

MULTI-SITE

WALK-IN

SPA

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SHORTCUTS FUSION

SUNDRY INCOME

SETTING UP A DATE
SURCHARGE

HOME &
MOBILE

BEAUTY


SHORTCUTS[™]
SMARTER BUSINESS TECHNOLOGY

it suits you

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Country: Australia

CONTENTS

- CREATING A DATE SURCHARGE 1**
- APPLYING A DATE SURCHARGE..... 3**

ABOUT THIS DOCUMENT

You can set up a date surcharge in Shortcuts by first creating a sundry item, then applying the surcharge to a particular date on the roster.

The surcharge feature is fully customisable to suit your business needs. You can choose whether to apply a percentage or a fixed amount surcharge; you can even set up a surcharge that will only be applied when the sale total is less than a certain amount.

Once you have set up a date surcharge, it will be automatically applied to transactions processed on the specified date, which will save you time.

For example, you could create a date surcharge for certain holidays such as New Year’s Day.

CREATING A DATE SURCHARGE

- 1 Click on the **setup** menu.
- 2 Click on the **configuration** icon.
- 3 Click on the **sales** setup menu.
- 4 Click on the **sundry income** icon.
- 5 Click **new**.
- 6 Enter the name of the surcharge.
- 7 Click **done**.
- 8 Select **date surcharge** as the sundry type.
- 9 Tick the relevant box to create either a percentage surcharge or a fixed amount surcharge. Then enter the percentage or amount in the relevant field.

The screenshot displays the 'Sundry Income Setup' interface. The sidebar on the left contains navigation icons for Sales, Point Of Sale, Payment Types, Discounts, Receipt, Sundry Income, Expenses, Gift Certificates, Terminals, and Payment Processor. The main form is titled 'Sundry Income Setup' and includes the following elements:

- Sundry Income:** A dropdown menu showing 'New Year's Day Surcharge'.
- Description:** A text input field.
- Amount:** A text input field with the value '0'.
- Tax Rate:** A dropdown menu showing '<Exempt>'.
- Barcode:** A text input field with the value '00053'.
- External Id:** A text input field.
- Date Surcharge Applies To...:** A section with checkboxes for 'Products', 'Services', and 'Sundries'. 'Services' is checked.
- Surcharge:** A section with three options:
 - Percentage of sale surcharge: 20 %
 - Fixed amount surcharge: \$ 0
 - Only apply when sale total is less than: \$ 0

At the bottom of the main form are three buttons: 'New' (with a plus icon), 'Edit' (with a pencil icon), and 'Save' (with a folder icon). A 'Done' button with a checkmark icon is located to the right of the main form.

The 'Sundry Income Name' dialog box is open, showing the 'Sundry Name' field with the text 'New Year's Day Surcharge'. Below the field are two buttons: 'Done' (with a checkmark icon) and 'Cancel' (with a red X icon).

- A** If you only want to apply this surcharge when the sale total is less than a certain amount, you can tick this box and enter the relevant value.
- 10** Select the relevant tax rate.
- 11** Tick the relevant boxes to indicate which items the surcharge applies to.
- 12** Click **save**.
- 13** Click **done**.

Sales

- Point Of Sale
- Payment Types
- Discounts
- Receipt
- Sundry Income
- Expenses
- Gift Certificates
- Terminals
- Payment Processor

General

Region

Sundry Income Setup

Sundry Income Active Display Inactive

New Year's Day Surcharge

Description **Amount** 0

Tax Rate <Exempt> **10**

Sundry Type Date Surcharge **Barcode** 00053

External Id

Date Surcharge Applies To...

Products Services Sundries **11**

Surcharge

Percentage of sale surcharge 20 %

Fixed amount surcharge \$ 0

Only apply when sale total is less than **A** \$ 0

New

Edit

Save **12**

Done **13**

SHORTCUTS

3:09 PM
Tue, 19 Jul '16

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

Anna
Owner
Log Off

APPLYING A DATE SURCHARGE

- 1 Click on the **tools** menu.
- 2 Click on the **roster** icon.
- 3 Next you'll need to select the date you wish to apply to surcharge to. If the date is currently within view, you may skip to step 6. If not, continue to step 4.
- 4 Click on **select roster date**.
- 5 Select the relevant date from the calendar.
- 6 Click on the relevant date on the left-hand side.
- 7 Enter the name of the holiday.
- 8 Select the surcharge you wish to apply.
- A Tick this box if it's a public holiday.
- 9 Click **done**.

Employee Roster

Search Employee: [] Select Roster Date: []

Mark Cells: Anna, James, Chris, Katie, Lucy, Michael

Calendar: January 2017

Select A Date

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
January 2017	1	2	3	4	5	6	7
	8	9	10	11	12	13	14
	15	16	17	18	19	20	21
	22	23	24	25	26	27	28
	29	30	31	1	2	3	4
February 2017	5	6	7	8	9	10	11
	12	13	14	15	16	17	18
	19	20	21	22	23	24	25
	26	27	28	1	2	3	4
March 2017	5	6	7	8	9	10	11
	12	13	14	15	16	17	18

Sun 1 Jan 2017

Holiday Name: New Year's Day

Surcharge: New Year's Day Surcharge

Public Holiday?

Buttons: Done, Cancel, Clear



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