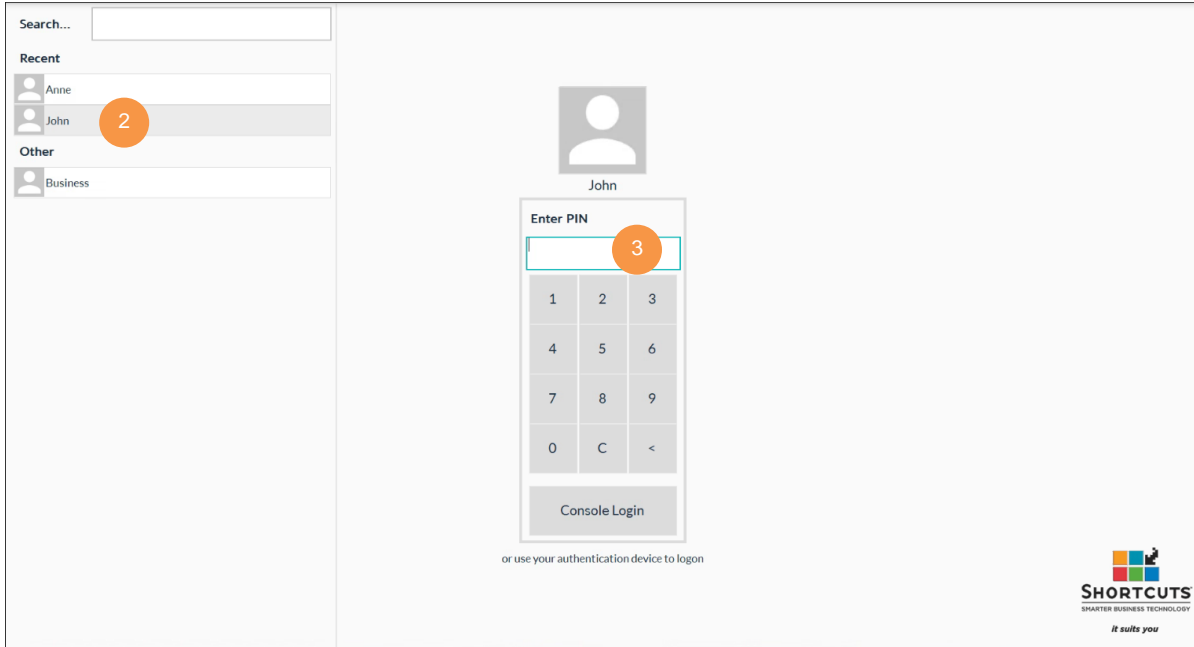


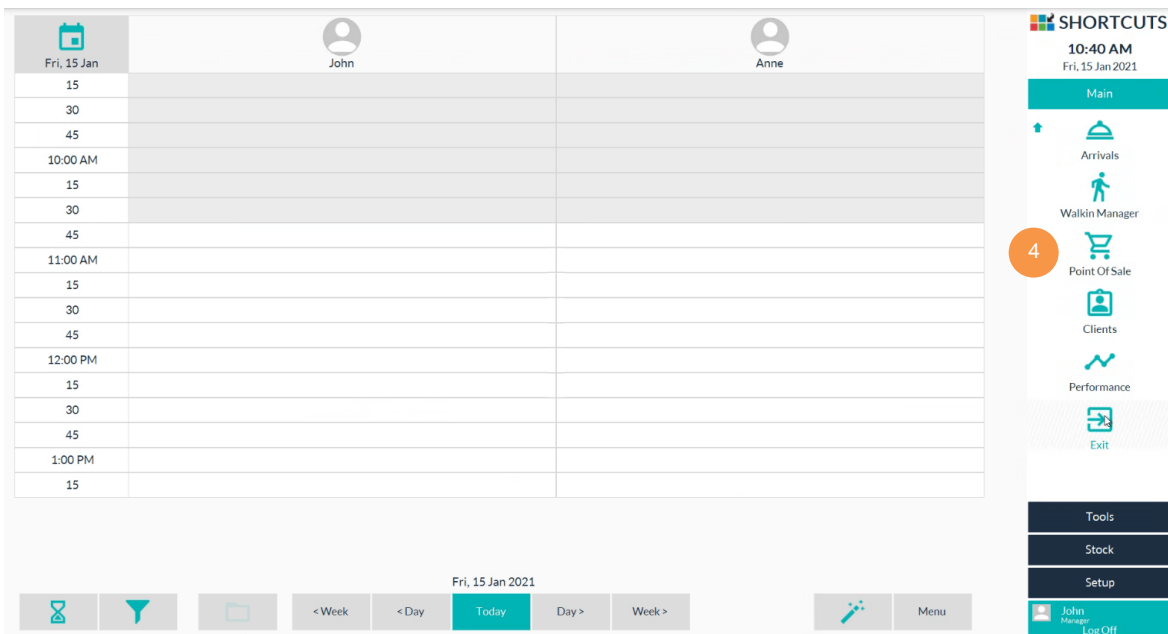
B. Transactions

- [Purchase](#)

1. Open **Shortcuts Point of Sale**.
2. Search for and select the employee.
3. Enter employee's PIN to access Shortcuts. (Shortcuts will automatically log the user in after entering the PIN).



