MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

CLINIC

SHORTCUTS FUSION

GIFT CERTIFICATES

SETTING UP GIFT CERTIFICATES

HOME & MOBILE

BEAUTY

SHORTCUTS

SMARTER BUSINESS TECHNOLOGY

it suits you

CONTENTS

ABOUT THIS DOCUMENT

Gift certificates are items that can be redeemed for products or services at your business, and are a very effective way of increasing client loyalty.

This feature is fully integrated with Shortcuts to save you time when processing transactions at the Point of Sale. Gift certificates are a great way to encourage your clients to return to the business, and can also help to increase revenue from discount-driven clients who may not have visited without a gift certificate.

CREATING A GIFT CERTIFICATE

1	Click on the **setup** menu.
2	Click on the **configuration** icon.
3	Click on the **sales setup** menu.
4	Click on the **gift certificates** icon.
5	Click **new**.
6	Enter the name of the gift certificate.
7	Click **done**.
8	**Optional:** Enter a default amount for the gift certificate.
9	Tick the 'requires tracking number' box if you want the gift certificate to require a tracking number.
10	**Optional:** Enter an expiry.

Gift Certificates Setup

Gift Certificates

$100 Gift Certificate

☐ Inactive

Show me

Description

Amount 100

Barcode 0005Q

External Id

Tax Rate

GST Sundry Tax

☑ Active
☑ Requires Tracking Number
☑ Employee Receives Credit On Sale
☐ Is a Gift Card
☐ Is a Gift Card Adjustment
☐ Is a Gift Card Reissue

Expiry 12 Month(s)

Settings apply to all gift certificates

Employee receives   10   % on Sale

☑ Award points on sale
☐ Award points on redemption

New   Edit   Save

Done

Sidebar (Sales)
- Point Of Sale
- Payment Types
- Discounts
- Receipt
- Sundry Income
- Expenses
- Gift Certificates
- Terminals
- Payment Processor
- General
- Region

Shortcuts
SHORTCUTS
9:51 AM
Fri, 15 Apr '16
- Main
- Tools
- Stock
- Setup
- Configuration
- Employees
- Employee Groups
- Capabilities
- Services
- Series
- Contraindications

Anna
Owner
Log Off

Gift Certificate Name

Certificate Name

$100 Gift Certificate

Done   Cancel

11 Tick this box if you want employees to receive credit when they sell a gift certificate.

12 If you have chosen to give employees credit, enter the portion of the sale you want employees to receive as credit.

13 If you're using clubs, you can choose whether you want clients to receive points when they buy a gift certificate, or when they redeem it.

14 Click **save**.

SHORTCUTS

9:51 AM
Fri, 15 Apr '16

Main

Tools

Stock

Setup

Configuration

Employees

Employee Groups

Capabilities

Services

Series

Contraindications

Anna
Owner
Log Off

Sales

Point Of Sale

Payment Types

Discounts

Receipt

Sundry Income

Expenses

Gift Certificates

Terminals

Payment Processor

General

Region

Gift Certificates Setup

Gift Certificates

$100 Gift Certificate

Show me
☐ Inactive

Description

Amount   100

Barcode   0005Q

External Id

☑ Active
☑ Requires Tracking Number
☑ Employee Receives Credit On Sale   **11**
☐ Is a Gift Card
☐ Is a Gift Card Adjustment
☐ Is a Gift Card Reissue

Tax Rate

GST Sundry Tax

Expiry   12   Month(s)

Settings apply to all gift certificates

Employee receives   10   % on Sale   **12**

☑ Award points on sale   **13**
☐ Award points on redemption

New   Edit   Save   **14**

Done

SELLING A GIFT CERTIFICATE

1 Click on the **main** menu.

2 Click on the **Point of Sale** icon.

3 Click on the **clients** icon.

4 Select the relevant client.

5 Click **done**.

Select Client

Search For ...

Delete

Sort By...

First Name

Show Me...

☐ Inactive

Kelly Matthews
0488 515 151 (M) **4**

Kelly Roberts
0455 545 444 (M)

Kristen Humphrey
0488 585 858 (M)

Larry Hodgkins
0411 999 777 (M)

Leanne Thomas
0499 555 000 (M)

Liam Harrington
0422 888 333 (M)

Lisa Summers
0444 000 440 (M)

Louise Simons
0411 777 111 (M)

Luke Woods
0433 222 999 (M)

Mandy Mason
0422 333 555 (M)

Matthew Darcy
0455 999 333 (M)

Melanie Goodman
0455 777 757 (M)

