



SHORTCUTS™

SMARTER BUSINESS TECHNOLOGY

it suits you



Quick Reception Guide



Shortcuts Checklist

DAILY TASKS

	TASK	COMPLETED
START OF DAY	Count and confirm the float balance	<input type="checkbox"/>
	Ensure each team member clocked on or started at the rostered time	<input type="checkbox"/>
	Distribute client profile card (CPC) folders to team members	<input type="checkbox"/>
	Confirm today's Appointment Book has been printed and displayed	<input type="checkbox"/>
	Review any online bookings that have come in overnight	<input type="checkbox"/>
	Check the confirmation status screen to review any notes left by clients	<input type="checkbox"/>
PRE-END OF DAY	Enter all visit notes into Shortcuts and throw away hard copies	<input type="checkbox"/>
	Print out the Appointment Book for tomorrow and display in the staff area	<input type="checkbox"/>
	Print out CPCs for tomorrow's clients	<input type="checkbox"/>
	Check the confirmation status screen and manually contact clients who have not already received a confirmation message	<input type="checkbox"/>
	Check that all client have been checked out or marked as no show	<input type="checkbox"/>
	Check that any petty cash taken has been returned	<input type="checkbox"/>

END OF DAY	Run the End of Day Wizard	<input type="checkbox"/>
	Confirm each team member clocked off or left at the rostered time	<input type="checkbox"/>
	Back up Shortcuts to a removable drive and leave the computer on to ensure online bookings can be received overnight	<input type="checkbox"/>
	Secure the float	<input type="checkbox"/>

WEEKLY TASKS

TASK	COMPLETED
Check the 'Visit Note Reminder' report to ensure all visit notes have been entered for the week	<input type="checkbox"/>
Check out any products from the professional stock bin	<input type="checkbox"/>
Review and respond to your clients' feedback in Ratings and Reviews	<input type="checkbox"/>
Review your weekly specials and add them into the Console	<input type="checkbox"/>
Run the following reports: Trading Summary, Employee Performance Summary, Employee Hours, and Hours by Roster Type	<input type="checkbox"/>
Run client merge	<input type="checkbox"/>
Exit Shortcuts and select Run Now to complete system maintenance	<input type="checkbox"/>
Restart your computer to ensure optimal performance	<input type="checkbox"/>

MONTHLY TASKS

TASK	COMPLETED
Run the following reports: Trading Summary, Employee Performance Summary, Top Selling Products, Top Selling Services, Value of Future Appointments, Rebooking Breakdown, and Discount Reason Breakdown	<input type="checkbox"/>
Review your business performance results in Business Benchmarking	<input type="checkbox"/>
Check your Return on Investment (ROI) for your Shortcuts Marketing campaigns in the 'Dashboard' of your Cloud Appointment Book (pos.shortcutssoftware.com)	<input type="checkbox"/>



New Employee Checklist

This checklist details the various tasks you will need to perform when adding a new employee to Shortcuts. Once you have completed a task, place a tick in the 'Done' column. For more information on any of these tasks, refer to your Shortcuts User Guide.

ADDING THE NEW EMPLOYEE SETUP (NAVIGATION BAR) > EMPLOYEE ICON

DONE



1. Click the New button
2. Enter employee's name
3. Enter employee's personal details
4. Enter employee's contact details
5. Enter employee's address
6. Enter employee's pay details
7. Enter the employee's alias (if applicable)
8. Click the Save button

ASSIGNING AN APPOINTMENT BOOK POSITION TO THE EMPLOYEE SETUP (NAVIGATION BAR) > EMPLOYEE ICON

DONE



1. Click to select the new employee from the Alias drop down list
2. Select the desired Appointment Book position from the Position drop down list. If you do not want the employee to appear in the Appointment Book, select the <None> option.
3. Click the Save button

ASSIGNING THE EMPLOYEE TO AN EMPLOYEE LEVEL SETUP (NAVIGATION BAR) > EMPLOYEE ICON

DONE



1. Click to select the new employee from the Alias drop down list
2. Select the appropriate employee level from the Level drop down list
3. Click the Save button

