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SHORTCUTS FUSION APPOINTMENT BOOK REBOOKING

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SHORTCUTS

SMARTER BUSINESS TECHNOLOGY

it suits you

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ABOUT THIS DOCUMENT

Rebooking is an extremely effective way to predict future revenue and improve client retention.

The Shortcuts rebooking feature ensures that your team will never forget to ask a client to rebook again. Each time you check out a service, you'll be given the option to book the client in for their next appointment.

You can also allocate credit to your employees when they successfully rebook a client. This provides your staff with incentive to rebook as many clients as possible, and allows you to keep track of rebooking rates. You can view your rebooking rates via the Rebooking Breakdown report.

ENABLING THE REBOOKING PROMPT

The rebooking prompt will remind you to ask clients to rebook each time you check out an appointment.

- 1 Click on the **setup** menu.
- 2 Click on the **configuration** icon.
- 3 Click on the **sales** setup menu.
- 4 Click on the **Point of Sale** icon.
- 5 Tick the **ask to rebook** box.
- 6 Click **done**.

The screenshot shows the 'Point Of Sale Setup' window. On the left is a navigation sidebar with icons for Sales, Point Of Sale, Payment Types, Discounts, Receipt, Sundry Income, Expenses, Gift Certificates, Terminals, and Payment Processor. At the bottom of the sidebar are 'General' and 'Region' buttons. The main area is titled 'Point Of Sale Setup' and contains the following sections:

- Automatic Client:** <none> (Clients dropdown)
- Automatic Employee:** <none>
- Options:**
 - Sell Products
 - Sell Services
 - Sell Sundry
 - Allow Pay off Accounts
 - Low Stock Warning
 - Ask to Rebook (5)
 - Require Discount Reason
 - Require Refund Reason
 - Create Walkin Manager Visits at POS
 - Confirm Employee on Service for Level Pricing
 - Disallow Cash Out from Credit/EFT Card
 - Automatically Show Appointments
 - Allocate Employee Points on Product Sales
 - Sell services deactivated since booking
 - Update Appointment Book on Service Change
 - Enforce employees be clocked on before being used in POS
 - Use End Of Day
 - Enter float at start of End of Day
 - Use Start of Day
 - Auto-populate EFT Takings
 - Auto Clock Off Employees
 - Number of EOD Employees: 1
 - Clock Off Delay (minutes): 0
 - Auto Clock On Employees at logon
 - Allow Tips
 - Give Tips Directly From Register
 - Allow Tips to Business
 - Enter Tips when Clocking Off
 - Prompt for Tip on Card Payment
 - Limit Tip to: 0 % of sale
 - Limit Tip to: \$ 0 fixed amount
- Quote Terms:**
 - Enable Quotes
 - Thank you for your enquiry today. This quote is valid for 14 days.

At the bottom right of the main area is a 'Done' button with a green checkmark and a blue circle containing the number 6. On the right side of the interface is a 'SHORTCUTS' menu with buttons for Main, Tools, Stock, Setup (1), Configuration (2), Employees, Employee Groups, Capabilities, Services, Series, and Contraindications. At the bottom right of the shortcuts menu is a user profile for 'Anna Owner' with a 'Log Off' button. The top right corner shows the time '12:57 PM' and date 'Wed, 6 Apr '16'.

REBOOKING AN APPOINTMENT

A Once you have entered the payment details at the Point of Sale, the rebooking prompt will appear.

1 Click **rebook**.

The screenshot shows a POS interface with the following elements:

- Client Information:** Crystal Walker, Not a member of a club or program, Remove Client button, Trans# 5.
- Transaction Table:**

Employee	Product/Service	Qty.	Price	Disc.	GST	Total
Lucy	Tanning Full Body Tan	1	30.00	0.00	2.73	30.00
- Payment Summary:**
 - Discount: 0.00
 - TIP: 0.00
 - Sales Total: 30.00
 - GST: 2.73
 - Redemptions: 0.00
- Payment Methods:** Cash (\$0.00), Card (\$0.00), VISA (\$0.00), No Sale (\$0.00).
- Future Appointments Dialog:**

Future Appointments

Date	Time	Service	Employee
[Empty]			

Ask if Crystal Walker wishes to rebook

Buttons: Rebook (1), Done (✓)
- Right Sidebar (SHORTCUTS):**
 - 11:13 AM Thu, 3 Mar '16
 - Main
 - Appointments
 - Arrivals
 - Walkin Manager
 - Point Of Sale
 - Clients
 - Performance
 - Exit
 - Tools
 - Stock
 - Setup
 - Anna Owner Log Off

- 2 You will then be taken to the Appointment Book. Navigate to the date the client wishes to rebook.
- 3 Click on the client's desired time slot in the relevant employee's column.
- 4 You will then be taken to the client list where the client will already be selected. Continue making the appointment as usual.