4. On the primary menu, navigate to **Main > Point of Sale**.



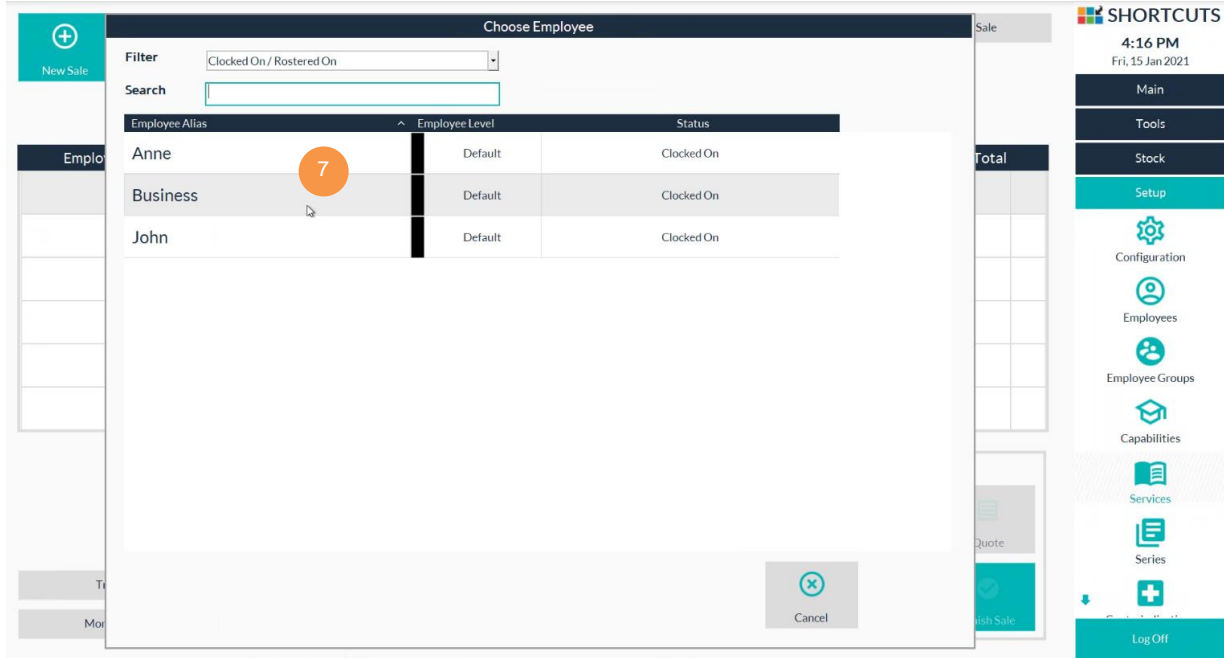
5. Select **#Walkin (quick sale)** from the sale drop-down list.

The screenshot shows the Shortcuts interface with a dropdown menu open. The menu items are: #Walkin (quick sale): 9 (highlighted with a red circle containing '5'), #Walkin (quick sale), #Retail (quick retail sale), #Group (group sale), #Business (track professional stock usage), #Expense (track expenses), #Walkin (quick sale): 7, #Walkin (quick sale): 8, and #Walkin (quick sale): 9. The interface also features a 'New Sale' button, a 'Cancel Sale' button, and a sidebar with navigation options: Main, Tools, Stock, Setup, Configuration, Employees, Employee Groups, Capabilities, Services, Series, and Log Off.

