

MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

CLINIC

SHORTCUTS FUSION

APPOINTMENT BOOK

USING THE WAIT LIST

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

CONTENTS

ADDING A CLIENT TO THE WAIT LIST 1

SCHEDULING A WAITLISTED APPOINTMENT..... 7

ABOUT THIS DOCUMENT

The wait list helps you manage booking requests when you have a busy Appointment Book.

Rather than trying to keep track of waiting clients on paper, this time-saving feature lets you enter a client's name against the time slots that suit them. You can specify which services they want, as well as their preferred employees.

If an appointment gets cancelled at a time that suits a client on your wait list, you'll receive a notification on the Appointment Book. This means your Appointment Book stays full, and more clients get their ideal appointment time.

ADDING A CLIENT TO THE WAIT LIST

- 1 Click on the **main** menu.
- 2 Click on the **appointments** icon.
- 3 Click on the appointment assistant button.

Mon, 14 Mar

Time	Anna	James	Lucy	Chris	Katie
9:00 AM		Amber Ashton Bridal Makeup 0422 111 888	Off	Jessica Davies Full Leg IPL	RDD
9:15			Off		RDD
9:30			Off		RDD
9:45			Off		RDD
10:00 AM	Meeting		Off		RDD
10:15		Vanessa Anderson	Off	Derrick Barker	RDD
10:30			Off		RDD
10:45			Off		RDD
11:00 AM		Rebecca Love Cleansing Facial	Off	Patricia Lawson Airbrush 0444 111 404	RDD
11:15	Rachel Walters Body Scrub		Off		RDD
11:30		Quinta Davies	Off	Bianca Lopez Ladies Style Cut	RDD
11:45	Freya Lee Blowdry		Off		RDD
12:00 PM			Off	Joanna Fitzroy Full Leg Wax	RDD
12:15			Off		RDD
12:30			Off		RDD
12:45			Off		RDD
1:00 PM	Lunch	Off	Cameron Porter		RDD
1:15		Off	Cameron Porter		RDD
1:30		Off			RDD
1:45		Off			RDD
2:00 PM		Off		Lunch	RDD
2:15		Off			RDD
2:30		Off			RDD
2:45		Off			RDD
3:00 PM	Giselle Sims Full Head Highlights 0433 535 353	Off	Daniel Ross		RDD
3:15		Off			RDD
3:30		Off	Andrea Collins		RDD
3:45		Off		Rachael Clarke 30 min Massage	RDD
4:00 PM		Off			RDD
4:15	Giselle Sims	Off	Jason Garland 60 min Massage 0499 888 000	Yasmin Green 1/4 Head Highlights	RDD
4:30		Off			RDD
4:45		Off			RDD
5:00 PM	Eric Moore	Off			RDD
5:15		Off			RDD
5:30		Off			RDD
5:45		Off		Yasmin Green	RDD

Mon, 14 Mar 2016

< Week < Day Today Day > Week >

Menu

SHORTCUTS
9:07 AM
Mon, 14 Mar '16
Main
Appointments
Arrivals
Walkin Manager
Point Of Sale
Clients
Performance
Exit
Tools
Stock
Setup
Anna Owner
Log Off

4 Click on the **clients** icon to open the client list.

New Appointment

Client not yet selected

^ From	To	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Start	Finish
Today	Sun 12 Jun		✓	✓	✓	✓	✓	✓	Open	Close

^ Service	Tag	Employee	Resource

Starting Times	Min Employees	Min Duration

Search Waitlist Book Cancel

SHORTCUTS
9:07 AM
Mon, 14 Mar '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna Owner
Log Off

