

MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

CLINIC

SHORTCUTS FUSION

CLIENTS

ENTERING DETAILS IN A
CLIENT CARD

HOME &
MOBILE

BEAUTY


SHORTCUTS
SMARTER BUSINESS TECHNOLOGY
it suits you

Last updated 17 March 2017

By Erin Lewis

Product: Shortcuts Fusion

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Country: Australia

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ABOUT THIS DOCUMENT

Recording each client's contact details is extremely important for marketing purposes. The more client data you record, the more accurately you'll be able to target your marketing campaigns.

The Shortcuts client card allows you to record not only your clients' contact details, but everything from their preferred employee, to who referred them to the business. Access to these details will enable you to send personalised email and SMS campaigns that will resonate with your audience.

ENTERING DETAILS IN A CLIENT CARD

- 1

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

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

You can search for a client's name here.
- 3

Select the relevant client.
- 4

Click on the **card** button.

Select Client

Search For ...

A

Delete

Sort By...

First Name

Show Me...

☐ Inactive

New

Quick

CPC

History

Card

Merge

Assistant

Appt Book

Joanna Fitzroy
0483 303 808 (M)

3

No preferred employee
Not a club member | No Programs.
1 Visits (0 No Shows, 0 Cancellations)
\$50.00 average spend
\$0.00 outstanding on account

Joe Hanson
0477 333 222 (M)

Joshua Baker
0455 222 555 (M)

Joshua Bates
0499 111 999 (M)

Josie Harris
0477 666 776 (M)

Judy Harrington
0444 666 212 (M)

Kathy Reed
0488 333 440 (M)

Katie Morrison
0404 333 444 (M)

Kayla Jones
0400 444 999 (M)

Keira Price
0444 848 448 (M)

Kelly Matthews
0488 515 151 (M)

Kelly Roberts
0455 545 444 (M)

Outstanding Client Series

No future appointments

Past Appointments

10 Mar 11:30 AM: Ladies Style Cut - Katie

SHORTCUTS

2:40 PM
Fri, 11 Mar '16

Main

1

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

2

Performance

Exit

Tools

Stock

Setup

Anna
Owner
Log Off

- B** The client section is used to enter the client's title, first name and last name.
- C** The contact details section is used to enter the client's phone numbers, fax and email.
- D** The address section is used to enter the client's home and work address.
- E** The message section is used to enter any further information.
- F** The refreshment section is used to enter the client's preferred refreshment.
- 5** Enter the client's details into the appropriate fields.
- 6** If you need to enter an alert message about the client (e.g. if they have an allergy), click the **alert** button and enter the message. The alert message will then be shown on the client dashboard.
- 7** Click on the **info** button to open the extra client information window.

The screenshot displays a client management interface with the following sections and callouts:

- Client Section (B):** Includes fields for Title, First Name (Joanna, with callout 5), and Last Name (Fitzroy).
- Contact Details Section (C):** Includes fields for Home Phone, Mobile (0483 303 808), Work Phone, Fax, and Email (joanna.fitzroy5@email.com).
- Home Address Section (D):** Includes fields for Number / Street (123 Peach Street), Suburb (Fortitude Valley), State (QLD), and PCode (4006).
- Work Address Section:** Similar fields to the Home Address section.
- Message Section (E):** A large text area for additional information.
- Refreshment Section (F):** A dropdown menu currently showing "white tea with 1 sugar".
- Extra Details:** A list of checkboxes including Inactive, Card Complete, Do not accept a Cheque, Buy Professional Products, Record Credit Card Details (checked), and Tax Exempt.
- Barcode:** A field showing "0006K".
- Bottom Action Bar:** Contains buttons for Delete, Alert (with callout 6), Custom, Info (with callout 7), CPC, History, Attach, Member, Save, and Done.
- Right Sidebar:** Includes a SHORTCUTS section with icons for Appointments, Arrivals, Walkin Manager, Point Of Sale, Clients, Performance, and Exit. Below this are sections for Tools, Stock, Setup, and a user profile for Anna Owner with a Log Off button.

