

MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

CLINIC

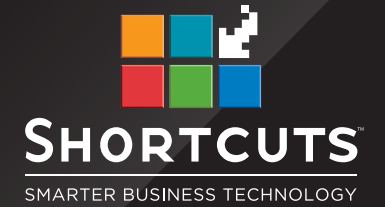
SHORTCUTS FUSION

POINT OF SALE

USING CLIENT ACCOUNTS

HOME & MOBILE

BEAUTY



it suits you

Last updated 6 October 2016

By Erin Lewis

Product: Shortcuts Fusion

Software version no: 8.0.16.1

Document version no: 1.0

Country: Australia

CONTENTS

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ABOUT THIS DOCUMENT

Client accounts allow you to keep track of credits and debits via your Point of Sale system. This feature is particularly useful when a client wishes to pay in advance for services or products.

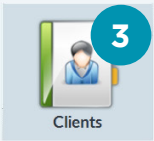
For example, you can take a deposit for an appointment over the phone when a client books. When they come in for their appointment and you are checking them out, you will be able to see that they have already paid for part of their service, and the remaining balance will be automatically calculated for you.

You can also use this feature to keep track of small debits as well. For example, if one of your trusted clients accidentally leaves their credit card at home, you can debit their account and they can pay the next time they visit.

In addition to this, client accounts also offer a convenient way to provide clients with store credit.

CREDITING A CLIENT'S ACCOUNT

- 1 Click on the **main** menu.
- 2 Click on the **Point of Sale** icon.
- 3 Click on the **clients** icon.

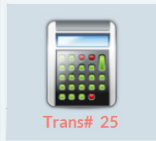


Clients

#Walkin


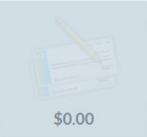
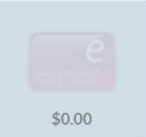
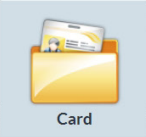
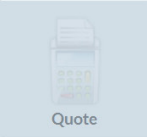
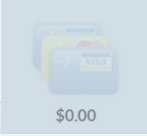
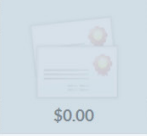
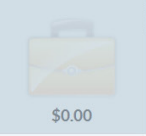
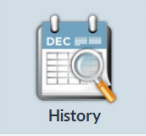
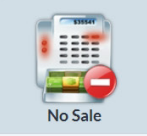
Not a member of a club or program.

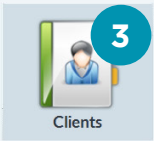
Remove Client




Trans# 25

Employee	Product/Service	Qty.	Price	Disc.	GST	Total

 <p>\$0.00</p>	 <p>\$0.00</p>	 <p>\$0.00</p>	<div style="background-color: #333; color: white; padding: 2px 5px; margin-bottom: 2px;">Discount</div> <div style="background-color: #333; color: white; padding: 2px 5px;">TIP</div> <p>Sales Total 0.00</p> <p>GST 0.00</p> <p>Redemptions 0.00</p> <p>Amount Owing 0.00</p> <p>Payment Received 0.00</p> <p>Change 0.00</p>	 <p>Card</p>	 <p>Quote</p>
 <p>\$0.00</p>	 <p>\$0.00</p>	 <p>\$0.00</p>		 <p>History</p>	 <p>No Sale</p>



Clients



Point Of Sale

SHORTCUTS

4:17 PM
Fri, 4 Mar '16

Main 1

Appointments

Arrivals

Walkin Manager

Point Of Sale 2

Clients

Performance

Exit

Tools

Stock

Setup

Anna Owner
Log Off

- 4 Select the relevant client.
- 5 Click **done**.

Select Client

Search For ...

Delete

Sort By...
 First Name

Hannah Andrews 0400 111 000 (M)	Lucy is the preferred employee Not a club member No Programs. 20 Visits (0 No Shows, 0 Cancellations) \$237.06 average spend \$0.00 outstanding on account	<div style="border: 1px solid #ccc; padding: 5px;"> <input type="checkbox"/> Inactive </div> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <div style="text-align: center;"> <p>New</p> </div> <div style="text-align: center;"> <p>Quick</p> </div> </div> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <div style="text-align: center;"> <p>CPC</p> </div> <div style="text-align: center;"> <p>History</p> </div> </div> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <div style="text-align: center;"> <p>Card</p> </div> <div style="text-align: center;"> <p>Merge</p> </div> </div> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <div style="text-align: center;"> <p>Done</p> </div> <div style="text-align: center;"> <p>Cancel</p> </div> </div>
Harriet Sparks 0455 222 101 (M)		
Ingrid Foley 0488 444 848 (M)		
Isabella Weeks 0411 666 989 (M)		
Isiah Wickham 0411 222 444 (M)		
Jackie Welsh 0488 222 111 (M)		
James King 0433 808 791 (M)		
Jamie Lee Beadman 0422 000 444 (M)		
Jason Garland 0499 888 000 (M)		
Jeff Cooper 0455 000 111 (M)		
Jenna Wilson 0404 222 444 (M)		
Jerry Clark 0411 888 454 (M)		

