MULTI-
SITE

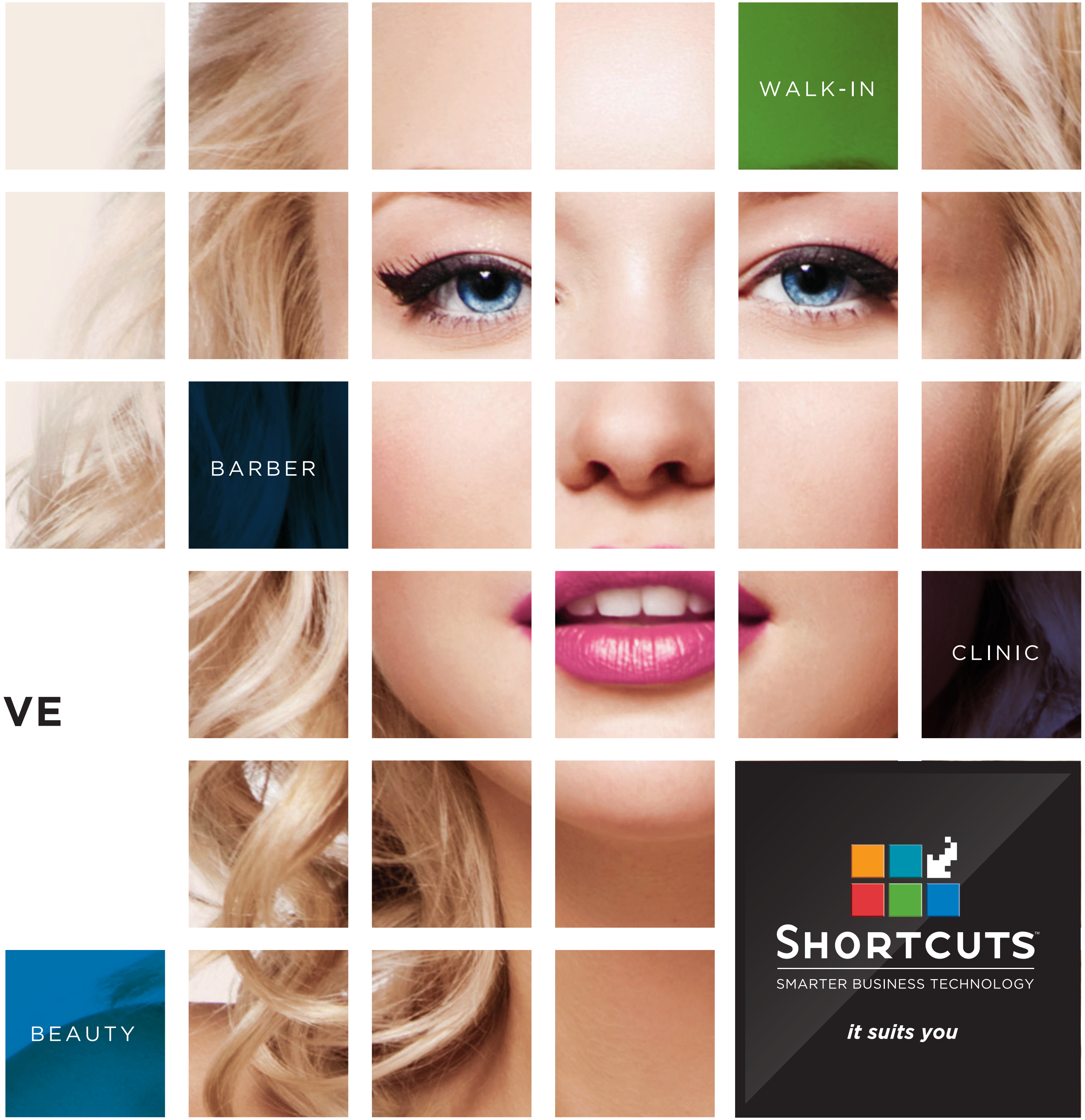
SPA

HAIR

ENTERPRISE LIVE

REPORTS

HOME &
MOBILE



Last updated 19 June 2017

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Product: Enterprise Live

Software version no: 8.0.20.1

Document version no: 1.0

Country: Australia

CONTENTS

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.

REPORT DESCRIPTIONS

Reporting is an essential tool for your enterprise system. Enterprise Live provides you with a wide range of reports to assist you in measuring the performance of your sites. There are several types of parameters that you can use to refine the results generated in reports. The following list of reports come standard with Enterprise Live.

APPOINTMENTS

Days Appointments: A listing of any date's appointments, listed by time, client and service.

Employee Appointment and Roster Analysis: A comparison of the rostered times to the allocated appointment times for each employee, and for the whole salon. If required, you can drill down to each site and then each employee individually.

Tag Usage: A report listing Appointment Tag usage between two dates. The results are grouped by tag name and lists the appointment date and time, as well as the employee and client. This report only includes appointments where a tag has been assigned to the appointment. The tags are sorted according to the tag that was associated with the highest revenue, to the least revenue.

Value of Future Appointments: A graphical representation of the value of all appointments within a specified date range for the selected sites. Percentages (%) are given for each employee at each site.