ASSIGNING CAPABILITIES TO THE EMPLOYEE
SETUP (NAVIGATION BAR) > EMPLOYEE ICON

DONE



1. Click to select the new employee from the Alias drop down list
2. Click the Capabilities button
3. Click to select the relevant capability from the Capabilities list. You may choose as many capability levels as required
4. Click the Add button
5. Click the Done button

SETTING UP THE EMPLOYEE'S ROSTER
SETUP (NAVIGATION BAR) > TOOLS MENU > ROSTER ICON

DONE



1. Click to select the first day of the employee's standard roster period under the employee's column
2. Select the relevant Shift Type from the Shift Type drop down list
3. Setup the employee's starting hour and minutes in the Work Times section
4. Setup the employee's finishing hour and minutes in the Work Times section
5. Repeat Steps 1 – 4 for each day of the employee's standard roster period

ASSIGNING THE EMPLOYEE TO A SECURITY LEVEL
SETUP (NAVIGATION BAR) > CONFIGURATION ICON
GENERAL SETUP (CONFIGURATION BAR) > SECURITY ICON

DONE



1. Click the Levels Tab. The new employee will be in the Unassigned security level
2. Use the drag bar to select the employee
3. Drag and drop the employee into the appropriate security level

EMPLOYEE CHOOSES A PIN
SETUP (NAVIGATION BAR) > EMPLOYEE ICON

DONE



1. Click to select the new employee from the Alias drop down list
2. Click the PIN button
3. If security is turned on, you may need to enter the owner/manager's PIN into the PIN Protected window and click Done. If not, skip to Step 4
4. Enter the new employee's PIN into the Change PIN window and click Done
5. Confirm the new employee's PIN by clicking Done, entering the PIN again, and clicking Done



Quick Reference Guide Management

1. In the Point of Sale, click No Sale.
2. Click Take Petty Cash and enter the amount you are removing, then click Done.

RETURNING CASH EXPENSES

1. In the Point of Sale, click No Sale.
2. Click Return Petty Cash.
3. Click to select the relevant cash out(s) to be settled in the drag bar and click Done.
4. Click to select the first cash expense from the list then click Add.
5. Enter the amount spent for the cash expense and click Done.
6. Repeat steps 4 to 5 until all cash expenses and their prices have been entered
7. Click Done.
8. Click End Sale, then click Done.
9. Attach all shopping dockets to the Shortcuts receipt, then place all change and the dockets/receipts into the cash register.

PRE-CLOSING PROCEDURE

PRINT APPOINTMENT PAGE, EMPLOYEE SCHEDULES AND CPCS

PRINTING APPOINTMENT PAGE & SCHEDULES

10. In the Appointment Book, use the Page Navigators to view tomorrow's appointments.
11. Double-click on any employee's picture.
12. Click the Day's Appointment Page + Employee Schedules button.

PRINTING CPCS

1. Change the paper in your printer to A5.
2. In the Select Client screen, select the #BUSINESS client.
3. Click CPC, then click the All Next Trading Days Clients button.

RECTIFYING HUMAN ERRORS

CHANGING AN EMPLOYEE FOR A TRANSACTION

1. In the Point of Sale, click the Transaction button.
2. Double-click on the relevant transaction, then double-click on the relevant service.
3. Click to highlight the sales item with the incorrect employee.
4. Click Employee and click to select the correct employee.

CHANGING PAYMENT TYPE FOR A TRANSACTION

1. In the Point of Sale, click the Transaction button.
2. Select the transaction with the incorrect payment type and click Payment.
3. Click to select the payment type you want to change.
4. Click Clear, then click Done.
5. Click to select the correct payment type, then click Done.

CLOSING PROCEDURE

RUN SHORTCUTS END OF DAY WIZARD

6. In the Point of Sale, click the Transaction button, then click End of Day.
7. Leave your regular float in the cash register and record the denominations in the Shortcuts float book.
8. Click Next and enter the appropriate values for each payment type, excluding the float.
9. Click Next, then click Yes.
10. If there are no discrepancies, click Next. If there are discrepancies, click Previous and review your manual counts. If you cannot get the till to balance, print the Transaction Breakdown Report to help find the variance. If there are still unresolved discrepancies, enter a comment before clicking Next.
11. Click Yes.
12. Tick to select the Session Balance Details and Trading Summary, then click Print.
13. Click Finish.

