

MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

CLINIC

# SHORTCUTS FUSION

## SERIES

SELLING AND REDEEMING A SERIES

HOME & MOBILE

BEAUTY



# SHORTCUTS™

SMARTER BUSINESS TECHNOLOGY

*it suits you*

**Last updated 7 April 2016**

By Erin Lewis

Product: Shortcuts Fusion

Software version no: 8.0.16.1

Document version no: 1.0

Country: Australia

# CONTENTS

- IMMEDIATELY REDEEMING A PURCHASED SERIES ..... 1**
- VIEWING A CLIENT’S PURCHASED SERIES..... 6**
- BOOKING IN A SERVICE FROM A SERIES ..... 8**
- CHECKING OUT A SERIES BOOKING..... 11**

## ABOUT THIS DOCUMENT

A series is a package of 2 or more of the same service, often sold at a discounted price as an incentive for clients to purchase the series. The series feature offers clients the convenience of paying in advance for multiple services, which can be redeemed over time.

Series help to increase client loyalty, by motivating clients to return and redeem their series once they have purchased it. You can even sell and redeem a series at the same time. For example, you could sell a series of 10 spray tans, and check out a spray tan from the series in the same transaction. Series also provide you with the benefit of guaranteed revenue due to the up-front nature of series payments.


# IMMEDIATELY REDEEMING A PURCHASED SERIES

In most cases, a client will come in for an appointment and then decide to purchase a series of the same service. In this case, the client can purchase a series and redeem their first service from the series at the same time.


- 1 Click on the **main** menu.
- 2 Click on the **appointments** icon.
- 3 Right click on the relevant appointment.
- 4 Select **checkout**.

The screenshot displays a software interface for managing appointments. On the left, a vertical timeline shows time slots from 9:00 AM to 5:00 PM in 15-minute increments. The main area is a grid where columns represent staff members (Anna, James, Lucy, Chris, Katie) and rows represent time slots. Appointments are listed with client names and services, such as 'Patricia Lawson Rehydrating Facial' and 'Yasmin Green Ladies Style Cut'. A context menu is open over an appointment, listing actions like 'Undo Arrived', 'Checkout', 'Confirmed', 'No Show', 'Change Service', 'Select', 'Tag', 'CPC', 'Notes', 'Recur', 'View Week', 'Add to Group', 'Extra', and 'Delete'. The 'Checkout' option is highlighted with a red circle and the number 4. The bottom navigation bar includes buttons for '< Week', '< Day', 'Today', 'Day >', and 'Week >'. The top right corner shows the current time as 2:37 PM on Tue, 8 Mar '16.



- 5 Click on an empty sale line.
- 6 Select the relevant employee.
- 7 Click **service**.

  
Clients

Olivia Black  
 Not a member of a club or program.

  
Trans# 16










  


Employee	Product/Service	Qty.	Price	Disc.	GST	Total
 Katie	 Body Treatments 30 min Massage	1	65.00	0.00	5.91	65.00





  

Choose Employee

Filter: <All>  
 Search:


Employee Alias	Employee Level	Status
 Anna	Director	Rostered On
 Business	Default	Rostered On
 Chris	Senior Stylist	Rostered On
 Helen	Senior Stylist	Not Rostered On
 James	Stylist	Rostered On
 Katie	Stylist	Not Rostered On
 Lucy	Senior Stylist	Rostered On
 Michael	Apprentice	Not Rostered On
 Michelle	Stylist	Not Rostered On


  
Cancel


0.00	 Card	 Quote
0.00		
65.00	 History	 No Sale
5.91		
0.00		
65.00		
0.00		
65.00		


  


Product or Service?

  
Product








  
Service

  
Sundry

  
Account

 SHORTCUTS  
 2:38 PM  
 Tue, 8 Mar '16


Main

-  Appointments
-  Arrivals
-  Walkin Manager
-  Point Of Sale
-  Clients
-  Performance
-  Exit

Tools

Stock

Setup

 Anna Owner  
 Log Off

- 8** Click on the relevant service category.
- 9** Click on the **available series** tab.
- A** As an alternative to steps 8 and 9, you can click on the category called **series** to view all your available series.
- 10** Click on the relevant series.
- B** The selected services/series section will display the series you have selected.
- 11** Click **done**.

