

MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

CLINIC

# ENTERPRISE MANAGER EMPLOYEES

HOME &  
MOBILE

BEAUTY



**SHORTCUTS**

SMARTER BUSINESS TECHNOLOGY

*it suits you*

**Last updated 16 June 2017**

By Erin Lewis

Product: Enterprise Manager

Software version no: 8.0.20

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Country: Australia

# CONTENTS

- EMPLOYEES ..... 1**
- EMPLOYEE LEVELS OVERVIEW .....1**
- ADDING AN EMPLOYEE LEVEL .....2**
- COMPLETING AN EMPLOYEE SEARCH .....4**
- ADDING AN EMPLOYEE .....7**

## ABOUT THIS DOCUMENT

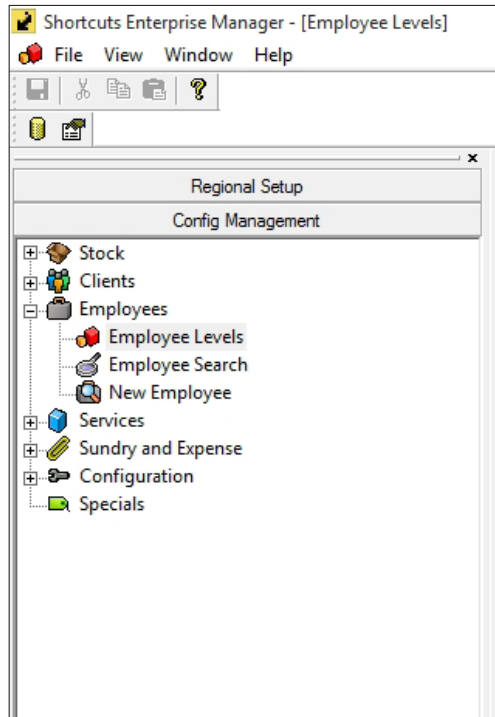
Working hand in hand with Shortcuts Fusion at your individual sites, Enterprise Manager provides you with the power and flexibility to make fast and intelligent decisions to enhance and grow your business.

With Enterprise Manager, you can configure items such as products, services, sundry items, payment options, employee details, security levels and much more!

This document is designed to give you a helping hand when it comes to setting up and managing your sites in Enterprise Manager.

# EMPLOYEES

## EMPLOYEE LEVELS OVERVIEW



Some businesses have different employee levels depending on an employee's experience or position in the business. For example, a business may have stylists, senior stylists and apprentices. Each level may charge a different price for a service, and the time taken to complete a service may also differ.

The employee levels feature allows you to set up service times and service durations for different levels of employee. Your employee level settings are located within the **config management** menu under the **employees** category, as shown on the left hand side. Once levels are set up and assigned to employees, Shortcuts Fusion will automatically adjust the price and duration for the relevant services, according to the service setup.

Employee levels can be added at any regional level within the regional structure (e.g. global, country, state/region). For example, if you wanted the new employee level to be consistent and available across all sites, you would select the global region. If you wanted the new employee level to only be available within a certain sub-region, you would select the relevant sub-region.