Time	Anna	James	Lucy	Chris	Katie
9:00 AM		Off		RDD	
9:15 AM		Off		RDD	
9:30 AM		Off		RDD	
9:45 AM	Patricia Lawson Ladies Style Cut	Off	Daniel Ross	RDD	
10:00 AM		Off		RDD	
10:15 AM		Off		RDD	
10:30 AM		Off		RDD	
10:45 AM		Off		RDD	
11:00 AM		Off		RDD	
11:15 AM		Off	Olivia Black 1/4 Head Highlights	RDD	
11:30 AM		Off		RDD	
11:45 AM	Dean Carpenter	Off		RDD	
12:00 PM		Off		RDD	
12:15 PM		Off	Olivia Black	RDD	Emily King Blowdry
12:30 PM		Off		RDD	
12:45 PM		Off		RDD	
1:00 PM		Off		RDD	
1:15 PM		Off		RDD	
1:30 PM		Off		RDD	
1:45 PM		Off		RDD	
2:00 PM	Off			RDD	
2:15 PM	Off		Simone Day Full Leg Wax	RDD	
2:30 PM	Off			RDD	
2:45 PM	Off		Simone Day	RDD	
3:00 PM	Off			RDD	
3:15 PM	Off			RDD	
3:30 PM	Off	Rachael Clarke Ladies Style Cut		RDD	
3:45 PM	Off			RDD	
4:00 PM	Off			RDD	
4:15 PM	Off			RDD	
4:30 PM	Off			RDD	
4:45 PM	Off			RDD	
5:00 PM	Off			RDD	
5:15 PM	Off			RDD	
5:30 PM	Off			RDD	
5:45 PM	Off			RDD	

5

Once you have selected the service(s) for the rebooking, the employee credit prompt will appear. Click **yes** if you would like to allocate employee credit. If not, click **no** and go to step 8.

6

Select the employee to receive credit.

The screenshot displays a scheduling interface for Thursday, 17 Mar 2016. The main calendar grid shows appointments for employees Anna, James, Lucy, Chris, and Katie. Services include 'Ladies Style Cut', '1/4 Head Highlights', and 'Full Leg Wax'. A 'Choose Employee' dialog box is open, listing employees with their levels and statuses. A blue circle with the number '6' highlights the 'Anna' row in the dialog. The top right corner shows 'SHORTCUTS' and '11:14 AM Thu, 3 Mar '16'.

Employee Alias	Employee Level	Status
Anna	Director	Rostered On
Chris	Senior Stylist	Not Rostered On
Helen	Senior Stylist	Not Rostered On
James	Stylist	Rostered On
Katie	Stylist	Rostered On
Lucy	Senior Stylist	Rostered On
Michael	Apprentice	Not Rostered On
Michelle	Stylist	Not Rostered On

Question - Shortcuts: Point of Sale

If this is a rebooking, would you like to give an Employee credit?

Yes **5** No

Cancel

7

Once you have selected an employee, you'll be asked if you would like to give another employee credit. If you would like to give another employee credit, click **yes** and repeat steps 6 and 7 as required. If not, click **no**.

8

Click **yes** to return to the Point of Sale and continue processing the transaction.

Thu, 17 Mar	Anna	James	Lucy	Chris	Katie
9:00 AM		Off		RDD	
15		Off		RDD	
30		Off		RDD	
45	Patricia Lawson Ladies Style Cut	Off	Daniel Ross	RDD	
10:00 AM		Off		RDD	
15		Off		RDD	
30		Off		RDD	
45		Off		RDD	
11:00 AM		Off		RDD	
15		Off	Olivia Black	RDD	
30		Off	Olivia Black 1/4 Head Highlights	RDD	
45	Dean Carpenter	Off		RDD	
12:00 PM		Off		RDD	
15		Off	Olivia Black	RDD	Emily King Blowdry
30		Off		RDD	
45		Off		RDD	
1:00 PM		Off		RDD	
15		Off		RDD	
30		Off		RDD	
45		Off		RDD	
2:00 PM	Off			RDD	
15	Off		Simone Day	RDD	
30	Off		Simone Day Full Leg Wax	RDD	
45	Off		Simone Day	RDD	
3:00 PM	Off			RDD	
15	Off			RDD	
30	Off	Rachael Clarke		RDD	
45	Off	Rachael Clarke Ladies Style Cut		RDD	
4:00 PM	Off			RDD	
15	Off			RDD	
30	Off			RDD	
45	Off			RDD	
5:00 PM	Off			RDD	
15	Off			RDD	
30	Off			RDD	
45	Off			RDD	

Thu, 17 Mar 2016

< Week < Day Today Day > Week >

+ Menu

SHORTCUTS

11:14 AM
Thu, 3 Mar '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna
Owner
Log Off

Question - Shortcuts Point of Sale

Would you like to give another Employee credit for this rebooking?

✓ 7 ✗
 Yes No

Information - Shortcuts Point of Sale

Rebooking done.
Would you like to return to Point of Sale?

✓ 8 ✗
 Yes No



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