

MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

CLINIC

**ENTERPRISE  
MANAGER**

CLIENTS

HOME &  
MOBILE

BEAUTY



**SHORTCUTS**

SMARTER BUSINESS TECHNOLOGY

*it suits you*

**Last updated 16 June 2017**

By Erin Lewis

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## 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!

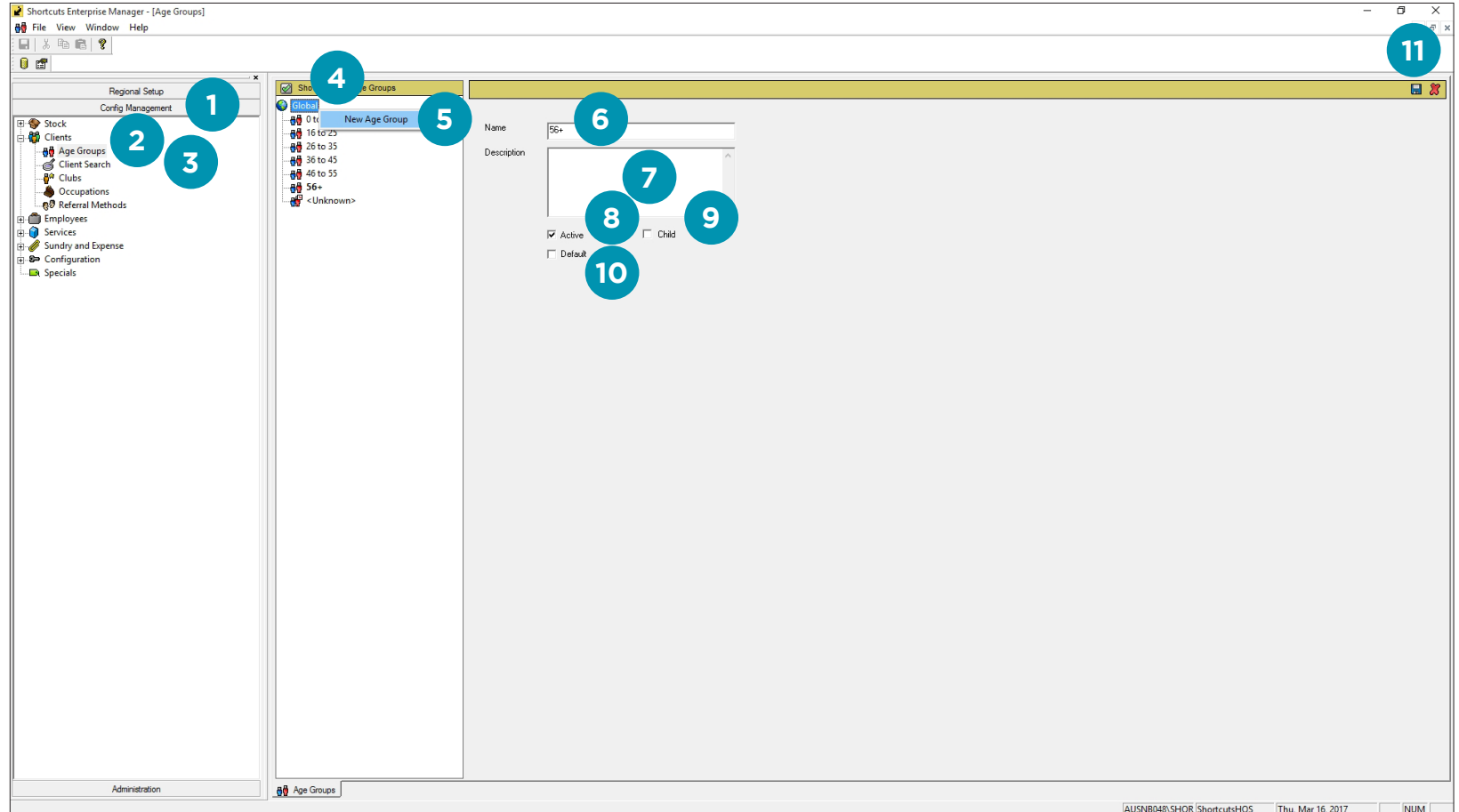
This document is designed to give you a helping hand when it comes to setting up and managing your sites in Enterprise Manager.

