

MULTI-SITE

WALK-IN

SPA

HAIR

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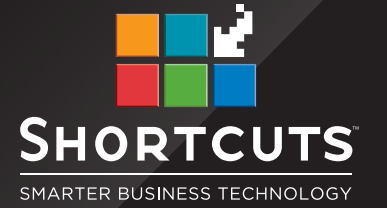
CLINIC

# ENTERPRISE LIVE

## EMPLOYEE LOCATIONS

HOME & MOBILE

BEAUTY



*it suits you*

**Last updated 19 June 2017**

By Erin Lewis

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## ABOUT THIS DOCUMENT

Enterprise Live is the web-based interface for Enterprise Manager. Enterprise Live allows users such as regional managers and owners to log in remotely, enabling you to view reports and manage your sites from anywhere in the world. With Enterprise Live, users can access and update configuration items such as discounts, promotions, product pricing information, employee details and much more!

This document is designed to give you a helping hand when it comes to managing your sites and performing daily tasks in Enterprise Live.

# EMPLOYEE LOCATIONS

## USING THE EMPLOYEE LOCATIONS SCREEN

- 1** Click on the **locations** button in the **employees** menu.
- A** You can select an individual employee from the **employee** drop-down list.
- B** You can search for employees by selecting the relevant region and site.
- C** You can search for an employee by entering their first name, last name and alias.
- D** You can tick the **show inactive** box to include inactive employees in the search.
- E** You can choose the number of locations you want to display.
- F** To only view employees effective from a particular date, select the relevant date from the **effective on** drop-down lists. The **effective on** date defaults to the current date to show all employees currently working.

The screenshot shows the 'Employee Location' screen in the Enterprise LIVE system. The interface includes a navigation menu on the left, a search and filter section at the top, and a table of employee locations below. Callouts A-F highlight specific features: A (Employee dropdown), B (Region dropdown), C (First Name, Last Name, and Alias input fields), D (Show Inactive checkbox), E (Display 200 Locations dropdown), and F (Effective On date dropdown).

**Administration**

- Access
- Roles
- Employees**
  - Management
  - Locations** (1)
- Stock
  - Products
  - Pricing
  - Stock Level
- Reports
  - View Reports
  - Site Groups
- Configuration
  - Discounts
  - Promotions

**Employee Location**

Employee: All (A) | First Name: | Last Name: | Alias: | Effective On: 19 May 2016 (F)

Region: QLD (B) | Site: Carindale (D) | Show Inactive:  (D)

Search: | Reset | Display 200 Locations (E) | Create a New Employee Location

Save | Refresh | Searched for employee locations under QLD region, site: Carindale, and employee: All.

First Name	Last Name	Region	Site	Effective From	Active	Security Level	Service Level	Booking Interval	Online Booking	Send Confirmations
Chris	Glasshouse	Carindale	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Employee	Therapist	15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Crystal	Madden	Carindale	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Employee	Therapist	<Site Controlled>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Emma	Collins	Carindale	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Manager	Master Therapist	<Site Controlled>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
HEAD OFFICE	HEAD OFFICE	Carindale	Carindale	21/08/2013	<input checked="" type="checkbox"/>	Owner	<none>	<Site Controlled>	<input type="checkbox"/>	<input type="checkbox"/>
Jessyka	Humphrey	Carindale	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Employee	Therapist	15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Josephine	Lane	Carindale	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Owner	Doctor	<Site Controlled>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Kathy	Mosby	Carindale	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Support	Therapist	15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Kristina	Andrews	Carindale	Carindale	12/09/2013	<input checked="" type="checkbox"/>	Clinical Trainer	<none>	<Site Controlled>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Lia	Davids	Carindale	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Employee	Master Therapist	15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mandy	Brown	Carindale	Carindale	12/09/2013	<input checked="" type="checkbox"/>	Clinical Trainer	<none>	<Site Controlled>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Melinda	Melinda	Carindale	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Employee	Therapist	<Site Controlled>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Rowan	Patterson	Carindale	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Employee	Therapist	<Site Controlled>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sally	Chalmers	Carindale	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Manager	Master Therapist	<Site Controlled>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

2

Once you have entered your desired criteria, click **search**.

