addresses Contacts Reservations Statuses Bookings Waiting List Contracts Tickets For Client Property

Contact Name	Contact Designation	Contact Number	Contact Notes
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The Client Profile Creation Process:

- 1 Clients tab
- 2 The **New Client Profile** tab
- 3 **Edit Client Profile** (page glyph)
- 4 **Details** subtab
- 5 **Contacts** subtab
- 6 **New Contact** (Page glyph)
- 7 **Specify Contact Name** window
- 8 **Type** in the Contact Name
- 9 Select the **Accept** (green tick glyph)



The Client Profile Creation Process:

- 1 Clients tab
- 2 The New Client Profile tab
- 3 Edit Client Profile (page glyph)
- 4 Details subtab
- 5 Contacts subtab
- 6 Select the New Contact (Page glyph)
- 7 Contact Name column: the Added Name (can be edited here once the new line has been added)
- 8 Contact Description column: type in the description
- 9 Contact Number column: type in the number
- 10 Contact Name column: type in the notes



The Client Profile Creation

The Client Profile Creation Process:

- 1 **Clients** tab
- 2 The **Create Client's Profile** tab
- 3 Select the **Edit** (Page 7 Pencil glyph) this will change the editable areas from pink back to blue. Which will lock the profile
- 4 Select the **Print** (printer glyph) to print the profile

INManager - Licensed to Imperial Palace - Local ID: MASTER

Shortcuts **Clients** 1 Reservations Property Products/Services Task Manager Tickets

3 4

Search Dr S Weste 2

Surname: Weste Title: Dr Employer: Rayna CJ Talent Client Code: SRWE0002
First Name: Samuel S Gender: Male Designation: Travelling Doctor Member No:
Given Name: Sam Birth Date: 5 Apr 1955 Greeting: Dear Dr S Weste ID/Passport:
Nationality: Romania Language: English Mailing: Dr S Weste Reference:

Detail Client Financial Custom Fields Client Notes Client Messages Client Preferences Identification Documents Memberships Dependencies

Type	Description	Statuses	Number/Address	Priority	Access Restriction
Email	Private email		srweste@gmail.com	Average	Access Hiding
Call	Direct Call		0823234967	Average	Access Hiding

Address Contacts Reservations Statuses Bookings Waiting List Contracts Tickets For Client Property

Description	Statuses	Box / Street	Suburb	City	State	Country	Code	Delivery Priority
Residential	Physical	1 ABC Street	Abot	Suffox	West	Romania	15870	Average



The screenshot shows the CLIENTmanager software interface. A window titled "Print Preview - Client Datasheet" is open, displaying a client profile. The profile includes sections for Personal Details, Contact Numbers, Client Links, Address Detail, Financial Information, and Remarks. At the bottom of the preview window, there is a toolbar with icons for Print Setup, Print, Fax, E-mail, Load Report, Save Report, and Close. The status bar shows "Page 1 of 1".

The **Print Preview**, you are able to **Print, Fax, Save or Email** the report



Thank you!