Outstanding Client Series

No future appointments

Past Appointments

1 Mar 3:45 PM: Blowdry - James
1 Mar 2:00 PM: Full Head Highlights - James
18 Feb 9:00 AM: Full Head Highlights - Anna
16 Feb 10:15 AM: 1/2 Leg Wax - Lucy
16 Feb 9:45 AM: Cleansing Facial - Katie
2 Feb 3:30 PM: Full Leg IPL - Lucy
20 Jan 9:45 AM: Eyebrow Wax - Anna

SHORTCUTS
 4:18 PM
 Fri, 4 Mar '16

Main

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

Tools


Stock

Setup


Anna
 Owner


Log Off


- 9 Click on the cell in the price column of the relevant sale line.
- 10 Enter the amount the client wishes to pay.
- 11 Click **done**.



Clients


Hannah Andrews
Not a member of a club or program.


Trans# 25

Employee	Product/Service	Qty.	Price	Disc.	GST	Total
	Pay To Account For a Credit Note use Discount	1	0.00	0.00		0.00



\$0.00



\$0.00



\$0.00


Discount
 TIP
Sales Total

0.00
0.00
0.00
0.00
0.00
0.00
0.00
0.00


Card


End Sale



History



No Sale

Enter Amount

100.00

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


Done


Cancel

SHORTCUTS

4:21 PM
Fri, 4 Mar '16

Main

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


Tools


Stock

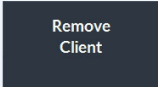
Setup


 Anna
Owner
Log Off


- 12 Select the relevant payment type.
- 13 Enter the amount to be paid using this payment type.
- 14 Click **done**.



Clients



 Hannah Andrews
Not a member of a club or program.



Remove Client



Trans# 25


Employee	Product/Service	Qty.	Price	Disc.	GST	Total
 Business	Pay To Account For a Credit Note use Discount	1	100.00	0.00		100.00


\$0.00


\$0.00


\$0.00


\$0.00


\$0.00

Discount 0.00

TIP 0.00

Sales Total 0.00

0.00

0.00

0.00

0.00


0.00


0.00


0.00


0.00

100.00


Card


End Sale



History



No Sale

Enter Amount for Cash

100.00
13

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


Done


Cancel

SHORTCUTS

4:22 PM
Fri, 4 Mar '16

Main

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

Tools


Stock

Setup


 Anna Owner
Log Off

15

Click **end sale**. The client's account balance will then be updated.

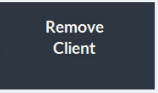


Clients




Hannah Andrews


Not a member of a club or program.




Remove Client




Trans# 25


Employee	Product/Service	Qty.	Price	Disc.	GST	Total
 Business	Pay To Account For a Credit Note use Discount	1	100.00	0.00		100.00




\$100.00




\$0.00




\$0.00



\$0.00



\$0.00



\$0.00

Discount 0.00

TIP 0.00

Sales Total 0.00


GST 0.00

Redemptions 0.00


Amount Owing 0.00

Payment Received 100.00


Change 0.00




Card



End Sale



History



No Sale

SHORTCUTS

4:24 PM
Fri, 4 Mar '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna Owner
Log Off

A When a client has store credit, a green book icon will be displayed at the Point of Sale, along with their account balance.

B A green book icon will also be displayed next to the client's name in the client list.

C The account balance will be displayed on the client dashboard.


The screenshot displays a software interface for a business, likely a salon or spa, with a focus on client management. The interface is divided into several sections:

- Client Dashboard (Top):** Shows the client's name, "Hannah Andrews", and a status "Not a member of a club or program." A "Remove Client" button is present. A green book icon (A) is shown next to the account balance of "\$100.00". A "Trans# 2" is also displayed.
- Client List (Bottom):** A table listing clients with their names and phone numbers. A green book icon (B) is next to "Hannah Andrews". The list includes:

