

MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

CLINIC

SHORTCUTS FUSION

POINT OF SALE

CHANGING THE PAYMENT
TYPE OF A TRANSACTION

HOME &
MOBILE

BEAUTY



SHORTCUTS

SMARTER BUSINESS TECHNOLOGY

it suits you

Last updated 17 May 2016

By Erin Lewis

Product: Shortcuts Fusion

Software version no: 8.0.16.1

Document version no: 1.0

Country: Australia

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ABOUT THIS DOCUMENT

You can easily change the payment type at the Point of Sale, and in the transaction list. For example, if the wrong payment type was accidentally selected at the Point of Sale, then you can change the payment type before ending the sale. If a transaction has been processed under the incorrect payment type, then you can change the payment type in the transaction list. This allows you to ensure that your transaction history and your end of day balance are correct, which is essential for tracking business performance.

CHANGING THE PAYMENT TYPE AT THE POINT OF SALE

- 1 Click on the incorrect payment type that has been entered.
- 2 Change the amount to zero. Alternatively, click the **c** button to clear the quantity.
- 3 Click **done**.


The screenshot displays a POS interface for a client named Isabella Weeks. The main area shows a transaction table with the following data:

Employee	Product/Service	Qty.	Price	Disc.	GST	Total
Chris	Hair Styling Blowdry	1	50.00	0.00	4.55	50.00


Below the table, a payment summary shows a sales total of \$50.00. A modal window titled "Enter Amount for EFTPOS" is open, showing a numeric keypad with a '0' button highlighted, and 'Done' and 'Cancel' buttons. The 'Done' button is marked with a '3' in a blue circle, corresponding to step 3 in the instructions.

The interface also includes a sidebar with navigation options: Appointments, Arrivals, Walkin Manager, Point Of Sale, Clients, Performance, Exit, Tools, Stock, Setup, and a user profile for Anna Owner with a Log Off button.


- 4 Click on the correct payment type.
- 5 Enter the amount to be paid using this payment type.
- 6 Click **done** and continue processing the transaction as usual.



Clients


Isabella Weeks
 Not a member of a club or program.



Trans# 12


Employee	Product/Service	Qty.	Price	Disc.	GST	Total
Chris	Hair Styling Blowdry	1	50.00	0.00	4.55	50.00


4
 \$0.00


 \$0.00


 \$0.00


 \$0.00


 \$0.00

Discount

TIP

Sales Total

0.00

0.00

50.00


4.55


0.00


50.00


0.00

50.00


Card


Quote


History


No Sale

Enter Amount for Cash

5
50.00

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

6

Done

X

Cancel

Discount

TIP

Sales Total

0.00

0.00

50.00

4.55

0.00

50.00

0.00

50.00

Discount

TIP

Sales Total


Card


Quote


History


No Sale

Discount

TIP

Sales Total

0.00

0.00

50.00

4.55

0.00

50.00

0.00

50.00

Discount

TIP

Sales Total


Card


Quote


History


No Sale

Discount

TIP

Sales Total

0.00

0.00

50.00

4.55

0.00

50.00

0.00

50.00

Discount

TIP

Sales Total


Card


Quote


History


No Sale

Discount

TIP

Sales Total

0.00

0.00

50.00

4.55

0.00

50.00

0.00

50.00

Discount

TIP

Sales Total


Card


Quote


History


No Sale

Discount

TIP

Sales Total

0.00

0.00

50.00

4.55

0.00

50.00

0.00

50.00

Discount

TIP

Sales Total


Card


Quote


History


No Sale

Discount

TIP

Sales Total

0.00

0.00

50.00

4.55

0.00

50.00

0.00

50.00

Discount

TIP

Sales Total


Card


Quote


History


No Sale

Discount

TIP

Sales Total

0.00

0.00

50.00

4.55

0.00

50.00

0.00

50.00

Discount

TIP

Sales Total


Card


Quote


History


No Sale

Discount

TIP

Sales Total

0.00

0.00

50.00

4.55

0.00

50.00

0.00

50.00

Discount

TIP

Sales Total


Card


Quote


History


No Sale

Discount

TIP

Sales Total

0.00

0.00

50.00

4.55

0.00

50.00

0.00

50.00

Discount

TIP

Sales Total


Card


Quote


History


No Sale

Discount

TIP

Sales Total

0.00

0.00

50.00

4.55

0.00

50.00

0.00

50.00

Discount

TIP

Sales Total


Card


Quote


History


No Sale

Discount

TIP

Sales Total

0.00

0.00

50.00

4.55

0.00

50.00

0.00

50.00

Discount

TIP

Sales Total


Card


Quote


History


No Sale

Discount

TIP

Sales Total

0.00

0.00

50.00

4.55

0.00

50.00

0.00

50.00

Discount

TIP

Sales Total


Card


Quote


History


No Sale

Discount

TIP

Sales Total

0.00

0.00

50.00

4.55

0.00

50.00

0.00

50.00

Discount

TIP

Sales Total


Card


Quote


History


No Sale

Discount

TIP

Sales Total

0.00

0.00

50.00

4.55

0.00

50.00

0.00

50.00

Discount

TIP

Sales Total


Card


Quote


History


No Sale

Discount

TIP

Sales Total

0.00

0.00

50.00

4.55

0.00

50.00

0.00

50.00

Discount

TIP

Sales Total


Card


Quote


History


No Sale

Discount

TIP

Sales Total

0.00

0.00

50.00

4.55

0.00

50.00

0.00

50.00

Discount

TIP

Sales Total


Card


Quote


History


No Sale

Discount

TIP

Sales Total

0.00

0.00

50.00

4.55

0.00

50.00

0.00

50.00

Discount

TIP


Sales Total


Card


Quote

CHANGING THE PAYMENT TYPE IN THE TRANSACTION LIST


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




Clients

#Walkin

Not a member of a club or program.






