

MULTI-SITE

WALK-IN

SPA

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CLINIC

SHORTCUTS FUSION APPOINTMENT BOOK MAKING AN APPOINTMENT FOR A NEW CLIENT

HOME &
MOBILE

BEAUTY


SHORTCUTS
SMARTER BUSINESS TECHNOLOGY

it suits you

Last updated 21 July 2016

By Erin Lewis

Product: Shortcuts Fusion

Software version no: 8.0.16.1

Document version no: 1.0

Country: Australia

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MAKING AN APPOINTMENT FOR A NEW CLIENT 1

ABOUT THIS DOCUMENT

Shortcuts allows you to add a new client and create an appointment for them in a single streamlined process. Rather than adding a new client in the client list, then going back to the Appointment Book, you can do both at the same time.

Making an appointment for a new client is simple; all you need to do is enter the new client's details rather than selecting a client from the list. Their details will then be saved in the client list for easy selection next time they make an appointment.

MAKING AN APPOINTMENT FOR A NEW CLIENT

- 1 Click on the **main** menu.
- 2 Click on the **appointments** icon.
- 3 Move to the desired day using the navigation buttons at the bottom of the Appointment Book. Alternatively, you can click on the date in the top left corner of the screen to select a date from the calendar.
- 4 Click on the relevant timeslot in the relevant employee's column.

Time	Anna	James	Lucy	Chris	Katie
9:00 AM		Carl Reed Mens Style Cut	Off	Chelsea Grey Full Leg IPL	RDO
9:15			Off		RDO
9:30			Off		RDO
9:45	Talliah Gibson Ladies Style Cut		Off		RDO
10:00 AM			Off		RDO
10:15			Off		RDO
10:30		Ruby Marsden Ladies Style Cut	Off		RDO
10:45			Off		RDO
11:00 AM			Off		RDO
11:15			Off		RDO
11:30			Off	Darrel Roberts Microdermabrasion	RDO
11:45			Off		RDO
12:00 PM	Brooke James Full Head Highlights 0477 999 333		Off		RDO
12:15			Off		RDO
12:30			Off		RDO
12:45			Off		RDO
1:00 PM		Off	REQ Viktor Reed Mens Clipper Cut	Lunch	RDO
1:15		Off			RDO
1:30	Brooke James	Off			RDO
1:45		Off			RDO
2:00 PM	Lunch	Off	TMH Ebony Phillips	SAL Vanessa Anderson Full Head Highlights 0477 272 772	RDO
2:15		Off			RDO
2:30		Off			RDO
2:45		Off			RDO
3:00 PM		Off	REQ Phoebe Kelly Ladies Style Cut		RDO
3:15		Off			RDO
3:30		Off			RDO
3:45	SAL Sasha King Rehydrating Facial	Off			RDO
4:00 PM		Off			RDO
4:15		Off			RDO
4:30		Off			RDO
4:45		Off			RDO
5:00 PM		Off			RDO
5:15		Off			RDO
5:30		Off			RDO
5:45		Off			RDO

Fri, 1 Apr 2016

< Week < Day Today Day > Week >

Menu

- 5** Click **new** to add a new client.
- 6** Enter the client's details into the appropriate fields.
- A** Fields marked with an asterisk are mandatory and must be filled in.
- 7** Click **done**.
- 8** Click **done**.
- 9** Select the relevant tag. Tags provide extra information about the client at a glance on the Appointment Book.
- 10** Click **done**.

Select Client
Delete

Search For ...

