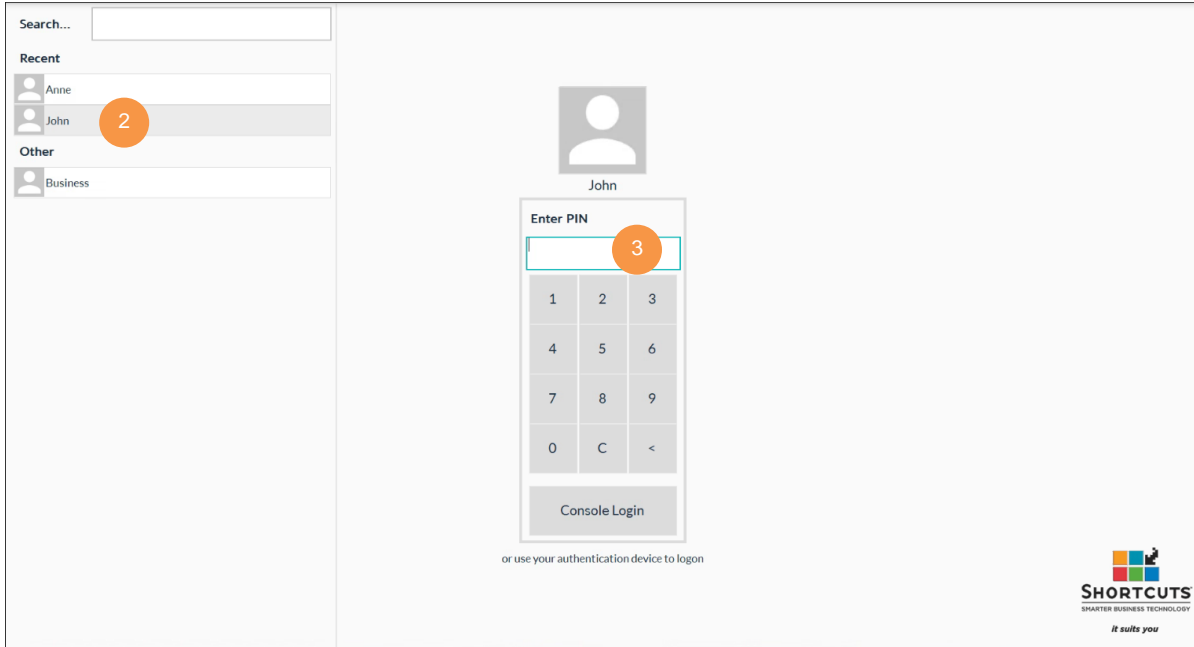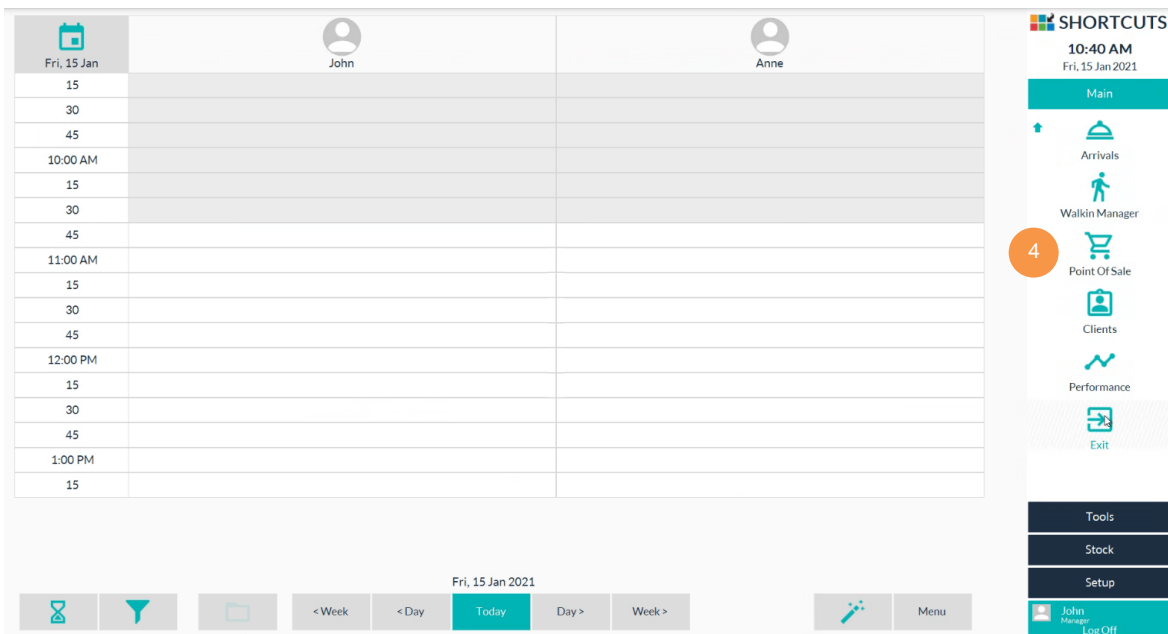B. Transactions

