

MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

CLINIC

SHORTCUTS FUSION
POINT OF SALE
REFUNDING

HOME &
MOBILE

BEAUTY


SHORTCUTS
SMARTER BUSINESS TECHNOLOGY
it suits you

Last updated 12 October 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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ABOUT THIS DOCUMENT

Shortcuts makes it easy to process a refund for a client. The refunding feature ensures that all refunds are recorded in your transaction list, the client's history and product movement history.

If a client wants to purchase a new item in place of the refunded item, you can save time by processing both at the same time. You also have several options for returning the payment to the client. For example, you could offer a cash refund, or you could refund the money into the client's account as store credit.

When you are refunding a product, you can specify whether it will be returned to the shelf or discarded, ensuring that your product levels remain up to date.

REFUNDING VIA CLIENT HISTORY

- 1

Click on the **main** menu.
- 2

Click on the **clients** icon.
- 3

Select the relevant client.
Alternatively, if the client was a walk-in, you can select **#walkin** from the client list.
- 4

Click **history**.

Select Client

Search For ...

Delete

Sort By...

First Name

Show Me...

☐ Inactive

New

Quick

CPC

History

Card

Merge

Assistant

Appt Book

Taylor Rhodes

0444 222 244 (M)

Thomas Smith

0433 777 337 (M)

Tom Wallace

0411 888 666 (M)

Veronica Darcy

0411 111 777 (M)

Vicky Beckhouse

0422 662 662 (M)

Viktor Reed

0433 666 112 (M)

Wendy Peterson

0499 777 999 (M)

William Black

0466 777 676 (M)

Xavier Scott

0433 222 141 (M)

Yasmin Green

0433 444 000 (M)

Zoe Stevenson

0400 444 000 (M)

3

No preferred employee
Not a club member | No Programs.
5 Visits (0 No Shows, 0 Cancellations)
\$112.11 average spend
\$0.00 outstanding on account

Outstanding Client Series

No future appointments

Past Appointments

17 Feb 2:30 PM: Full Head Highlights - Anna
2 Feb 4:30 PM: Ladies Style Cut - James
2 Feb 3:00 PM: 1/2 Head Highlights - Katie
27 Jan 4:15 PM: Underarm IPL - Anna
15 Jan 3:00 PM: Blowdry - Chris
15 Jan 2:30 PM: Ladies Style Cut - Chris
14 Jan 3:15 PM: Full Body Tan - Lucy

SHORTCUTS

3:19 PM
Tue, 1 Mar '16

1

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

2

Clients

Performance

Exit

Tools

Stock

Setup

Anna
Owner

Log Off

Page 1

5

Right click on the item you want to refund.

6

Select **refund**.

7

A message will appear telling you that the client has been transferred to the Point of Sale. Click **done**.

History for Taylor Rhodes

History List

History Totals

Taylor Rhodes (home: ???????? work: ???????? mobile: 0444 222 244)

- Today	Cash \$79.95		\$79.95
<div> <div>Lucy</div> <div>Liquid Founda</div> </div>		<div> <div>5</div> <div>history</div> </div>	\$79.95
- Wed 24 Feb 2016	MasterCard \$300.00	<div> <div>6</div> <div>Refund</div> </div>	\$300.00
<div> <div>Lucy</div> <div>Injectables Restyla</div> </div>		Resell	\$300.00
- Tue 2 Feb 2016	Cash \$120.00		\$120.00
<div> <div>Katie</div> <div>Hair Colouring 1/2</div> </div>		Photo Record	\$70.00
<div> <div>James</div> <div>Ladies Cuts Ladies</div> </div>		Photo History	\$50.00
		Details	
- Thu 28 Jan 2016	Cash \$30.00		\$30.00
<div> <div>James</div> <div>Tanning Full Body Tan</div> </div>			\$30.00
- Thu 14 Jan 2016	Amex \$30.60		\$30.60

Visit Notes (0)

Clinic Notes (0)

Notes

Show only date with notes

Employee

Service

Date Range

New

Edit

View

Print

Visit Details

Treatment

Help

Done

SHORTCUTS

3:19 PM

Tue, 1 Mar '16

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Information - Shortcuts Point of Sale



Taylor Rhodes has been Transferred to the Point Of Sale ready to complete the Transaction.