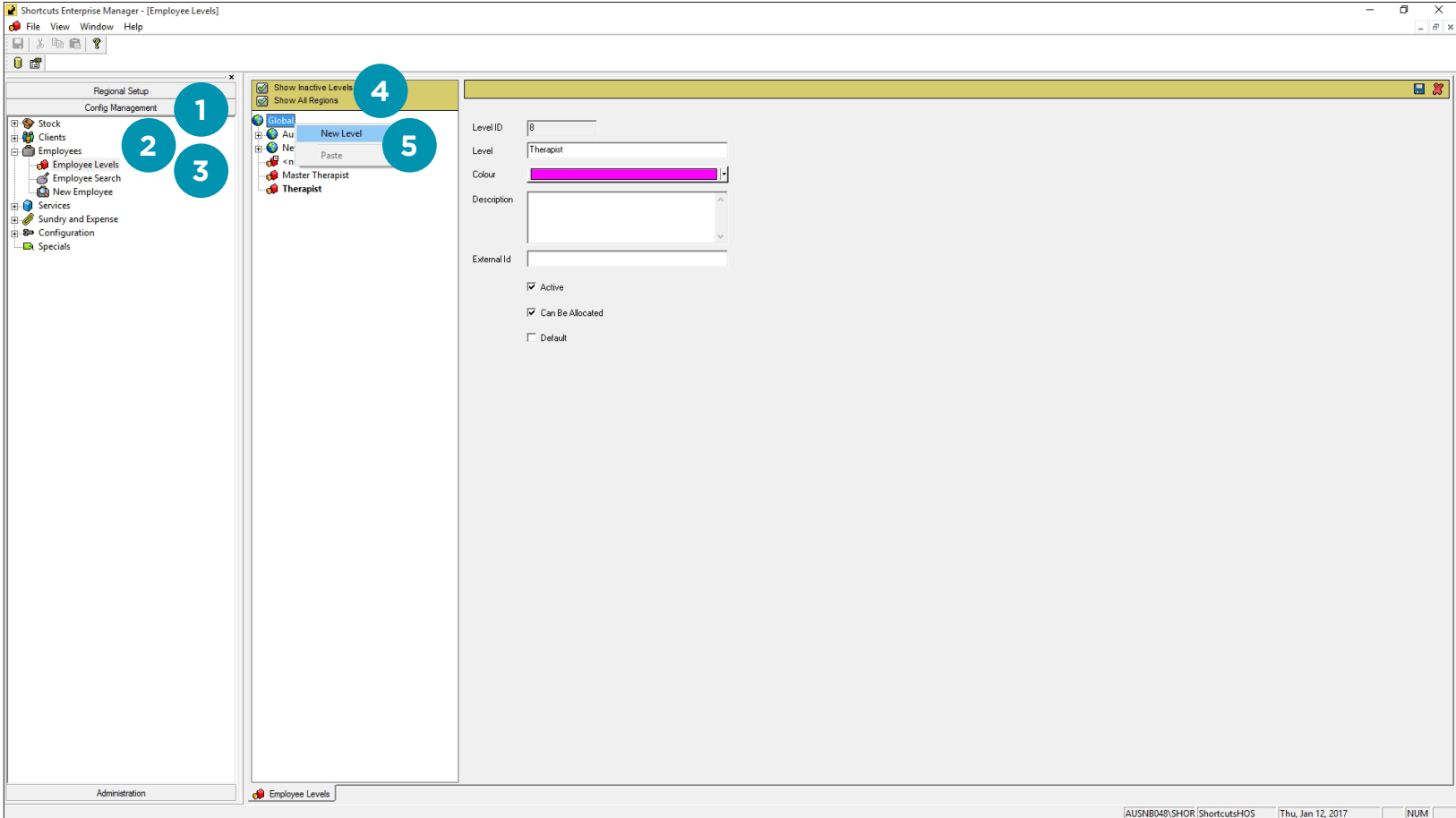
Please note that employee levels need to be configured prior to setting up employees and services. If your business does not have tiered service pricing, timing, or level specific commissions or deductions, you do not need to set up employee levels.

**Example 1 - Price:** A senior stylist charges \$70 for a ladies haircut, whereas an apprentice charges \$45 for a ladies haircut.

**Example 2 - Appointment Duration:** A senior stylist takes 15 minutes to apply a colour, whereas an apprentice takes 30 minutes to apply a colour.

# ADDING AN EMPLOYEE LEVEL

- 1 Click on the **config management** menu.
- 2 Double click to expand **employees**.
- 3 Double click on **employee levels**.
- 4 Right click on the region you want to add the employee level to.
- 5 Select **new level**. A new employee level will be added.



6

Enter the name of the employee level.

7

Select a colour code for the level. This colour code will be displayed on various screens in Shortcuts Fusion next to the relevant employees.

8

**Optional:** Enter a short description of the level.

9

Tick the **active** box to allow this level to be assigned to employees.

