

MULTI-SITE

WALK-IN

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SHORTCUTS FUSION APPOINTMENT BOOK

SETTING UP TIME
ALLOCATION

HOME &
MOBILE

BEAUTY



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SMARTER BUSINESS TECHNOLOGY

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ABOUT THIS DOCUMENT

The time allocation feature allows you to reserve a percentage of the Appointment Book for walk-in visits, ensuring you'll never have to turn a client away again. Once you reach the booking limit for a particular time, the remaining timeslots in that row will be marked as reserved. You will receive a warning message if you attempt to book an appointment during a timeslot that is reserved for walk-ins. This feature allows you to strategically plan out your appointments while keeping possible walk-in clients in mind. This will help you maximise the number of clients you can see in one day.

ALLOCATING TIME FOR WALK-IN VISITS

- 1 Click on the **setup** menu.
- 2 Click on the **configuration** icon.
- 3 Click on the **general** setup menu.
- 4 Click on the **Appointment Book** icon.
- 5 Click on the **time allocation** tab.
- 6 Enter the percentage of the Appointment Book you wish to reserve for walk-in visits.

The screenshot shows a software interface with a central panel and two sidebars. The central panel has three tabs: 'Appointment Book', 'Cancellation Fees', and 'Time Allocation'. The 'Time Allocation' tab is selected and highlighted in red. Below the tabs, the text 'Time Allocation' is displayed. A form field labeled 'Default Time Reserved For Walk-ins' contains the value '20' followed by a '%' sign. A 'Done' button with a green checkmark is located at the bottom right of the central panel. The left sidebar contains a vertical menu with icons for 'Sales', 'General', 'Security', 'Business', 'General', 'Appointment Book', 'Stock', 'Clients', 'Confirmation', 'Walkin', 'Roster', and 'Visual Options'. The 'Appointment Book' icon is highlighted. The right sidebar contains a 'SHORTCUTS' section with a clock showing '10:11 AM Wed, 16 Mar '16' and a list of menu items: 'Main', 'Tools', 'Stock', 'Setup', 'Configuration', 'Employees', 'Employee Groups', 'Capabilities', 'Services', 'Series', and 'Contraindications'. The 'Setup' menu item is highlighted. At the bottom of the right sidebar, there is a user profile for 'Anna Owner' with a 'Log Off' button.

BOOKING APPOINTMENTS DURING RESERVED TIME

A The black area on the Appointment Book indicates that appointments should not be booked here, as this time is reserved for walk-in visits.

B If you try to book an appointment during this time, you will receive a warning message advising you that the booking limit has been reached, and asking if you want to continue booking the appointment. However, if you have not been granted access to exceed the reserved time limit, you will not be able to book an appointment during this time.

The screenshot displays a software interface for managing appointments. The main area is a grid with time slots on the left (9:00 AM to 5:00 PM) and staff members on the top (Anna, James, Lucy, Chris, Katie). A black box labeled 'A' is placed over a time slot for James at 2:00 PM, indicating a reserved time. A warning message box labeled 'B' is overlaid on the interface, stating: "Warning - Shortcuts Point of Sale. The booking limit for the selected timeslot has already been reached. Do you want to continue?" with "Yes" and "No" buttons.

B

Warning - Shortcuts Point of Sale

The booking limit for the selected timeslot has already been reached.
Do you want to continue?

Yes No

SETTING UP TIME ALLOCATION SECURITY

You can specify which employee levels have access to exceed the reserved time limit on the Appointment Book.

- 1 Click on the **setup** menu.
- 2 Click on the **configuration** icon.
- 3 Click on the **general setup** menu.
- 4 Click on the **security** icon.
- 5 Click on the **access** tab.
- 6 Click to select the appropriate security level.
- 7 Double click to expand the Appointment Book category.
- 8 Tick the 'can exceed reserved time limit' box if you want this security level to be able to book appointments during time reserved for walk-in visits. Alternatively, untick this box if you do not want this level to be able to book appointments during time reserved for walk-in visits.

The screenshot shows the 'Security Setup' interface. On the left is a navigation menu with icons for Sales, General, Security, Business, General, Appointment Book, Stock, Clients, Confirmation, Walkin, Roster, Visual Options, and Region. The main area is titled 'Security Setup' and has two tabs: 'Levels' and 'Access'. The 'Access' tab is selected. Below the tabs is a table with columns 'Levels/Terminals', 'Item/Action', 'Access', and 'Type'. The 'Appointment Book' category is expanded, and the 'Can Exceed Reserved Time Limit' row is selected. Below the table is a 'Password' section with a lock icon and four checkboxes: 'Double PIN Verification to delete Transactions', 'Require Return or Done when entering PIN's', 'Security Enabled', and 'Support Verification Devices'. A 'Done' button with a green checkmark is at the bottom right. On the right side of the screen is a 'SHORTCUTS' panel with a clock showing 9:27 AM on Thu, 17 Mar '16, and a list of menu items: Main, Tools, Stock, Setup, Configuration, Employees, Employee Groups, Capabilities, Services, Series, and Contraindications. The 'Setup' and 'Configuration' items are highlighted with numbered callouts 1 and 2 respectively.

Levels/Terminals	Item/Action	Access	Type
Security Levels	Allow PIN Logon	<input checked="" type="checkbox"/>	Action
Owner	Allow SMS ADHOC	<input checked="" type="checkbox"/>	Action
Manager	Appointment Book	<input checked="" type="checkbox"/>	Action
Employee	Alter Cancellation Fee	<input checked="" type="checkbox"/>	Action
2IC	Appointment Book	<input checked="" type="checkbox"/>	Screen
AUSNB067	Can Exceed Reserved Time Limit	<input checked="" type="checkbox"/>	Action
	Cancellation	<input checked="" type="checkbox"/>	Screen
	Change Appointment Service	<input checked="" type="checkbox"/>	Action
	Confirmation Usage	<input checked="" type="checkbox"/>	Screen
	Create Appointment	<input checked="" type="checkbox"/>	Action
	Create Appointment With Assistant	<input checked="" type="checkbox"/>	Action
	Create Employee Filter	<input checked="" type="checkbox"/>	Action
	Create Task	<input checked="" type="checkbox"/>	Action
	Delete Appointment	<input checked="" type="checkbox"/>	Action
	Delete Employee Filter	<input checked="" type="checkbox"/>	Action
	Delete Task	<input checked="" type="checkbox"/>	Action



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