

MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

CLINIC

LOYALTY
VIEWING A
MEMBER'S LOYALTY
BALANCE

HOME &
MOBILE

BEAUTY



SHORTCUTS

SMARTER BUSINESS TECHNOLOGY

it suits you

Last updated 10 January 2017

By Erin Lewis

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Country: Australia

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ABOUT THIS DOCUMENT

Loyalty is a great way to reward your valued clients and create long term customer relationships, providing flexible options to keep them coming back for more. Automated, sophisticated and sleek, the feature uses a points-based system that allows you to reward your clients based on the amount they spend on products and services. You can check a client's Loyalty balance at any time through their client card, at the Point of Sale, or through the Program Manager.

VIEWING LOYALTY BALANCE IN THE CLIENT CARD

- 1 Click on the **main** menu.
- 2 Click on the **clients** icon.
- 3 Select the relevant client.
- A The number of programs a client belongs to will be displayed on the client dashboard.
- 4 Click **card**.

Select Client

Search For ... Delete

Sort By...
First Name

Show Me...
 Inactive

New Quick

CPC History

Card Merge

Assistant Appt Book

SHORTCUTS
3:37 PM
Mon, 9 May '16
Main
Appointments
Arrivals
Walkin Manager
Point Of Sale
Clients
Performance
Exit
Tools
Stock
Setup
Anna Owner
Log Off

Name	Phone	Programs	Notes
Allisa Cameron	0477 111 171 (M)	3	Anna is the preferred employee Not a club member 1 Program(s) 16 Visits (0 No Shows, 0 Cancellations) \$92.06 average spend \$0.00 outstanding on account
Allison Tenby	0488 338 888 (M)		
Ally Jones	045555333 (M)		
Amanda Phillips	0411 333 555 (M)		
Amber Ashton	0422 111 888 (M)		
Amy Newman	0411 777 888 (M)		
Andrea Collins	0433 222 323 (M)		
Andrew Fitzpatrick	0411111444 (M)		
Andy Ellis	0455 666 555 (M)		
Angela Jefferson	0444 242 424 (M)		
Ashley Taylor	0433 666 363 (M)		
Audrey Patterson	0444 333 444 (M)		

Outstanding Client Series

No future appointments

Past Appointments

- 29 Apr 12:00 PM: Blowdry - Chris
- 19 Apr 1:00 PM: Full Head Highlights - Katie
- 12 Mar 2:00 PM: Body Scrub - Lucy
- 10 Mar 9:00 AM: 60 min Massage - Anna
- 4 Mar 3:15 PM: Up Do - Anna
- 3 Mar 4:15 PM: Blowdry - Lucy
- 3 Mar 2:30 PM: Full Head Highlights - Lucy

- 5 Click on the **member** button at the bottom of the screen.
- 6 Select the relevant loyalty program.
- 7 Click **balance**.
- B The member's loyalty balance details will be displayed.

Client

Title First Name
Allisa

Last Name
Cameron

Contact Details

Home Phone Mobile
0477 111 171

Work Phone Fax

Email

Home Address

Number / Street

Suburb State PCode

Work Address

Number / Street

Suburb State PCode

Refreshment

Extra Details

- Inactive
- Card Complete
- Do not accept a Cheque
- Buy Professional Products
- Record Credit Card Details
- Tax Exempt

Program Information for Allisa Cameron

Program Name	Type	Status	Start Date	End Date	Duration Months
VIP Loyalty Program 6299740000000802270	Loyalty				

Balance Inquiry

Loyalty balance of Allisa Cameron

	Balance	Next Renewal Date
VIP Loyalty Program - 6299740000000802270		
Points	5	
Amount	\$40.00	

SHORTCUTS

3:53 PM
Mon, 9 May '16

Main

- Appointments
- Arrivals
- Walkin Manager
- Point Of Sale
- Clients
- Performance
- Exit
- Tools
- Stock
- Setup

Anna

Member Save Done

Balance History Done

VIEWING LOYALTY BALANCE AT THE POINT OF SALE

- 1 Click on the **main** menu.
- 2 Click on the **Point of Sale** icon.
- 3 Select the relevant client from the client list or the client drop-down menu.
- A When a member is selected at the Point of Sale, their program details will be displayed at the top of the screen.
- 4 Click **no sale**.
- 5 Click **balance inquiry**.
- B The member's loyalty balance details will be displayed.

