

MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

CLINIC

GIFT CARDS

SELLING AND REDEEMING GIFT CARDS

HOME & MOBILE

BEAUTY



it suits you

Last updated 2 November 2016

By Erin Lewis

Product: Gift Cards

Software version no: 8.0.18.1

Document version no: 1.1

Country: Australia

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ABOUT THIS DOCUMENT

Gift cards are the perfect way to grow your client base as well as being a great branding tool to help you increase revenue from sales. This feature is fully integrated with Shortcuts to save you time when processing transactions at the Point of Sale. Gift cards also help to increase client loyalty, by motivating clients to return to the business and redeem their gift card. If you have more than one site, your clients are free to choose any location to redeem their gift card at their convenience.

SELLING A GIFT CARD

- 1 Click on the **main** menu.
- 2 Click on the **Point of Sale** icon.
- 3 Click on the **clients** icon.

#Walkin

Not a member of a club or program.

Remove Client

Trans# 1

Employee	Product/Service	Qty.	Price	Disc.	GST	Total

\$0.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00

Discount	0.00
TIP	0.00
Sales Total	0.00
GST	0.00
Redemptions	0.00
Amount Owing	0.00
Payment Received	0.00
Change	0.00

Card	Quote
History	No Sale

SHORTCUTS

11:26 AM
Fri, 11 Mar '16

Main **1**

Appointments

Arrivals

Walkin Manager

Point Of Sale **2**

Clients

Performance

Exit

Tools

Stock

Setup

Anna Owner
Log Off

4 Select the relevant client.

5 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
Greg Nelson	0488 884 448 (M)	4 No preferred employee Not a club member No Programs. 1 Visits (0 No Shows, 0 Cancellations) \$40.00 average spend \$0.00 outstanding on account
Hannah Andrews	0400 111 000 (M)	
Harriet Sparks	0455 222 101 (M)	
Hayley Sanchez	0499 339 993 (M)	
Ingrid Foley	0488 444 848 (M)	
Isabella Weeks	0411 666 989 (M)	
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)	

Outstanding Client Series

No future appointments

Past Appointments

- 26 Feb 3:30 PM: Beard Trim - Anna
- 26 Feb 3:15 PM: Mens Style Cut - Anna
- 16 Feb 11:45 AM: Cut Throat Shave - Katie
- 16 Feb 11:30 AM: Mens Style Cut - Katie
- 19 Jan 2:15 PM: Cleansing Facial - James

SHORTCUTS

11:27 AM
Fri, 11 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 **gift card**.

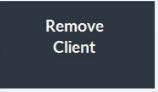


Clients




Greg Nelson

Not a member of a club or program.



Remove Client












Trans# 1


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

Choose Employee

Filter: <All>

Search:

Employee Alias	Employee Level	Status
 Anna 7	Director	Rostered On
 Business	Default	Not 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





Gift Card 8


SHORTCUTS


11:27 AM
Fri, 11 Mar '16


Main


 Appointments


 Arrivals

 Walkin Manager

 Point Of Sale

 Clients


 Performance

 Exit


Tools


Stock

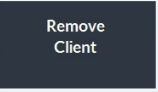
Setup


 Anna Owner
Log Off


- 11** If you need to change the price of the gift card, click on the relevant cell in the price column.
- 12** Enter the price of the gift card.
- 13** Click **done**.
- 14** Select the relevant payment type.
- 15** Enter the value that is being processed using this payment type.
- 16** Click **done**.



Clients



 Greg Nelson
Not a member of a club or program.



Remove Client



Trans# 1

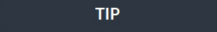
Employee	Product/Service	Qty.	Price	Disc.	GST	Total
 Chris	Sundry Income Gift Card	1	11	0.00	9.09	100.00

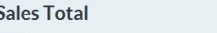

\$0.00



\$0.00



\$0.00


Discount
0.00


TIP
0.00


Sales Total
100.00



Card



Quote

Enter Amount

100.00 **12**

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



Done
13



Cancel


Enter Amount for Cash


100.00 **15**


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



Done
16



Cancel



History


No Sale



Tools



Stock


Setup

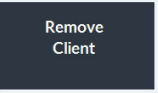

Anna
Owner
Log Off


- 17 Click **end sale**.
- 18 Scan the gift card.
- 19 Once the gift card number has been validated, click **activate**.



Clients





Not a member of a club or program.