No preferred employee
Not a club member | No Programs.
4 Visits (0 No Shows, 0 Cancellations)
$62.50 average spend
$0.00 outstanding on account

Outstanding Client Series

Future Appointments
9 Mar 11:30 AM: Underarm Wax - Anna
9 Mar 11:45 AM: Eyebrow Wax - Anna
9 Mar 12:00 PM: Full Arm Wax - Anna

Past Appointments
17 Feb 2:00 PM: Yoga Class - Lucy
18 Jan 12:30 PM: Cleansing Facial - James
7 Jan 10:00 AM: Eyebrow Wax - Anna
7 Jan 9:15 AM: Rehydrating Facial - Anna
23 Dec 12:15 PM: Ladies Style Cut - Katie
23 Dec 10:45 AM: 1/2 Head Highlights - Katie
2 Dec 1:00 PM: 1/4 Head Highlights - Anna

New

Quick

CPC

History

Card

Merge

5 Done

Cancel

SHORTCUTS

10:23 AM
Fri, 4 Mar '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna
Owner
Log Off

6 Click on an empty sale line.

7 Select the relevant employee.

8 Click **sundry**.

SHORTCUTS

10:24 AM
Fri, 4 Mar '16

Main

Kelly Matthews

Not a member of a club or program.

Remove Client

Trans# 1

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Employee	Product/Service	Qty.	Price	Disc.	GST	Total
		6				

0.00
0.00
0.00
0.00
0.00
0.00
0.00
0.00
0.00

Card   Quote

History   No Sale

Tools

Stock

Setup

Anna
Owner
Log Off

Choose Employee

Filter   <All>

Search

Employee Alias		^ Employee Level	Status
Anna	**7**	Director	Rostered On
Business		Default	Rostered On
Chris		Senior Stylist	Rostered On
Helen		Senior Stylist	Not Rostered On
James		Stylist	Rostered On
Katie		Stylist	Not Rostered On
Lucy		Senior Stylist	Rostered On
Michael		Apprentice	Not Rostered On
Michelle		Stylist	Not Rostered On

Cancel

Product or Service?

Product   Service   Sundry **8**   Account

Page 5

9 Select the gift certificate you want to sell.

10 Click **done**.

Sundry Income

$100 Gift Certificate **9**

$50 Gift Certificate

Gift Certificate

SHORTCUTS

10:29 AM
Fri, 4 Mar '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna
Owner
Log Off

10 Done
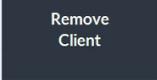
Cancel

Help

11 If you need to change the price of the gift certificate, click on the relevant cell in the price column.

12 Enter the price of the gift certificate.

13 Click **done**.

14 Select the relevant payment type.

15 Enter the value that is being processed using this payment type.

16 Click **done**.

SHORTCUTS

10:32 AM
Fri, 4 Mar '16

Main

Kelly Matthews

Not a member of a club or program.

Remove Client

Clients

Trans# 1

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit
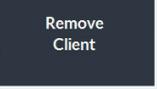
Employee	Product/Service	Qty.	Price	Disc.	GST	Total
Anna	Sundry Income Gift Certificate	1	**11**	0.00	0.00	150.00

Discount	0.00
TIP	0.00
Sales Total	150.00

$0.00 $0.00 $0.00 **14**

Card

Quote

History

No Sale

Tools

Stock

Setup

Anna
Owner
Log Off

Enter Amount

150.00 **12**

1	2	3
4	5	6
7	8	9
0	C	.

13 Done

Cancel

Enter Amount for Cash

150.00 **15**

1	2	3
4	5	6
7	8	9
0	C	.

16 Done

Cancel
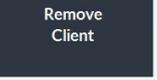
17 Click **end sale**.

A If the gift certificate requires a tracking number, this window will appear. If this is not your first time selling a gift certificate, a tracking number will be automatically generated.

18 Enter a tracking number or use the default tracking number.

19 Click **done**.

REDEEMING A GIFT CERTIFICATE

1 Once the transaction is prepared and ready to be processed at the Point of Sale, click on the **custom payment type** button.

2 Click on **gift certificate**.

3 If your gift certificates have tracking numbers, you will need to select the appropriate gift certificate from the list.

4 If the client is only making a partial redemption from the gift certificate, click **edit** and enter the desired amount.
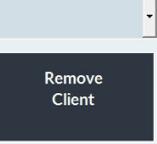
5 Click **done**.

			SHORTCUTS

Kelly Matthews

Not a member of a club or program.

