

MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

CLINIC

SHORTCUTS FUSION

POINT OF SALE

CHANGING THE EMPLOYEE FOR A TRANSACTION

HOME & MOBILE

BEAUTY



SHORTCUTS

SMARTER BUSINESS TECHNOLOGY

it suits you

Last updated 17 May 2016

By Erin Lewis

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Country: Australia

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ABOUT THIS DOCUMENT

You can easily change the employee at the Point of Sale, and in the transaction list. For example, if a service was booked in with one employee, but another employee actually ended up completing the service, then you may wish to change the employee at the Point of Sale. If a transaction has been processed under the wrong employee, then you can change the employee in the transaction list. This allows you to make sure that your transaction history and employee performance records are accurate. It also ensures that your employees will receive the right amount of credit.

CHANGING THE EMPLOYEE AT THE POINT OF SALE

CHANGING THE EMPLOYEE FOR A PRODUCT OR SERVICE

1 Click on the employee cell on the sale line you wish to change. This will open the choose employee window.

2 Click on the correct employee. The correct employee will then be displayed on the sale line.

The screenshot shows a POS interface with a sales line and a 'Choose Employee' dialog box. The sales line has the following data:

Employee	Product/Service	Qty.	Price	Disc.	GST	Total
Anna	Ladies Cuts	1	55.00	0.00	5.00	55.00


The 'Choose Employee' dialog box is open, showing a list of employees with the following columns: Employee Alias, Employee Level, and Status. The 'James' row is highlighted with a blue circle and the number '2'.

Employee Alias	Employee Level	Status
Anna	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


Other interface elements include a client dropdown menu (Jessie Walker), a 'Remove Client' button, a 'Trans# 8' field, a 'Quote' button, a 'No Sale' button, and a 'Cancel' button in the dialog box. The right sidebar shows a 'SHORTCUTS' menu with options like Appointments, Arrivals, Walkin Manager, Point Of Sale, Clients, Performance, and Exit. The bottom right shows the user 'Anna Owner' and a 'Log Off' button.

CHANGING THE EMPLOYEE FOR A MULTI-BLOCK SERVICE

- 1 Click on the employee cell on the sale line you wish to change. This will open the choose employee window.
- 2 Click to select the service block you wish to edit.
- 3 Click on the correct employee at the bottom of the window.
- 4 Repeat steps 2 and 3 until the correct employee appears next to each block.
- 5 Click **done**.

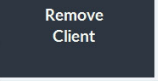


Clients




Ashley Taylor



Not a member of a club or program.




Remove Client




Trans# 8


Employee	Product/Service	Qty.	Price	Disc.	GST	Total
 Anna	 Spa Packages Relaxation Package	1	95.00	0.00	8.64	95.00



\$0.00



\$0.00



\$0.00

Discount


0.00

TIP


0.00

Sales Total


95.00




Card



Quote





\$0.00



\$0.00


Spa Packages Relaxation Package

Employee	Product/Service
 Anna	Body Scrub
 Anna	30 Min Massage

Select All


Employees

Anna	Business
James	Helen
Lucy	Michael
Chris	Michelle
Katie	



5

Done



Help

SHORTCUTS

12:41 PM
Wed, 9 Mar '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna Owner
Log Off

CHANGING THE EMPLOYEE IN THE TRANSACTION LIST

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

#Walkin
Not a member of a club or program.

Remove Client

Trans# 12

Employee	Product/Service	Qty.	Price	Disc.	GST	Total

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
12:56 PM
Tue, 1 Mar '16
Main 1
Appointments
Arrivals
Walkin Manager
Point Of Sale 2
Clients
Performance
Exit
Tools
Stock
Setup
Anna Owner
Log Off

4 Double click on the transaction to view further details.

5 If you are changing an employee for a service, double click on the relevant service to view the breakdown of service blocks.

6 Select the item with the incorrect employee.

7 Click the **employee** button.

8 Select the correct employee.

9 Click **done** to proceed.

Point of Sale Transactions [Tue 1 Mar 2016]

6	#WALK IN	Visa \$173.00	\$173.00
7	#WALK IN	Cash \$95.00	\$95.00
8	#WALK IN	MasterCard \$368.45	\$368.45
9	Veronica Darcy	EFTPOS \$80.00	\$80.00
10	Natalie Anderson	MasterCard \$89.00	\$89.00
- Lucy Hair Colouring 1/4 Head Highlights			
	Lucy	1/4 Head Highlights	\$0.00 \$45.00
	Lucy	Finish	\$0.00 \$0.00
	Lucy	Crème Blush Plum Satin	\$0.00 \$44.00
11	James King	Visa \$20.00	\$20.00
12	Danielle Moore	Cash \$100.00	\$100.00
13	(Void of: 2) Brooke James	Cash -\$105.00	-\$105.00
14	Jenna Wilson	Cash \$70.00	\$70.00
15	#WALK IN	EFTPOS \$44.00	\$44.00
16	Elouise Penn	Visa \$20.00	\$20.00
17	Christy Thomas	MasterCard \$100.00	\$100.00

Employee

Choose Employee

Employee Alias	Employee Level	Status
Anna	Director	Clocked On
Chris	Senior Stylist	Not Rostered On
Helen	Senior Stylist	Rostered On
James	Stylist	Rostered On
Katie	Stylist	Rostered On
Lucy	Senior Stylist	Rostered On
Michael	Apprentice	Not Rostered On
Michelle	Stylist	Not Rostered On

Date

Done

Transaction Update

Are you sure you want to update the Transaction?

Done Cancel

SHORTCUTS

2:16 PM
Tue, 1 Mar '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna Owner
Log Off



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