5 Select the relevant client.

6 Click **done**.

Select Client

Search For ... Delete

Sort By...
First Name

Show Me...
 Inactive

New Quick

CPC History

Card Merge

Done Cancel

Client Name	Phone	Details
Isabella Weeks	0411 666 989 (M)	Chris is the preferred employee Not a club member No Programs. 9 Visits (0 No Shows, 0 Cancellations) \$102.17 average spend \$0.00 outstanding on account
Isiah Wickham	0411 222 444 (M)	
Jackie Welsh	0488 222 111 (M)	
James King	0433 444 343 (M)	
Jamie Lee Beadman	0422 000 444 (M)	
Jason Garland	0499 888 000 (M)	
Jeff Cooper	0455 000 111 (M)	
Jenna Wilson	0404 222 444 (M)	
Jerry Clark	0411 888 454 (M)	
Jessica Davies	0455 777 111 (M)	
Jessie Walker	0455 666 565 (M)	
Joanna Fitzroy	0483 303 808 (M)	

Outstanding Client Series

No future appointments

Past Appointments

- 4 Mar 5:00 PM: Underarm IPL - Anna
- 4 Mar 4:15 PM: Full Leg IPL - Anna
- 29 Feb 11:00 AM: Full Head Highlights - Chris
- 18 Jan 4:30 PM: Botox - Lucy
- 13 Jan 11:45 AM: 60 min Massage - Anna
- 13 Jan 11:15 AM: Body Scrub - Chris
- 7 Jan 4:00 PM: Up Do - James

SHORTCUTS

9:08 AM
Mon, 14 Mar '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna
Owner
Log Off

- 7 Click on the cells in the 'from' and 'to' columns to specify the date range you would like to search for appointment times.
- 8 Tick the days of the week within the date range when the client is available.
- 9 Use the 'start' and 'finish' drop-down menus to select the time range you would like to search for appointment times.
- A You can click on the green plus sign to create another set of search criteria. This is helpful for clients who may have different available timeslots for different days.
- 10 Click **services** to open the service selection screen.

New Appointment

Isabella Weeks 0411 666 989 (M)

Clients

Services

^ From	To	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Start	Finish
Today	Today	N/A	✓	N/A	N/A	N/A	N/A	N/A	9:00 AM	11:00 AM

^ Service
Tag
Employee
Resource

SHORTCUTS

9:09 AM
Mon, 14 Mar '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna
Owner

Log Off

Starting Times

Min Employees

Min Duration

Search

Waitlist

Book

Cancel

- 11 Click on the relevant service category.
- 12 Click on the relevant service.
- 13 Repeat steps 11 and 12 as required.
- B The selected services section will display all the services you have selected.
- 14 Click **done**.

Service Selection

Categories

Isabella Weeks

Body Treatments
11

Facials

Hair Colouring

Hair Styling

Injectables

IPL

Ladies Cuts

Makeup

Mens Cuts

Spa Packages

Tanning

Available Services

Category	Name	Last Purchased
Body Treatments	30 min Massage	
Body Treatments	60 min Massage	13/01/2016
Body Treatments	Body Scrub	13/01/2016

Selected Services/Series

Category	Name	Series	Employee	Price
Body Treatments	60 min Massage			\$80.00

Services Selected 1
Total Price \$80.00
Total Duration 60 mins

Show Me
All Services
Services for Employee

SHORTCUTS

9:09 AM
Mon, 14 Mar '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna
Owner
Log Off

History

14

Done


X


Cancel

- 15** If the client has requested a specific employee, click on the relevant cell in the employee column to choose an employee. If not, go to step 17.
- C** You can allocate different service blocks to different employees.
- 16** Select the requested employee.
- 17** Click **waitlist** to add the client to the wait list.

New Appointment

Isabella Weeks 0411 666 989 (M)


 Clients


 Services





From	To	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Start	Finish
Today	Today	N/A	✓	N/A	N/A	N/A	N/A	N/A	9:00 AM	11:00 AM


Service	Tag	Employee	Resource
60 min Massage		C 15	N/A


Starting Times


Choose Employee


Employee selected will be Locked for ALL blocks of service: 60 min Message

Employee Alias	Employee Level	Status
[Clear Employee]		
 Anna	Director	Rostered On
 Chris	Senior Stylist	Rostered On
 Katie	Stylist	Not Rostered On
 Lucy	Senior Stylist	Rostered On

 Cancel

 **17**
 Waitlist









 Book


 Cancel

SHORTCUTS

9:10 AM
Mon, 14 Mar '16


Main


-  Appointments
-  Arrivals
-  Walkin Manager
-  Point Of Sale
-  Clients
-  Performance
-  Exit


Tools


Stock

Setup

 Anna Owner
 Log Off

 **17**
 Waitlist


 Book


 Cancel

SCHEDULING A WAITLISTED APPOINTMENT

A A notification will appear in the bottom left corner of the Appointment Book when a waitlisted appointment becomes bookable.