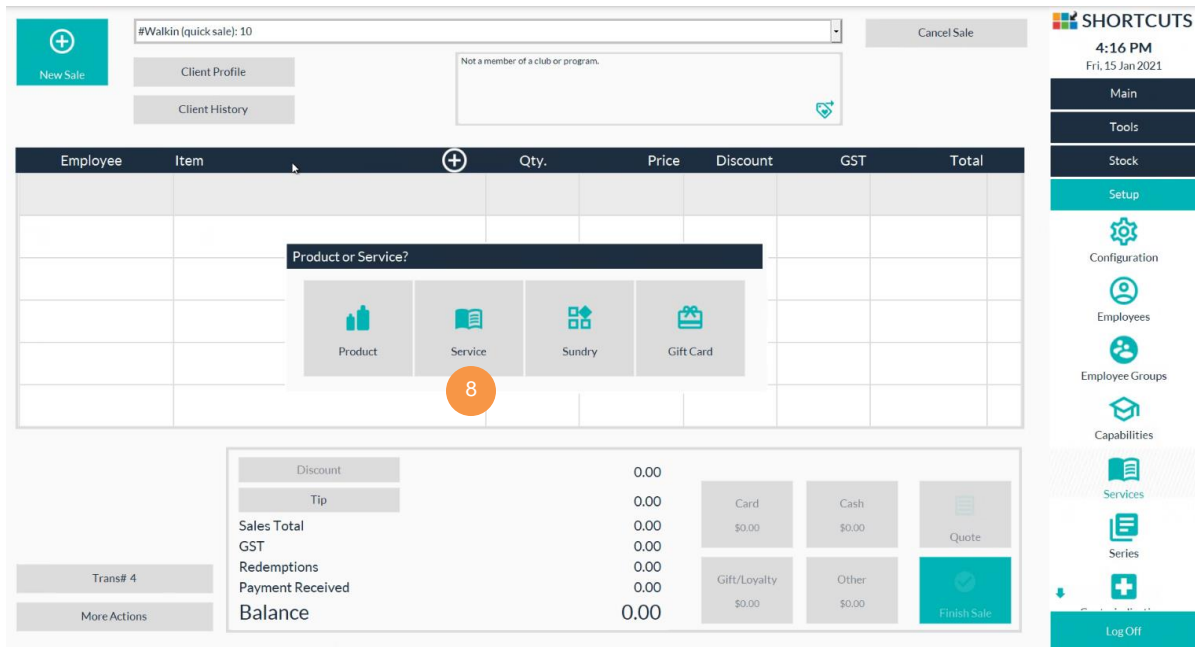
6. Click an empty line item or click the + button.

The screenshot shows the Shortcuts interface with a table. The table has columns: Employee, Item, Qty., Price, Discount, GST, and Total. A red circle containing the number '6' is placed over the '+' button in the table header. The interface also features a 'New Sale' button, a 'Cancel Sale' button, and a sidebar with navigation options: Main, Tools, Stock, Setup, Configuration, Employees, Employee Groups, Capabilities, Services, Series, and Log Off.

7. Select an employee.



8. Click on the **Product** or **Service** button.



9. Select a product or service to add to the sale.
10. Click **Done**.

Service Selection - Anne

Available Services

Category	Name	Last Purchased
Cuts	Hair Cut	

Selected Services/Series

Category	Name	Series	Employee	Request	Price	Available
Cuts	Hair Cut		Anne	<input type="checkbox"/>	\$100.00	✓

Services Selected: 1 Total Price: \$100.00 Total Duration: 15 mins

Buttons: Employee, Products, Sundry, History, Cancel, Done (10)

11. Click on the **Card** button to make payment.

#Walkin (quick sale): 10

Client Profile: Not a member of a club or program.

Employee	Item	Qty.	Price	Discount	GST	Total
Anne	Cuts Hair Cut	1	100.00	0.00	9.09	100.00

Summary:

- Discount: 0.00
- Tip: 0.00
- Sales Total: 100.00
- GST: 9.09
- Redemptions: 0.00
- Payment Received: 0.00
- Outstanding: 100.00

Payment Options: Card (\$0.00) (11), Cash (\$0.00), Gift/Loyalty (\$0.00), Other (\$0.00), Quote, Finish Sale

12. Click **Process**. Follow the prompts on the connected payment device to process the card payment.

The screenshot shows the Shortcuts interface with a modal dialog for processing a credit card payment. The dialog includes an 'Amount' field with '100.00' and a 'Process' button circled in red with the number '12'. Below the dialog, a summary table displays the following data:

Category	Amount
Discount	0.00
Tip	0.00
Sales Total	100.00
GST	9.09
Redemptions	0.00
Payment Received	0.00
Outstanding	100.00

13. The payment will be processed. Click **Done**.

The screenshot shows the Shortcuts interface after the payment is processed. The modal dialog now shows an 'Amount' of '0.00' and a 'Done' button highlighted with a red circle and the number '13'. The summary table below the dialog is updated as follows:

Category	Amount
Discount	0.00
Tip	0.00
Sales Total	100.00
GST	9.09
Redemptions	0.00
Payment Received	100.00
Outstanding	0.00

- 14. A merchant receipt will be printed.
- 15. A customer receipt can be printed by clicking the **Receipt** button.

#Walkin (quick sale): 10

Cancel Sale

Client Profile

Client History

Not a member of a club or program.

