

MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

CLINIC

ENTERPRISE MANAGER

SERVICES

RESOURCES, CAPABILITIES
& SERIES

HOME &
MOBILE

BEAUTY



SHORTCUTS

SMARTER BUSINESS TECHNOLOGY

it suits you

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By Erin Lewis

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CONTENTS

- ADDING A RESOURCE CATEGORY.....1**
- ASSIGNING RESOURCE CATEGORIES TO SERVICES.....2**
- ADDING A CAPABILITY.....3**
- ASSIGNING CAPABILITIES TO SERVICES4**
- ADDING A SERIES5**
- DEACTIVATING A SERIES.....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.

ADDING A RESOURCE CATEGORY

A resource is a room or a piece of equipment used to provide particular services (e.g. massage room). Shortcuts allows you to keep track of resource availability which helps to ensure that no clashes occur when scheduling appointments. Resources are created in Shortcuts Fusion, however they must be assigned to resource categories, which are created in Enterprise Manager. Resource categories must also be assigned to services in Enterprise Manager. Once this is configured the resource category acts as a link between the services and the resources, meaning when you schedule an appointment for a service it will prompt you to select the appropriately linked resource.

- 1 Click on the **config management** menu.
- 2 Double click to expand **services**.
- 3 Double click on **resource categories**.
- 4 Right click on the blank area in the resource categories screen.
- 5 Select **add resource category**.
- 6 Enter the name of the new resource category.
- 7 **Optional:** Enter a description.
- 8 Click **OK**.
- 9 Tick **selection mandatory** if you want it to be mandatory to select a resource when making a booking for this category.
- 10 Click **save**.

The screenshot shows the 'Shortcuts Enterprise Manager - [Resource Categories]' window. The left pane shows a tree view with 'Services' expanded to 'Resource Categories'. The main pane shows a table with columns 'Name', 'Description', 'Active', and 'Selection Mandatory'. A context menu is open over the table with options 'Add Resource Category...' and 'Refresh'. A 'New Resource Category' dialog box is open in the foreground with the following fields and buttons:

Name	Description	Active	Selection Mandatory
Body		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Collagen Stimulation Treatment		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cosmetic Tattoo		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Electrolysis		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Endermologie		<input checked="" type="checkbox"/>	<input type="checkbox"/>
IPL		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Injectables		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Laser		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Massage		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Microdermabrasion		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Piercing		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tanning		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Waxing		<input checked="" type="checkbox"/>	<input type="checkbox"/>

The 'New Resource Category' dialog box contains the following fields and buttons:

- Name: Threading (6)
- Description: (7)
- Buttons: OK (8), Cancel

ASSIGNING RESOURCE CATEGORIES TO SERVICES

Once you have added your resource categories, you will need to link these categories to the relevant services.

- 1 Click on the **config management** menu.
- 2 Double click to expand **services**.
- 3 Double click on **services**.
- 4 Expand the relevant service category, then right click on the relevant service.
- 5 Select **resource categories**.
- 6 Select the resource category the service requires from the **available resource categories** list. Only one resource category should be assigned.
- 7 Click on the > arrow to move it to the **selected resource categories** list on the right.
- 8 Click **OK**.

The screenshot displays the Shortcuts Enterprise Manager interface. The main window is titled "Shortcuts Enterprise Manager - [Services and Categories - Global]". The left sidebar shows a tree view of the system structure, with "Services" expanded and "Threading" selected. A context menu is open over "Threading", with "Resource Categories" highlighted. A dialog box titled "Select Resource Categories" is open in the foreground, showing a list of "Available Resource Categories" (Body, Collagen Stimulation Treatment, Cosmetic Tattoo, Electrolysis, Endermologie, Injectables, IPL, Laser, Massage, Microdermabrasion, Piercing, Tanning, Waxing) and a "Selected Resource Categories" list containing "Threading". The "OK" button is highlighted.

Category ID	Category	Description	External Id	Active
1	<Unknown>			<input type="checkbox"/>

ADDING A CAPABILITY

The capabilities feature allows you to set up certain skills (e.g. waxing, tanning, cutting, foiling) that are needed to perform services in your business. These capabilities can then be assigned to the relevant employees. Each employee can be assigned to multiple capabilities, but only one capability should be assigned to each service. Setting up capabilities ensures that services are only allocated to employees who are capable of performing the service. Capabilities are set up in Enterprise Manager, but must be assigned to employees through Shortcuts Fusion.