Schedule a Task

Debbie Harris 0411 999 999 (M)	A	M	Y
Derrick Barker 0488 666 111 (M)	B	N	Z
Diana Watson 0477 000 444 (M)	C	O	0
Dominic Aloni 0444 555 333 (M) 07 3834 3267 (H) 07 3834 3232 (W)	D	P	1
Ebony Phillips 0499 111 991 (M)	E	Q	2
Eliza Chandra 0477 000 707 (M)	F	R	3
Ellie Brady 0477 777 000 (M)	G	S	4
Elouise Penn 0488 777 222 (M)	H	T	5
Emily King 0499 989 889 (M)	I	U	6
Emma Ridgeway 0499 666 100 (M)	J	V	7
Eric Moore 0422 777 222 (M)	K	W	8
	L	X	9

Sort By...
First Name

Show Me...
 Inactive

5
New

8
Quick

7
CPC

9
History

6
Card

10
Merge

7
Done

8
Cancel

Please enter the details for the new Client:

First Name* **A**

Last Name* **6**

Home Phone

Work Phone

Mobile

E-Mail

Referral Method

Quick

7

Done

8

Cancel

Choose a Tag

Tag	Description
NEW	Clear Tag
REQ	New Client
SAL	Requested Stylist
	Salon Client

9

10

Done

8

Cancel

SHORTCUTS

12:58 PM
Fri, 1 Apr '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna
Owner
Log Off

- 11** Click on the relevant service category. This will display the services within the category.
- 12** Click on the relevant service.
- 13** Repeat steps 11 and 12 as required.
- B** The selected services section will display all the services you have selected.
- C** You can remove a selected service by clicking on the recycle bin next to it.
- 14** Once all the required services have been selected, click **done**.

Service Selection - Chris

Categories

- Body Treatments
- Facials **11**
- Hair Colouring
- Hair Styling
- Injectables
- IPL
- Ladies Cuts
- Makeup
- Mens Cuts
- Spa Packages
- Tanning
- Waxing

Available Services

Category	Name	Last Purchased
Facials	Cleansing Facial 12	
Facials	Microdermabrasion	
Facials	Rehydrating Facial	

Selected Services/Series

Category	Name	Employee	Price	Start	Available
Facials	Cleansing Facial B	Chris	\$40.00	4:00 PM	✔

Services Selected: 1 Total Price: \$40.00 Total Duration: 30 mins

Show Me

- All Services
- Services for Chris

Employee

Assistant

History

14
Done

Cancel

SHORTCUTS

12:59 PM
Fri, 1 Apr '16

Main

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

Tools

Stock

Setup

Anna Owner
Log Off

D

The appointment will then be displayed on the Appointment Book.

Fri, 1 Apr	Anna	James	Lucy	Chris	Katie
9:00 AM			Off		RDO
15			Off		RDO
30		Carl Reed Mens Style Cut	Off	IPL-1 Chelsea Grey Full Leg IPL	RDO
45			Off		RDO
10:00 AM	Tallah Gibson Ladies Style Cut		Off		RDO
15			Off		RDO
30			Off		RDO
45			Off		RDO
11:00 AM		Ruby Marsden Ladies Style Cut	Off		RDO
15			Off		RDO
30			Off	Darrel Roberts Microdermabrasion	RDO
45			Off		RDO
12:00 PM	REQ Brooke James Full Head Highlights 0477 999 333		Off		RDO
15			Off		RDO
30			Off		RDO
45			Off		RDO
1:00 PM		Off	REQ Viktor Reed Mens Clipper Cut	Lunch	RDO
15		Off	Off		RDO
30	Brooke James	Off		SAL Vanessa Anderson Full Head Highlights 0477 272 772	RDO
45	Lunch	Off			RDO
2:00 PM		Off	TAM-1 Ebony Phillips		RDO
15		Off	Off		RDO
30		Off			RDO
45		Off	REQ Phoebe Kelly Ladies Style Cut		RDO
3:00 PM		Off			RDO
15		Off		Vanessa Anderson	RDO
30	SAL Sasha King Rehydrating Facial	Off			RDO
45		Off		NEW Debbie Harris Cleansing Facial	RDO
4:00 PM		Off	Samuel Costello 60 min Massage 0466 333 202		RDO
15		Off			RDO
30		Off			RDO
45		Off			RDO
5:00 PM		Off			RDO
15		Off			RDO
30		Off			RDO
45		Off			RDO

Fri, 1 Apr 2016

< Week
< Day
Today
Day >
Week >

+
Menu

SHORTCUTS

12:59 PM
Fri, 1 Apr '16

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