- [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).

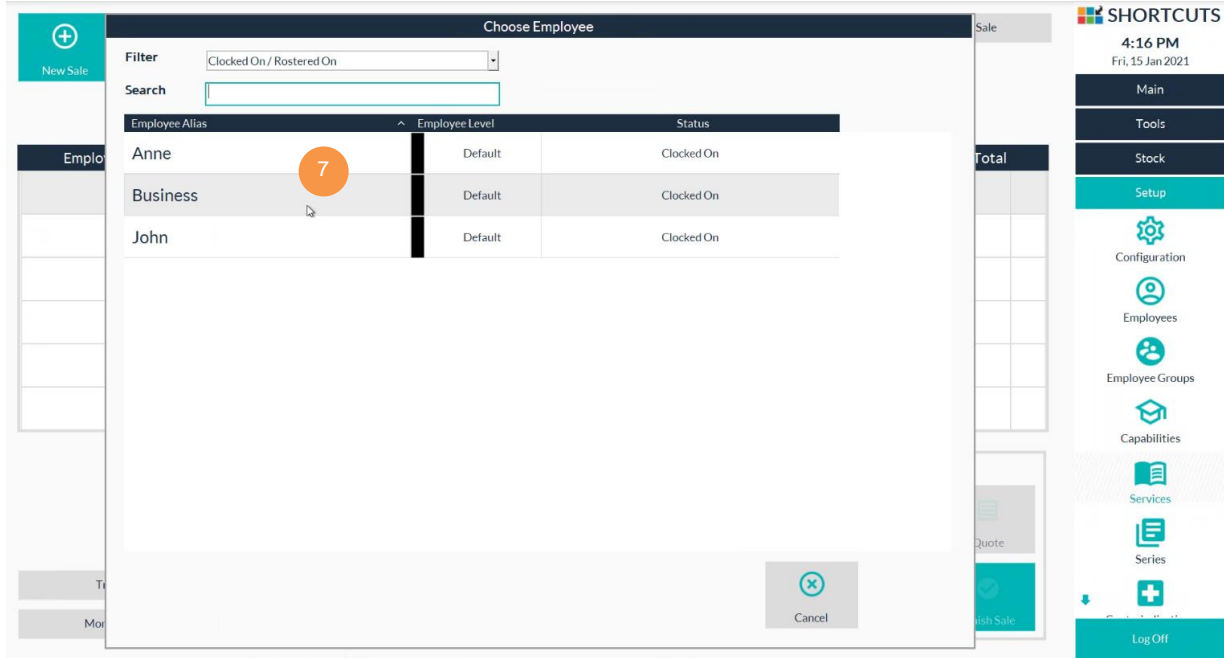4. On the primary menu, navigate to **Main** > **Point of Sale**.

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

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

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7. Select an employee.