# CLIENTS

## ADDING AN AGE GROUP

Age groups are a useful way to classify or group clients for marketing purposes, including Set & Forget Marketing. Age groups are global (available across all sites) in Enterprise. In Shortcuts Fusion, the user will have the option to select a client's age group within their client card.

- 1 Click on the **config management** menu.
- 2 Double click to expand **clients**.
- 3 Double click on **age groups**.
- 4 Right click on the **global** region.
- 5 Select **new age group**.
- 6 Enter the name of the age group (e.g. 35 to 45 yrs).
- 7 **Optional:** Enter a description.
- 8 Tick the **active** box.
- 9 Tick the **child** option if people in this age group are considered children.
- 10 Tick the **default** box if you want this to be the default age group.
- 11 Click **save**.



12

Close tab.

The screenshot displays the 'Shortcuts Enterprise Manager - [Age Groups]' application window. The interface is divided into several sections:

- Left Panel (Regional Setup):** A tree view under 'Config Management' containing categories like Stock, Clients, Age Groups, Client Search, Clubs, Occupations, Referral Methods, Employees, Services, Sundry and Expense, Configuration, and Specials.
- Middle Panel (Show Inactive Age Groups):** A list of age groups including '0 to 16', '16 to 23', '26 to 35', '36 to 45', '46 to 55', '56+', and '<Unknown>'. A 'New Age Group' button is visible at the top of this list.
- Right Panel (Form):** A form for configuring an age group with fields for 'Name' (containing '56+') and 'Description'. Below the fields are checkboxes for 'Active' (checked), 'Child', 'Default', and 'Inactive'.
- Bottom Panel:** A status bar showing 'Administration' on the left, 'Age Groups' in the center, and system information on the right: 'AUSNB048\SHOR ShortcutsHOS | Thu, Mar 16, 2017 | NUM |'.

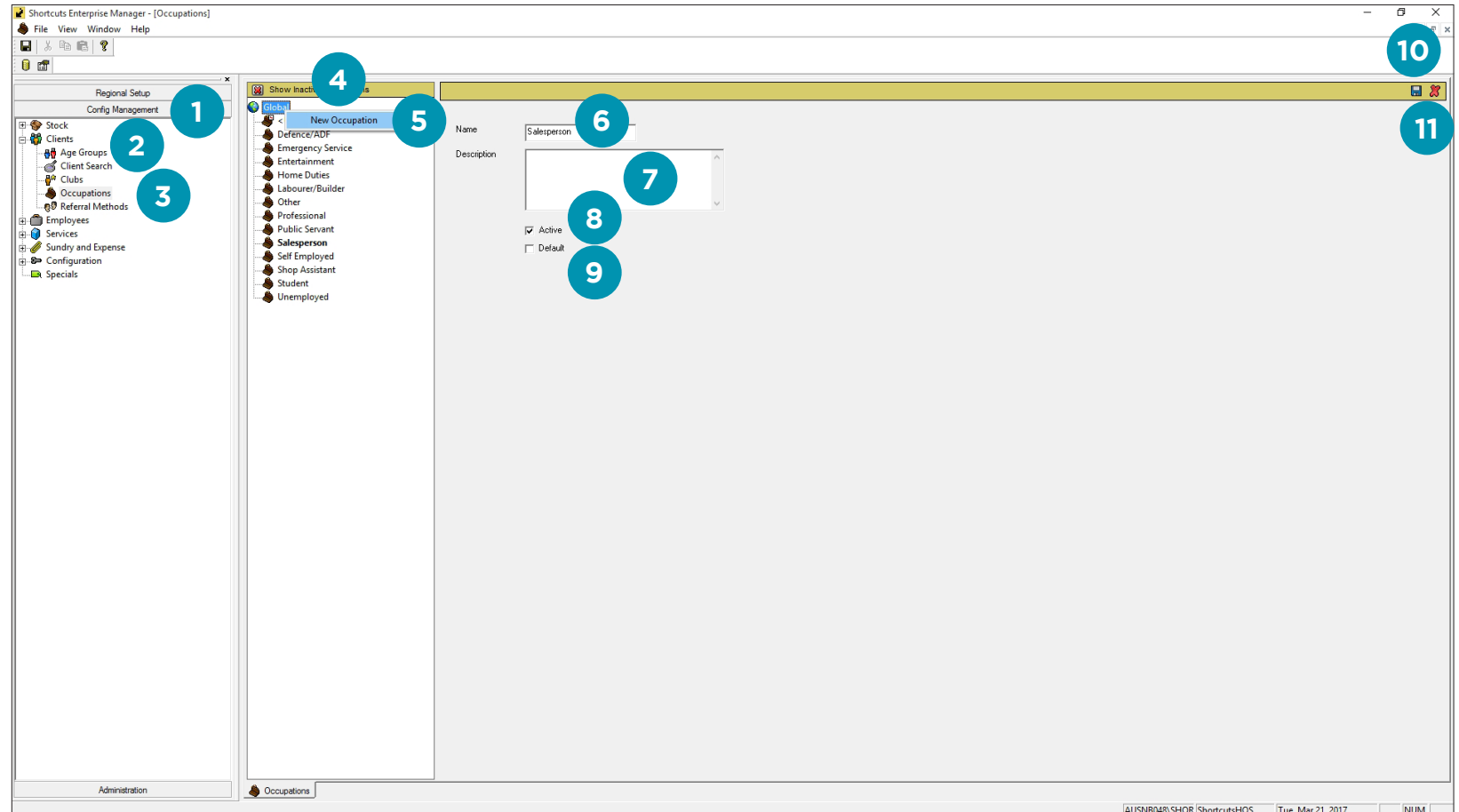
A blue circle with the number '12' is overlaid on the top right corner of the application window.