G	The client's occupation.
H	The club the client belongs to and their club ID.
I	The client's preferred employee. If this is set to <none - auto>, the preferred employee will default to the employee who has assisted the client the most regularly.
J	The client's referral method.
K	The date of the client's first visit.
L	The client's marital status.
M	The client's gender.
N	The address that will receive marketing materials.

Occupation

<none>

G

Club

<none>

H

Club ID

Pref. Employee

<none - auto>

I

Referred

Search Engine

J

First Visit

10/03/2016

K

Marital Status

Single

Partner

L

Gender

Male

Female

M

Marketing

Marketing

Last

Prev.

Opt.

Home address

N

☒ Accept Marketing

Contact Method(s)

SMS

Customise

Age / Birthday

Day

20

Month

January

Year

1987

Age Group

25 to 34

Current Age:

29

Last Updated

11/03/2016

Done

Help

O

You can uncheck the 'accept marketing' box if the client does not wish to receive electronic marketing.

P

The customise button can be used to change the client's preferred method of receiving appointment confirmations.

Q

The client's birthday and age.

8

Input the client's details into the appropriate sections.

9

Click **done** when you are finished using the extra client information window.

Extra Client Information

Occupation

<none>

Club

<none>

Club ID

Pref. Employee

<none - auto>

Referred

Search Engine

First Visit

10/03/2016

Marital Status

☐ Single ☐ Partner

Gender

☐ Male ☒ Female

Marketing

Last

Prev.

Opt.

Marketing

Home address

☒ Accept Marketing

Contact Method(s)



SMS



Customise

Age / Birthday

Day

20

Month

January

Year

1987

Age Group

25 to 34

Current Age:

29

Last Updated

11/03/2016



Done




Help

10

Once you have filled in all the details you wish to store in the client card, tick the 'card complete' box in the bottom right corner.

R

On the appointment book, any clients who have an incomplete card will have a blue information icon  on their appointment. Once you have completed a client card, the icon will disappear.

11

Click **save** to save your changes.

Client

Title

First Name

Joanna

Last Name

Fitzroy

Contact Details

Home Phone

Mobile

0483 303 808

Work Phone

Fax

Email

joanna.fitzroy5@email.com

Message

Home Address

Number / Street

123 Peach Street

Suburb

State

PCode

Fortitude Valley

QLD

4006

Work Address

Number / Street

Suburb

State

PCode

Refreshment

white tea with 1 sugar

Barcode

0006K

Extra Details

☐ Inactive
 ☐ Card Complete
 ☐ Do not accept a Cheque
 ☐ Buy Professional Products
 ☒ Record Credit Card Details
 ☐ Tax Exempt

Delete

Alert

Custom

Info

CPC

History

Attach

Member

11

Save

Done

SHORTCUTS

3:03 PM

Fri, 11 Mar '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna Owner

Log Off

ASSOCIATING CLIENT REFERRALS

If a client was referred to the business by another client, you can specify which client referred them in the client card.

- 1 Click on the **main** menu.
- 2 Click on the **clients** icon.
- 3 Select the relevant client.
- 4 Click on the **card** button.

Select Client

Search For ... Delete

Sort By...
First Name

Show Me...
☐ Inactive

New **Quick**

CPC **History**

Card **Merge**

Assistant **Appt Book**

Joanna Fitzroy
0483 303 808 (M)

Joe Hanson
0477 333 222 (M)

Joshua Baker
0455 222 555 (M)

Joshua Bates
0499 111 999 (M)

Josie Harris
0477 666 776 (M)

Judy Harrington
0444 666 212 (M)

Kathy Reed
0488 333 440 (M)

Katie Morrison
0404 333 444 (M)

Kayla Jones
0400 444 999 (M)

Keira Price
0444 848 448 (M)

Kelly Matthews
0488 515 151 (M)

Kelly Roberts
0455 545 444 (M)

No preferred employee
Not a club member | No Programs.
1 Visits (0 No Shows, 0 Cancellations)
\$50.00 average spend
\$0.00 outstanding on account

Outstanding Client Series

No future appointments

Past Appointments
10 Mar 11:30 AM: Ladies Style Cut - Katie

SHORTCUTS
2:40 PM
Fri, 11 Mar '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna Owner
Log Off

5

Click on the **info** button at the bottom of the screen to open the extra client information window.