Remove Client

Trans# 4

11:19 AM
Fri, 4 Mar '16

Main

Clients

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Employee	Product/Service	Qty.	Price	Disc.	GST	Total
Chris	Hair Colouring Full Head Highlights	1	100.00	0.00	9.09	100.00
Chris	Ladies Cuts Ladies Style Cut	1	55.00	0.00	5.00	55.00

Discount

TIP

Sales Total
GST
Redemptions
Amount Owing
Payment Received
Outstanding

$0.00 $0.00 $0.00

1

$0.00 $0.00 $0.00

Other Payment Type

Gift Certificate   **2**

Series Redemption

Cancel

Redeem Gift Certificates

Unallocated Transaction Value $155.00

Value Allocated $150.00

Certificate Number	Used	Outstanding
002		75.50
004		100.00
005	150.00	0.00
006		100.00

3

☐ Show Expired Gift Certificates

4 Edit   Delete   Clear   Search   **5** Done   Cancel

A The amount from the gift certificate will be deducted from the total price.

6 If there is any remaining balance left on the transaction, process this as usual by selecting the relevant payment type and entering the value.
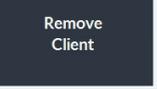

SHORTCUTS

11:23 AM
Fri, 4 Mar '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna
Owner
Log Off

Kelly Matthews

Not a member of a club or program.

Remove Client

Clients

Trans# 5

Employee	Product/Service	Qty.	Price	Disc.	GST	Total
Chris	Hair Colouring Full Head Highlights	1	100.00	0.00	9.09	100.00
Chris	Ladies Cuts Ladies Style Cut	1	55.00	0.00	5.00	55.00
Business	Gift Certificate Redemption Gift Certificate 005	-1	150.00	0.00	0.00	-150.00

$0.00 $0.00 $0.00

$0.00 $150.00 $0.00

Discount	0.00
TIP	0.00
Sales Total	155.00
GST	14.09
Redemptions	-150.00
Amount Owing	**5.00**
Payment Received	0.00
Outstanding	**5.00**

Card   End Sale

History   No Sale

7 Click **end sale** to complete the transaction.

Kelly Matthews

Not a member of a club or program.

Remove Client

Clients

Trans# 5

Employee	Product/Service	Qty.	Price	Disc.	GST	Total
Chris	Hair Colouring Full Head Highlights	1	100.00	0.00	9.09	100.00
Chris	Ladies Cuts Ladies Style Cut	1	55.00	0.00	5.00	55.00
Business	Gift Certificate Redemption Gift Certificate 005	-1	150.00	0.00	0.00	-150.00

$5.00

$0.00

$0.00

$0.00

$150.00

$0.00

Discount	0.00
TIP	0.00
Sales Total	155.00
GST	14.09
Redemptions	-150.00
Amount Owing	**5.00**
Payment Received	5.00
Change	**0.00**

Card

End Sale

History

No Sale

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna
Owner
Log Off

VIEWING GIFT CERTIFICATE REPORTS

1 Click on the **tools** menu.

2 Click on the **reports** icon.

3 Expand the business category.

A There are three gift certificate reports available: expired, expiring, and outstanding gift certificates.

4 Select the report you wish to view.

5 Click **view**.

6 Select the date (or date range).

7 Click **view** to generate the report.

Reports

Report
- ⊞ 🧊 Appointments
- ⊟ 📕 Business **3**
  - ● *Aged Receivables*
  - ● *Business Breakdown by Reports Category*
  - ● *Business Sales Summary*
  - ● *Client Account Statements*
  - ● *Client List by Batch Number*
  - ● *Club Account Statements*
  - ● *Consolidated Liability*
  - ● *Credit Notes*
  - ● *Expired Gift Certificates* **A**
  - ● *Expiring Gift Certificates*
  - ● *Outstanding Client Points*
  - ● *Outstanding Gift Certificates* **4**
  - ● *Profit and Loss*
  - ● *Promotion Activity*
  - ● *Promotion List*
  - ● *Sales by Terminal*
  - ● *Sales Trend*
  - ● *Series Sales Liability*

Show Me...

☐ Inactive

Status

5 View

Report Information

Report Description

A report displaying all Gift Certificates that have not been fully redeemed. It displays the Certificate Number, the Client who bought the certificate, the date it was sold, the original Certificate Amount, the last date some of the certificate was redeemed and the current outstanding value. The Report also gives you a total outstanding Gift Certificate Value.

☑ Active

SHORTCUTS

10:18 AM
Fri, 15 Apr '16

Main

Tools **1**

Reports **2**

Backup

Marketing

Roster

Log

Attendance

Support and Logins

Options
- Date
- Misc

Date

Please enter the date for this report

Friday, 15 April 2016

Date **6**

Clear | Save | Previous | Next | View **7** | Cancel

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