12

## ADDING AN OCCUPATION

Occupations are a useful way to classify or group clients for marketing purposes, including Set & Forget Marketing. Occupations are global (available across all sites) in Enterprise. In Shortcuts Fusion, the user will have the option to select a client's occupation within their client card.

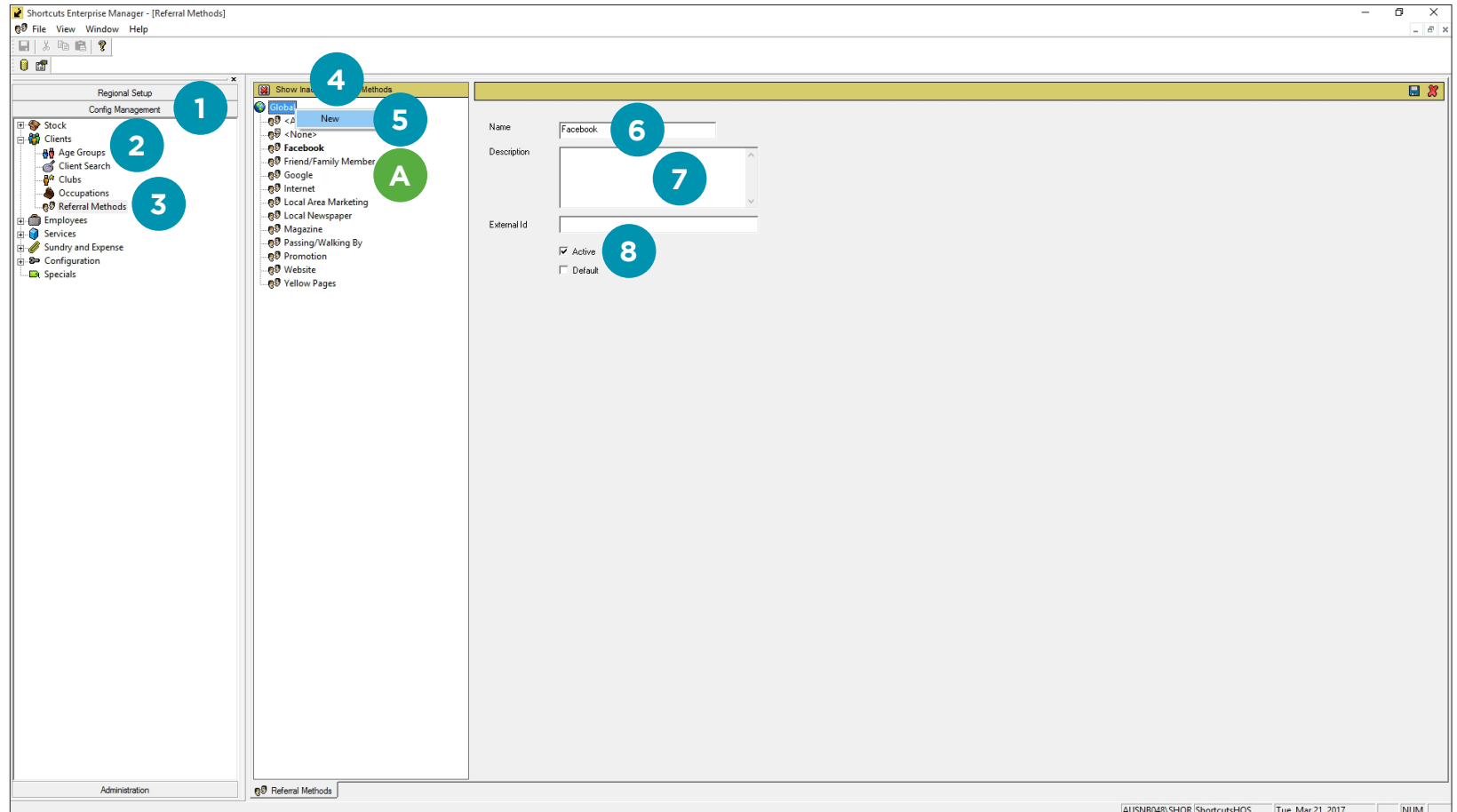
- 1 Click on the **config management** menu.
- 2 Double click to expand **clients**.
- 3 Double click on **occupations**.
- 4 Right click on the **global** region.
- 5 Select **new occupation**.
- 6 Enter the name of the occupation (e.g. Salesperson).
- 7 **Optional:** Enter a description.
- 8 Tick the **active** box.
- 9 Tick the **default** box if you want this to be the default occupation.
- 10 Click **save**.
- 11 Close tab.



## ADDING A REFERRAL METHOD

The way that the client found out about your business is the 'referral method'. Referral methods are a useful way to classify or group clients for marketing purposes, including Set & Forget Marketing. Referral methods are global (available across all sites) in Enterprise. In Shortcuts Fusion, the user will have the option to select a client's referral method within their client card.

- 1 Click on the **config management** menu.
- 2 Double click to expand **clients**.
- 3 Double click on **referral methods**.
- A There is a standard referral method called **<another client>**. This referral method cannot be edited or deleted. It is used to link a new client with the existing client who referred them. Shortcuts Fusion will track these individual client referrals.