10

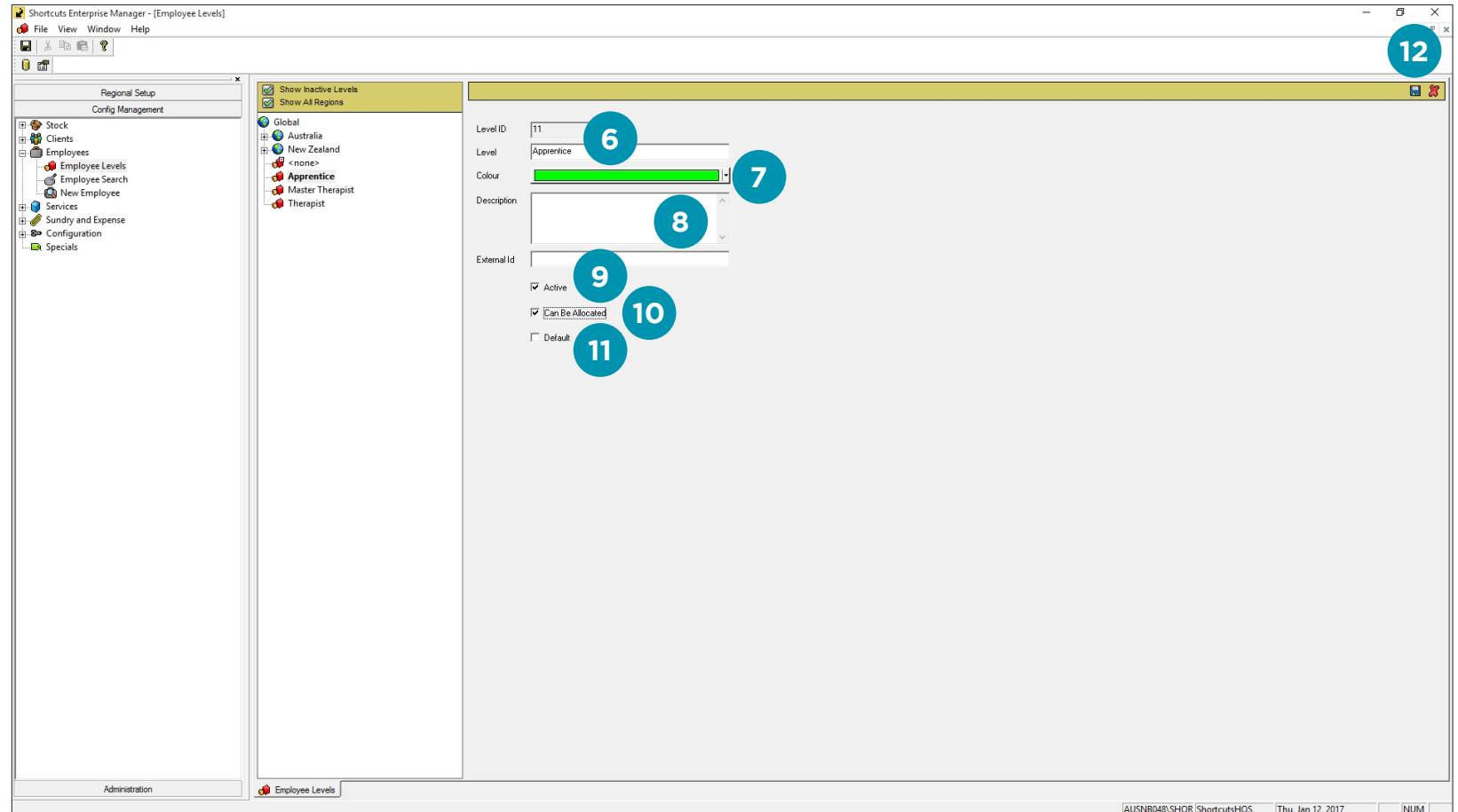
Tick the **can be allocated** box if employees of this level can have services allocated to them.

11

Tick the **default** box if you want this to be the default level for new employees.

12

Click **save**.



## COMPLETING AN EMPLOYEE SEARCH

The employee search feature allows you to easily find and select employees. It also allows you to export your results into CSV format which can be easily opened in Microsoft Excel. The detailed search option (employee search) and keyword search option are available for you to use; however, the custom search feature is for Shortcuts use only.