- 1 Click on the **config management** menu.
- 2 Double click to expand **services**.
- 3 Double click on **capabilities**.
- 4 Right click on the blank area in the capabilities screen.
- 5 Select **add capability**.
- 6 Enter the name of the new capability.
- 7 **Optional:** Enter a description.
- 8 Click **OK**.
- 9 Click **save**.

The screenshot shows the 'Shortcuts Enterprise Manager - [Capabilities]' window. The left sidebar shows a tree view with 'Config Management' expanded, and 'Services' and 'Capabilities' also expanded. The main area displays a list of capabilities, including 'Beauty', 'Bio Sculpture', 'Body Cool Sculpting', 'Body Treatments', 'Collagen Stimulation Treatment', 'Cosmetic Tattoo', 'Diatomy', 'Electrolysis', 'Endermologie', 'Eyelash Extensions', 'Eyelash Lift', 'Facials', 'Facials - Advanced', 'Facials - Express', 'Hands_Feet', 'IPL', 'Injectables', 'LED', 'Laser', 'Makeup', 'Massage', 'Massage - Hot Stone', 'Microdermabrasion', 'Piercing', 'Remedial Massage', 'Skin Rejuvenation', 'Spray Tan', 'Waxing', and 'Waxing - Brazilian'. A right-click context menu is open over 'Waxing - Brazilian', with 'Add Capability...' selected. A 'New Capability' dialog box is shown in the foreground, with 'Threading' entered in the 'Capability' field and a blank 'Description' field. The dialog has 'OK' and 'Cancel' buttons.

ASSIGNING CAPABILITIES TO SERVICES

Once you have added your capabilities, you will need to link them to the relevant services.

- 1 Click on the **config management** menu.
- 2 Double click to expand **services**.
- 3 Double click on **services**.
- 4 Expand the relevant service category, then right click on the relevant service.
- 5 Select **capabilities**.
- 6 Select the capability the service belongs to from the **available capabilities** list. Only one capability should be assigned.
- 7 Click on the **>** arrow to move it to the **selected capabilities** list on the right.
- 8 Click **OK**.

The screenshot shows the Shortcuts Enterprise Manager interface. The main window displays a tree view of services under 'Global'. A context menu is open over the 'Threading' service, with 'Capabilities' selected. A 'Select Capabilities' dialog box is open, showing a list of available capabilities on the left and a list of selected capabilities on the right. The 'Threading' capability is selected in the 'Selected Capabilities' list. The dialog box has 'OK' and 'Cancel' buttons at the bottom.

Category ID	Category	Description	External Id	Active
1	<Unknown>			<input type="checkbox"/>

Available Capabilities:

- Makeup
- Massage
- Massage - Hot Stone
- Microdermabrasion
- Piercing
- Remedial Massage
- Skin Rejuvenation
- Spray Tan
- Waxing
- Waxing - Brazilian

Selected Capabilities:

- Threading

ADDING A SERIES

A series is two or more of the same service sold as one combined package, often at a discounted price for the client. You can create multiple series for a single service; for example, you could create a series of 5 manicures, and a series of 10 manicures. When a client purchases a series, the series is purchased upfront and the services are then redeemed over time. Shortcuts will keep track of how many services a client has remaining in their series at any time.

- 1 Click on the **config management** menu.
- 2 Double click to expand **services**.
- 3 Double click on **services**.
- 4 Double click on the service you want to add a series for.
- 5 Click on the **series** button.
- 6 Enter the name of the series. We recommend including the quantity in the name of the series (e.g. 5 x Spray Tan).
- 7 Select the first date that this series will be available from. By default this will be set to tomorrow's date. If the series is effective immediately change this to today's date.
- 8 Enter the number of services the series contains in the **qty** column.

