

MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

CLINIC

SHORTCUTS FUSION

CLIENT HISTORY

ADDING CLIENT HISTORY NOTES

HOME & MOBILE

BEAUTY



SHORTCUTS

SMARTER BUSINESS TECHNOLOGY

it suits you

Last updated 17 March 2017

By Erin Lewis

Product: Shortcuts Fusion

Software version no: 8.0.16.1

Document version no: 1.0

Country: Australia

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ABOUT THIS DOCUMENT

Client history notes allow you to record extra information about a client’s services and personal preferences. For example, if you take notes on how your client prefers their haircut, next time they come in for a visit you can take a quick look at their history notes and ask if they want the same style again. Client history notes can be accessed at any time via the client history screen. This will help you provide a more personalised experience for each and every client.

ADDING CLIENT HISTORY NOTES

- 1 Click on the **main** menu.
- 2 Click on the **clients** icon.
- 3 Select the relevant client.
- 4 Click on the **history** button.

Select Client

Search For ...

Delete

Sort By...
First Name

Andrew Fitzpatrick 0422 666 141 (M) 3	A	M	Y
Andy Ellis 0455 666 555 (M)	B	N	Z
Angela Jefferson 0444 242 424 (M)	C	O	0
Ashley Taylor 0433 666 363 (M)	D	P	1
Audrey Patterson 0444 333 444 (M)	E	Q	2
Betty McCormick 0455 999 333 (M)	F	R	3
Brandon Robinson 07 3300 0033 (H)	G	S	4
Brenda Peters 0411 999 919 (M)	H	T	5
Brooke James 0477 999 333 (M)	I	U	6
Cameron Porter 0466 111 666 (M)	J	V	7
Carl Reed 0422 555 666 (M)	K	W	8
Carolyn Burrel 0455 666 222 (M)	L	X	9

Show Me...

Inactive

New

Quick

CPC

History 4

Card

Merge

Assistant

Appt Book

SHORTCUTS
3:33 PM
Thu, 3 Mar '16

Main 1

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients 2

Performance

Exit

Tools

Stock

Setup

Anna
Owner
Log Off

- 5 If you have multiple note types, click on the relevant tab.
- 6 Select the transaction date you want to add notes for.
- 7 Click on the **new** button at the bottom of the screen.
- 8 Click within the notes field.
- 9 Type in your note.
- 10 Click **done**.

History for Andrew Fitzpatrick

History List
History Totals

Andrew Fitzpatrick (home: ?????????? work: ?????????? mobile: 0422 666 141)

- Today	Cash \$30.00	\$30.00
Katie	Tanning Full Body Tan	\$30.00
- Mon 8 Feb 2016	Cash \$42.00	\$42.00
Chris	TIP	\$12.00
Chris	Mens Cuts Mens Style Cut	\$30.00
- Fri 11 Dec 2015	Cash \$50.00	\$50.00
Anna	Facials Rehydrating Facial	\$50.00
- Wed 9 Dec 2015	MasterCard \$30.00	\$30.00
Lucy	Mens Cuts Mens Style Cut	\$30.00
- Tue 1 Dec 2015	Cash \$30.00	\$30.00

Visit Notes (1)
Clinic Notes (0)

Notes

Visit Date - Tue 1 Dec 2015

- Anna - Tuesday, 5 January 2016 5:09 PM
 - Medium tan 10%

Show only date with notes

Employee

Service

Date Range

+ **7**
New

Edit

Treatment

?

Add Visit Note for Andrew Fitzpatrick by Anna

Visit Date
3/03/2016
Note Type
Visit Notes

Notes

Dark tan 15%

Clear

10
Done

X
Cancel

SHORTCUTS

🕒 3:37 PM
Thu, 3 Mar '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

VIEWING CLIENT HISTORY NOTES

- 1 Click on the **main** menu.
- 2 Click on the **clients** icon.
- 3 Select the relevant client.
- 4 Click on the **history** button.

Select Client

Search For ...

Delete

Sort By...
First Name

Andrew Fitzpatrick 0422 666 141 (M) 3	A	M	Y
Andy Ellis 0455 666 555 (M)	B	N	Z
Angela Jefferson 0444 242 424 (M)	C	O	0
Ashley Taylor 0433 666 363 (M)	D	P	1
Audrey Patterson 0444 333 444 (M)	E	Q	2
Betty McCormick 0455 999 333 (M)	F	R	3
Brandon Robinson 07 3300 0033 (H)	G	S	4
Brenda Peters 0411 999 919 (M)	H	T	5
Brooke James 0477 999 333 (M)	I	U	6
Cameron Porter 0466 111 666 (M)	J	V	7
Carl Reed 0422 555 666 (M)	K	W	8
Carolyn Burrel 0455 666 222 (M)	L	X	9

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- 5** If you have multiple note types, click on the relevant tab.
- A** When history notes are added, they are stamped with the date, time and the employee who added the note. You can expand and hide information by double clicking on it.
- B** This checkbox acts as a quick filter to only show dates with notes.
- C** You can use the filters at the bottom of the screen (employee, service and date range) to view particular history notes. Click on the filter button again if you want to remove the applied filter.
- 6** Select a note and click **view** to open the note in a new window. This is useful for viewing longer notes.