### DETAILED SEARCH

The detailed search option allows you to search for specific employee details.

- 1 Click on the **config management** menu.
- 2 Double click to expand **employees**.
- 3 Double click on **employee search**.
- 4 Enter your desired search criteria into the relevant field(s).
- 5 Click to select either the **search head office sites** option or **search POS sites** option.
- 6 Tick the **show business employees** box if you want to display the business employee for each site in the results list.
- 7 Click **submit** to search.

The screenshot displays the 'Employee Search' window in Shortcuts Enterprise Manager. The interface includes a search form with the following fields and options:

- Title:** Dropdown menu with 'Sarah' selected.
- First Name:** Text input field.
- Last Name:** Text input field.
- Employee ID:** Text input field.
- Country:** Dropdown menu with 'Australia' selected.
- State:** Dropdown menu.
- Suburb:** Text input field.
- Postcode:** Text input field.
- Search Options:** Radio buttons for 'Search Head Office Sites' and 'Search POS Sites' (selected), and a checkbox for 'Show Business Employees'.
- Buttons:** Submit, Reset, and Export.

The results table below shows the following data:

Employee ID	Title	Last Name	First Name	Site
130			Sarah	Belmain
130			Sarah	Bondi
248		Kaslik	Sarah	Edgecliff
248		Kaslik	Sarah	MacArthur
248		Kaslik	Sarah	Mosman
276		Gibson	Sarah	South St
307		Gibson	Sarah	Shenton Park
352		Mitchell	Sarah	Adelaide St
393		Mitchell	Sarah	Southbank
424		Mitchell	Sarah	Adelaide St
592		Choe	Sarah	Kogarah
641		Sarah	Sarah	Parramatta

- A** Click the **reset** button if you want to clear all criteria fields.
- B** Click **export** to export your results into a CSV file.
- C** Your search results will be shown here. You can double click on an employee in the search results to open their details in a new tab.

Shortcuts Enterprise Manager - [Employee Search]

File View Window Help

Regional Setup  
Config Management

- Stock
- Clients
- Employees
- Employee Levels
- Employee Search
- New Employee
- Services
- Sundry and Expense
- Configuration
- Specials

Employee Search | Keyword Search | Custom Search

Details

Title First Name Last Name Employee ID

Country State Suburb Postcode

Search Head Office Sites Site

Search POS Sites

Show Business Employees

Submit

Reset

Export

Employee ID	Title	Last Name	First Name	Site
130			Sarah	Belmain
130			Sarah	Bondi
248		Kaslik	Sarah	Edgecliff
248		Kaslik	Sarah	MacArthur
248		Kaslik	Sarah	Mosman
276		Gibson	Sarah	South St
307		Gibson	Sarah	Shenton Park
352		Mitchell	Sarah	Adelaide St
393		Mitchell	Sarah	Southbank
424		Mitchell	Sarah	Adelaide St
592		Choe	Sarah	Kogarah
641		Sarah	Sarah	Parramatta

Administration | Employee Search

AUSNB048.SHOR | PeppermintParkHQ Fri, Mar 10, 2017 | NUM



## KEYWORD SEARCH

The keyword search feature allows you to search for a word or phrase across all employee fields. You can use the wildcards \* and ? in your search. To search for a phrase, enclose it in quotations marks.

1

Click on the **keyword search** button.

2

Enter the relevant keyword or phrase in the **containing** field.

3

Click **submit**.

A

Your search results will be shown here. You can double click on an employee in the search results to open their details in a new tab.

Shortcuts Enterprise Manager - [Employee Search]

File View Window Help

Regional Setup  
Config Management

Stock  
Clients  
Employees  
Employee Levels  
New Employee  
Services  
Sundry and Expense  
Configuration  
Specials

Employee Search Keyword Search Custom Search

Keywords: Containing: Smith

Submit  
Reset  
Export

Hint: You can use the wildcards \* and ? in your queries. To search for a phrase, enclose it in quotation marks ("\*\*\*\*").






