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APPOINTMENT BOOK

DELETING AN APPOINTMENT

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By Erin Lewis

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ABOUT THIS DOCUMENT

Deleting unneeded appointments will allow you to maximise the time available for new bookings, while keeping your Appointment Book clutter-free. For example, you may wish to delete an appointment due to a no show or client cancellation.

Shortcuts keeps a record of all appointment deletions, allowing you to easily see when a client has had a previous cancellation or no show. You can also enter the reason for deleting a booking, which may assist with reducing future appointment cancellations.

DELETING AN APPOINTMENT

- 1 Click on the **main** menu.
- 2 Click on the **appointments** icon.
- 3 Right click on the appointment block you wish to delete.
- 4 Select **delete**.
- A As an alternative to steps 3 and 4, you can click and hold on the lighter area of an appointment, then drag the appointment to the left-hand side of the screen.
- 5 **Optional:** Enter a reason for the deletion in the notes field.
- 6 Click on the reason for the deletion.
- ! If you are deleting the main block of a multiple block service, all other appointment blocks for the same service will be deleted.

The screenshot shows a scheduling software interface. At the top, there's a header with the date 'Fri, 26 Feb' and staff names: Anna, James, Lucy, Chris, and Katie. Below this is a calendar grid with time slots from 9:00 AM to 5:00 PM. Appointment blocks are visible, such as 'Yasmin Green 1/4 Head Highlights', 'Natalie Anderson Full Leg IPL', 'Derrick Barker Rehydrating Facial', and 'Wendy Peterson 1/2 Leg Wax'. A context menu is open over the 'Derrick Barker Rehydrating Facial' appointment, with 'Delete' selected. An 'Appointment Deletion Warning' dialog box is displayed in the foreground, asking for a reason for deletion. The dialog has a 'Notes' field and three options: 'No Reason', 'Client Cancellation', and 'No Show'. A 'Cancel' button is also present. The interface includes a sidebar with 'SHORTCUTS' and a 'Main' menu.

CANCELLATIONS / NO SHOWS IN THE CLIENT LIST

- 1 Click on the **main** menu.
 - 2 Click on the **clients** icon.
 - 3 Select the relevant client.
- A** Clients who have no showed or cancelled an appointment will have a blue cross icon next to their name in the client list.
- B** The number of no shows and cancellations will be displayed on the client dashboard.

The screenshot shows a software interface for client management. At the top, there is a 'Select Client' header. Below it is a search bar with the text 'Search For ...' and a 'Delete' button. A list of clients is displayed, with 'Tanya Doyle' selected. To the right of the list is a detailed view for Tanya Doyle, showing her contact information, status (Not a club member), and appointment statistics (8 Visits, 0 No Shows, 1 Cancellations). Below this are sections for 'Outstanding Client Series', 'No future appointments', and 'Past Appointments'. On the right side of the interface, there are various tool icons like 'New', 'Quick', 'CPC', 'History', 'Card', 'Merge', 'Assistant', and 'Appt Book'. At the bottom right, there is a 'SHORTCUTS' menu with icons for 'Main', 'Appointments', 'Arrivals', 'Walkin Manager', 'Point Of Sale', 'Clients', 'Performance', and 'Exit'. The user's name 'Anna Owner' and a 'Log Off' button are also visible.

Client Name	Phone Number	Status
Tammy Neilson	0444 000 333 (M)	
Tanya Doyle	0433 666 777 (M)	8 Visits (0 No Shows, 1 Cancellations)
Taylor Rhodes	0444 222 244 (M)	
Thomas Smith	0433 777 337 (M)	
Tina Adams	0488 222 228 (M)	
Tom Wallace	0411 888 666 (M)	
Vanessa Anderson	0477 272 772 (M)	
Veronica Darcy	0411 111 777 (M)	
Vicky Beckhouse	0422 662 662 (M)	
Viktor Reed	0433 666 112 (M)	
Wendy Peterson	0499 777 999 (M)	
William Black	0466 777 676 (M)	

Client Dashboard for Tanya Doyle:

- No preferred employee
- Not a club member | No Programs.
- 8 Visits (0 No Shows, 1 Cancellations)**
- \$44.62 average spend
- \$23.95 account in credit

Past Appointments:

- 7 Mar 10:00 AM: Full Head Highlights - Anna
- 18 Jan 3:00 PM: Ladies Style Cut - Chris
- 15 Jan 1:30 PM: 1/4 Head Highlights - Anna
- 9 Dec 12:15 PM: Cleansing Facial - Katie
- 3 Dec 10:45 AM: Ladies Style Cut - Katie
- 1 Dec 1:45 PM: Up Do - Anna
- 27 Nov 3:00 PM: Ladies Fringe Trim - Chris



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AUSTRALIA AND ASIA

166 Knapp Street
Fortitude Valley
QLD 4006
Tel: +61 7 3834 3232

www.shortcuts.com.au

UK AND EUROPE

Dalton House
Dane Road, Sale
Cheshire M33 7AR
Tel: +44 161 972 4900

www.shortcuts.co.uk

NORTH AMERICA

7711 Center Avenue
Suite 650
Huntington Beach CA 92647
Tel: +1 714 622 6682

www.shortcuts.net

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