

MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

CLINIC

# SHORTCUTS FUSION APPOINTMENT BOOK USING TASKS

HOME &  
MOBILE

BEAUTY



**SHORTCUTS**

SMARTER BUSINESS TECHNOLOGY

*it suits you*

**Last updated 11 October 2016**

By Erin Lewis

Product: Shortcuts Fusion

Software version no: 8.0.16.1

Document version no: 1.0

Country: Australia

# CONTENTS

<b>SCHEDULING A TASK.....</b>	<b>1</b>
<b>CREATING, EDITING AND DELETING A TASK .....</b>	<b>3</b>

## ABOUT THIS DOCUMENT

Tasks are used to allocate time on the Appointment Book for activities other than services, such as lunch breaks and meetings. This can help you better manage your time, by allowing you to plan out your daily activities on the Appointment Book.

The tasks feature is also fully customisable, so you can create tasks that suit your unique business.

Tasks are particularly helpful when used in combination with Online Booking. The Shortcuts Online Booking feature recognises when a task is scheduled on your Appointment Book, and will not allow clients to book a service during that time.

# SCHEDULING A TASK

- 1 Click on the **main** menu.
- 2 Click on the **appointments** icon.
- A Tasks are displayed in white on the Appointment Book. They can be resized and moved in the same way as an appointment.
- 3 Navigate to the desired day on the Appointment Book.
- 4 Click on the relevant time slot in the relevant employee's column.

The screenshot displays a scheduling application interface. On the right side, there is a vertical sidebar with a 'SHORTCUTS' menu containing icons for 'Main', 'Appointments', 'Arrivals', 'Walkin Manager', 'Point Of Sale', 'Clients', 'Performance', and 'Exit'. Below this is a 'Tools' section with 'Stock' and 'Setup' options, and a 'Log Off' button for the user 'Anna Owner'. The main area is an appointment book for 'Tue, 1 Mar 2016'. The columns represent employees: Anna, James, Lucy, Chris, and Katie. The rows represent time slots from 9:00 AM to 5:45 PM. Various tasks are scheduled, such as 'Ingrid Foley 1/2 Leg Wax', 'Brooke James Ladies Style Cut', 'Natalie Anderson 1/4 Head Highlights', and 'Hannah Andrews Full Head Highlights'. A green circle 'A' is placed over a 'Meeting' task in the Katie column at 10:00 AM. A blue circle '4' is placed over a 3:00 PM slot in the Chris column. A blue circle '3' is placed over the 'Today' button in the bottom navigation bar, which also includes '< Week', '< Day', 'Day >', and 'Week >' options. The bottom bar also features a green plus icon and a 'Menu' button.

- 5** Select **schedule a task** at the top of the client list.
- 6** Click **done**.
- 7** Select the relevant task.
- 8** Click **done**. The task will then appear on the Appointment Book.

Select Client

Search For ...

Delete

<b>Schedule a Task</b> <span style="font-size: 24px; color: #00a0c0; border-radius: 50%; padding: 2px 6px;">5</span>	A	M	Y
#BUSINESS	B	N	Z
#CLASS	C	O	0
#EXPENSE	D	P	1
#GROUP	E	Q	2
#STAFF	F	R	3
#WALK IN	G	S	4
Aaron Douglas 0404 440 004 (M) 07 3333 7373 (H)	H	T	5
Allisa Cameron 0477 111 171 (M)	I	U	6
Allison Tenby 0488 338 888 (M)	J	V	7
Amber Ashton 0422 111 888 (M)			8
Amy Newman 0411 777 888 (M)			9

Sort By...  
First Name

Show Me...  
 Inactive

New

Quick

CPC

History

Card

Merge

Done 6

Cancel

Choose a Task

Tasks

- Lunch
- Meeting 7

Edit

Delete

New

Done 8

Cancel

SHORTCUTS
3:28 PM  
Mon, 29 Feb '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna  
Owner  
Log Off

# CREATING, EDITING AND DELETING A TASK

- 1 Click on the **main** menu.
- 2 Click on the **appointments** icon.
- 3 Click on the relevant cell on the Appointment Book.