Service Selection - Katie

**Categories**

- Olivia Black
- Series **A**
- Body Treatments **8**
- Facials
- Fitness
- Hair Colouring
- Hair Styling
- Injectables
- IPL
- Ladies Cuts
- Makeup
- Mens Cuts

**Show Me**

- All Services
- Services for Katie

Available Services

Available Series **9**

Category	Service	Name	Qty	Price	Expiry
Body Treatments	30 min Massage	4 x 30 min Massage Series <b>10</b>	4	\$208.00	12 Months
Body Treatments	30 min Massage	8 x 30 min Massage Series	8	\$390.00	12 Months

Selected Services/Series

Category	Name	Series	Price
Body Treatments	4 x 30 min Massage Se...	4 <b>B</b>	\$208.00

Services Selected 1
Total Price \$208.00
Total Duration 0 mins

**Employee**

**Products**

**Sundry**

**History**

**Done** **11**

**Cancel**

SHORTCUTS

2:39 PM  
Tue, 8 Mar '16

Main

- Appointments
- Arrivals
- Walkin Manager
- Point Of Sale
- Clients
- Performance
- Exit


Tools

Stock


Setup







Anna  
Owner  
Log Off


- C** The scheduled service.
- D** The series being purchased.
- E** The service being deducted from the series.
- 12** Select the relevant payment type.
- 13** Enter the amount to be paid using this payment type.
- 14** Click **done**.


  
Clients


Olivia Black  
Not a member of a club or program.


  
Trans# 16


Employee	Product/Service	Qty.	Price	Disc.	GST	Total
 Katie	 Body Treatments 30 min Massage	<b>C</b> 1	52.00	N/A	4.73	52.00
 Katie	 Series (30 min Massage x4) 4 x 30 min Massage Series	<b>D</b> 1	208.00	0.00	18.91	208.00
 Business	 Series Redemption 4 x 30 min Massage Series	<b>E</b> -1	52.00	N/A	-4.73	-52.00

  
\$0.00

  
\$0.00

  
\$0.00

  
\$0.00

  
\$52.00

Discount

TIP

Sales Total

0.00

0.00

260.00


18.91


-52.00


208.00


0.00

208.00

  
Card

  
End Sale

  
History

  
No Sale

Enter Amount for Cash

208.00

1	2	3
4	5	6
7	8	9
0	C	.

✓ **14**  
Done

✗  
Cancel

**SHORTCUTS**


2:40 PM  
Tue, 8 Mar '16

Main


-  Appointments
-  Arrivals
-  Walkin Manager
- Point Of Sale
-  Clients
-  Performance
-  Exit
- Tools
- Stock
- Setup
-  Anna Owner  
Log Off

15

Click **end sale** to complete the transaction. The number of services remaining in the series will then be updated accordingly.

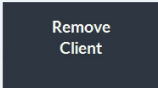


Clients




Olivia Black







Not a member of a club or program.




Remove Client




Trans# 16


Employee	Product/Service	Qty.	Price	Disc.	GST	Total
 Katie	 Body Treatments 30 min Massage	1	52.00	N/A	4.73	52.00
 Katie	 Series (30 min Massage x4) 4 x 30 min Massage Series	1	208.00	0.00	18.91	208.00
 Business	 Series Redemption 4 x 30 min Massage Series	-1	52.00	N/A	-4.73	-52.00




\$208.00




\$0.00




\$0.00



\$0.00



\$52.00



\$0.00

Discount 0.00

TIP 0.00

Sales Total 260.00


GST 18.91

Redemptions -52.00


Amount Owing 208.00

Payment Received 208.00


**Change 0.00**




Card



End Sale



History



No Sale

SHORTCUTS

2:41 PM  
Tue, 8 Mar '16

Main

-  Appointments
-  Arrivals
-  Walkin Manager
-  Point Of Sale
-  Clients
-  Performance
-  Exit

Tools

Stock

Setup

 Anna Owner  
Log Off



# VIEWING A CLIENT'S PURCHASED SERIES

- 1 Click on the **main** menu.
- 2 Click on the **clients** icon.
- 3 Select the relevant client.
- A The client's outstanding series will be displayed on the client dashboard.
- 4 Click **history** to view more information about the series.