BACKING UP

1. Click Backup in the Main Menu.
2. When prompted, ensure that the USB key or disk is in the backup drive, then click Backup.
3. Once the Backup has finished, click Done and remove the backup device from the computer.
4. Store the backup device in a safe location.



Quick Reference Guide Team

OPENING PROCEDURE CONFIRMING TOMORROWS' APPOINTMENTS

1. Click to view tomorrow's page in the Appointment Book.
2. Click Menu and select Confirmation Status.
3. For clients with SMS, click Contact and send all SMS confirmation requests. Check for replies throughout the day.
4. For all other clients, click Ph List and use the printed list of phone number(s) to call and confirm their appointments.
5. If an appointment is confirmed or cancelled, click and hold on the relevant appointment, select Change Status and select the appropriate option.
6. If a client cannot be contacted, click on the relevant Notes field and use either No Answer or Left Msg to record the reason why.
7. Click Done.

CLIENT RECORDS CLIENT INFORMATION CARD (CIC)

A CIC is to be completed by all new clients, and their information entered into Shortcuts.

CLIENT PROFILE CARD (CPC)

A CPC contains a client's contact details, the day's appointment details, previous appointment details, previous visit notes, and previous product

purchases. It is passed between employees when performing services for the client.

UPDATING A CLIENT CARD

8. Search for and select the client from the Select Client screen, then click Card.
9. Fill in any necessary details in the appropriate fields.
10. Click Info and fill in any necessary details in the appropriate fields, then click Done.
11. Tick the Card Complete option, then click Done.

UPDATING A CLIENT'S HISTORY

1. In the Employees' Performance screen, click Visit Details.
2. Select the appropriate employee from the Employee drop down list.
3. Click to select the relevant service under the client in the list.
4. Enter relevant details in the Notes field, then tick Complete.
5. Continue to add visit details for any other relevant clients.
6. Click Done.

APPOINTMENT BOOK MAKING AN APPOINTMENT

Selecting a Time

1. In the Appointment Book, choose the day of the appointment by using the Page Navigators.

2. Click to select an appointment block under the appropriate employee's picture.

Selecting an Existing Client

1. In the Select Client screen, type in the client's last name in the search bar.
2. Click to select the desired client from the list then click Done.

Selecting a New Client

1. In the Select Client screen, click New.
2. Enter the client's details in the appropriate fields.
3. Click Done twice.

Selecting a Service

1. In the Service Selection screen, click to select a service from the relevant service category or from the client's previously selected services then click Done.

MOVING AN APPOINTMENT

1. In the Appointment Book, click to select the appointment block you wish to move.
2. Click the dark coloured area and without lifting your finger, drag the appointment block to its new position.
3. Lift your finger to confirm the appointment's new time.

RESIZING AN APPOINTMENT

1. In the Appointment Book, click to select the appropriate appointment block to resize.
2. Click the light coloured area of the appointment block and without lifting your finger, drag the cursor up or down.
3. Lift your finger to confirm the appointment's new size.

MARKING AN APPOINTMENT AS CONFIRMED

1. In the Appointment Book, click and hold on the relevant appointment.
2. Select Confirmed from the pop-up menu.

DELETING AN APPOINTMENT

1. In the Appointment Book, double-click on the relevant appointment block.
2. Click Delete, then click Yes.

CHECKING IN CLIENTS

1. In the Appointment Book, click and hold on the client's appointment block.
2. Select Arrived from the pop-up menu.

TASKS

1. In the Appointment Book, select a time and employee.
2. In the Select Client screen, select Schedule a Task, then click Done.
3. Click to select the relevant task, then click Done.