Client Name	Phone Number
Hannah Andrews	0400 111 000 (M)
Harriet Sparks	0455 222 101 (M)
Hayley Sanchez	0499 339 993 (M)
Ingrid Foley	0488 444 848 (M)
Isabella Weeks	0411 666 989 (M)
Isiah Wickham	0411 222 444 (M)
Jackie Welsh	0488 222 111 (M)
James King	0433 808 791 (M)
Jamie Lee Beadman	0422 000 444 (M)
Jason Garland	0499 888 000 (M)
Jeff Cooper	0455 000 111 (M)
Jenna Wilson	0404 222 444 (M)
- Client Dashboard (Right):** A detailed view for Hannah Andrews, showing:
 - Employee: Lucy (with a green book icon B)
 - Status: Not a club member | No Programs.
 - Visits: 21 Visits (0 No Shows, 0 Cancellations)
 - Average Spend: \$230.53
 - Account Balance: \$100.00 account in credit (with a green book icon C)
 - Outstanding Client Series: (Empty)
 - Past Appointments:
 - 1 Mar 3:45 PM: Blowdry - James
 - 1 Mar 2:00 PM: Full Head Highlights - James
 - 18 Feb 9:00 AM: Full Head Highlights - Anna
 - 16 Feb 10:15 AM: 1/2 Leg Wax - Lucy
 - 16 Feb 9:45 AM: Cleansing Facial - Katie
 - 2 Feb 3:30 PM: Full Leg IPL - Lucy
 - 20 Jan 9:45 AM: Eyebrow Wax - Anna
- Navigation and Tools (Right Side):** A vertical sidebar with icons for Appointments, Arrivals, Walkin Manager, Point Of Sale, Clients, and Performance. A "Tools" section includes New, Quick, CPC, History, Card, Merge, Assistant, and Appt Book.
- Footer (Bottom Right):** Shows the user "Anna Owner" and a "Log Off" button.

PAYING ON ACCOUNT


- 1 Once the transaction is ready to be processed at the Point of Sale, click on the **account** button when choosing a payment type.
- 2 Enter the amount to be charged against the client account.
- 3 Click **done**.
- 4 If there is any remaining balance left on the transaction, process this as usual by selecting the relevant payment type and entering the value.




Clients

Sarah Jane Walters

Not a member of a club or program.



Remove Client



Trans# 24

SHORTCUTS

4:04 PM
Fri, 4 Mar '16

Main





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


Tools

Stock


Setup

Anna Owner
Log Off


Employee	Product/Service	Qty.	Price	Disc.	GST	Total
 Anna	 Hair Colouring Full Head Highlights	1	100.00	0.00	9.09	100.00
 Chris	 Hair Styling Blowdry	1	50.00	0.00	4.55	50.00




\$0.00




\$0.00




\$0.00



\$0.00



\$0.00



\$0.00

Discount 0.00

TIP 0.00

Sales Total 150.00

GST

Redemptions

Amount Owing

Payment Received

Outstanding

Discount

0.00

TIP

0.00

Sales Total

150.00

Card

Quote

No Sale

Enter Amount for Account

100.00

2

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


3

Done

X

Cancel


5 Click **end sale** to complete the transaction.




Clients

Sarah Jane Walters





Not a member of a club or program.









Remove Client







Trans# 24

Employee	Product/Service	Qty.	Price	Disc.	GST	Total
 Anna	 Hair Colouring Full Head Highlights	1	100.00	0.00	9.09	100.00
 Chris	 Hair Styling Blowdry	1	50.00	0.00	4.55	50.00

 \$50.00	 \$0.00	 \$0.00
 \$0.00	 \$0.00	 \$100.00

Discount	0.00
TIP	0.00
Sales Total	150.00
GST	13.64
Redemptions	0.00
Amount Owing	150.00
Payment Received	150.00
Change	0.00

 Card	 5 End Sale
 History	 No Sale

SHORTCUTS

4:08 PM
Fri, 4 Mar '16

Main

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

Tools

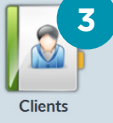
Stock

Setup

 Anna
 Owner
 Log Off

PAYING AN OUTSTANDING ACCOUNT

- 1 Click on the **main** menu.
- 2 Click on the **Point of Sale** icon.
- 3 Click on the **clients** icon.

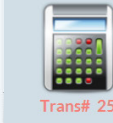


Clients

#Walkin




Not a member of a club or program.