- 4 Right click on the **global** region.
- 5 Select **new referral method**.
- 6 Enter the name of the referral method (e.g. Search Engine).
- 7 **Optional:** Enter a description.
- 8 Tick the **active** box.



9 Tick the **default** box if you want this to be the default referral method.

10 Click **save**.

11 Close tab.

The screenshot shows the 'Shortcuts Enterprise Manager - [Referral Methods]' application window. The interface is divided into several sections:

- Left Panel (Regional Setup / Config Management):** A tree view showing various categories like Stock, Clients, Age Groups, Client Search, Clubs, Occupations, Referral Methods, Employees, Services, Sundry and Expense, Configuration, and Specials. The 'Referral Methods' category is expanded.
- Middle Panel (Show Inactive Referral Methods):** A list of referral methods including '<Another Client>', '<None>', Facebook, Friend/Family Member, Google, Internet, Local Area Marketing, Local Newspaper, Magazine, Passing/Walking By, Promotion, Website, and Yellow Pages. 'Facebook' is selected.
- Right Panel (Form):** A form for editing the selected 'Facebook' referral method. It includes fields for 'Name' (containing 'Facebook'), 'Description', and 'External Id'. Below these fields are two checkboxes: 'Active' (checked) and 'Default' (unchecked). A blue circle with the number '9' is positioned over the 'Default' checkbox.
- Bottom Panel:** A status bar at the bottom of the window showing 'Administration', 'Referral Methods', and system information: 'AUSNB048\SHOR ShortcutsHOS Tue, Mar 21, 2017 NUM'.