G

You can click **reset** to clear the search criteria.

H

The employee list will be displayed here.

I

The **view employee location history** icon allows you to view the employee location schedule. This includes details of historic and future location changes.

J

The **has future location event** icon indicates that the employee has upcoming changes to their location information. You can click on this icon to view the employee location schedule.

Administration

- Access
- Roles

Employees

- Management
- Locations

Stock

- Products
- Pricing
- Stock Level

Reports

- View Reports
- Site Groups

Configuration

- Discounts
- Promotions

Employee Location

Employee: All | First Name: | Last Name: | Site: Carindale | Effective On: 19 May 2016

Search | Reset | Show Inactive | 200 Locations | Create a New Employee Location

Save | Refresh | Searched for employee locations under QLD region, site: Carindale, and employee: All.

First Name	Last Name	Region	Site	Effective From	Active	Security Level	Service Level	Booking Interval	Online Booking	Send Confirmations
	Glasshouse	Carindale	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Employee	Therapist	15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Madden	Carindale	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Employee	Therapist	<Site Controlled>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Emma	Collins	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Manager	Master Therapist	<Site Controlled>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	HEAD OFFICE	HEAD OFFICE	Carindale	21/08/2013	<input checked="" type="checkbox"/>	Owner	<none>	<Site Controlled>	<input type="checkbox"/>	<input type="checkbox"/>
	Jessyka	Humphrey	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Employee	Therapist	15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Josephine	Lane	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Owner	Doctor	<Site Controlled>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Kathy	Mosby	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Support	Therapist	15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Kristina	Andrews	Carindale	12/09/2013	<input checked="" type="checkbox"/>	Clinical Trainer	<none>	<Site Controlled>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Lia	Davids	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Employee	Master Therapist	15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Mandy	Brown	Carindale	12/09/2013	<input checked="" type="checkbox"/>	Clinical Trainer	<none>	<Site Controlled>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Melinda	Melinda	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Employee	Therapist	<Site Controlled>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Rowan	Patterson	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Employee	Therapist	<Site Controlled>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Sally	Chalmers	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Manager	Master Therapist	<Site Controlled>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## ADDING AN EMPLOYEE TO ANOTHER SITE

An employee can be added to multiple sites in Enterprise Live. You can also specify different information (e.g. security level, service level) for each site the employee works at.

- 1 Click on the **locations** button in the **employees** menu.
- 2 Enter your desired search criteria (e.g. region and site).
- 3 Select the relevant employee from the **employee** drop-down menu.
- 4 Click on the **create a new employee location** button. The employee management screen will appear.

The screenshot displays the Enterprise LIVE interface. The left-hand navigation menu is expanded to the 'Employees' section, where the 'Locations' option is highlighted with a blue circle labeled '1'. The main content area is titled 'Employee Location' and contains several input fields: 'Employee' (a dropdown menu with 'Chris Glasshouse' selected, circled with a blue '3'), 'Region' (a dropdown menu with 'QLD' selected), 'Site' (a dropdown menu with 'Carindale' selected, circled with a blue '2'), 'First Name', 'Last Name', and 'Alias' (all empty text boxes). Below these fields is a date picker for 'Effective On' set to '18 May 2016'. At the bottom of the main content area, there is a 'Create a New Employee Location' button with a green checkmark, circled with a blue '4'. Other buttons include 'Search', 'Reset', and 'Display 200 Locations'. The header shows 'Welcome Administrator' and 'Your control region is global'. The top right corner has a 'Logout' button and the 'Enterprise LIVE' logo.