Employee	Item	Qty.	Price	Discount	GST	Total
Anne	Cuts Hair Cut	1	100.00	0.00	9.09	100.00

Discount: 0.00

Tip: 0.00

Sales Total: 100.00

GST: 9.09

Redemptions: 0.00

Payment Received: 100.00

Balance: 0.00

Card: \$100.00

Cash: \$0.00

Quote

Gift/Loyalty: \$0.00

Other: \$0.00

Receipt

Trans# 5

More Actions

SHORTCUTS

4:22 PM
Fri, 15 Jan 2021

- Main
- Tools
- Stock
- Setup
- Configuration
- Employees
- Employee Groups
- Capabilities
- Services
- Series
- Log Off

Merchant Receipt sample

```
Henry's House of Hair  
Removal  
Expert Defoliators  
8462 Tweed Valley Way  
Tumbulgum  
Muwillumbah NSW 2490  
Phone 02 667 662 88  
  
15/01/2021  
  
-----  
SMARTPAY  
TEST TERMINAL  
205-209 WAIRAU  
  
*-----EFTPOS-----*  
TERMINAL 100000  
TIME 15 JAN21 16:20  
TRAN 000256 CREDIT  
VISA  
CARD ...4022  
VISA  
PURCHASE NZ$ 100.00  
TOTAL NZ$ 100.00  
ACCEPTED  
*-----*  
  
SUB TOTAL: $100.00  
  
Merchant Copy
```

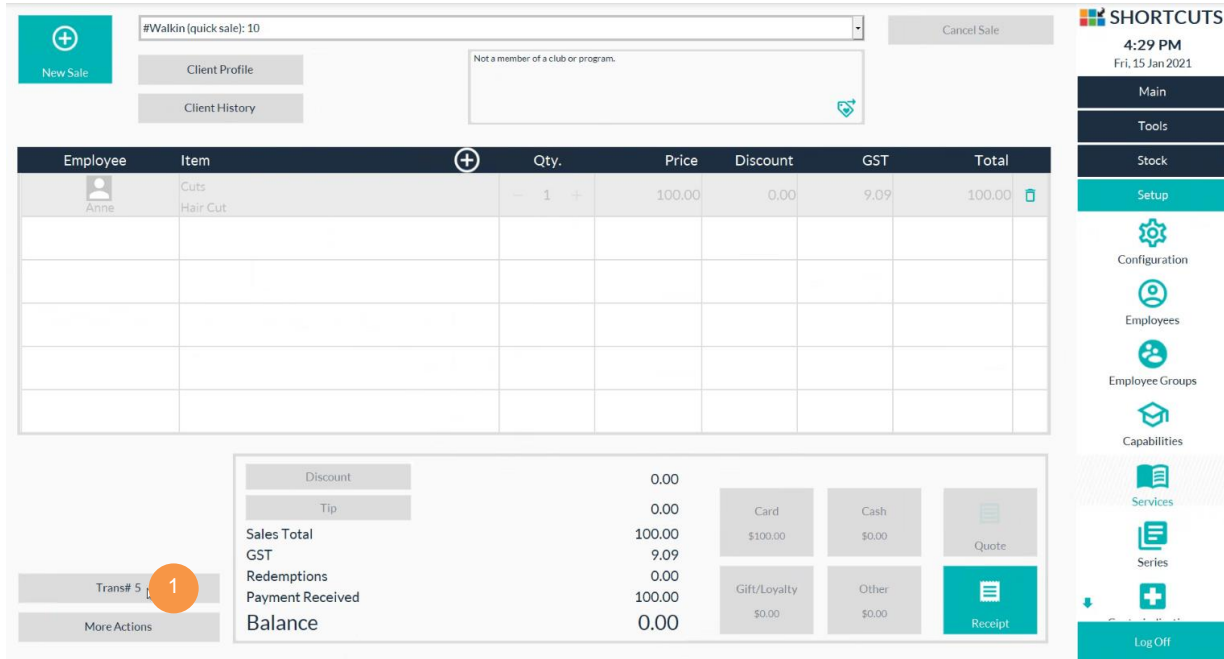
Customer Receipt sample

```
Henry's House of Hair  
Removal  
Expert Defoliators  
8462 Tweed Valley Way  
Tumbulgum  
Muwillumbah NSW 2490  
Phone 02 667 662 88  
  
15/01/2021  
  
-----  
SMARTPAY  
TEST TERMINAL  
205-209 WAIRAU  
  
*-----EFTPOS-----*  
TERMINAL 100000  
TIME 15JAN21 16:20  
TRAN 000256 CREDIT  
VISA  
CARD ...4022  
VISA  
PURCHASE NZ$ 100.00  
TOTAL NZ$ 100.00  
ACCEPTED  
*-----*  
  
SUB TOTAL: $100.00  
TOTAL: $100.00  
  
Customer Copy  
PLEASE RETAIN FOR YOUR RECORD
```