6

Click on the referred drop-down menu and select **<another client>**.

Client

Title

First Name

Joanna

Last Name

Fitzroy

Contact Details

Home Phone

Mobile

0483 303 808

Work Phone

Fax

Email

joanna.fitzroy5@email.com

Message

Refreshment

white tea with 1 sugar

Extra Details

☐ Inactive
☐ Card Complete
☐ Do not accept a Cheque
☐ Buy Professional Products
☒ Record Credit Card Details

Barcode

Delete

Alert

Custom

Info

CPC

History

Home Address

Number / Street

123 Peach Street

Suburb

State

PCode

Fortitude Valley

QLD

4006

Work Address

Number / Street

Suburb

State

PCode

Extra Client Information

Occupation

<none>

Club

<none>

Club ID

Pref. Employee

<none - auto>

Referred

<Another Client>

First Visit

10/03/2016

Marital Status

☐ Single
 ☐ Partner

Gender

☐ Male
 ☒ Female

Marketing

Last

Prev.

Opt.

Home address

☒ Accept Marketing

Contact Method(s)

☒ SMS
 ☐ Customise

Age / Birthday

Day

Month

20

January

Year

1987

Age Group

25 to 34

Current Age

29

Last Updated

11/03/2016

Done

Help

7

Select the client who referred this client.

8

Click **done**.

Select Client

Search For ...

Delete

Sort By...

First Name

Show Me...

☐ Inactive



New



Quick



CPC



History



Card



Merge



Done



Cancel

Kelly Matthews
0488 515 151 (M)

7

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)

Lily Carter
0477 666 888 (M)

Lisa Summers
0444 000 440 (M)

Louise Simons
0411 777 111 (M)

Luke Woods
0433 222 999 (M)

Macy Brown
0499 229 992 (M)

Mandy Jones
0499 444 949 (M)

No preferred employee
Not a club member | No Programs.
7 Visits (0 No Shows, 0 Cancellations)
\$67.86 average spend
\$0.00 outstanding on account

Outstanding Client Series

No future appointments

Past Appointments

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

SHORTCUTS

4:40 PM
Fri, 11 Mar '16

Main



Appointments



Arrivals



Walkin Manager



Point Of Sale



Clients



Performance



Exit

Tools

Stock

Setup

Anna
Owner
Log Off

A

The associated client will now be displayed in the referred section.

9

Click **done** to close the extra client information window.

10

Click **save**.

Client

Title

First Name

Joanna

Last Name

Fitzroy

Contact Details

Home Phone

Mobile

0483 303 808

Work Phone

Fax

Email

joanna.fitzroy5@email.com

Message

Home Address

Number / Street

123 Peach Street

Suburb

State

PCode

Fortitude Valley

QLD

4006

Work Address

Number / Street

Suburb

State

PCode

Refreshment

white tea with 1 sugar

Extra Details

☐ Inactive
☐ Card Complete
☐ Do not accept a Cheque
☐ Buy Professional Products
☒ Record Credit Card Details
☐ Tax Exempt

0006K

Attach

Member

10

Save

✓

Done

Extra Client Information

Occupation

<none>

Club

<none>

Club ID

Pref. Employee

<none - auto>

Referred

Kelly Matthews

First Visit

10/03/2016

Marital Status

☐ Single
 ☐ Partner

Gender

☐ Male
 ☒ Female

Marketing

Last

Prev.

Opt.

Home address

☒ Accept Marketing

Contact Method(s)

☒ SMS
 ☐ Customise

Age / Birthday

Day

Month

20

January

Year

1987

Age Group

25 to 34

Current Age:

29

Last Updated

11/03/2016

9

Done

Help

SHORTCUTS

3:03 PM

Fri, 11 Mar '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna Owner

Log Off



it suits you

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