BUSINESS

Business Takings Comparison: This report is set out so that you can easily compare the client numbers and day's total takings for a particular weekday over a specified date range.

Gift Certificate Usage: A report that provides a listing of Gift Certificate usage for a specified date range for the specified site(s).

Outstanding Gift Certificates: This report displays a list of all outstanding gift certificates, including the associated client, original and outstanding amounts and date of last redemption. There is also a summary of Total Sold and Total Outstanding for each site, and the group as a whole.

Payments: A report showing the breakdown of a date range's transactions by payment type.

Payments Breakdown: This report gives a summary of the sites' daily takings for each payment type over a specified date range.

Sales Breakdown: A graphical and tabular comparison of daily product, service, sundry, series and gift certificate takings across a group of sites for a specified date range.

Sales by Item: This report displays all products, services and sundries (excluding gift certificates, series and point redemptions) sold for a specified date range. It displays the item name, as well as each client that bought it, the quantity bought, the amount paid and any discount provided, as well as the profit margin. The last page displays the total quantity sold, discount given, and amount and tax received.

Sales by Product/Service: This report displays all products, services and sundry income items sold for a specified date range. It displays the item name, quantity bought, the product's cost (as an average figure over the specified time period), normal sale price, actual amount paid, tax paid and any discount provided, as well as the gross profit margin in $ and %.

Series Sales Liability: This report displays Series Sales Liability at a given date for a specified site(s). Liability for series sales is also shown per client and in terms of series expiring within a given number of days. A graph is also shown displaying the Historical Trend of Liability over a specified number of months.

Site Performance Summary: A summary containing all sites' performance for a specified date range. The report includes the number of clients seen in the time period, service and product values, a breakdown of the types of services done (based on Report Categories) and the average client spend for each site. This report uses the Service setup to generate the figures, so it is very important that each service is set up correctly.

Site Ranking: This report ranks the top 15 sites according to their service, retail and total income figures, across a group of sites for a specified date range.

Tax: (may be named GST, VAT etc.) This report lists all tax received and paid for a specified date range for the selected sites. The report will list all taxes received on sales, and taxes paid on expenses and stock orders. Drill down is supported so it is possible to determine how each total is made up by clicking on the relevant total.

Yearly Sales by Month: This report lists all sales income for the year for the selected site(s), broken down month by month into service, product, gift certificate and sundry/series. It also lists the number of clients for the year.

CLIENTS

Aged Debtors: A list indicating all clients on account with the total amount due or in credit for each client. Business total for outstanding accounts, credit amounts and total due amount.

Client Accuracy: A report displaying two pie charts showing the completeness of the client cards. The first pie chart shows the ratio of clients with addresses to clients without addresses. The second pie chart shows the ratio of clients with complete cards to clients with incomplete cards. This report helps the Business to ensure accurate records for marketing. The report can also produce a list of all clients without addresses and also a list of clients that do not have the Card Complete option ticked.

New Clients: A list of new clients whose first visit was within the specified date range. This report is also available as a marketing query, which can be exported for mail merges.

Non Returning Clients: A report that displays all clients in the selected date range who have not returned to the business since.

EMPLOYEES

Consolidated Employee Performance Summary: A summary containing all employees' performances for a specified date range and site(s). The report includes the number of clients seen in the time period, service and product values as well as a breakdown of the types of services done and the average client values for each employee. Employee figures can appear separately for each site they work at, or can be consolidated. This report uses the Service setup to generate the figures, so it is very important that each service is set up correctly.

Consolidated Employee Ranking: This report ranks the top 35 employees (figures are consolidated if they work at more than one site) according to their service, retail and total income figures, across one or more sites for a specified date range.

Employee Hours: A summary containing all employees' Clock on and Clock off times for the specified date range at the specified site(s). The report indicates the number of hours worked by each employee each day and a final total for that period.

Employee Performance Summary: A summary containing all employees' performance for a specified date range. The report includes the number of clients seen in the time period, service and product values, a breakdown of the types of services done (based on Report Categories) and the average client spend for each employee. Employee figures will appear separately for each site they work at (not consolidated). This report uses the Service setup to generate the figures, so it is very important that each service is set up correctly.

Employee Ranking by Site: This report ranks the top 15 employees according to their service, retail and total income figures, across individual sites for a specified date range. Figures for employees that work at multiple sites are not consolidated.

Rebooking Breakdown: A report listing employee appointment rebooking statistics for a specified date range for the specified site(s). The percentages of Total Rebooking Credit is displayed for each employee in the pie chart and the bar chart displays the total rebooking credit for each employee. The Totals at the top of the report give total client visits in the period, the number of those clients that were rebooked and the rebook percentage. Drill down into each employee to see individual rebook credits.

Series Sales by Employee: A report displaying all series sales, including the quantity and total amount, made by employees for a specified date range for the specified site(s).

Tips by Employee: A report displaying all tips for a specified date range for the specified site(s). The report can be restricted to certain employees and will display a pie graph showing the relative percentage of tips for each employee.

Visit Note Reminders: A list of clients that have not had their Visit Notes updated for a service they have had. Grouped by site and employee.

END OF DAY

Client Site Log: This report lists significant actions and screen access for all employees for a specified date range. Grouped by site.