Remove Client



Trans# 1


Employee	Product/Service	Qty.	Price	Disc.	GST	Total
 Chris	Sundry Income Gift Card	1	100.00	0.00	9.09	100.00



\$100.00


\$0.00


\$0.00


\$0.00



\$0.00



\$0.00


Discount

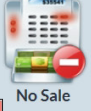
TIP




Sales Total 100.00
 GST 9.09
 Redemptions 0.00
Amount Owing 100.00
 Payment Received 100.00
Change 0.00


Card









End Sale 17


History


No Sale

 SHORTCUTS
 11:31 AM
 Fri, 11 Mar '16


Main

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

Tools


Stock


Setup

 Anna
Owner
 Log Off

New Gift Card Number(s) for Activation

No.	Number	Amount	Status
1	6299740000149211354	\$100.00	Validated



Manual


Activate 19



Cancel

REDEEMING A GIFT CARD

- 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 card**.
- 3 Scan the gift card.
- 4 Enter the amount to be redeemed from the gift card.
- 5 Click **done**.

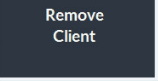


Clients




Ebony Phillips





Not a member of a club or program.





Remove Client





Trans# 2


Employee	Product/Service	Qty.	Price	Disc.	GST	Total
 Anna	 Ladies Style Cut	1	55.00	0.00	5.00	55.00
 Anna	 Blowdry	1	50.00	0.00	4.55	50.00



\$0.00


\$0.00


\$0.00


\$0.00


\$0.00


\$0.00

Discount 0.00

TIP 0.00

Sales Total 105.00


GST 0.55


Redemptions

Amount Owing


Payment Received

Outstanding


Card


Quote

Other Payment Type

<p>Gift Certificate</p> <p>Series Redemption</p> <p>Gift Card 2</p>	 Cancel
--	---


Amount for Gift Card (Max \$100.00)

100.00


4

C

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


5

Done



Cancel

Tools

Stock

Setup



Anna
Owner

Log Off

SHORTCUTS

11:56 AM

Fri, 11 Mar '16

Main

Appointments

Arrivals

Walkin Manager


Point Of Sale


Clients

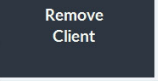
Performance


Exit





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



Clients



 Ebony Phillips
 Not a member of a club or program.



Remove Client

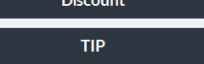

Trans# 2

Employee	Product/Service	Qty.	Price	Disc.	GST	Total
 Anna	 Ladies Style Cut	1	55.00	0.00	5.00	55.00
 Anna	 Blowdry	1	50.00	0.00	4.55	50.00



\$0.00



\$0.00



\$0.00



TIP


Discount 0.00
 TIP 0.00
Sales Total 105.00
 GST 9.55
 Redemptions 0.00
Amount Owing 105.00



Card



End Sale


\$0.00


\$100.00




\$0.00



DEC 11 2015



No Sale


Enter Gift Card Payment(s)








Outstanding: \$5.00

Number	Balance	Amount	Status
 6299740000149211354	\$100.00	\$100.00	Validated
	...	\$5.00	Incomplete



Done



Cancel

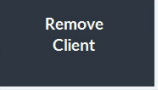
 SHORTCUTS
 11:59 AM
 Fri, 11 Mar '16


- Main
-  Appointments
-  Arrivals
-  Walkin Manager
- Point Of Sale
-  Clients
-  Performance
-  Exit
- Tools
- Stock
- Setup
-  Anna
 Owner
 Log Off





- 8 Click **end sale** to complete the transaction.
- 9 Click **redeem** to finalise the gift card payment.



Clients



 Ebony Phillips
 Not a member of a club or program.



Remove Client



Trans# 2


Employee	Product/Service	Qty.	Price	Disc.	GST	Total
 Anna	 Ladies Style Cut	1	55.00	0.00	5.00	55.00
 Anna	 Blowdry	1	50.00	0.00	4.55	50.00



\$5.00


\$0.00


\$0.00


\$0.00



\$100.00



\$0.00


Discount


TIP

Sales Total 105.00
 GST 9.55
 Redemptions 0.00
Amount Owing 105.00
 Payment Received 105.00
Change 0.00


Card


End Sale 8









History


No Sale

SHORTCUTS

12:00 PM
Fri, 11 Mar '16


Main

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

Tools

Stock

Setup

 Anna Owner
Log Off

Redeem Gift Card Payment(s)

Outstanding: \$0.00

Number	Balance	Amount	Status	Offline
 6299740000149211354	\$100.00	\$100.00	Validated	<input type="checkbox"/>


Redeem 9


Cancel

RELOADING A GIFT CARD

- 1 Click on the **main** menu.
- 2 Click on the **Point of Sale** icon.
- 3 Click on the **clients** icon.

#Walkin

Not a member of a club or program.