1 Click on the hourglass icon to open the wait list menu.

Mon, 14 Mar

Time	Anna	James	Lucy	Chris	Katie
9:00 AM		Amber Ashton Bridal Makeup 0422 111 888	Off	Jessica Davies Full Leg IPL	RDO
9:15			Off		RDO
9:30			Off		RDO
9:45			Off		RDO
10:00 AM			Off		RDO
10:15			Off		RDO
10:30		Vanessa Anderson	Off	Derrick Barker	RDO
10:45			Off		RDO
11:00 AM			Off	Patricia Lawson Airbrush 0444 111 404	RDO
11:15			Off		RDO
11:30	Rachel Walters Body Scrub	Rebecca Love Cleansing Facial	Off		RDO
11:45			Off		RDO
12:00 PM		Quinta Davies	Off	Bianca Lopez Ladies Style Cut	RDO
12:15	Freya Lee Blowdry		Off		RDO
12:30			Off	Joanna Fitzroy Full Leg Wax	RDO
12:45			Off		RDO
1:00 PM	Lunch	Off	Cameron Porter		RDO
1:15		Off			RDO
1:30		Off	Cameron Porter		RDO
1:45		Off			RDO
2:00 PM		Off		Lunch	RDO
2:15		Off			RDO
2:30		Off			RDO
2:45		Off	Daniel Ross		RDO
3:00 PM	Giselle Sims Full Head Highlights 0433 535 353	Off			RDO
3:15		Off			RDO
3:30		Off	Andrea Collins		RDO
3:45		Off		Rachael Clarke 30 min Massage	RDO
4:00 PM		Off			RDO
4:15	Giselle Sims	Off		Yasmin Green 1/4 Head Highlights	RDO
4:30		Off	Jason Garland 60 min Massage 0499 888 000		RDO
4:45		Off		Yasmin Green	RDO
5:00 PM		Off			RDO

Wait List Availabilities **A**

There are booking requests waiting on the time slot just released.

Mon, 14 Mar 2016

< Week < Day **Today** Day > Week >

Menu

SHORTCUTS
9:12 AM
Mon, 14 Mar '16
Main
Appointments
Arrivals
Walkin Manager
Point Of Sale
Clients
Performance
Exit
Tools
Stock
Setup
Anna Owner
Log Off

B

The wait list menu has two options:

The first option will display a list of clients waiting for a timeslot on the selected day.

All bookable requests will display a list of bookable clients.

2

Click on **all bookable requests**.

Mon, 14 Mar

Time	Anna	James	Lucy	Chris	Katie
9:00 AM		Amber Ashton Bridal Makeup 0422 111 888	Off	Jessica Davies Full Leg IPL	RDO
9:15			Off		RDO
9:30			Off		RDO
9:45			Off		RDO
10:00 AM			Off		RDO
10:15		Vanessa Anderson	Off	Derrick Barker	RDO
10:30			Off		RDO
10:45			Off		RDO
11:00 AM		Rebecca Love Cleansing Facial	Off	Patricia Lawson Airbrush 0444 111 404	RDO
11:15	Rachel Walters Body Scrub		Off		RDO
11:30			Off		RDO
11:45		Quinta Davies	Off	Bianca Lopez Ladies Style Cut	RDO
12:00 PM	Freya Lee Blowdry		Off		RDO
12:15			Off		RDO
12:30			Off		RDO
12:45			Off		RDO
1:00 PM	Lunch	Off	Cameron Porter		RDO
1:15		Off	Cameron Porter		RDO
1:30		Off			RDO
1:45		Off			RDO
2:00 PM		Off		Lunch	RDO
2:15		Off			RDO
2:30		Off			RDO
2:45		Off	Daniel Ross		RDO
3:00 PM	Giselle Sims Full Head Highlights 0433 535 353	Off			RDO
3:15		Off			RDO
3:30		Off	Andrea Collins		RDO
3:45		Off		Rachael Clarke 30 min Massage	RDO
					RDO
			Jason Garland 60 min Massage 0499 888 000		RDO
				Yasmin Green 1/4 Head Highlights	RDO
					RDO
				Yasmin Green	RDO