Consolidated Trading Summary: A summary of trade over a date range for a group of sites. The report includes payments received, sales, and a breakdown of product sales for the employees and for the business. Figures are consolidated for all sites within the specified group.

End of Day Till Balance: A printed form for you to use to balance the day. Breaks the day's takings into Cash, Credit Card, Cheque and Account and leaves spaces to write in the totals from the Cash Draw. Grouped by site.

Session Details: A report which provides more descriptive information regarding a particular End-Of-Day session.

Site Transactions: A breakdown of transactions including client name, service and products, transaction amount and any discounts given.

Trading Summary: A summary of trade over a date range. The report includes payments received, sales, and a breakdown of product sales for the employees and for the business.

Transactions Breakdown by Client: A breakdown of transactions by client including items purchased, transaction amount and any discounts given.

Transactions Summary: A breakdown of transactions including client name, service and products, transaction amount and any discounts given.

MISCELLANEOUS

Connection Blackouts: Use this report to identify any possible outages between head office and the sites - this will report on any times when there has been more than 60 minutes between POS sites connecting to Enterprise Server.

Site Connection Statistics: This report displays the connection status of each selected site, along with the time of the last connection and transaction received by Enterprise Server. Also displays the site GUID for easy log searching.

Site Security: This report displays the current security settings for all security levels for the selected sites. Grouped by site.

ORDER PROCESSING

Outstanding Orders: A list containing all orders that have not been received. The report is grouped by site and supplier and lists the order number, order date, manufacturer name and general product details. Totals for quantity, tax and the price are given for each supplier followed by a final total for the business.

Stock Received: A list containing all orders that have been received by the relevant sites during a date range, including invoice number and date, total number of items, order cost and received cost per supplier.

SERVICES

Service Breakdown by Quantity: This report displays the quantity of services performed for each employee. Grouped by site. The report does not show revenue, only quantities. To see revenue, refer to the Service Revenue Breakdown report.

Service Points Categories: A tabular and graphical comparison of service sales quantities, grouped by report categories, across multiple sites for a date range. This report does not show income figures, only quantities. To see income figures, refer to the Service Sales report.

Service Price List: A complete service price list, including individual blocks and break times. Grouped by site and category.

Service Revenue Breakdown: This report displays the service revenue for each employee at each site over a date range. The report does not show service quantities, only revenue. To see service quantities for each employee, see the Service Breakdown by Quantity report.

Services Sales: A tabular comparison of service revenue across multiple sites for a date range. Grouped by service name. Also lists all employees and the services they performed, with quantities and total revenue.

STOCK

Manufacturer Sales Performance: A graphical representation of the total revenue based on Manufacturer, including totals and percentages. Grouped by site.

Product Breakdown by Qty: This report displays the quantity of products sold by each employee. Grouped by site. The report does not show revenue, only quantities. To see income figures, refer to the Product Sales report.

Product Price List: A list of all active products grouped into Manufacturer and Line, displaying current Sell Price as of the report date. Grouped by site.

Product Sales: Displays a bar graph for easy comparison of sales over a date range, grouped by Manufacturer, across a group of sites. Also displays each employee along with the quantities sold per manufacturer and total retail revenue.

Product Sales - Detailed: A tabular comparison of sales over a date range, for each product, across a group of sites. Also displays each employee along with the quantities sold per item and total retail revenue.

Product Sales Summary: This report displays a list of all products sold and quantities, along with the minimum, maximum and average price they were sold for, and the net amount.

Stock Level Comparison: This report displays a list of all current stock levels at a specified Group or Site for all active products.

Stock on Hand: Displays all active products, along with the current stock on hand, on order and warning/required quantities.

Stock Price Comparison: Compares the price of products between selected sites.

TRANSACTIONS

Client Transactions: A report listing all clients with their corresponding transaction information, including payment types, and the services and products purchased.

Consolidated Discount Reason: This report gives a consolidated view of discounts (inc tax) given across multiple sites, including discount amount and total sale amount (after discount), and which employee gave the discount. Totals are provided for each discount reason, allowing you to determine how effective a particular marketing campaign might have been, for example.

Discount Reason: This report lists the discounts given across multiple sites, including discount amount and total sale amount (after discount), and which employee gave the discount. Totals are provided for each discount reason, allowing you to determine how effective a particular marketing campaign might have been, for example.