8. Click on the **Product** or **Service** button.
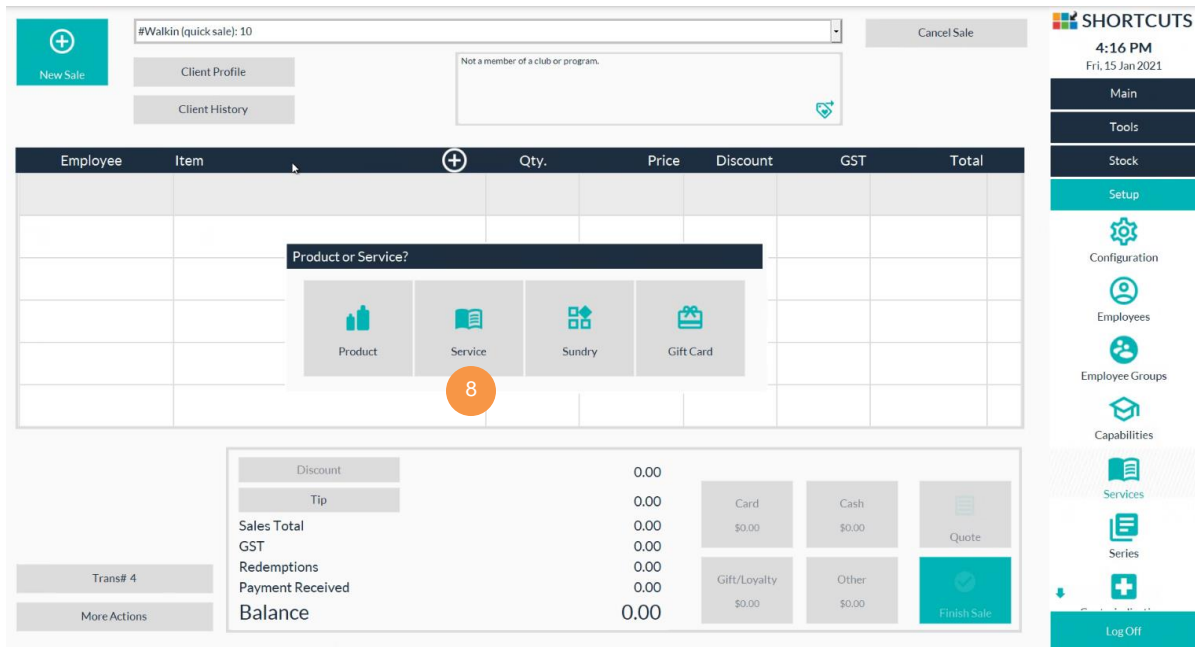
9. Select a product or service to add to the sale.

10. Click **Done**.

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

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

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

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14. A merchant receipt will be printed.