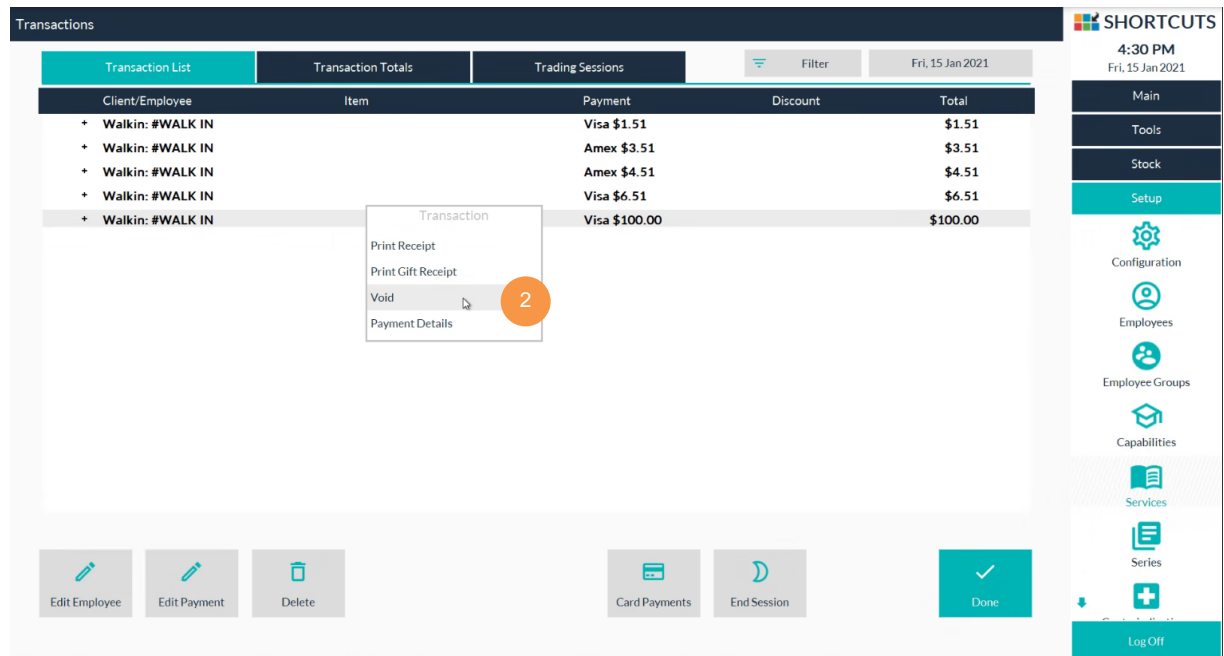

- [Void](#)

Note that a card must be present to Void a payment.

1. In Shortcuts **Point of Sale** screen, click on the **Transaction** button (labeled Trans# 5 in this screen):



2. Locate the transaction you wish to void. Right-click on the transaction select **Void**.



3. A prompt will appear asking you if you want to proceed to void the transaction. Click **Yes**.

The screenshot shows the 'Transactions' screen in the Shortcuts POS application. At the top, there are tabs for 'Transaction List', 'Transaction Totals', and 'Trading Sessions'. A table lists several transactions with columns for Client/Employee, Item, Payment, Discount, and Total. A modal dialog titled 'Information - Shortcuts Point of Sale' is open, asking 'Voiding this transaction will void all histories relating to this transaction, update product counts and void the credit card payments made against it. This process cannot be reversed. Proceed?' with 'Yes' and 'No' buttons. An orange circle with the number '3' highlights the 'Yes' button. The bottom of the screen features a toolbar with buttons for 'Edit Employee', 'Edit Payment', 'Delete', 'Card Payments', 'End Session', and 'Done'.

Client/Employee	Item	Payment	Discount	Total
+ Walkin: #WALK IN		Visa \$1.51		\$1.51
+ Walkin: #WALK IN		Amex \$3.51		\$3.51
+ Walkin: #WALK IN		Amex \$4.51		\$4.51
+ Walkin: #WALK IN		Visa \$6.51		\$6.51
+ Walkin: #WALK IN		Visa \$100.00		\$100.00

4. Enter a reason for the void.

5. Click **Done**.

This screenshot shows the same 'Transactions' screen as above, but with the 'Enter Void Reason' dialog box open. The dialog has a text input field containing the word 'Test', with an orange circle '4' highlighting it. Below the input field are 'Cancel' and 'Done' buttons, with an orange circle '5' highlighting the 'Done' button. The background transaction list and bottom toolbar are visible but dimmed.