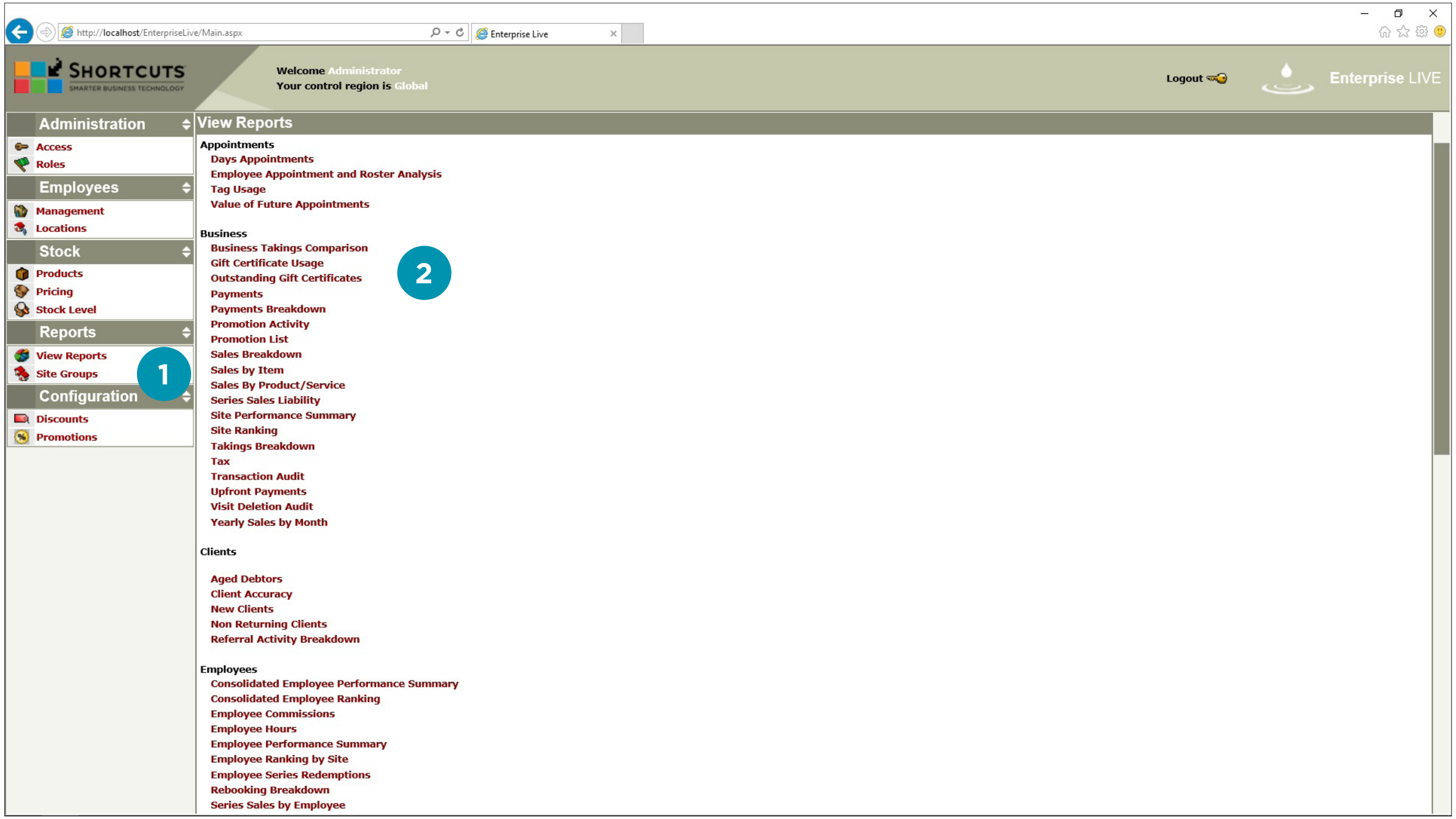
Expenses: This report displays a list of expenses, along with the date of the transaction, the tax, discount and total amount spent.