The screenshot displays a salon appointment booking system. The main interface is a grid with columns for staff members (Anna, James, Lucy, Chris, Katie) and rows for time slots (9:00 AM to 5:00 PM). A blue circle with the number '3' highlights a cell in the Chris column at 1:00 PM. The right sidebar contains a 'SHORTCUTS' menu with icons for Main, Appointments, Arrivals, Walkin Manager, Point Of Sale, Clients, Performance, and Exit. The bottom navigation bar includes a calendar view for 'Tue, 1 Mar 2016' and a 'Menu' button.

Time	Anna	James	Lucy	Chris	Katie
9:00 AM	Ingrid Foley 1/2 Leg Wax	Off	Off	RDD	
15	Ingrid Foley	Off	Brooke James Ladies Style Cut	RDD	
30		Off		RDD	
45		Off	Brooke James Blowdry	RDD	
10:00 AM		Off		RDD	Meeting
15		Off		RDD	
30	Jamie Lee Beadman Ladies Style Cut	Off		RDD	
45		Off		RDD	
11:00 AM		Off	Natalie Anderson 1/4 Head Highlights	RDD	
15	Veronica Darcy Airbrush 0411 111 777	Off		RDD	
30		Off		RDD	James King
45		Off		RDD	
12:00 PM		Off	Natalie Anderson	RDD	
15	Garry Lang	Off		RDD	
30	Garry Lang	Off		RDD	
45		Off		RDD	IPL1 Jenna Wilson Full Leg IPL
1:00 PM		Off		RDD	IPL1 Jenna Wilson
15		Off		RDD	
30		Off		RDD	
45		Off		RDD	
2:00 PM	Off	Hannah Andrews Full Head Highlights 0400 111 000		RDD	Lunch
15	Off		Simone Day Microdermabrasion	RDD	
30	Off			RDD	Jessie Walker Rehydrating Facial
45	Off			RDD	Jessie Walker Body Scrub
3:00 PM	Off			RDD	
15	Off			RDD	
30	Off			RDD	
45	Off			RDD	
4:00 PM	Off	Hannah Andrews Blowdry	Thomas Smith 30 min Massage	RDD	
15	Off			RDD	
30	Off			RDD	
45	Off			RDD	Penelope Stanley Full Leg Wax
5:00 PM	Off	Yasmin Green Rehydrating Facial		RDD	
15	Off			RDD	
30	Off			RDD	
45	Off			RDD	

- 4** Select **schedule a task** at the top of the client list.
- 5** Click **done**.
- 6** If you want to create a task, click **new**.  
Enter the name and the default duration of the task.  
Click **done**.
- 7** If you want to edit a task, select the task and click **edit**.  
Enter the new task name or duration.  
Click **done**.
- 8** If you want to delete a task, select the task and click **delete**.  
Click **yes** to confirm.
- 9** When you're finished, click **done** to schedule the selected task, or click **cancel** to exit the task window.

Select Client

Search For ...

[Delete](#)

Schedule a Task <b>4</b>	A	M	Y
#BUSINESS	B	N	Z
#CLASS	C	O	0
#EXPENSE	D	P	1
#GROUP	E	Q	2
#STAFF	F	R	3
#WALK IN	G	S	4
Aaron Douglas 0404 440 004 (M) 07 3333 7373 (H)	H	T	5
Allisa Cameron 0477 111 171 (M)	I	U	6
Allison Tenby 0488 338 888 (M)	J	V	7
Amber Ashton 0422 111 888 (M)			8
Amy Newman 0411 777 888 (M)			9

Sort By...  
First Name

Show Me...  
 Inactive

+

⌚

📁

📅

📄

👤

✓

✗

Choose a Task

Tasks

Lunch

Meeting

✎

♻️

+

✓

✗

SHORTCUTS
 

3:28 PM  
Mon, 29 Feb '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna  
Owner  
Log Off



**SHORTCUTS™**

SMARTER BUSINESS TECHNOLOGY

*it suits you*

**AUSTRALIA AND ASIA**

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

**[www.shortcuts.com.au](http://www.shortcuts.com.au)**

**UK AND EUROPE**

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

**[www.shortcuts.co.uk](http://www.shortcuts.co.uk)**

**NORTH AMERICA**

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

**[www.shortcuts.net](http://www.shortcuts.net)**

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