Remove Client

Trans# 1

Employee	Product/Service	Qty.	Price	Disc.	GST	Total

\$0.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00

Discount 0.00

TIP 0.00

Sales Total 0.00

GST 0.00

Redemptions 0.00

Amount Owing 0.00

Payment Received 0.00

Change 0.00

Card	Quote
History	No Sale

SHORTCUTS

11:26 AM
Fri, 11 Mar '16

1 Main

Appointments

Arrivals

Walkin Manager

2 Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna Owner
Log Off

- 4 Select the relevant client.
- 5 Click **done**.

Select Client

Search For ...

Delete

Sort By...
 First Name

Greg Nelson 0488 884 448 (M)	<div style="text-align: right; font-size: 24px; font-weight: bold; color: #007bff;">4</div> No preferred employee Not a club member No Programs. 1 Visits (0 No Shows, 0 Cancellations) \$40.00 average spend \$0.00 outstanding on account
Hannah Andrews 0400 111 000 (M)	
Harriet Sparks 0455 222 101 (M)	
Hayley Sanchez 0499 339 993 (M)	Outstanding Client Series
Ingrid Foley 0488 444 848 (M)	
Isabella Weeks 0411 666 989 (M)	No future appointments
Isiah Wickham 0411 222 444 (M)	
Jackie Welsh 0488 222 111 (M)	
James King 0433 444 343 (M)	Past Appointments 26 Feb 3:30 PM: Beard Trim - Anna 26 Feb 3:15 PM: Mens Style Cut - Anna 16 Feb 11:45 AM: Cut Throat Shave - Katie 16 Feb 11:30 AM: Mens Style Cut - Katie 19 Jan 2:15 PM: Cleansing Facial - James
Jamie Lee Beadman 0422 000 444 (M)	
Jason Garland 0499 888 000 (M)	
Jeff Cooper 0455 000 111 (M)	

Show Me...

Inactive

New

Quick

CPC

History

Card

Merge

Done

Cancel

SHORTCUTS

11:27 AM
 Fri, 11 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 **gift card**.

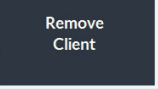


Clients




Greg Nelson

Not a member of a club or program.



Remove Client












Trans# 1


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

Choose Employee

Filter: <All>

Search:

Employee Alias	Employee Level	Status
 Anna 7	Director	Rostered On
 Business	Default	Not 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










Gift Card 8

SHORTCUTS

11:27 AM
Fri, 11 Mar '16


Main

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


Tools


Stock

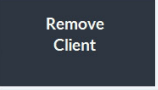
Setup


 Anna Owner
Log Off


- 11** Click on the relevant cell in the price column.
- 12** Enter the amount to be reloaded onto the gift card.
- 13** Click **done**.
- 14** Select the relevant payment type.
- 15** Enter the value that is being processed using this payment type.
- 16** Click **done**.



Clients



 Greg Nelson
Not a member of a club or program.



Remove Client



Trans# 4

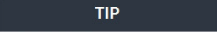
Employee	Product/Service	Qty.	Price	Disc.	GST	Total
 Chris	Sundry Income Gift Card Reload	1	11	0.00	9.09	100.00



\$0.00



\$0.00



\$0.00


Discount
0.00


TIP
0.00


Sales Total
100.00



Card



Quote

Enter Amount

100.00 **12**

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



Done



Cancel


Enter Amount for Cash


100.00 **15**


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



Done



Cancel



History



No Sale



Tools



Stock



Setup



Exit



Appointments



Arrivals



Walkin Manager



Point Of Sale



Clients


Performance



SHORTCUTS



12:22 PM
Fri, 11 Mar '16


Main

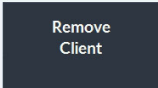

Anna Owner
Log Off


- 17** Click **end sale**.
- 18** Scan the gift card.
- A** The new gift card balance will be displayed.
- 19** Click **adjust** to finalise the reload.



Clients









Greg Nelson
Not a member of a club or program.




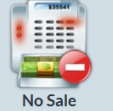

Remove Client


Trans# 4

Employee	Product/Service	Qty.	Price	Disc.	GST	Total
 Chris	Sundry Income Gift Card Reload	1	100.00	0.00	9.09	100.00








 \$100.00	 \$0.00	 \$0.00
 \$0.00	 \$0.00	 \$0.00

Discount	0.00
TIP	0.00
Sales Total	100.00
GST	9.09
Redemptions	0.00
Amount Owing	100.00
Payment Received	100.00
Change	0.00

 Card	 17 End Sale
 History	 No Sale

SHORTCUTS
 12:23 PM
 Fri, 11 Mar '16


Main

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

Tools

Stock

Setup

 Anna Owner
Log Off

Gift Card Adjustment				
No.	Number	Balance	New Balance	Status
1	6299740000149211296	\$40.00	\$140.00	Validated


Manual


19
Adjust


Cancel



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