7

Done

8

Click on the **Point of Sale** icon in the **main** menu.

A

The item will be displayed in the sale line with a quantity of -1.

9

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

10

Select the payment type to refund to.

11

Select the reason for the refund from the drop-down menu.

12

Select the action for the refunded item from the drop-down menu.

13

Click **done**.

Clients

Taylor Rhodes

Not a member of a club or program.

Remove Client

Trans# 19

Employee	Product/Service	Qty.	Price	Disc.	GST	Total
Lucy	Liquid Foundation Liquid Foundation Sun Kissed	-1	79.95	0.00	-7.27	-79.95

\$0.00

\$0.00

\$0.00

Discount

TIP

Sales Total -79.95

GST -7.27

Redemptions 0.00

Amount Owing -79.95

Payment Received

Cash Out

Card

End Sale

Select Payment Type to Refund To

Cash

Account

Amex

Visa

MasterCard

EFTPOS

Cancel

Refund Information

You are Refunding a Liquid Foundation Sun Kissed

Select a Reason for the Refund

Defective

Select an Action for the Refunded Product(s)

Return to Manufacturer

Done

SHORTCUTS

3:20 PM
Tue, 1 Mar '16

Main

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Arrivals

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Performance

Exit

Tools

Stock

PROCESSING A REFUND AND A NEW ITEM AT THE SAME TIME

- 1

Once the refund is prepared at the Point of Sale, you will need to add the new item. Click on an empty sale line.
- 2

Select the relevant employee.
- 3

Select the relevant item type, then select the new item the client wishes to purchase as usual.

Elouise Penn

Not a member of a club or program.

Remove Client

Trans# 5

Employee	Product/Service	Qty.	Price	Disc.	GST	Total
<div><div>Anna</div></div>	<div><div>Cleansers</div><div>Dermal Clay Cleanser 250ml</div></div>	-1	51.00	0.00	-4.64	-51.00

Choose Employee

Filter <All>

Search

Employee Alias	Employee Level	Status
<div><div>Anna</div></div>	Director	Rostered On
<div><div>Business</div></div>	Default	Rostered On
<div><div>Chris</div></div>	Senior Stylist	Rostered On
<div><div>Helen</div></div>	Senior Stylist	Not Rostered On
<div><div>James</div></div>	Stylist	Rostered On
<div><div>Katie</div></div>	Stylist	Not Rostered On
<div><div>Lucy</div></div>	Senior Stylist	Rostered On
<div><div>Michael</div></div>	Apprentice	Not Rostered On
<div><div>Michelle</div></div>	Stylist	Not Rostered On

Cancel

0.00

0.00

-51.00

-4.64

0.00

-51.00

0.00

51.00

Card

End Sale

History

No Sale

Product or Service?

Product

Service

Sundry

Account

SHORTCUTS

2:48 PM

Wed, 6 Apr '16

Main

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Exit

Tools

Stock

Setup

Anna Owner

Log Off

Page 4

A


The item that is being refunded and the new item being purchased are now both displayed.

B

Any price difference will be calculated.

4

Process any outstanding balance (if the new item has a higher price than the refund item).






Elouise Penn


Not a member of a club or program.


Remove Client


Trans# 3


Employee	Product/Service	Qty.	Price	Disc.	GST	Total
Anna	 Cleansers	-1	51.00	0.00	-4.64	-51.00
Anna	 Cleansers	1	73.00	0.00	6.64	73.00


 \$0.00

 \$0.00

 \$0.00

 \$0.00

 \$0.00

 \$0.00

Discount

TIP

Sales Total

GST

Redemptions

Amount Owing

Payment Received

Outstanding

0.00

0.00

22.00


2.00


0.00


22.00


0.00

22.00

 Card

 End Sale

 History

 No Sale

SHORTCUTS

2:32 PM
Wed, 6 Apr '16

Main

Appointments

Arrivals

Walkin Manager

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Performance

Exit

Tools

Stock

Setup

Anna Owner

Log Off

5

Press **end sale**.