VIEW REPORTS

GENERATING A REPORT

1. Click on the **view reports** button in the **reports** menu.

2. Click on the name of the report you wish to view. The reports screen will open in a new window.



3 Select a date range to be included in the report.

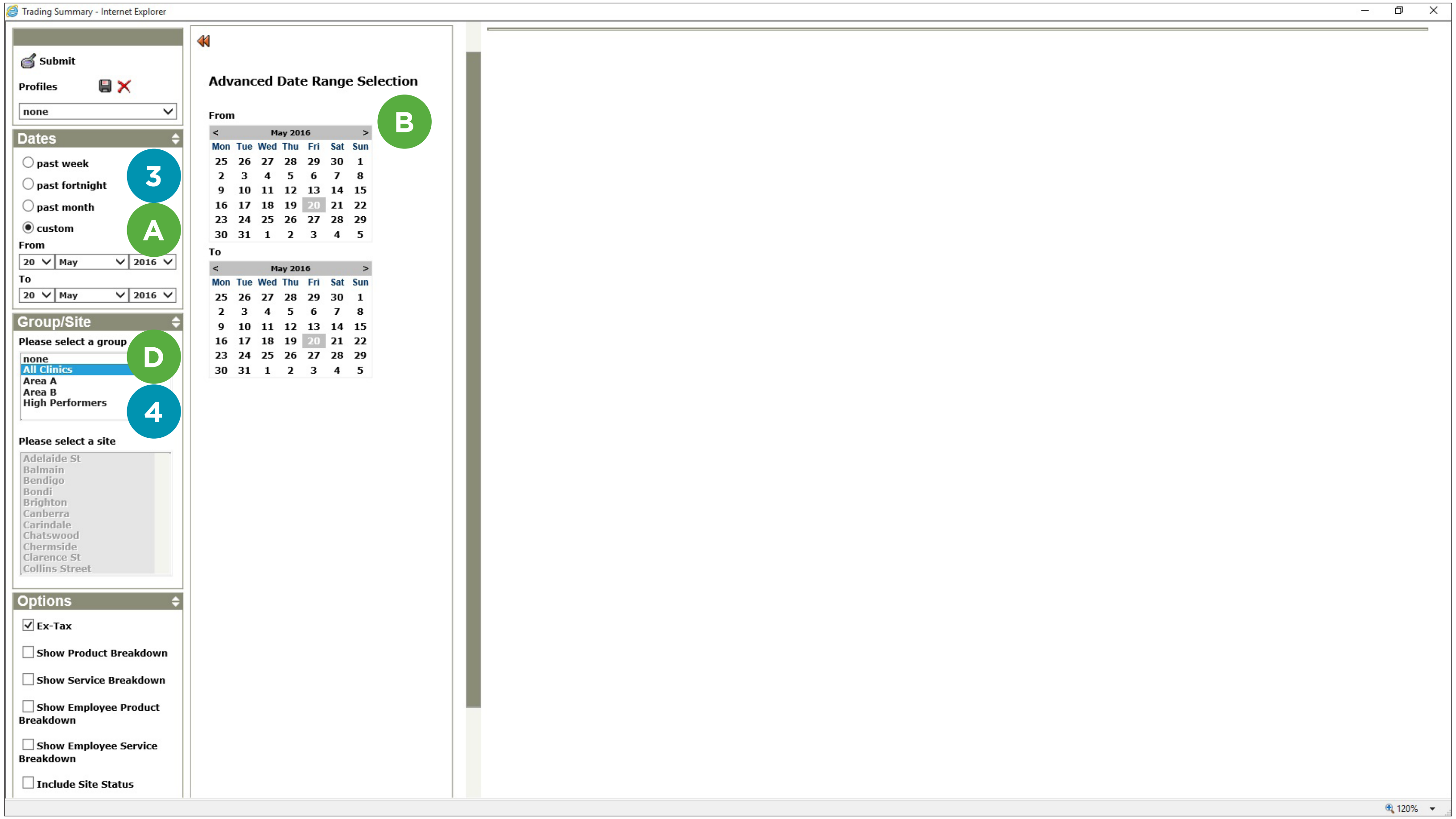
A You can use the **dates** section to choose from a list of preset date ranges, or you can select a custom date range using the **from** and **to** drop-down lists.

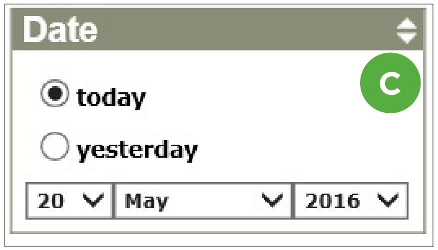
B Alternatively, you can select a date range using the **advanced date range selection** calendars.

C Some reports allow you to choose a single date to report on (e.g. today, yesterday). This is used for the more detailed reports such as Days Appointments.

D The group/site section allows you to choose which site(s) will be reported on.

4 If you wish to select a group of sites, simply click on the group name. If you wish to select a single site, select **none** from the group list, then select the relevant site.