Employee ID	Surname	First Name	Addr1 Line1	Addr1 Line2	Addr1 State	Addr1 Country	Suburb	Postcode	Title Name	Site Name
269	Smith	Rebecca				Australia				South St
300	Smith	Rebecca				Australia				Shenton Park
300	Smith	Rebecca				Australia				Shenton Park
505	Smith	Tamilia				Australia				Mosman
505	Smith	Tamilia				Australia				Balmain
761	Smith	Christina								Paramatta
791	Smith	John								Collins Street

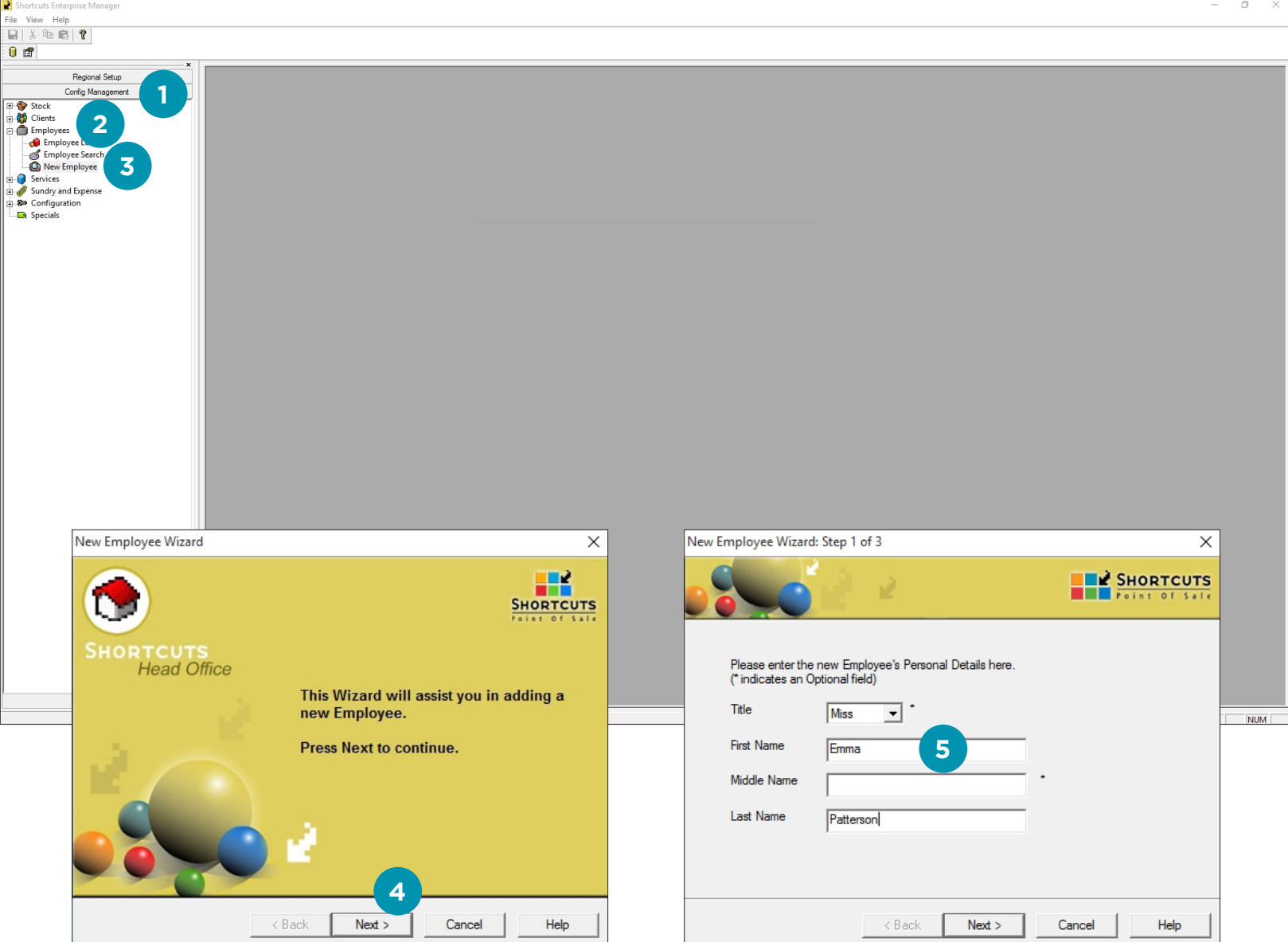
Administration Employee Search

AUSNB048.SHOR | PeppermintParkHQ | Fri, Mar 10, 2017 | NUM

## ADDING AN EMPLOYEE

You must ensure that all employees using Shortcuts Fusion at all sites are entered into Enterprise Manager.