Remove Client





Trans# 25


Employee	Product/Service	Qty.	Price	Disc.	GST	Total

 \$0.00	 \$0.00	 \$0.00	Discount 0.00
			TIP 0.00
			Sales Total 0.00
			GST 0.00
			Redemptions 0.00
			Amount Owning 0.00
			Payment Received 0.00
			Change 0.00


 Card


 Quote


 History


 No Sale

SHORTCUTS

4:17 PM
Fri, 4 Mar '16

Main 1

Appointments

Arrivals

Walkin Manager

Point Of Sale 2

Clients

Performance

Exit

Tools

Stock

Setup

 Anna
 Owner
 Log Off

- A** A red book icon will be displayed next the client's name if they have an outstanding account.
- B** The client's account balance will be displayed on the client dashboard.
- 4** Select the relevant client.
- 5** Click **done**.

Select Client

Search For ...

Delete

Sort By...
First Name

Jessica Davies 0455 777 111 (M) 4 A	No preferred employee Not a club member No Programs. 9 Visits (0 No Shows, 0 Cancellations) \$118.10 average spend \$100.00 outstanding on account B
Jessie Walker 0455 666 565 (M)	
Joe Hanson 0477 333 222 (M)	
Joshua Baker 0455 222 555 (M)	
Joshua Bates 0499 111 999 (M)	
Josie Harris 0477 666 776 (M)	
Judy Harrington 0444 666 212 (M)	
Kathy Reed 0488 333 440 (M)	
Katie Morrison 0404 333 444 (M)	
Kayla Jones 0400 444 999 (M)	
Keira Price 0444 848 448 (M)	
Kelly Matthews 0488 515 151 (M)	

Outstanding Client Series

No future appointments

Past Appointments

3 Mar 1:30 PM: 1/2 Leg IPL - Lucy
26 Feb 11:00 AM: Ladies Style Cut - Chris
26 Feb 9:15 AM: Full Head Highlights - Chris
17 Feb 2:00 PM: Yoga Class - Lucy
17 Feb 10:15 AM: Full Body Tan - Chris
29 Jan 1:45 PM: Blowdry - Chris
21 Jan 9:30 AM: Blowdry - Anna

New

Quick

CPC

History

Card

Merge

5

Done

Cancel

Show Me...
 Inactive

+

⌚

Show Me...
 Inactive

+

⌚

5

Done

Cancel

SHORTCUTS
 11:03 AM
 Mon, 7 Mar '16

Main
 Appointments
 Arrivals
 Walkin Manager
 Point Of Sale
 Clients
 Performance
 Exit

Tools

Stock

Setup


Anna
 Owner
 Log Off

C A red book icon and the client's outstanding balance will also be displayed when they are selected at the Point of Sale.

6 Click on a sale line.

7 Select **business** as the employee.

8 Select **account**.




Clients

Jessica Davies

Not a member of a club or program.

\$100.00 **C**












Trans# 4


Employee	Product/Service	Qty.	Price	Disc.	GST	Total
	6					





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
0.00	 Quote
0.00	 History
0.00	 No Sale
0.00	
0.00	
0.00	
0.00	








Product or Service?

 Product	 Service	 Sundry	 8 Account
--------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------

SHORTCUTS

11:06 AM
Mon, 7 Mar '16


Main

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


Tools

Stock



Setup


 Anna Owner
Log Off


- D** The amount owing will be automatically added to the sale line.
- 9** Select the relevant payment type.
- 10** Enter the amount to be paid using this payment type.
- 11** Click **done**.



Clients


Jessica Davies
Not a member of a club or program.

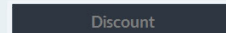
 \$100.00
 Trans# 4


Employee	Product/Service	Qty.	Price	Disc.	GST	Total
 Business	Pay To Account For a Credit Note use Discount	1	100.00	D	0.00	100.00


\$0.00


\$0.00



\$0.00



Discount



TIP


9

0.00
0.00
0.00
0.00
0.00
0.00
0.00
100.00


Card


End Sale


\$0.00



\$0.00


Enter Amount for Cash


100.00


10

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

 **11**
Done








 Cancel


History


No Sale

SHORTCUTS
11:11 AM
 Mon, 7 Mar '16


Main

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

Tools


Stock

Setup

 Anna Owner
Log Off

12

Click **end sale**. The client's account balance will then be updated.




Clients


Jessica Davies







Not a member of a club or program.

\$100.00



Trans# 4

Employee	Product/Service	Qty.	Price	Disc.	GST	Total
 Business	Pay To Account For a Credit Note use Discount	1	100.00	0.00		100.00

 \$100.00	 \$0.00	 \$0.00
 \$0.00	 \$0.00	 \$0.00

Discount 0.00

TIP 0.00

Sales Total 0.00





GST 0.00

Redemptions 0.00

Amount Owing 0.00

Payment Received 100.00

Change 0.00

 Card	 End Sale
 History	 No Sale

SHORTCUTS

11:18 AM
Mon, 7 Mar '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna Owner
Log Off



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