- 5 Select the date that these details will come into effect from.
- 6 Select the site you want to add the employee to.
- 7 Select the employee's security level for this site.
- 8 Select the employee's service level for this site.
- 9 Select the employee's booking interval, if applicable.
- 10 Select the employee's commission schedule, if applicable.
- 11 Tick the **online booking** box if you want this employee to receive online bookings for this site.
- 12 Tick the **send confirmations** box if you want clients to receive a confirmation message when they have an appointment booked with this employee.
- 13 Click **save** to finish adding the employee to this site.

The screenshot shows the 'Employee Management' page in the Enterprise LIVE system. The interface includes a navigation menu on the left with categories like Administration, Employees, Stock, Reports, and Configuration. The main content area is for adding or editing an employee, with fields for personal details and site-specific settings. Numbered callouts (5-13) point to specific elements: 5 (Date), 6 (Site), 7 (Security Level), 8 (Service Level), 9 (Booking Interval), 10 (Commission Schedule), 11 (Online Booking checkbox), 12 (Send Confirmations checkbox), and 13 (Save button).

**Administration**

- Access
- Roles

**Employees**

- Management
- Locations

**Stock**

- Products
- Pricing
- Stock Level

**Reports**

- View Reports
- Site Groups

**Configuration**

- Discounts
- Promotions

Welcome Administrator  
Your control region is Global

Logout Enterprise LIVE

**Employee Management**

First Name:

Last Name:

Alias:

External Id:

Location

This employee will be active from the date:    5

This employee will be based at the site:  6

and will have Security Level:  7

and will have Service Level:  8

and will have Booking Interval:  9

and will have Commission Schedule:  10

Online Booking 11

Send Confirmations 12

13

## EDITING AN EMPLOYEE'S LOCATION INFORMATION

You can edit an employee's location information such as their security level, service level, booking interval, online booking availability, and send confirmation settings on the employee location screen. You can also choose the date when these changes will be implemented.

- 1 Click on the **locations** button in the **employees** menu.
- 2 Enter the desired search criteria and click **search**. Ensure that you can see the relevant employee in the employee list.
- 3 Select the date that you want your changes to come into effect from the **effective on** drop-down lists in the search criteria section.
- 4 Click **search**.
- 5 Edit the employee's location information as required. For example, you may wish to update an employee's security level, service level or booking interval.
- 6 Click **save** when you are finished updating the employee's information. The new information will be sent to the relevant site when the effective date arrives.

The screenshot shows the 'Employee Location' management interface. The left sidebar contains a navigation menu with categories like Administration, Employees, Stock, Reports, and Configuration. The 'Locations' option under 'Employees' is highlighted with a red circle and the number 1. The main area contains search filters for Employee, Region, Site, and Effective On, with a 'Search' button circled in red and labeled 4. A table below displays a list of employees with columns for First Name, Last Name, Region, Site, Effective From, Active status, Security Level, Service Level, Booking Interval, Online Booking, and Send Confirmations. A red circle with the number 5 is placed over the 'Booking Interval' column. At the bottom left of the table, a 'Save' button is circled in red and labeled 6. The top right of the interface shows a 'Logout' button and the 'Enterprise LIVE' logo.

First Name	Last Name	Region	Site	Effective From	Active	Security Level	Service Level	Booking Interval	Online Booking	Send Confirmations
Chris	Glasshouse	Carindale	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Employee	Therapist	15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Crystal	Madden	Carindale	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Employee	Therapist	<Site Controlled>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Emma	Collins	Carindale	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Manager	Master Therapist	15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
HEAD OFFICE	HEAD OFFICE	Carindale	Carindale	21/08/2013	<input checked="" type="checkbox"/>	Owner	<none>	<Site Controlled>	<input type="checkbox"/>	<input type="checkbox"/>
Jessyka	Humphrey	Carindale	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Employee	Therapist	15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Josephine	Lane	Carindale	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Owner	Doctor	<Site Controlled>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Kathy	Mosby	Carindale	Carindale	29/05/2016	<input checked="" type="checkbox"/>	Support	Therapist	15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Kristina	Andrews	Carindale	Carindale	12/09/2013	<input checked="" type="checkbox"/>	Clinical Trainer	<none>	<Site Controlled>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Lia	Davids	Carindale	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Employee	Master Therapist	15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mandy	Brown	Carindale	Carindale	12/09/2013	<input checked="" type="checkbox"/>	Clinical Trainer	<none>	<Site Controlled>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Melinda	Melinda	Carindale	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Employee	Therapist	<Site Controlled>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Rowan	Patterson	Carindale	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Employee	Therapist	<Site Controlled>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sally	Chalmers	Carindale	Carindale	29/05/2016	<input checked="" type="checkbox"/>	Manager	Master Therapist	15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