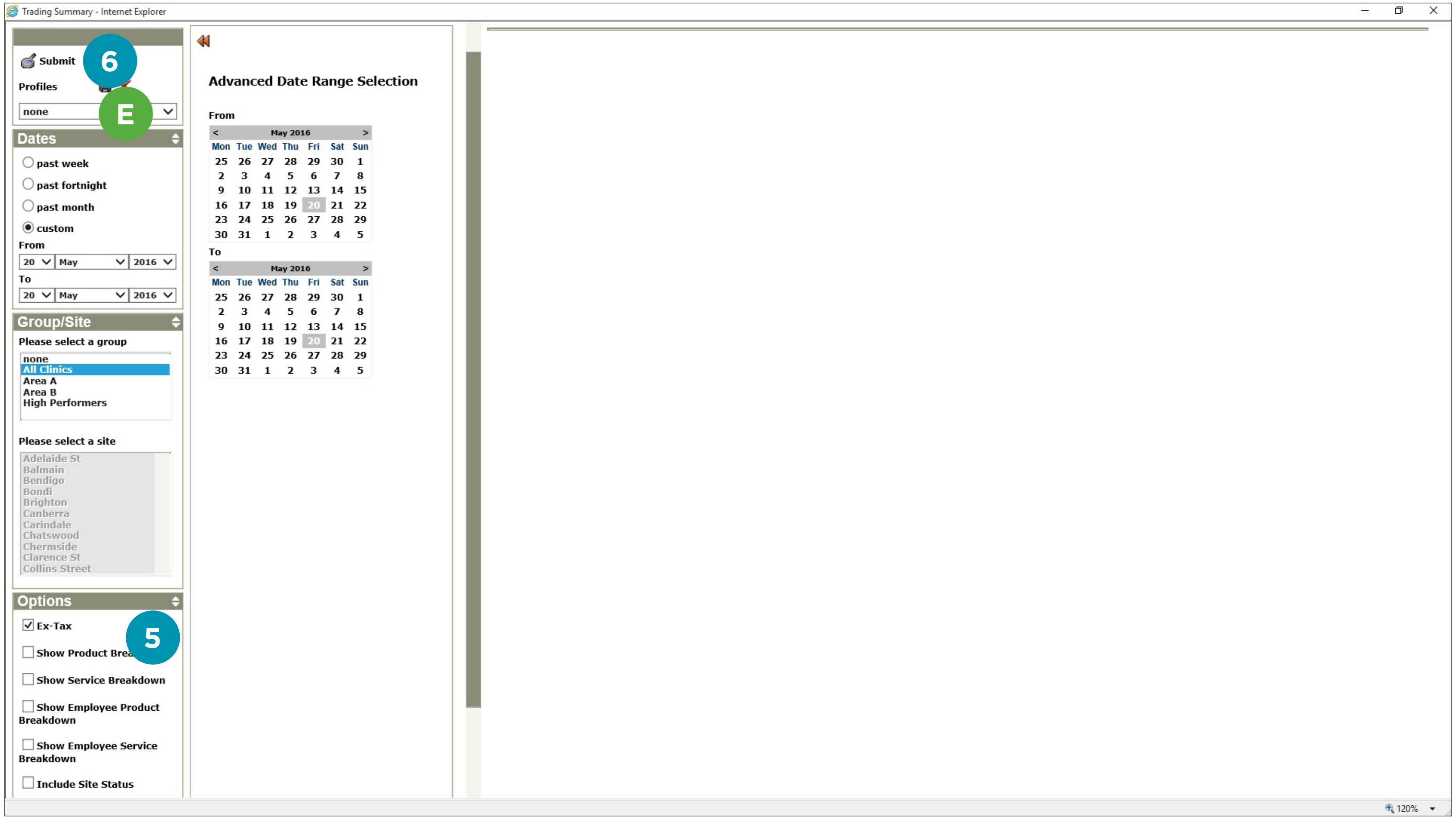




5 The tickboxes in the **options** section will differ depending on the report. Tick the relevant boxes to specify which information you want to include in the report.

E If you have previously saved profiles for this report, you can select a profile from the drop-down menu. This will automatically fill the report criteria with the relevant information.

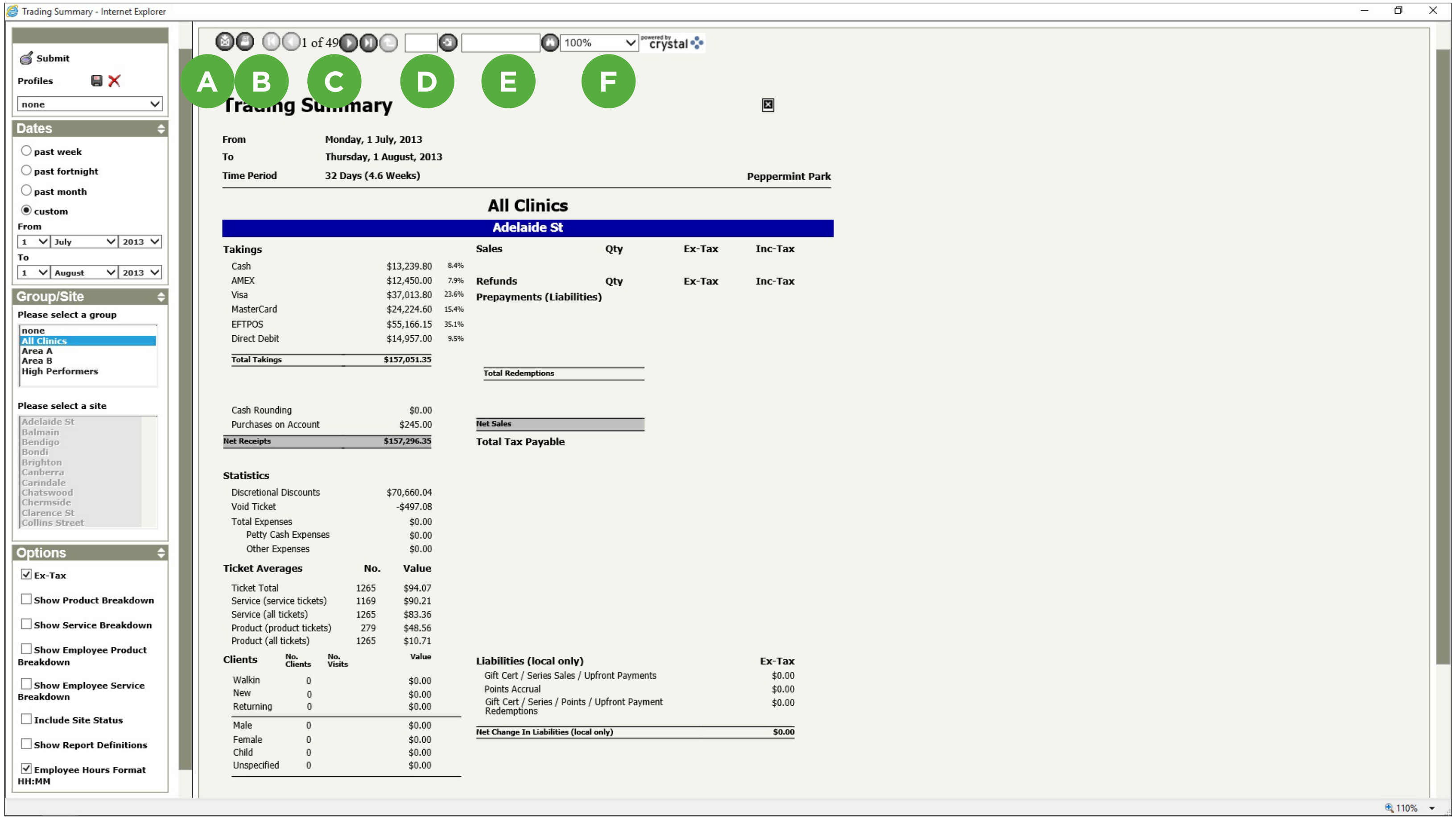
6 Click the **submit** button in the top left corner to generate the report.