**Select Client**

Search For ...  Delete

Sort By...  
First Name

Show Me...  
 Inactive

New Quick

CPC History

Card Merge

Assistant Appt Book

SHORTCUTS  
3:15 PM  
Tue, 8 Mar '16

Main 1

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients 2

Performance

Exit

Tools

Stock

Setup

Anna Owner  
Log Off

Client Name	Phone	Employee
Andrea Collins	0433 222 323 (M)	3
Andrew Fitzpatrick	0422 666 141 (M)	
Andy Ellis	0455 666 555 (M)	
Angela Jefferson	0444 242 424 (M)	
Ashley Taylor	0433 666 363 (M)	
Audrey Patterson	0444 333 444 (M)	
Betty McCormick	0455 999 333 (M)	
Bianca Lopez	0433 222 332 (M)	
Brandon Robinson	07 3300 0033 (H)	
Brenda Peters	0411 999 919 (M)	
Brooke James	0477 999 333 (M)	
Cameron Porter	0466 111 666 (M)	

Client Details for Andrea Collins:

- No preferred employee
- Not a club member | No Programs.
- 2 Visits (0 No Shows, 0 Cancellations)
- \$104.00 average spend
- \$0.00 outstanding on account

**Outstanding Client Series**

- 3/4 30 min Massage A

**No future appointments**

**Past Appointments**

- 7 Mar 5:15 PM: Rehydrating Facial - Chris

**5** Click on the **history totals** tab.

**B** The outstanding series section will display the client's purchased series, including how many services remain in the series as well as the purchase date and the expiry date (if applicable).

History for Andrea Collins

History List
History Totals **5**

**Status for Andrea Collins**

<b>✦ Sales</b>		<b>\$208.00</b>
<b>• Discount</b>		<b>\$0.00</b>
<b>• Outstanding Account</b>		<b>\$0.00</b>
<b>• Visits</b>		<b>2</b>
<b>• Rebookings</b>		<b>0</b>
<b>• Clients Referred</b>	<b>0</b>	<b>\$0.00</b>
<b>• Average Spend</b>		<b>\$26.00</b>
<b>• Booking Prepayments</b>		<b>\$0.00</b>
<b>- Outstanding Series</b>		<b>1</b>
<span style="color: red;">•</span> 4 x 30 min Massage Series: 3 of 4 30 min Massage(s) - Purchased: 8/03/2016, Expires: 8/03/2017 <b>B</b>		

Visit Notes (0)
Clinic Notes (0)

**Notes**

Show only date with notes

Employee

Service

Date Range

New

Edit

View

Print

Visit Details

Treatment

Help

Done

SHORTCUTS  
3:16 PM  
Tue, 8 Mar '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna  
Owner  
Log Off

# BOOKING IN A SERVICE FROM A SERIES

- 1 Click on the **main** menu.
- 2 Click on the **appointments** icon.
- 3 Move to the desired day on the Appointment Book.
- 4 Click on the relevant timeslot in the relevant employee's column.

The screenshot displays a salon appointment booking system interface for Friday, 1 April 2016. The interface is organized into a grid where rows represent time slots (from 9:00 AM to 5:00 PM) and columns represent different employees: Anna, James, Lucy, Chris, and Katie. Various services are booked, such as 'Carl Reed Mens Style Cut', 'Talliah Gibson Ladies Style Cut', 'Brooke James Full Head Highlights', 'Viktor Reed Mens Clipper Cut', 'Ebony Phillips', 'Sasha King Rehydrating Facial', 'Samuel Costello 60 min Massage', 'Chelsea Grey Full Leg IPL', 'Darriel Roberts Microdermabrasion', and 'Vanessa Anderson Full Head Highlights'. A sidebar on the right contains 'SHORTCUTS' like Main, Appointments, Arrivals, Walkin Manager, Point Of Sale, Clients, Performance, and Exit. A bottom navigation bar includes '< Week', '< Day', 'Today', 'Day >', 'Week >', and a 'Menu' button. A 'Log Off' button is at the bottom right. Numbered callouts 1-4 highlight the main menu, appointments icon, day selection, and a specific time slot.

- A** The number of services remaining in the series can be viewed in the outstanding client series section on the client dashboard.
- 5** Select the relevant client.
- 6** Click **done**.

**Select Client**

Search For ...

Delete

Sort By...  
 First Name

Schedule a Task

<b>Amanda Phillips</b> 0411 333 555 (M) <span style="float: right; font-size: 24px; color: #0070c0; border: 1px solid #0070c0; border-radius: 50%; padding: 2px 5px;">5</span>
Amber Ashton 0422 111 888 (M)
Amy Newman 0411 777 888 (M)
Andrea Collins 0433 222 323 (M)
Andrew Fitzpatrick 0411 111 444 (M)
Andy Ellis 0455 666 555 (M)
Angela Jefferson <span style="float: right; font-size: 18px; color: #f08080;">!</span> 0444 242 424 (M)
Ashley Taylor 0433 666 363 (M)
Audrey Patterson 0444 333 444 (M)
Betty McCormick 0455 999 333 (M)
Bianca Lopez <span style="float: right; font-size: 24px; color: #f0e68c;">★</span> 0433 222 111 (M)