15. A customer receipt can be printed by clicking the **Receipt** button.

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            15JAN21 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
```

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- 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):
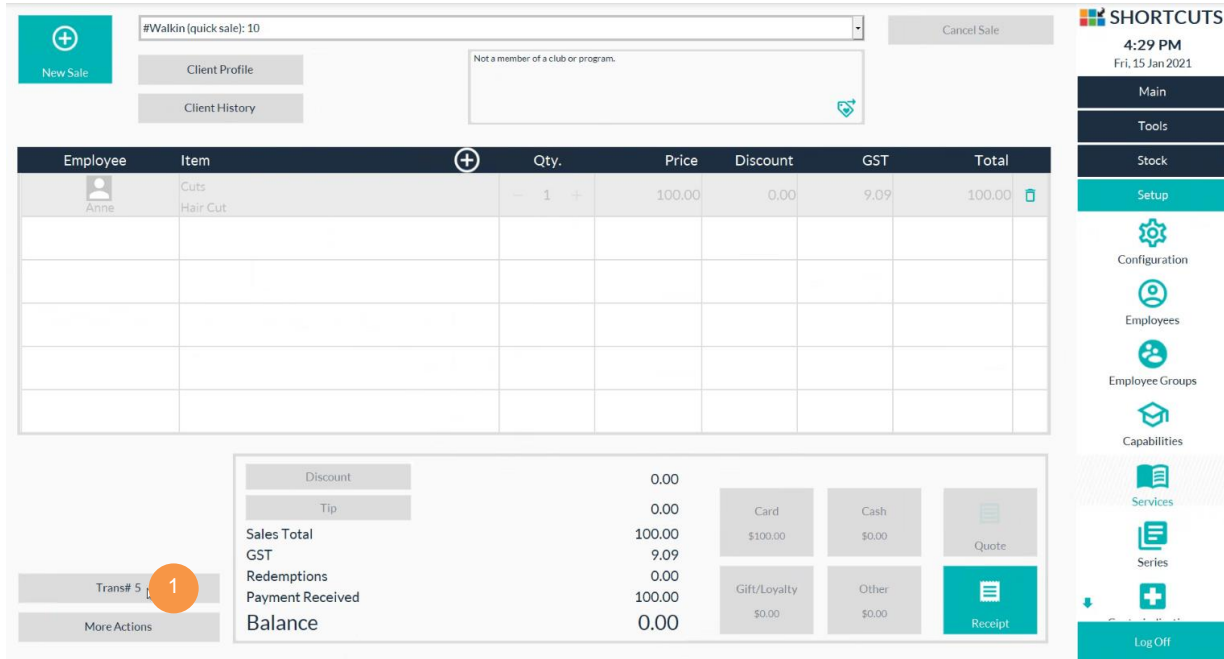
2. Locate the transaction you wish to void. Right-click on the transaction select **Void**.
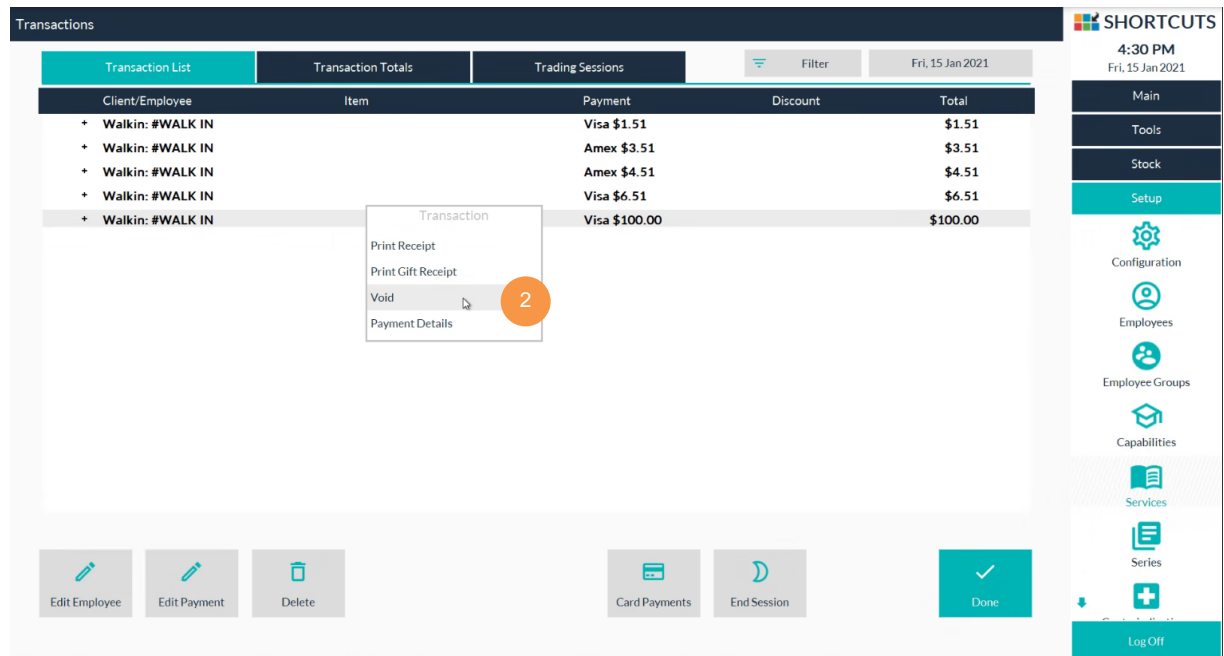
3. A prompt will appear asking you if you want to proceed to void the transaction. Click **Yes**.

4. Enter a reason for the void.
5. Click **Done**.

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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.

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- [Dependent Refund](#)

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

2. Click **Client History**.

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

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

5. Click **Done** on the main **History** screen to return to the **Point of Sale**.

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

7. Click **EFT Card**.

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

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

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

11. Click **Finish Sale**.

12. Select the reason for the refund.

13. Click **Done**.

- [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.

2. Click **Finish Sale**.

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3. Click **EFT Card**.

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

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

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

7. Click **Finish Sale**.

8. Select the reason for the refund.

9. Click **Done**.