6. The void will be sent to the payment device. The card must be present void a payment – use the card and follow the prompts on the payment device to complete the void.
7. The void is completed. The voided and voiding transactions are marked as such on the Transactions list.

The screenshot displays the 'Transactions' screen in the Shortcuts application. The interface includes a top navigation bar with tabs for 'Transaction List', 'Transaction Totals', and 'Trading Sessions'. A table lists transactions with columns for Client/Employee, Item, Payment, Discount, and Total. A red circle with the number '7' highlights a voided transaction for 'Cuts Hair Cut'.

Client/Employee	Item	Payment	Discount	Total
+ Walkin: #WALK IN		Visa \$1.51		\$1.51
+ Walkin: #WALK IN		Amex \$3.51		\$3.51
+ Walkin: #WALK IN		Amex \$4.51		\$4.51
+ Walkin: #WALK IN		Visa \$6.51		\$6.51
- (Voided) Walkin: #WALK IN		Visa \$100.00		\$100.00
+ Anne	Cuts Hair Cut			
- (Void) Walkin: #WALK IN		Visa -\$100.00		-\$100.00
+ Anne	Cuts Hair Cut			

At the bottom of the screen, there are several action buttons: 'Edit Employee', 'Delete', 'Card Payments', 'End Session', and 'Done'. A right-hand sidebar contains navigation options: Main, Tools, Stock, Setup, Configuration, Employees, Employee Groups, Capabilities, Services, Series, and Log Off.

- [Dependent Refund](#)

1. In Shortcuts **Point of Sale** screen, select **#Walkin (quick sale)** from the sale drop-down list.

The screenshot shows the Shortcuts Point of Sale interface. At the top left, there is a 'New Sale' button with a plus icon. A dropdown menu is open, showing a list of sale types: '#Walkin (quick sale): 9', '#Walkin (quick sale)', '#Retail (quick retail sale)', '#Group (group sale)', '#Business (track professional stock usage)', '#Expense (track expenses)', '#Walkin (quick sale): 7', '#Walkin (quick sale): 8', and '#Walkin (quick sale): 9'. A red circle with the number '1' is placed over the first '#Walkin (quick sale)' option. Below the dropdown is an 'Employee' field. The main area is a large empty table with columns for 'Employee', 'Item', 'Qty.', 'Price', 'Discount', 'GST', and 'Total'. At the bottom, there is a summary section with fields for 'Discount', 'Tip', 'Sales Total', 'GST', 'Redemptions', 'Payment Received', and 'Balance', all showing '0.00'. There are also buttons for 'Card', 'Cash', 'Quote', 'Gift/Loyalty', 'Other', and 'Finish Sale'. On the right side, there is a sidebar with the Shortcuts logo, time (4:14 PM), date (Fri, 15 Jan 2021), and a list of navigation options: Main, Tools, Stock, Setup, Configuration, Employees, Employee Groups, Capabilities, Services, Series, and Log Off.

2. Click **Client History**.

The screenshot shows the Shortcuts Point of Sale interface after clicking 'Client History'. The dropdown menu is now closed, and the 'Client History' button is highlighted with a red circle and the number '2'. The 'Client Profile' field shows 'Not a member of a club or program.' The main table and summary section are the same as in the previous screenshot. The sidebar on the right is also the same, showing the time as 4:15 PM.

- In this **History List** tab, locate the transaction you want to refund. Right-click the item you wish to refund, and select **Refund**.

History for #WALK IN

History List	History Totals	
- #WALK IN		
+ Today	Amex \$8.02 Visa \$8.02	\$16.04
+ Thu 14 Jan 2021	EFT Card \$100.00	\$100.00
- Tue 12 Jan 2021	EFT Card \$100.00	\$100.00
+ Anne	Cuts	\$100.00
+ Mon 11 Jan 2021	Cash \$25.00	\$175.00
+ Thu 24 Dec 2020	EFT Card \$231.65	\$231.65
+ Wed 23 Dec 2020	EFT Card \$833.00	\$833.00
+ Tue 22 Dec 2020	EFT Card \$11.00	\$11.00
+ Fri 18 Dec 2020	EFT Card \$600.00	\$600.00
+ Wed 16 Dec 2020	EFT Card \$492.34	\$492.34

Visit Notes (0)
• Notes

Show only date with notes Include history from other sites

Employee Service Date Range New Edit View Print Visit Details Done

- A prompt will let you know the item has been transferred to Point of Sale, ready for refunding. Click **Done** on the prompt.
- Click **Done** on the main **History** screen to return to the **Point of Sale**.