No preferred employee  
 Not a club member | No Programs.  
 1 Visits (0 No Shows, 0 Cancellations)  
 \$208.00 average spend  
 \$0.00 outstanding on account

**Outstanding Client Series**  
 3/4 30 min Massage A

No future appointments

No past appointments

Inactive

New

Quick

CPC

History

Card

Merge

6  

Done

Cancel

SHORTCUTS

🕒 3:47 PM  
 Thu, 7 Apr '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna  
 Owner  
 Log Off

- B** Any series previously purchased by the client will be displayed in the 'outstanding client series' section. The number of services remaining in the series, and the expiry date (if applicable) will also be displayed here.
- 7** Click on the relevant series in the 'outstanding client series' section.
- C** As an alternative to step 9, you can select the service as usual and it will be automatically deducted from the series.
- D** The service will then be displayed in the selected services/series section.
- 8** Click **done**.

Service Selection - Lucy

**Categories**

- Amanda Phillips
- Body Treatments
- Facials
- Hair Colouring
- Hair Styling
- Injectables
- IPL
- Ladies Cuts
- Makeup
- Mens Cuts
- Spa Packages
- Tanning

Previous Client Services

Category	Name	Last Purchased
Body Treatments	30 min Massage	7/04/2016

Outstanding Client Series

Purchased	Name	Remaining	Expires
7/04/2016	4 x 30 min Massage Series <b>7</b>	3/4	7/04/2017 <b>B</b>

Selected Services/Series

Category	Name	Employee	Price	Start	Available
Body Treatments	30 min Massage <b>D</b>	Lucy	\$65.00	2:00 PM	✔

Services Selected 1
Total Price \$65.00
Total Duration 30 mins

Show Me

- All Services
- Services for Lucy

Employee

Assistant

History

8

Done

X

Cancel

SHORTCUTS

3:48 PM  
Thu, 7 Apr '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

---

Tools


Stock


Setup

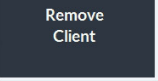
Anna Owner  
Log Off


# CHECKING OUT A SERIES BOOKING





- A The -1 in the quantity column represents a service being deducted from the series.
- 1 Select the client from the drop-down menu at the Point of Sale.
- 2 No payment is necessary as the service has already been paid for. Click **end sale** to complete the transaction. The number of services remaining in the series will then be updated accordingly.


  
Clients


  
1 Andrea Collins  
Not a member of a club or program.


  
Remove Client

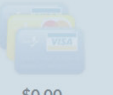
  
Trans# 3

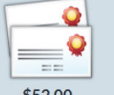
Employee	Product/Service	Qty.	Price	Disc.	GST	Total
 Anna	 Body Treatments 30 min Massage	1	52.00	N/A	4.73	52.00
 Business	 Series Redemption 4 x 30 min Massage Series	-1 <span style="font-size: 24px; color: green; border-radius: 50%; padding: 2px 8px; display: inline-block;">A</span>	52.00	N/A	-4.73	-52.00

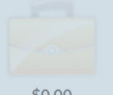
  
\$0.00

  
\$0.00

  
\$0.00

  
\$0.00

  
\$52.00

  
\$0.00

Discount

TIP

Sales Total

GST

Redemptions

Amount Owing

Payment Received

Change

0.00

0.00

52.00


0.00


-52.00


0.00

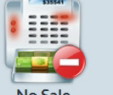
0.00

0.00

  
Card

 2  
End Sale

  
History


  
No Sale


SHORTCUTS


12:02 PM


Tue, 8 Mar '16


Main


 Appointments


 Arrivals

 Walkin Manager

 Point Of Sale

 Clients


 Performance

 Exit

Tools

Stock

Setup

 Anna Owner  
Log Off



**SHORTCUTS™**

SMARTER BUSINESS TECHNOLOGY

*it suits you*

**AUSTRALIA AND ASIA**

166 Knapp Street  
Fortitude Valley  
QLD 4006  
Tel: +61 7 3834 3232

[www.shortcuts.com.au](http://www.shortcuts.com.au)

**UK AND EUROPE**

Dalton House  
Dane Road, Sale  
Cheshire M33 7AR  
Tel: +44 161 972 4900

[www.shortcuts.co.uk](http://www.shortcuts.co.uk)

**NORTH AMERICA**

7711 Center Avenue  
Suite 650  
Huntington Beach CA 92647  
Tel: +1 714 622 6682

[www.shortcuts.net](http://www.shortcuts.net)

HAIR | BEAUTY | CLINIC | SPA | BARBER | WALKIN | SCHOOL | MULTI-SITE