6

Select the payment type to refund to (if the refund has a higher price than the new item).

7


Select the reason for the refund from the drop-down menu.

8

Select the action for the refunded item from the drop-down menu.

9

Click **done**.




Clients

Elouise Penn


Not a member of a club or program.

Remove Client




Trans# 5


Employee	Product/Service	Qty.	Price	Disc.	GST	Total
Anna	dermatology Cleansers Dermal Clay Cleanser 250ml	-1	51.00	0.00	-4.64	-51.00
Anna	dermatology Cleansers Special Cleansing Gel 500ml	1	73.00	0.00	6.64	73.00




\$22.00




\$0.00




\$0.00



Card



End Sale



5

Discount 0.00

TIP 0.00

Sales Total 22.00

GST 2.00

Redemptions 0.00

Amount Owing 22.00

Payment Received

Select Payment Type to Refund To

Cash

Account

Amex

Visa

MasterCard

EFTPOS

Cancel

Refund Information

You are Refunding a Dermal Clay Cleanser 250ml

Select a Reason for the Refund

Incorrect Product

Select an Action for the Refunded Product(s)

Add to Stock

Done

REFUNDING VIA NEGATIVE LINE

- 1

On the Point of Sale screen, click on an empty sale line.
- 2

Select the relevant employee.
- 3

Select the relevant item type, then select the item you wish to refund as usual.

Walkin: 2

Not a member of a club or program.

Remove Client

Trans# 6

Employee	Product/Service	Qty.	Price	Disc.	GST	Total
		1				

Choose Employee

Filter <All>

Search

Employee Alias	Employee Level	Status
Anna	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

0.00

0.00

0.00

0.00

0.00

0.00

0.00

0.00

Card

Quote

History

No Sale

Product or Service?

Product

Service

Sundry

Account

SHORTCUTS

3:22 PM
Wed, 6 Apr '16

Main

Appointments

Arrivals

Walkin Manager

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Clients

Performance

Exit

Tools

Stock

Setup

Chris Manager
Log Off

Page 7

4

Once the item has been added to the Point of Sale, click on the relevant cell in the quantity column.

5

Change the value to -1.

6

Click **done**.

7

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

8

Select the payment type to refund to.

9

Select the reason for the refund from the drop-down menu.

10

Select the action for the refunded item from the drop-down menu.

11

Click **done**.

Clients

Walkin: 2

Not a member of a club or program.

Remove Client

Trans# 6

Employee	Product/Service	Qty.	Price	Disc.	GST	Total
Chris	Eye Treatments Soothing Eye Make-Up Remover 118ml	4	38.00	0.00	-3.46	-38.00

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

Discount

TIP

Sales Total -38.00

GST -3.46

Redemptions 0.00

Amount Owing -38.00

Payment Received 0.00

Cash Out 38.00

Card

End Sale

History

No Sale

Enter New Quantity

-1 5

C

1 2 3

4 5 6

7 8 9

0 . -

Done

Cancel

Select Payment Type to Refund To

Cash 8

Account

Amex

Visa

MasterCard

EFTPOS

Cancel

Refund Information

You are Refunding a Liquid Foundation Sun Kissed

Select a Reason for the Refund

Defective 9

Select an Action for the Refunded Product(s)

Return to Manufacturer 10

Done 11



it suits you

AUSTRALIA AND ASIA

166 Knapp Street
Fortitude Valley
QLD 4006
Tel: +61 7 3834 3232

www.shortcuts.com.au

UK AND EUROPE

Dalton House
Dane Road, Sale
Cheshire M33 7AR
Tel: +44 161 972 4900

www.shortcuts.co.uk

NORTH AMERICA

7711 Center Avenue
Suite 650
Huntington Beach CA 92647
Tel: +1 714 622 6682

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