History for #WALK IN

History List	History Totals	
- #WALK IN		
+ Today	Amex \$8.02 Visa \$8.02	\$16.04
+ Thu 14 Jan 2021	EFT Card \$100.00	\$100.00
- Tue 12 Jan 2021	EFT Card \$100.00	\$100.00
+ Anne	Cuts Hair Cut	\$100.00
+ Mon 11 Jan 2021	Cash \$25.00 EFT Card \$150.00	\$175.00
+ Thu 24 Dec 2020	EFT Card \$231.65	\$231.65
+ Wed 23 Dec 2020	EFT Card \$833.00	\$833.00
+ Tue 22 Dec 2020	EFT Card \$11.00	\$11.00
+ Fri 18 Dec 2020	EFT Card \$600.00	\$600.00
+ Wed 16 Dec 2020	EFT Card \$492.34	\$492.34

Information - Shortcuts Point of Sale

#WALK IN has been Transferred to the Point Of Sale ready to complete the Transaction.

Done

Visit Notes (0)
• Notes

Show only date with notes Include history from other sites

Employee Service Date Range New Edit View Print Visit Details Done Log Off

6. The item you wish to refund will appear with a Qty of -1. Click **Finish Sale**.

The screenshot shows the Shortcuts POS interface during a refund process. At the top, there's a 'Refund: 11' dropdown and a 'Cancel Sale' button. Below that are 'Client Profile' and 'Client History' buttons. A central table lists items with columns for Employee, Item, Qty., Price, Discount, GST, and Total. The first row shows 'Anne' as the employee and 'Cuts Hair Cut' as the item, with a quantity of -1, a price of 100.00, a discount of 0.00, a GST of -9.09, and a total of -100.00. Below the table is a summary section with buttons for 'Discount', 'Tip', 'Sales Total', 'GST', 'Redemptions', and 'Payment Received'. To the right of this section are buttons for 'Card', 'Cash', 'Quote', 'Gift/Loyalty', and 'Other'. The 'Finish Sale' button is highlighted with a red circle and the number 6. On the right side of the screen is a vertical navigation menu with options like 'Main', 'Tools', 'Stock', 'Setup', 'Configuration', 'Employees', 'Employee Groups', 'Capabilities', 'Services', 'Series', and 'Log Off'.

7. Click **EFT Card**.

This screenshot shows the same Shortcuts POS interface as the previous one, but with a modal dialog box open. The dialog is titled 'Select Payment Type to Refund To' and contains a list of payment options: 'Cash', 'Cheque', 'GIVEX', and 'EFT Card'. The 'EFT Card' option is highlighted with a red circle and the number 7. There is also a 'Cancel' button in the dialog. The background interface is slightly dimmed, showing the same item table and summary section as before.

8. Click **Confirm** to initiate the payment device.

The screenshot shows the 'Process Credit Card Refund' screen in the Shortcuts POS system. At the top, there's a 'Refund: 11' dropdown and a 'Cancel Sale' button. Below that, there are buttons for 'Client Profile' and 'Client History'. A table lists items: 'Cuts Hair Cut' with a quantity of -1, price of 100.00, and GST of -9.09, resulting in a total of -100.00. The 'Process Credit Card Refund' section shows a table with one entry: 'EFT Card' with an amount of -\$100.00 and a status of 'Queued'. At the bottom right, a 'Confirm' button is highlighted with a red circle containing the number 8. Other buttons include 'Cancel', 'Finish Sale', and 'Cash Out'.

9. Process the refund on the payment device with the card present.

10. Once completed, Shortcuts will show the approval status. Click **Confirm**.

This screenshot shows the 'Process Credit Card Refund' screen after the refund has been approved. The 'Process Credit Card Refund' section now displays the message 'Transaction(s) approved with signature'. The table below it shows the 'EFT Card' entry with a status of 'Queued'. The 'Confirm' button at the bottom right is highlighted with a red circle containing the number 10. The rest of the interface, including the item list and summary section, remains the same as in the previous screenshot.

11. Click **Finish Sale**.
12. Select the reason for the refund.
13. Click **Done**.

The screenshot shows the Shortcuts POS interface during a refund process. A modal window titled "Refund Information" is open, displaying "You are Refunding a Hair Cut". Below this, there is a dropdown menu labeled "Select a Reason for the Refund" with "Defective" selected. A "Done" button with a checkmark is visible next to the dropdown. The background shows a sales summary with "Cash Out" of 100.00 and a "Finish Sale" button. The interface includes a top navigation bar with "New Sale" and "Cancel Sale" buttons, a client profile section, and a sidebar with various menu options like "Main", "Tools", "Stock", "Setup", "Configuration", "Employees", "Employee Groups", "Capabilities", "Services", "Series", and "Log Off".