Wait List Menu

- All requests for Mon 14 Mar 2016
- All bookable requests

Mon, 14 Mar 2016

< Week < Day Today Day > Week >

Menu

SHORTCUTS
9:13 AM
Mon, 14 Mar '16

Main

- Appointments
- Arrivals
- Walkin Manager
- Point Of Sale
- Clients
- Performance
- Exit

Tools

Stock

Setup

Anna Owner
Log Off

3 Click to select the appointment you wish to schedule.

4 Click **schedule**.

Wait List

Criteria

All Clients Employee <All>

Show by date

Show history

Today < > Range

Client	Services	Date Time Criteria	Status	Booked
Weeks, Isabella	60 min Massage	Mon (9:00 AM-11:00 AM)	Bookable	

Selected Client Weeks, Isabella 0411 666 989 (M)

Search

Details Schedule Card Done

SHORTCUTS 9:13 AM Mon, 14 Mar '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna Owner Log Off

- C** A list of suitable dates and timeslots will be displayed.
- 5** Click on a time range to view the available timeslots within the range.
- 6** Click on the desired appointment time.

Appointment Change for WaitList

Isabella Weeks 0411 666 989 (M)

Clients

Services

From	To	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Start	Finish
Today	Today	N/A	✓	N/A	N/A	N/A	N/A	N/A	9:00 AM	11:00 AM

Service	Tag	Employee	Resource
60 min Massage			

Prefer Minimum Duration ▼

Starting Times	Min Employees	Min Duration
Today		
9:15 AM - 9:45 AM		
• 9:15 AM	1	60 mins
• 9:30 AM	1	60 mins
• 9:45 AM	1	60 mins
10:00 AM - 10:00 AM		

Future Dates

Today

Restart

Waitlist

Book

Cancel

SHORTCUTS

9:14 AM
Mon, 14 Mar '16

Main

-
-
-
-
-
-
-

Tools

Stock

Setup

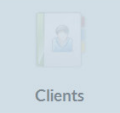
Anna
Owner
Log Off

7

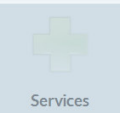
Click **book**. The appointment will then be added to the Appointment Book.

Appointment Change for WaitList

Isabella Weeks 0411 666 989 (M)




Clients







Services

From	To	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Start	Finish
Today	Today	N/A	✓	N/A	N/A	N/A	N/A	N/A	9:00 AM	11:00 AM

Service	Tag	Employee	Resource	Time	Duration
60 min Massage					
60 min Massage		 Anna	N/A	9:15 AM	60 mins

✓ Today9:15 AM - 10:15 AMDuration: 60 mins








Starting Times	Min Employees	Min Duration
Today		
9:15 AM - 9:45 AM		
10:00 AM - 10:00 AM		

 Restart
 Waitlist
 Book
 Cancel

SHORTCUTS

9:14 AM
Mon, 14 Mar '16


Main

-  Appointments
-  Arrivals
-  Walkin Manager
-  Point Of Sale
-  Clients
-  Performance
-  Exit

Tools

Stock

Setup

 Anna Owner
Log Off



SHORTCUTS™

SMARTER BUSINESS TECHNOLOGY

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

www.shortcuts.net

HAIR | BEAUTY | CLINIC | SPA | BARBER | WALKIN | SCHOOL | MULTI-SITE