

MULTI-SITE

WALK-IN

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CLINIC

MEMBERSHIPS

MANAGING
MEMBERSHIPS

HOME &
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BEAUTY


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SMARTER BUSINESS TECHNOLOGY
it suits you

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By Erin Lewis

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ABOUT THIS DOCUMENT

This document is designed to give you the tools you need to use Memberships to its full potential.

Memberships is a great way to keep your clients coming back for more, by providing them with regular payment options and exclusive benefits. With Memberships, your clients pay a regular fee and receive the benefits over a time frame determined by you. This enables you to establish an income stream you can count on, as revenue is recurring throughout the year.

MANAGING MEMBERSHIPS

MANAGING MEMBERSHIP PROGRAMS IN THE CLIENT CARD / APPOINTMENT BOOK

You can manage a client's membership program in Shortcuts Fusion either through the client card, or through the Appointment Book. To manage a membership program through the Appointment Book, replace steps 1 - 5 with right clicking on an appointment and selecting 'memberships'.

1Click on the **main** menu.

2Click on the **clients** icon.

3Select the relevant client.

4Click **card**.

Select Client

Search For ...

Delete

Sort By...
First Name

Bianca Lopez 0433 222 111 (M)	3	No preferred employee Not a club member 1 Program(s) 6 Visits (0 No Shows, 0 Cancellations) \$40.83 average spend \$0.00 outstanding on account
Brandon Robinson 07 3300 0033 (H)		
Brenda Peters 0411 999 919 (M)		
Brooke James 0477 999 333 (M)		
Cameron Porter 0466 111 666 (M)		
Carl Reed 0422 555 666 (M)		
Carolyn Burrel 0455 666 222 (M)		
Casey Payne 0466 555 222 (M)		
Charlie Gregson 0455 333 000 (M)		
Chelsea Grey 0499 777 111 (M)		
Chris Adams 0455 000 555 (M)		
Chris Peters 0488 717 171 (M)		

Outstanding Client Series

No future appointments

Past Appointments

29 Mar 11:00 AM: 1/4 Head Highlights - Anna
16 Mar 10:30 AM: Full Head Highlights - Chris
14 Mar 12:15 PM: Ladies Style Cut - Chris
8 Mar 10:00 AM: Full Body Tan - Katie
7 Mar 4:30 PM: Blowdry - Anna
7 Mar 1:45 PM: Full Head Highlights - Anna

Show Me...
☐ Inactive

NewQuick

CPCHistory

4CardMerge

AssistantAppt Book

SHORTCUTS

4:27 PM
Thu, 31 Mar '16

1Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

2Clients

Performance

Exit

Tools

Stock

Setup

Anna
Owner
Log Off

5

Click on the **member** button at the bottom of the client card.

Client		Home Address	
Title	First Name	Number / Street	
	Bianca		
Last Name			
Lopez		Suburb	State PCode
Contact Details		Work Address	
Home Phone	Mobile	Number / Street	
	0433 222 111		
Work Phone	Fax		
Email		Suburb	State PCode
Message		Refreshment	Extra Details
			<input type="checkbox"/> Inactive <input type="checkbox"/> Card Complete <input type="checkbox"/> Do not accept a Cheque <input type="checkbox"/> Buy Professional Products <input checked="" type="checkbox"/> Record Credit Card Details <input type="checkbox"/> Tax Exempt
		Barcode	0006A

Delete

Alert

Custom

Info

CPC

History

Attach

Member

Save

Done

SHORTCUTS

12:08 PM
Fri, 18 Mar '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna Owner
Log Off

6

Double click if you wish to expand a membership (view further information).

7

Select a membership to enable your membership options.

A

The client's member number is displayed.

B

The cancel button will remove the client from the selected membership program.

C

The suspend button will pause membership benefits and payments for a specified period of time. This period will then be added to the end of the membership.

D

The credit button can be used to extend the membership for a specified period of time. During this time, the member will continue to receive benefits at no additional cost.

Program Information for Bianca Lopez

Program Name	Type	Status	Start Date	End Date	Duration Months
<div> <div> <div>6</div> <div>7</div> </div> <div> <div>A</div> </div> </div> Blowdry Membership 6299740000000802271	Membership	Subscribed	18/03/2016		
<div> <div>2. Monthly Payments \$70</div> </div>		Active	18/03/2016		

Use 'Suspend' to pause payments for a number of periods (the periods will be added to the end of the membership).

Use 'Credit' when past payments have been received and the business has agreed to credit and extend the membership for no additional charges.



Cancel



Suspend



Credit



Resubscribe



Refund



Balance



History



Done

E

The resubscribe button will renew the client's subscription to the membership. This can be used when a client is unpaid and their missed payments are being waived.

F

The refund button will refund the amount based on the number of payment periods remaining on the membership.

G

The balance button will open the balance inquiry window.

H

The balance inquiry window will display the number of available benefits, as well as the next renewal dates.

I

The history button will open the client's membership payment history.

Program Information for Bianca Lopez

Program Name	Type	Status	Start Date	End Date	Duration Months
<div> <div>Blowdry Membership</div> <div>6299740000000802271</div> </div>	Membership	Subscribed	18/03/2016		
<div> <div>2. Monthly Payments \$70</div> </div>		Active	18/03/2016		

Use 'Suspend' to pause payments for a number of periods (the periods will be added to the end of the membership).

Use 'Credit' when past payments have been received and the business has agreed to credit and extend the membership for no additional charges.