-  Before adding employees, it is recommended that you have already set up your security settings and levels.
-  Click on the **config management** menu.
-  Double click to expand **employees**.
-  Double click on **new employee**. This will open the new employee wizard.
-  Click **next**.
-  Enter the employee's details and press **next**.



The screenshot shows the Shortcuts Enterprise Manager interface. The left-hand menu is expanded to show the 'Config Management' section, with 'Employees' and 'New Employee' highlighted. The 'New Employee Wizard' is open, displaying the 'Step 1 of 3' screen. The wizard prompts the user to enter the new employee's personal details. The fields shown are Title (Miss), First Name (Emma), Middle Name, and Last Name (Patterson). The 'Next >' button is highlighted.

Shortcuts Enterprise Manager

Regional Setup

Config Management

Stock

Clients

Employees

Employee L

Employee Search

New Employee

Services

Sundry and Expense

Configuration

Specials

New Employee Wizard

SHORTCUTS  
Point Of Sale

SHORTCUTS  
Head Office

This Wizard will assist you in adding a new Employee.  
Press Next to continue.

< Back Next > Cancel Help

New Employee Wizard: Step 1 of 3

SHORTCUTS  
Point Of Sale

Please enter the new Employee's Personal Details here.  
(\* indicates an Optional field)

Title Miss

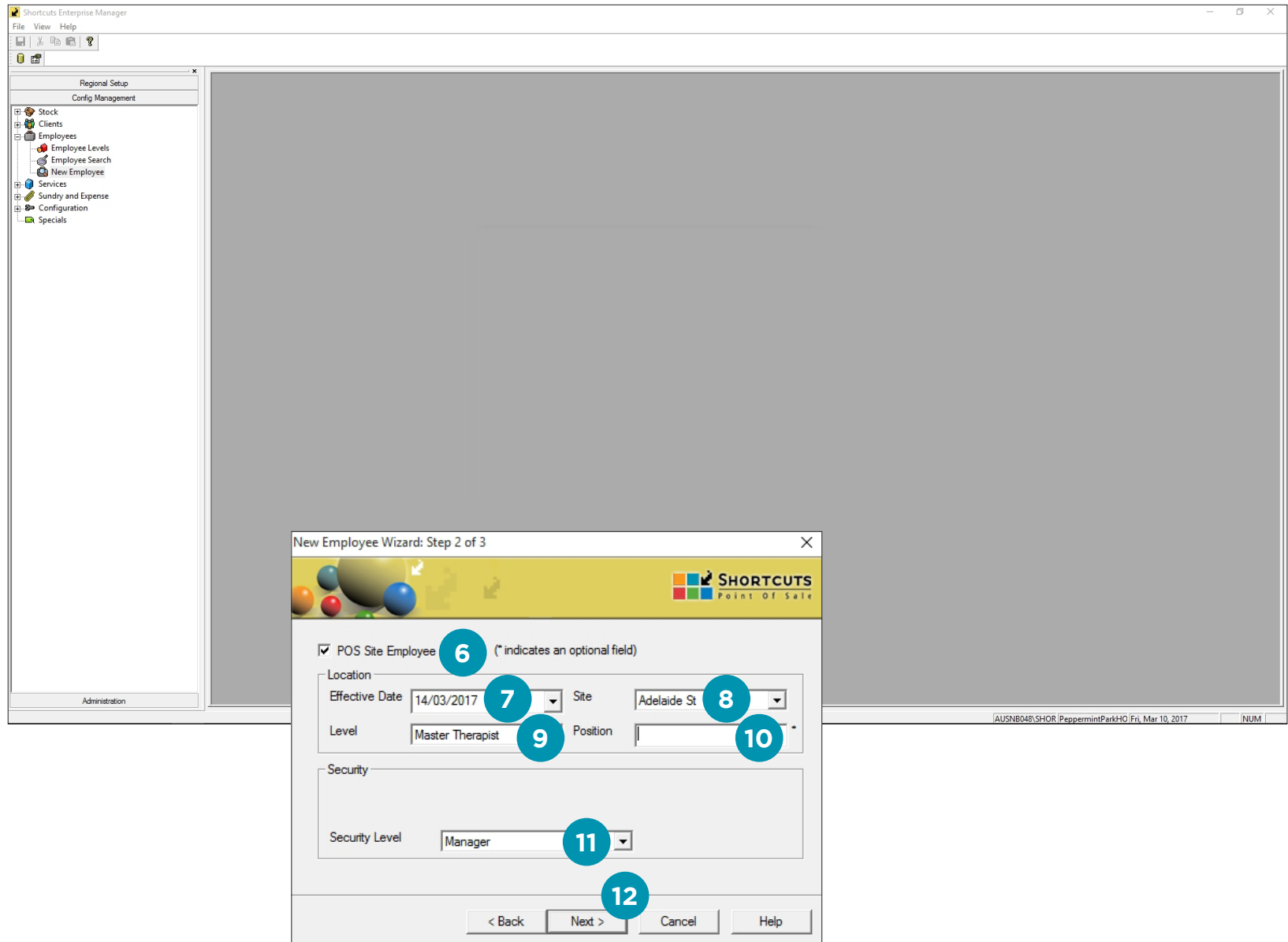
First Name Emma

Middle Name

Last Name Patterson

< Back Next > Cancel Help

- 6 Tick the **POS site employee** box to indicate that they work (or will work) at a site.
- 7 Select the date they will begin working at the site from the **effective date** drop-down list.
- 8 Select the relevant site.
- 9 Select their employee level (if applicable).
- 10 **Optional:** Enter the name of the employee's position.
- 11 Select the relevant security level.
- 12 Press **next**.