History for Andrew Fitzpatrick

History List
History Totals

Andrew Fitzpatrick (home: ?????????? work: ?????????? mobile: 0422 666 141)

- Today	Cash \$30.00	\$30.00	
+ Katie	Tanning Full Body Tan		\$30.00
- Mon 8 Feb 2016	Cash \$42.00	\$42.00	
+ Chris	TIP		\$12.00
+ Chris	Mens Cuts Mens Style Cut		\$30.00
- Fri 11 Dec 2015	Cash \$50.00	\$50.00	
+ Anna	Facials Rehydrating Facial		\$50.00
- Wed 9 Dec 2015	MasterCard \$30.00	\$30.00	
+ Lucy	Mens Cuts Mens Style Cut		\$30.00
- Tue 1 Dec 2015	Cash \$30.00	\$30.00	

Visit Notes (2)
Clinic Notes (0)

Notes

- Today**
 - + Anna - Thursday, 3 March 2016 3:39 PM **A**
 - + Dark tan 15%
- Visit Date - Tue 1 Dec 2015**
 - + Anna - Tuesday, 5 January 2016 5:09 PM
 - + Medium tan 10%

Show only date with notes

Employee

Service

Date Range **C**

New

Edit

View **6**

Print

Help

Treatment

Done

Visit Details

Done

SHORTCUTS
3:55 PM
Thu, 3 Mar '16

Main

Tools

Stock

Setup

Anna
Owner
Log Off

EDITING AND DELETING CLIENT HISTORY NOTES

- 1 Click on the **main** menu.
- 2 Click on the **clients** icon.
- 3 Select the relevant client.
- 4 Click on the **history** button.

Select Client


Search For ...


Andrew Fitzpatrick 0422 666 141 (M)	A	M	Y
Andy Ellis 0455 666 555 (M)	B	N	Z
Angela Jefferson 0444 242 424 (M)	C	O	0
Ashley Taylor 0433 666 363 (M)	D	P	1
Audrey Patterson 0444 333 444 (M)	E	Q	2
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Brooke James 0477 999 333 (M)	I	U	6
Cameron Porter 0466 111 666 (M)	J	V	7
Carl Reed 0422 555 666 (M)	K	W	8
Carolyn Burrel 0455 666 222 (M)	L	X	9


Delete


Sort By...
First Name


Show Me...
 Inactive



New



Quick



CPC


History


Card


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SHORTCUTS
3:33 PM
Thu, 3 Mar '16

Main
1


Appointments
Arrivals

Walkin Manager
Point Of Sale

Clients
2

Performance
Exit

Tools
Stock
Setup


Anna
Owner
Log Off

- 5 If you have multiple note types, click on the relevant tab.
- 6 Select the relevant note.
- 7 Click **edit**.
- 8 If you want to edit the note, click within the notes field and make the desired changes.
Click **done** to save.
The employee, date and time attached to the note will then be updated.
- 9 If you want to delete the note, click **delete**.
Click **yes** to confirm.

History for Andrew Fitzpatrick

History List
History Totals

- Andrew Fitzpatrick (home: ?????????? work: ?????????? mobile: 0422 666 141)

	Employee	Service	Amount
- Today	Cash	\$30.00	\$30.00
	Katie	Tanning Full Body Tan	\$30.00
- Mon 8 Feb 2016	Cash	\$42.00	\$42.00
	Chris	TIP	\$12.00
	Chris	Mens Cuts Mens Style Cut	\$30.00
- Fri 11 Dec 2015	Cash	\$50.00	\$50.00
	Anna	Facials Rehydrating Facial	\$50.00
- Wed 9 Dec 2015	MasterCard	\$30.00	\$30.00
	Lucy	Mens Cuts Mens Style Cut	\$30.00
- Tue 1 Dec 2015	Cash	\$30.00	\$30.00

Visit Notes (2) 5
Clinic Notes (0)

Notes

- Today

Anna - Thursday, 3 March 2016 3:39 PM

Dark tan 15% 6

- Visit Date - Tue 1 Dec 2015

Edit Visit Note for Andrew Fitzpatrick by Anna

Visit Date: 3/03/2016 Note Type: Visit Notes

Notes

Dark tan 15% 8

Clear
Delete 9
Done
Cancel

7
Edit

View

Print

Help

Treatment

Visit Details

Done

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3:55 PM
Thu, 3 Mar '16

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