- [Independent Refund](#)

1. Independent refund is processed the same way as a Credit Sale, except you enter a negative quantity in the **Point of Sale** screen by clicking the **minus sign (-)** in the Qty column.

The screenshot shows the 'Point of Sale' screen. At the top, there's a 'New Sale' button and a client selection dropdown. Below that is a table with columns: Employee, Item, Qty., Price, Discount, GST, and Total. The first row shows 'Anne' as the employee and 'Cuts Hair Cut' as the item, with a quantity of 1. An orange circle with the number '1' is placed over the quantity field. Below the table, there are buttons for 'Discount', 'Tip', and 'Sales Total' (100.00). A 'Finish Sale' button is visible in the bottom right corner of the main area.

2. Click **Finish Sale**.

This screenshot shows the same POS screen as the previous one, but the quantity for 'Cuts Hair Cut' is now -1. The 'Sales Total' is now -100.00. The 'Finish Sale' button is highlighted with an orange circle containing the number '2'. The overall status of the sale has changed from 'Outstanding' to 'Cash Out'.

3. Click **EFT Card**.

The screenshot shows the Shortcuts interface during a refund process. At the top, there's a 'Refund: 11' dropdown and a 'Cancel Sale' button. Below that, there are buttons for 'Client Profile' and 'Client History'. The main area features a table with columns: Employee, Item, Qty., Price, Discount, GST, and Total. The table contains one row: Anne, Cuts Hair Cut, -1, 100.00, 0.00, -9.09, -100.00. A modal window titled 'Select Payment Type to Refund To' is open, listing options: Cash, Cheque, GIVEX, and EFT Card. The 'EFT Card' option is selected and highlighted with an orange circle containing the number 3. Below the modal, there's a summary section with 'Discount: 0.00', 'Tip: 0.00', 'Sales Total: -100.00', 'GST: -9.09', 'Redemptions: 0.00', and 'Payment Received: 0.00'. A 'Cash Out' button is visible with the amount '100.00'. On the right, there's a sidebar with navigation options: Main, Tools, Stock, Setup, Configuration, Employees, Employee Groups, Capabilities, Services, Series, and Log Off. The top right corner shows the time '4:41 PM' and date 'Fri, 15 Jan 2021'.

4. Click **Confirm** to initiate the payment device.

The screenshot shows the Shortcuts interface during a refund process. The 'Process Credit Card Refund' modal is open, displaying a table with columns: Card Type, Number, Expiry, Amount, Surcharge, and Status. The table contains one row: EFT Card, ..., \$-100.00, \$0.00, Queued. The 'Confirm' button is highlighted with an orange circle containing the number 4. Below the modal, there's a summary section with 'Discount: 0.00', 'Tip: 0.00', 'Sales Total: -100.00', 'GST: -9.09', 'Redemptions: 0.00', and 'Payment Received: 0.00'. A 'Cash Out' button is visible with the amount '100.00'. On the right, there's a sidebar with navigation options: Main, Tools, Stock, Setup, Configuration, Employees, Employee Groups, Capabilities, Services, Series, and Log Off. The top right corner shows the time '4:41 PM' and date 'Fri, 15 Jan 2021'.

5. Process the refund on the payment device with the card present.

6. Once completed, Shortcuts will show the approval status. Click **Confirm**.

The screenshot shows the 'Process Credit Card Refund' screen in the Shortcuts application. At the top, there's a 'Refund: 11' dropdown and a 'Cancel Sale' button. Below that, there are fields for 'Client Profile' and 'Client History'. The main area features a table with columns: Employee, Item, Qty., Price, Discount, GST, and Total. The table contains one row for 'Anne' with 'Cuts Hair Cut' and a quantity of -1. Below the table, there's a 'Process Credit Card Refund' section with a 'Transaction(s) approved with signature' message and a table for card details. At the bottom, there's a summary section with 'Cash Out' of 100.00 and a 'Finish Sale' button. A red circle with the number 6 highlights the 'Confirm' button.

7. Click **Finish Sale**.

8. Select the reason for the refund.

9. Click **Done**.

The screenshot shows the 'Refund Information' dialog box overlaid on the previous screen. The dialog box has a title 'Refund Information' and a subtitle 'You are Refunding a Hair Cut'. It contains a 'Select a Reason for the Refund' dropdown menu with 'Defective' selected. A red circle with the number 8 highlights the dropdown. To the right of the dropdown is a 'Done' button with a checkmark, highlighted with a red circle and the number 9. Below the dialog box, the 'Finish Sale' button is highlighted with a red circle and the number 7.