13 Click **next**.

14 Click **finish**.

15 The new employee will be added to the database, and their details will appear in the employee details screen. Enter any further employee details as required.

16 Click **save**.

17 Close tab.

The screenshot displays the Shortcuts Enterprise Manager interface. The main window is titled "Shortcuts Enterprise Manager - [Employee - Patterson, Emma]". It features a "Regional Setup" sidebar on the left and a "Details" pane on the right. The "Details" pane shows the following information for Emma Patterson:

- Employee ID: 793, Alias: Emma, PIN: 9425
- Name: First Name: Emma, Middle Name: , Last Name: Patterson, Title: Miss
- Residential Address: Street: 123 Lavendar Street, Suburb: Ashgove, State: QLD, Postcode: 4060, Country: Australia
- Postal Address: Street: 123 Lavendar Street, Suburb: Ashgove, State: QLD, Postcode: 4060, Country: Australia
- Contact Details: Phone 1: , Phone 2: , Email: e.patterson1@email.com, Mobile: 0400111223
- Other Details: Gender: Female, DOB: 14/03/2017, Tax File No.: 12233444, Goal: 0.000000, Barcode: , External Id: , Biography:

Two wizard windows are overlaid on the main interface:

- New Employee Wizard: Step 3 of 3** (Step 13):
  - Head Office Employee:  (\* indicates an optional field)
  - Location: Effective Date: 26/04/2017, Site: Head Office, Position:
  - Security: HOS Login Name: , HOS Security Level: public
- New Employee Wizard: Complete** (Step 14):
  - Summary: Full Name: Emma Patterson, HO Site: -, Effective Date: -, HOS Security: -, HOS Login: -, POS Site: Adelaide St, Effective Date: 14/03/2017, POS Security: Manager, POS Level: Master Therapist

Numbered callouts (13-17) are placed over the wizard windows and the main details pane to indicate the sequence of actions.



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