USING THE REPORTS TOOLBAR

The reports toolbar allows you to print or export the report, as well as flick between pages or zoom in or out of particular sections of the report.

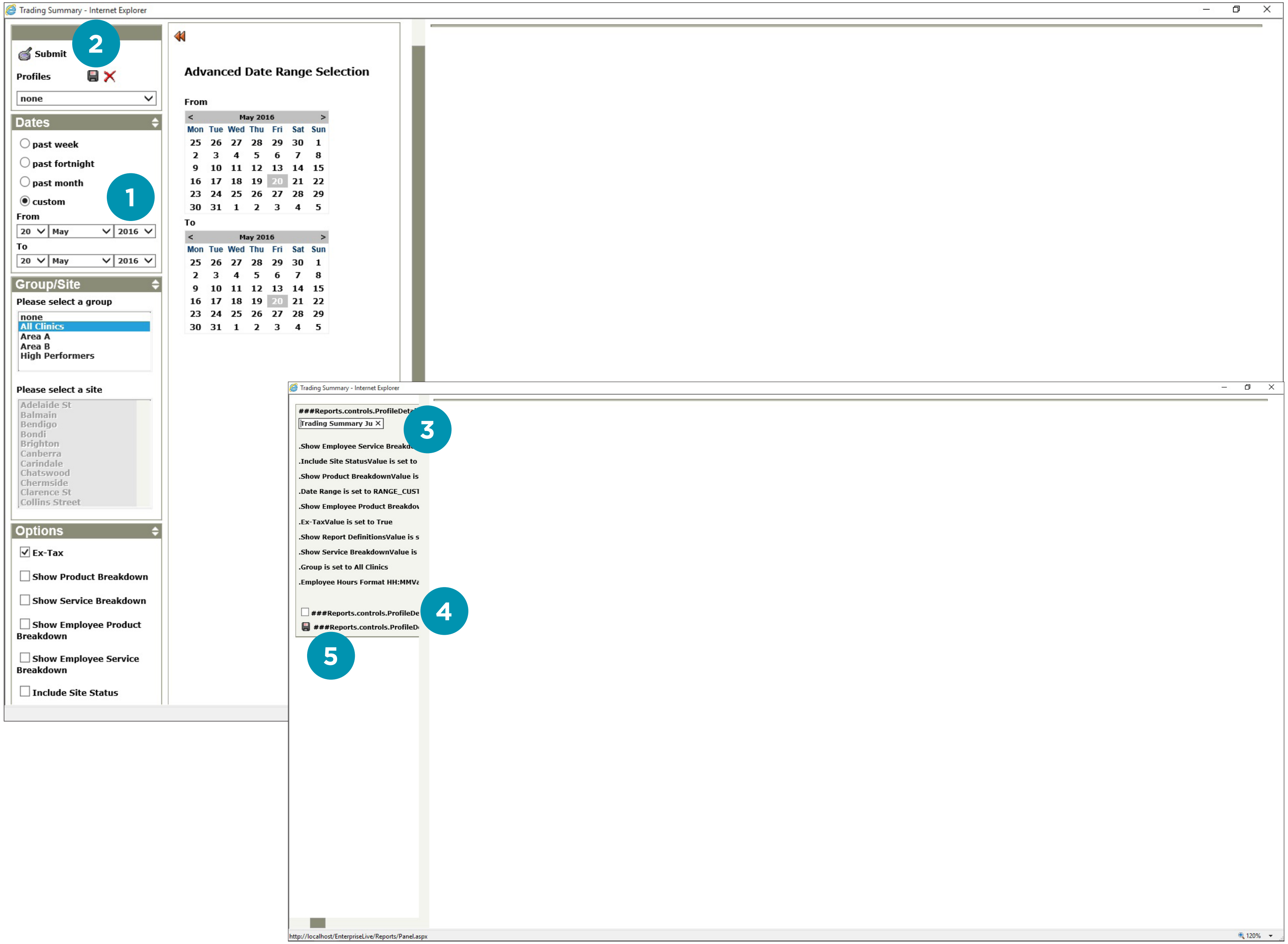
- **A** To export the report, click on the **export** icon, then choose your desired export settings.
- **B** To print the report, click on the **print** icon, then choose your desired print settings.
- **C** Use the arrow buttons to change between pages of the report.
- **D** To view a particular page, enter the page number that you want to view, then click the **go to** icon.
- **E** To search the report, enter the word/value you want to search for, then click the **search** icon. The search results will appear in yellow on the report.
- **F** To zoom in and out of the report, select the desired zoom percentage from the drop-down list.