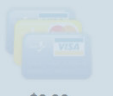


Remove Client







Trans# 10

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
 12:22 PM
 Wed, 2 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 transaction.
- 5** Click **payment**.
- 6** This will open the payment breakdown. Click on the payment type that was entered.
- 7** If the payment type was a credit card, an additional window will appear asking you to select the card type. Select the card type that was entered.

Point of Sale Transactions [Wed 2 Mar 2016]

Transactions

1	Fiona Smith	Cash \$45.00	\$45.00
2	Lisa Summers	Visa \$70.00	\$70.00
3	Nadine Thomas	MasterCard \$100.00	\$100.00
4	Brenda Peters	MasterCard \$300.00	\$300.00
5	#WALKIN	Cash \$100.00	\$100.00
6	#GROUP [Fiona Smith, Thomas...]	Cash \$115.00	\$115.00
8	Allison Tenby	Amex \$81.60	\$81.60
9	Oliver Jackson	Cash \$40.00	\$40.00
10	Veronica Darcy	Cash \$50.00	\$50.00

Transaction List

Employee

Payment

Transaction Totals

Payment Breakdown

Sale Total	\$100.00
Redemption Total	\$0.00
Received Total	\$100.00
Change Total	\$0.00

Done

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

Done

Cancel

Payment Type

Amex	
Visa	7
MasterCard	

Cancel

Employee

Payment

Tools

Stock

Setup

Anna Owner
Log Off

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

SHORTCUTS

12:39 PM
Wed, 2 Mar '16

Main

- 8 Change the value of the incorrect payment type to zero.
- 9 Click **done**.
- 10 Click on the correct payment type.
- 11 Enter the value that was processed using this payment type.
- 12 Click **done**.

Point of Sale Transactions [Wed 2 Mar 2016]

= Transactions			
1	Fiona Smith	Cash \$45.00	\$45.00
2	Lisa Summers	Visa \$70.00	\$70.00
3	Nadine Thomas	MasterCard \$100.00	\$100.00
4	Brenda Peters	MasterCard \$300.00	\$300.00
5	#WALKIN	Cash \$100.00	\$100.00
6	#GROUP [Fiona Smith, Thomas...]	Cash \$115.00	\$115.00
8	Allison Tenby	Amex \$81.60	\$81.60
9	Oliver Jackson	Cash \$40.00	\$40.00
10	Veronica Darcy	Cash \$50.00	\$50.00

Transaction List
Transaction Totals

Enter Amount for MasterCard

0.00

8

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

9
✓

Done

12
✗

Cancel

Enter Amount for Cash

100.00

11

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

9
✓

Done

12
✗

Cancel

Enter Amount for MasterCard

Employee	Product/Service	Qty.	Price	Disc.	GST	Total
Chis	Bowdye	1	50.00	0.00	4.55	50.00

9
✓

Done

12
✗

Cancel

Enter Amount for MasterCard

0.00

8

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

9
✓

Done

12
✗

Cancel

Enter Amount for Cash

100.00

11

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

9
✓

Done

12
✗

Cancel

Enter Amount for MasterCard

Employee	Product/Service	Qty.	Price	Disc.	GST	Total
Chis	Bowdye	1	50.00	0.00	4.55	50.00

9
✓

Done

12
✗

Cancel

Enter Amount for MasterCard

0.00

8

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

9
✓

Done

12
✗

Cancel

Enter Amount for Cash

100.00

11

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

9
✓

Done

12
✗

Cancel

Enter Amount for MasterCard

Employee	Product/Service	Qty.	Price	Disc.	GST	Total
Chis	Bowdye	1	50.00	0.00	4.55	50.00

9
✓

Done

12
✗

Cancel

13

Once the transaction value has been assigned to the correct payment type, click **done** in the payment breakdown window.


14


Click **done** again to proceed.

Point of Sale Transactions [Wed 2 Mar 2016]

= Transactions			
1	Fiona Smith	Cash \$45.00	\$45.00
2	Lisa Summers	Visa \$70.00	\$70.00
3	Nadine Thomas	MasterCard \$100.00	\$100.00
4	Brenda Peters	MasterCard \$300.00	\$300.00
5	#WALKIN	Cash \$100.00	\$100.00
6	#GROUP [Fiona Smith, Thomas...]	Cash \$115.00	\$115.00
8	Allison Tenby	Amex \$81.60	\$81.60
9	Oliver Jackson	Cash \$40.00	\$40.00
10	Veronica Darcy	Cash \$50.00	\$50.00


Transaction List Transaction Totals



Employee



Payment


Payment Breakdown


Sale Total	\$100.00
Redemption Total	\$0.00
Received Total	\$100.00
Change Total	\$0.00



\$100.00


\$0.00


\$0.00



Done



Cancel


Done

Transaction Update

Are you sure you want to update the Transaction?


Done


Cancel

SHORTCUTS

12:39 PM
Wed, 2 Mar '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna Owner
Log Off



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