The screenshot shows the Shortcuts Enterprise Manager interface for configuring a series for a service. The interface is divided into several panes:

- Left Pane (Config Management):** A tree view showing the navigation structure. The 'Services' folder is expanded, and 'Cleansing Facial' is selected. A red circle '1' is over the 'Config Management' menu, '2' is over 'Services', '3' is over 'Services' again, and '4' is over 'Cleansing Facial'.
- Right Pane (Service Details):** A table for configuring the series. A red circle '5' is over the 'Series' tab. A red circle '6' is over the 'Name' column, which contains '5 x Cleansing Facial'. A red circle '7' is over the 'Available From' column, which contains '11/03/2017'. A red circle '8' is over the 'Qty' column, which contains '5'. Below the table is a 'Block' table with columns for 'Block', 'Block Name', 'Block Break (minutes)', and 'Finishing'.

Name	Available From	Qty	Item Pri...	Sell Price	Saving %	Expiry	Active	External Id
5 x Cleansing Facial	11/03/2017	5	40.00	200.00	20	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Block	Block Name	Block Break (minutes)	Finishing
1	Cleansing Facial	0	<input type="checkbox"/>

9

Enter the price for an individual service in the **item price** column.

OR

Enter the total price for the entire series in the **sell price** column.

OR

Enter the discount percentage the client will receive compared to the normal price in the **saving %** column.

These 3 fields are all linked to each other, so when you enter a value in one field the other 2 will be calculated automatically.

10

Enter the number of months that the series is valid for. For example, if the series will expire after 2 years, enter '24' months. To set no expiry, simply leave this field as zero.

11

Click **save**.

12

Close tab.

The screenshot shows the 'Services and Categories - Cleansing Facial' window. On the left is a tree view of the service hierarchy, with 'Cleansing Facial' selected. The main area contains a table with columns: Name, Available From, Qty, Item Pri..., Sell Price, Saving %, Expiry, Active, and External Id. The row for '5x Cleansing Facial' has values: 11/03/2017, 5, 40.00, 200.00, 20, 0, and is active. Below this is a 'Block' table with columns: Block, Block Name, Block Break (minutes), and Finishing. The row for '1' has values: 1, Cleansing Facial, 0, and a checkbox. Numbered callouts 9, 10, 11, and 12 point to the 'Item Price', 'Expiry', 'Save', and 'Close' buttons respectively.

Name	Available From	Qty	Item Pri...	Sell Price	Saving %	Expiry	Active	External Id
5x Cleansing Facial	11/03/2017	5	40.00	200.00	20	0	<input checked="" type="checkbox"/>	

Block	Block Name	Block Break (minutes)	Finishing
1	Cleansing Facial	0	<input type="checkbox"/>

DEACTIVATING A SERIES

Once a series has been deactivated, sites will no longer be able to sell the series. However, clients who have already purchased the series will still be able to redeem services from the series after it has been deactivated.

- 1 Click on the **config management** menu.
- 2 Double click to expand **services**.
- 3 Double click on **services**.
- 4 Double click on the service you want to deactivate a series for.
- 5 Click on the **series** button.
- 6 Untick the **active** box for the relevant series.
- 7 Click **save**.
- 8 Close tab.

The screenshot shows the 'Shortcuts Enterprise Manager' interface with the 'Services and Categories - Cleansing Facial' window open. The interface is annotated with numbered steps 1 through 8. Step 1 points to the 'Config Management' menu. Step 2 points to the 'Services' folder in the left-hand tree. Step 3 points to the 'Services' sub-folder. Step 4 points to the 'Cleansing Facial' service. Step 5 points to the 'Series' tab in the top navigation bar. Step 6 points to the 'Active' checkbox in the table, which is currently checked. Step 7 points to the 'Save' button in the top right corner. Step 8 points to the 'X' close button in the top right corner.

Name	Available From	Qty	Item Pri...	Sell Price	Saving %	Expiry	Active	External Id
5 x Cleansing Facial	11/03/2017	5	40.00	200.00	20	0	<input checked="" type="checkbox"/>	
10 x Cleansing Facial	11/03/2017	10	35.00	350.00	30	0	<input type="checkbox"/>	

Block	Block Name	Block Break (minutes)	Finishing
1	Cleansing Facial	0	<input type="checkbox"/>



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AUSTRALIA AND ASIA

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

www.shortcuts.com.au

UK AND EUROPE

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

www.shortcuts.co.uk

NORTH AMERICA

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

www.shortcuts.net

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