Cancel

Suspend

Credit

Resubscribe

Refund

Balance

History

Done

Balance Inquiry

Benefit items of Bianca Lopez	Balance	Next Renewal Date
<div> <div>Blowdry Membership - 6299740000000802271</div> </div>		
<div> <div>Blowdry</div> </div>	2	18/04/2016
<div> <div>Treatment</div> </div>	1	18/04/2016



Find



Done

MANAGING MEMBERSHIPS IN THE PROGRAM MANAGER

1

Log into your S.M.A.R.T. system console (<https://console.shortcutssoftware.com>). Then click on the **programs** tile.

2

Click **member management**.

3

Select your community from the drop-down menu.

4

Select the filters you wish to apply, then click **apply filter**.

A

You can click on the categories in the 'attention' section to view the members within that category.

5

Select a member.

6

The member's details will appear. Scroll down to the bottom of the screen.

7

Click on the relevant button to make changes to the membership program.

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SMARTER BUSINESS TECHNOLOGY

Program Management

User: erin.lewis@shortcuts.com.au

Member Management

Choose Community

Community: Peppermint Park

Attention

3 subscribed member(s) without a payment schedule configured.
 0 member(s) cancellation to process
 0 member(s) with payments owing
 0 expired member(s) with active payment schedules.
 0 subscribed member(s) with Cancelled or Ended payment schedules.

Filter

Program

☒ Select All
☒ Blowdry Membership

Member Status

☐ Select All
☐ Unpaid
☒ Subscribed
☐ Cancelled
☐ Waiting
☐ Expired
☐ Cancellation Pending
☐ Suspended

Automatic Payment Status

☐ Select All
☐ Schedule Required
☐ Schedule Active
☐ Schedule Ended
☐ Schedule Cancelled

Members

Program	Member Number	Member Name	Phone	Member Status	Automatic Payment Status
Blowdry Membership	62997400000000802271	Bianca Lopez	0433 222 111	Subscribed	Schedule Required
Blowdry Membership	62997400000000809557	Claire Stewart	0477 000 555	Subscribed	Schedule Required
Blowdry Membership	62997400000000909880	Hannah Andrews	0400 111 000	Subscribed	Schedule Required

B

The 'change member status' button allows you to change the member's status.

subscribed: the member's subscription is current.

cancelled: the client will be removed from the membership program.

waiting: the member's subscription is waiting for additional details or payment verification.

cancellation pending: the cancellation is waiting on the payment provider to cease the payments.

suspended: the member will be suspended from accessing their membership benefits until their subscription has been brought up to date and outstanding amounts paid.

C

The 'benefit item adjustment' button allows you to change the current benefits the member is entitled to.

D

You can use the 'change automatic payment status' button to change the client's payment schedule.

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Member Status: Subscribed

Membership Start Date: 18-Mar-2016

Automatic Payment Status: Schedule Required

Suspend Start Date:

Suspend End Date:

Benefit Balance: 0.00 AUD

Balance: 0.00 AUD

Points: 0

Expiry Date: No Expiry

Name: Bianca Lopez

Email:

Payment Plans:

Name	Status	Start Date	End Date	Duration Months	Payment Interval	Total Payments Made	Expected Payments Amount	Next Payment Date
2. Monthly Payments \$70	Active	18-Mar-2016			Monthly	70.00	70.00	18-Apr-2016

Membership Benefit Items:

Name	Quantity	Benefit Value (Including Tax)	Unit Price (Including Tax)	Renewal Interval	Next Renewal Date	Renewal Action
Blowdry	0.00	0.00	0.00	Monthly	18-Apr-2016	Reset
Treatment	0.00	0.00	0.00	Monthly	18-Apr-2016	Accrue

Transaction History:

Site Date	Site	Activity	Program	Amount	Balance Amount	Benefit Quantity	Available Benefit Quantity	Auth Code	Reason
01-Apr-2016	Peppermint Park - Ashgrove	Benefit Redemption	Blowdry Membership	0.00	0.00	-1.00	0.00		
01-Apr-2016	Peppermint Park - Ashgrove	Benefit Redemption	Blowdry Membership	0.00	0.00	-1.00	0.00		
23-Mar-2016	Peppermint Park - Ashgrove	Benefit Redemption	Blowdry Membership	0.00	0.00	-1.00	1.00		
18-Mar-2016	Peppermint Park - Ashgrove	Benefit Accrual	Blowdry Membership	0.00	0.00	1.00	1.00		
18-Mar-2016	Peppermint Park - Ashgrove	Benefit Accrual	Blowdry Membership	0.00	0.00	2.00	2.00		
18-Mar-2016	Peppermint Park - Ashgrove	Activation	Blowdry Membership	0.00	0.00				
18-Mar-2016	Peppermint Park - Ashgrove	Registration	Blowdry Membership	0.00	0.00				

Payment History:

Site Date	Reference	Status	Type	Amount	Member Status	Program	Site	Reason
18-Mar-2016		Success	Revenue Allocation	-70.00	Subscribed	Blowdry Membership	Peppermint Park - Ashgrove	Revenue Allocation
18-Mar-2016	POS Payment Request Number #22	Success	Payment from POS	70.00	Subscribed	Blowdry Membership	Peppermint Park - Ashgrove	Recurring payment for payment plan 2. Monthly Payments
18-Mar-2016	POS Payment Request Number #21		Joining Fee		Waiting	Blowdry Membership	Peppermint Park - Ashgrove	Joined payment plan 2. Monthly Payments \$70.

Manual Redemption Manual Refund Amount Adjustment Loyalty Upgrade Points Adjustment **B** **C** **D** Change Member Status Benefit Item Adjustment Change Automatic Payment Status



it suits you

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