SAVING A REPORT PROFILE

You can save the selected report settings as a profile, for easy selection next time you run the report. This will only apply to the current report, and only for the user currently logged in.

1. Open the relevant report, and select your desired report criteria.
2. Click on the **save** icon to save the current settings. The save profile window will appear.
3. Enter a name for the profile.
4. Tick this box if you want this profile to be the default profile when opening this report.
5. Click the **save** icon. This profile will now be saved in the **profiles** drop-down menu for easy selection next time you run the report.



VIEWING REPORTS IN DIFFERENT WEB BROWSERS

Enterprise Live reports can be viewed on a smart phone, tablet or computer, in a range of different web browsers. When using Enterprise Live in a browser other than Internet Explorer, the **view reports** option is the only menu item available.

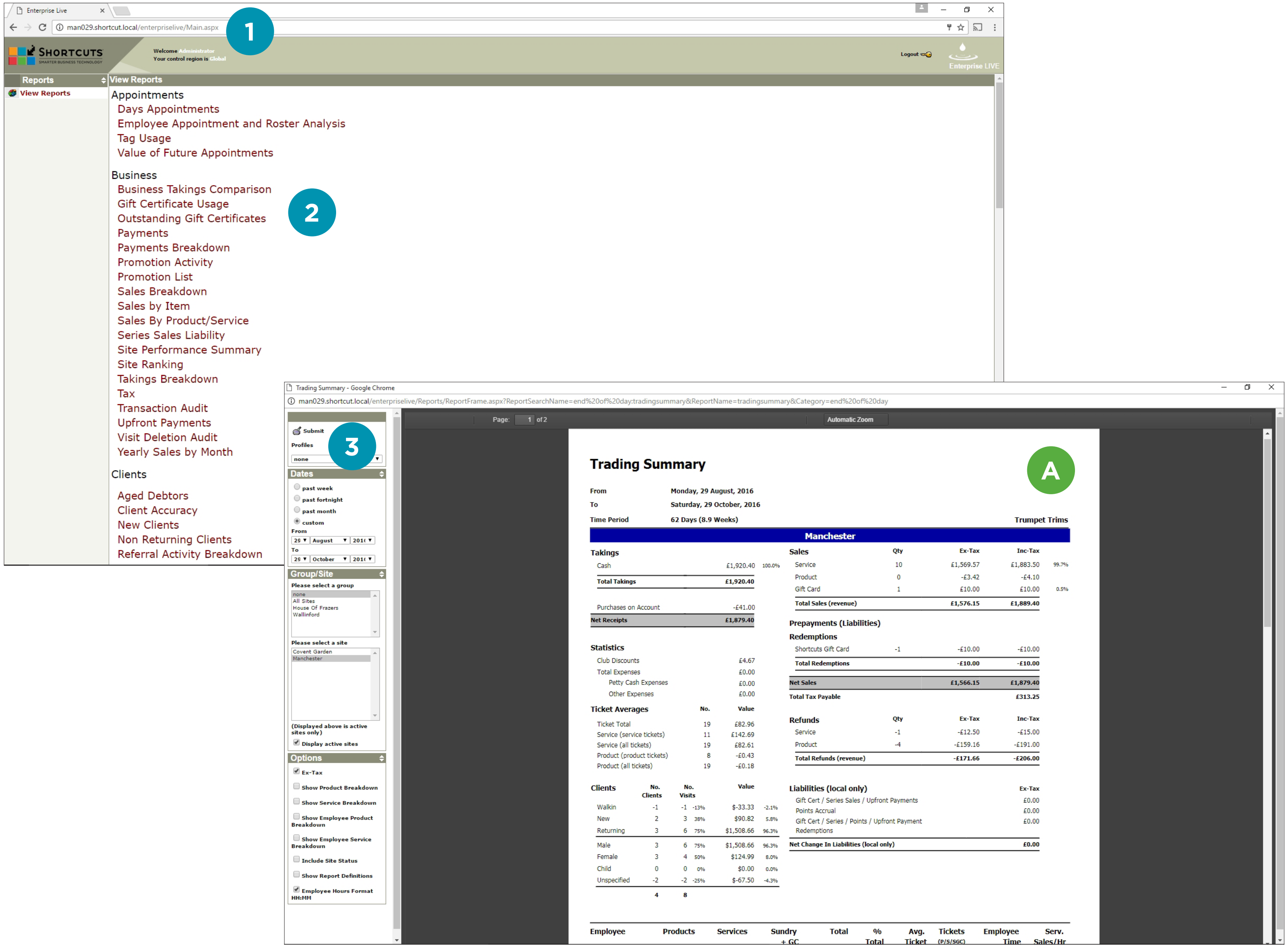
! If you have a pop-up blocker installed, make sure to switch this off while you're viewing reports, so that it doesn't prevent your reports from opening.

1 Go to your unique Enterprise Live URL in your preferred web browser, and enter your login details.

2 Once you have logged in, you will be presented with the reports list. Select the report you want to view.

3 Select the desired report options and press **submit**. For more details, see instructions on 'generating a report' on pages 49-51.

A Depending on the browser you're using, the report will either be downloaded as a PDF file, or it will be displayed in your browser window.



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