MULTI-SITE

WALK-IN

SPA

HAIR

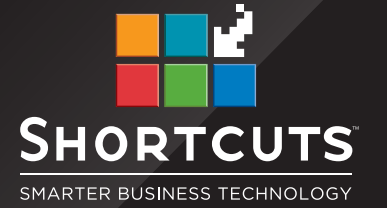BARBER

CLINIC

MEMBERSHIPS

UNDERSTANDING
MEMBERSHIPS
REPORTS

HOME & MOBILE

BEAUTY

SHORTCUTS

SMARTER BUSINESS TECHNOLOGY

it suits you

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ABOUT THIS DOCUMENT

This document is designed to give you the tools you need to use Memberships to its full potential.

Memberships is a great way to keep your clients coming back for more, by providing them with regular payment options and exclusive benefits. With Memberships, your clients pay a regular fee and receive the benefits over a time frame determined by you. This enables you to establish an income stream you can count on, as revenue is recurring throughout the year.

REPORTS

REPORT DESCRIPTIONS

The Shortcuts Program Manager provides you with a range of reports to assist you in measuring the success of your membership programs.

Transaction History Export: This report can be used to display a list of all program transactions (activations, redemptions, refunds etc.) for the selected date range.

New Signups: This report displays a list of clients who joined a program within the selected date range. This allows you to view information such as each member's selected payment plan, the name of the site where they signed up, and the total number of signups per site.

Expiring Members: This report displays all members whose programs are expiring within the selected date range. It includes the details of each member's remaining benefits, their benefit utilisation, as well as the date and site where they last redeemed a benefit item.

Membership Payments: This report displays all membership payments made for a specified program, date range and transaction status (e.g. success, fail, cancelled). You can choose whether you'd like to view Point of Sale payments, uploaded payments, or all payments. This report also shows the value of payments received and details of the payment source.

Membership Payment Status: This report displays a list of members and their payment status for the selected program. This includes each member's total payments received and total payments outstanding. You can also see when their last payment was received and when their next payment is due.

Membership List: This report displays a list of all members belonging to the specified community. This provides a quick and easy way to reference each member's current status, member number and the date they joined the program.

Membership Utilisation: This report displays a list of all members of the specified program and their benefit utilisation percentage. This indicates how many of their allocated benefits have been redeemed.

1 Log into your S.M.A.R.T. system console (https://console.shortcutssoftware.com). Then click on the **programs** tile.

2 Click **reports**.

3 Click on the report you wish to view.

4 Select the information you wish to view in the report, such as the program, site and date range.

5 Click **run report**.

A The selected report will be generated.

B You can use the arrow buttons to navigate to different pages within the report.

C Click the export button to view your export options. You can export a report in a variety of formats such as CSV, PDF, and Excel.

D You can use this button to refresh the report.

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Program Management

User: info@peppermintpark.com.au

- Administration
- Management
- Reports
  - Registration Range
  - Registration Export
  - Liability
  - Gift Card Expiry
  - Program Reconciliation - Centralized
  - Program Reconciliation - Decentralized
  - Loyalty Top % Spend
  - Loyalty Points Conversion
  - Transaction History Export
  - New Signups
  - Expiring Members
  - Membership Payments
  - Membership Payment Status
  - Membership List
  - Membership Utilisation
  - Program Notifications
- LogOff

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New Signups

B | 1 | of 1 | | **C** | **D**

XML file with report data
CSV (comma delimited)
PDF
MHTML (web archive)
Excel
TIFF file
Word

New Signups

Community:	**Peppermint Park**
Program:	All
From Date:	Tuesday, 29 March, 2016
To Date:	Friday, 29 April, 2016
Total Members:	8
Total New Signups:	7

Site	Program	No. Signups
Peppermint Park - Ashgrove		7
	Blowdry Membership	7

Member Name	Member Number	Payment Plan Name	Phone	Email	Purchase Date	Start Date	Expiry Date	N Signu
Blowdry Membership								
Peppermint Park - Ashgrove								
Amber Ashton	62997400000000932658	2. Monthly Payments $70	0422 111 888		28-Apr-16	28-Apr-16		
Chelsea Grey	62997400000000932668	2. Monthly Payments $70	0499 777 111		29-Apr-16	29-Apr-16		
Claire Stewart	62997400000000809557	2. Monthly Payments $70	0477 000 555		31-Mar-16	31-Mar-16		
Emily King	62997400000000909881	1. Weekly Payments $20	0499 989 889		01-Apr-16	01-Apr-16		
Hannah Andrews	62997400000000909880	2. Monthly Payments $70	0400 111 000		01-Apr-16	01-Apr-16		
Rachael Stewart	62997400000000932656	2. Monthly Payments $70	0444777777		28-Apr-16	28-Apr-16		
Simone Day	62997400000000932667	1. Weekly Payments $20	0477 323 232		29-Apr-16	29-Apr-16		

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