POINT OF SALE

PROCESSING A NORMAL POINT OF SALE TRANSACTION

1. In the Point of Sale, select the client from the Client drop down list.
2. Click to select the appropriate payment type.
3. Enter the appropriate amount, then click Done.
4. If the client is rebooking, click Yes and select the relevant employee performing the rebooking. Otherwise, click No.
5. Click End Sale to complete the transaction.

EDITING POINT OF SALE DETAILS

Changing an Employee on a Product or Service

1. In the Point of Sale, click the employee name on the sale line you wish to change.
2. Click to select the correct employee.

Changing an Employee on a Multiple Block Service

1. In the Point of Sale, click the employee name on the sale line you wish to change.
2. Click to select the relevant block(s) for the employee you need to change.

3. Click New Employee and select the new employee.
4. Repeat steps 2 & 3 until the correct employees appear for each block.
5. Click Done.

Changing a Product/Service

1. In the Point of Sale, click to select the relevant product or service in the sale line.
2. Click to select Product, Service or Sundry.
3. Select the replacement product, service or sundry item.

Changing an Item Quantity

1. In the Point of Sale, click on the quantity for the relevant sale line.
2. Enter the new quantity for the item and click Done.

Changing an Item Price

1. In the Point of Sale, click on the price for the relevant sale line.
2. Enter the new price for the item and click Done.

Removing a Sale Line

1. In the Point of Sale, click on the quantity of the relevant sale line.
2. Click C and click Done.

APPLYING DISCOUNTS AT THE POINT OF SALE

1. If you are applying a discount to a single item, click on the Disc amount for the relevant sale line. OR If you are applying a discount to the entire sale, click Discount in the sales total display area.
2. Select a discount reason.
3. If the discount is a percentage, select the appropriate percentage from the Discounts list. OR If the discount is a fixed amount, select Fixed Amount from the discounts list Enter the discount amount and click Done.
4. Click Done to return to the Point of Sale.

GIFT CERTIFICATES

Selling a Gift Certificate

1. Select the client so they appear at the Point of Sale.
2. Click an empty sale line and click to select the Business employee.
3. Click Sundry and click to select Gift Certificate.
4. Click Done.
5. Click on the price column and enter the new price, then click Done.
6. Select the relevant payment type(s) and enter in the appropriate amount, then click Done.
7. Click End Sale.
8. Enter the gift certificate's tracking number, then click Done.

Redeeming a Gift Certificate

1. Select the client so they appear at the Point of Sale.
2. Click to select the employee and the items being sold.
3. Click to select the Gift Certificate payment type and enter the appropriate amount.
4. Click to select any other payment type for any balance if required.
5. Click End Sale.
6. Click to select the relevant gift certificate number.

WALKIN SALES

Processing a Walkin Service Transaction

1. In the Point of Sale, select the Walkin client from the Client drop down list.
2. Click to select an empty sale line, click to select the appropriate employee then click the Service button.
3. Click to select a service category then click to select the desired service.
4. Repeat Step 4 until all required services have been selected.
5. Click Done.
6. Scan or select any products required.
7. Select the relevant payment type(s)
8. Click End Sale.

Processing a Walkin Retail Transaction

1. In the Point of Sale, select the Retail client from the Client drop down list.
2. Scan or select any products required.
3. Select the relevant payment type(s)
4. Click End Sale.

PROCESSING A GROUP/FAMILY SALE

1. In the Point of Sale, select the #Group client from the Client drop down list.
2. Click on the drag bar to select the relevant clients for the group then click Done.
3. Select the relevant payment type(s) and process the transaction as usual.

REFUNDING A PRODUCT

1. Select the client so they appear at the Point of Sale.
2. Click to select an empty sale line and click to select the Business employee.
3. Select or scan the product to be refunded.
4. Click on the Qty column. Change the quantity to -1 then click Done.
5. Click End Sale.
6. Click to select the relevant payment type for the refund. This must be the same as the original purchase's payment type.
7. Click to select the appropriate refund option.
8. Print a duplicate receipt and give one receipt to the client.
9. Write the following on the back of the second receipt:

- a) Client Name
- b) Client Address
- c) Payment Type
- d) Get the client to sign
- e) Counter signed by a manager



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