## DELETING AN EMPLOYEE'S FUTURE LOCATION DETAILS

If an employee was scheduled to start at a new location but these details are no longer relevant, then you can delete the employee's future location details.

- ! You cannot delete employee location details that have a past 'effective from' date.
- 1 Click on the **locations** button in the **employees** menu.
- 2 Enter the desired search criteria and click **search**.
- 3 Once you have found the employee, click on the **has future location event** icon (on the far right-hand side). The employee location schedule screen will appear.
- 4 Tick the **select** box for the locations that you want to delete.
- 5 Click the **delete** button to finish deleting the employee's future location details.

The screenshot shows the Enterprise LIVE interface. The top navigation bar includes the SHORTCUTS logo, a welcome message for the Administrator, and the Enterprise LIVE logo. The left sidebar contains a navigation menu with categories like Administration, Employees, Stock, Reports, and Configuration. The main content area is titled 'Employee Location' and contains a search form with fields for Employee, Region, Site, and Effective On. A search button is highlighted with a blue circle '2'. Below the search form is a table of search results with columns: First Name, Last Name, Region, Site, Effective From, Active, Security Level, Service Level, Booking Interval, Online Booking, and Send Confirmations. A row for 'Chris Glasshouse' is highlighted with a blue circle '3'. A second screenshot shows the 'Employee Location Schedule' screen for 'Chris Glasshouse'. It features a table with columns: Select, First Name, Last Name, Region, Site, Effective From, Active, Security Level, Service Level, Booking Interval, Online Booking, and Send Confirmations. The 'Select' column for the first row is checked with a blue circle '4'. A 'Delete' button is highlighted with a blue circle '5'.

## MAKING AN EMPLOYEE INACTIVE AT A SITE



Before making an employee inactive you must ensure they have no future appointments. Run the Future Appointments report, then allocate any future appointments to another employee.

1

Click on the **locations** button in the **employees** menu.

2

Enter your desired search criteria, then click **search**. Ensure that you can see the relevant employee in the employee list.

3

Select the date that you want the employee to become inactive from the **effective on** drop-down lists in the search criteria section.

4

Click **search**.

5

Untick the **active** box for the site where you want to make the employee inactive.

6

Click **save**. The employee will become inactive when the effective date arrives.

Enterprise LIVE interface showing the Employee Location search and list. The interface includes a navigation menu on the left, a search form at the top, and a table of employee locations below.

**Navigation Menu:**

- Administration
  - Access
  - Roles
- Employees
  - Management
  - Locations
- Stock
  - Products
  - Pricing
  - Stock Level
- Reports
  - View Reports
  - Site Groups
- Configuration
  - Discounts
  - Promotions

**Employee Location Search Form:**

- Employee: All
- Region: Global
- Site: All
- First Name: Chris
- Last Name: Glasshouse
- Effective On: 25 May 2016
- Show Inactive:

**Search Results Table:**

First Name	Last Name	Region	Site	Effective From	Active	Security Level	Service Level	Booking Interval	Online Booking	Send Confirmations
Chris	Glasshouse	Southbank	Southbank	24/05/2016	<input checked="" type="checkbox"/>	Manager	Therapist	15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Chris	Glasshouse	Carindale	Carindale	19/05/2016	<input checked="" type="checkbox"/>	Employee	Therapist	15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



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