The screenshot shows a Point of Sale (POS) interface. At the top, a client dropdown menu is set to 'Allisa Cameron'. Below this, program details are displayed: 'Program: VIP Loyalty Program Exp: No Expiry', 'Member No: 6299740000000802270', 'Program Points: 5', and 'Global Rewards: \$40.00'. A 'Remove Client' button is visible. To the right, there is a 'Trans# 6' icon.

The main area features a table with the following columns: Employee, Product/Service, Qty., Price, Disc., GST, and Total. The table is currently empty.

A 'No Sale' dialog box is open, titled 'Select an Option'. It contains several menu items: 'Open Cash Register', 'Take Petty Cash', 'Transfer Money In', 'Transfer Money Out', 'View Cash Movements', and 'Balance Inquiry' (highlighted with a blue circle '5'). A 'Cancel' button with a red 'X' icon is also present.

Below the 'No Sale' dialog, a 'Balance Inquiry' pop-up is displayed. It shows the 'Loyalty balance of Allisa Cameron' with a table of details:

	Balance	Next Renewal Date
VIP Loyalty Program - 6299740000000802270		
• Points	5	
• Amount	\$40.00	

The 'Balance Inquiry' pop-up also includes a 'Find' icon and a 'Done' button with a green checkmark. A blue circle 'B' is placed over the 'Amount' row in the table.

On the right side of the interface, there is a 'SHORTCUTS' menu with icons for 'Main' (1), 'Appointments', 'Arrivals', 'Walkin Manager', 'Point Of Sale' (2), 'Clients', 'Performance', 'Exit', 'Tools', 'Stock', 'Setup', and 'Log Off' (Anna Owner).

VIEWING LOYALTY BALANCE IN THE PROGRAM MANAGER

- 1 Log into your S.M.A.R.T. system console (https://console.shortcutsoftware.com). Then click on the **programs** tile.
 - 2 Enter the desired search criteria into the search fields.
 - 3 Click **search**.
 - 4 If you are presented with a list of possible matches, select a member by clicking on their member number. If there is only one match, you will be presented with the member's details.
- A** The member's balance details will be displayed, along with their transaction history.

- Administration
- Management
 - Member Management
 - View/Edit Transactions
 - Upload Payments
- Reports
- Number Registrations
- LogOff

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View/Edit Transactions

Search

Number: 2

First name:

Last name:

Member Status: 3

Number details

Number:	6299740000000802270
Type:	Loyalty
Program:	VIP Loyalty Program
Balance:	40.00 AUD A
Points:	5
Expiry Date:	No Expiry
Name:	Allisa Cameron
Email:	

Transaction History:

Site Date	Site	Activity	Program	Points	Balance Points	Amount	Balance Amount	Auth Code	Reason
09-May-2016	Peppermint Park - Ashgrove	Redemption	VIP Loyalty Program	0	5	-10.00	40.00		
09-May-2016	Peppermint Park - Ashgrove	Manual Adjustment	VIP Loyalty Program	0	5	50.00	50.00	324198	Refund
09-May-2016	Peppermint Park - Ashgrove	Redemption	VIP Loyalty Program	0	5	-40.00	0.00		
18-Mar-2016	Peppermint Park - Ashgrove	System Points Conversion	VIP Loyalty Program	-20	5	20.00	40.00		Loyalty Points Conversion
18-Mar-2016	Peppermint Park - Ashgrove	System Points Accrual	VIP Loyalty Program	4	25	0.00	20.00		Points Accrual
18-Mar-2016	Peppermint Park - Ashgrove	System Points Accrual	VIP Loyalty Program	11	21	0.00	20.00		Points Accrual
18-Mar-2016	Peppermint Park - Ashgrove	Manual Adjustment	VIP Loyalty Program	0	10	20.00	20.00	321198	\$20 bonus
18-Mar-2016	Peppermint Park - Ashgrove	Manual Adjustment	VIP Loyalty Program	5	10	0.00	0.00	344918	Manual points added
18-Mar-2016	Peppermint Park - Ashgrove	Manual Adjustment	VIP Loyalty Program	5	5	0.00	0.00	344918	Manual points added
18-Mar-2016	Peppermint Park - Ashgrove	Activation	VIP Loyalty Program	0	0	0.00	0.00		
18-Mar-2016	Peppermint Park - Ashgrove	Registration	VIP Loyalty Program	0	0	0.00	0.00		

Notifications:

Sent Date	Notification Type	Status	Reason
	New member (send notification to new loyalty and membership members)	Sent	

Manual Redemption
Manual Refund
Amount Adjustment
Loyalty Upgrade
Points Adjustment



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