



### **MAESTRO CLIENT CREATION**

When a Client is created within any Maestro Module, the same Client and associated Client code can be used within any other Maestro Module.  
There is no need to create a new Client Code

### **CLIENT #1234**

When a Client is created in the "**Client Maintenance**" screen, it becomes a UNIVERSAL client to be used within all Modules of Maestro

#### **A/R CLIENT #1234**

##### **"A/R Client Entry View"**

Additional Information for Billing Purposes

A/R Specific Details:

Credit Limits and Outstanding Balances

#### **Owner CLIENT #1234**

##### **"Owner Profile"**

Additional Information about the Owner

Owner Specific Details:

Payments and Charge Types, Total Units Owed

#### **S/C CLIENT #1234**

##### **"S/C Client Entry View"**

Captures more information about the Client needed by the Sales team.

S/C Client Specific Details:

Booking Contacts, Lead Source, Account Manager

#### **C/M CLIENT #1234**

##### **"Member Profile, Spa Client"**

Additional Information about Members

C/M Specific Details:

Join Date, Charging Privileges, Discount Types, Health Attributes

### **BEST PRACTICE WHEN A NEW CLIENT IS REQUIRED**

1. Use the Lookup (F8 key) to ensure that the Client does not already exist. \*It may be necessary to go to the *WINDOW* menu and *Toggle all Clients* to see all the Clients in the database.\*
2. Create (F6 key) a new CLIENT using the "**Client Maintenance**" screen