Three blue circular callouts with white numbers are overlaid on the image:

- '9' is located over the 'Default' checkbox in the right panel.
- '10' is located in the top right corner of the application window.
- '11' is located in the top right corner of the application window, below '10'.



## COMPLETING A CLIENT SEARCH

The client search feature allows you to easily find and select clients. It also allows you to export your results into CSV format which can be easily opened in Microsoft Excel.

### DETAILED SEARCH

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

- 1 Click on the **config management** menu.
  - 2 Double click to expand **clients**.
  - 3 Double click on **client search**.
  - 4 Enter your desired search criteria into the relevant field(s).
  - 5 Click **submit** to search.
- 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 a client in the search results to open their details in a new tab.

Shortcuts Enterprise Manager - [Client Search]

File View Window Help

Regional Setup  
Config Management

Stock  
Clients  
Age Groups  
Client Search  
Clubs  
Occupations  
Referral Methods  
Employees  
Services  
Sundry and Expense  
Configuration  
Specials

Client Search Keyword Search Custom Search

Details  
Title First Name Last Name Client ID  
Country State Postcode Site  
Submit  
Reset  
Export

Customer ID	Title	Surname	First Name	Site Name	Active
92025		Baart	Claire	Coffs Harbour	Yes
114983		Baart	Erika	Fannie Bay	Yes
68419		Baart	Katie	Toowoomba	Yes
17814		Baart	Patricia	Post Office Square	Yes

Administration Client Search

AUSNB048\SHOR ShortcutsHOS Tue, Mar 21, 2017 NUM

## KEYWORD SEARCH

The keyword search feature allows you to search for a word or phrase across all client 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 a client in the search results to open their details in a new tab.

Shortcuts Enterprise Manager - [Client Search]

File View Window Help

Client Search Keyword Search Custom Search

Keywords:

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

Customer ID	Surname	First Name	Address Line1	Address Line2	State	Country	Postal Code	Site Name
17814	Baart	Patricia	97 Camellia Street		BRISBANE		184	Post Office Square
19292	Baartz	Larissa	14 Peppermint St		QLD		40	Post Office Square
23910	Baartz	Mandy	47 Mango Drive		QLD		101	Post Office Square
24215	Baartz	Janice	80 Poppy St		QLD		203	Post Office Square
47860	Baartz	Joanne					1	Armidale
68419	Baart	Katie					1	Toowoomba
92025	Baart	Claire					1	Coffs Harbour
114983	Baart	Erika	145 Frangipani Road		NT		2763	Fannie Bay

Administration Client Search AUSNB048\SHOR ShortcutsHOS Tue, Mar 21, 2017 NUM

## ADDING A CLUB

The clubs feature allows you to create a rewards system for your clients. Clubs can be used to allocate points to clients as they spend; the more they spend, the more points they earn. These points are always accumulated based off the exclusive tax amount and can be used to purchase items at the Point of Sale. A client can only be assigned to one club. Clubs are global (available across all sites) in Enterprise; however, client points can only be tracked through the site where they were earned/redeemed.

### ADDING CLUB DETAILS

- 1 Click on the **config management** menu.
- 2 Double click to expand **clients**.
- 3 Double click on **clubs**.
- 4 Right click on the **global** region.
- 5 Select **new**.
- 6 Enter the name of the club.
- 7 If members of this club can pay for products/services/sundry items using points accrued from this club, tick this box.
- 8 Tick the **active** box.
- 9 Click **OK**.

The screenshot shows the 'Shortcuts Enterprise Manager - [Clubs]' window. The left sidebar has 'Config Management' expanded to 'Clients', which is further expanded to 'Clubs'. The 'Clubs' list is shown with a 'New' button highlighted. The 'New Club' dialog box is open, showing the following details:

- Club Name: Gold Club- SouthBank
- Members pay for products/services using points accumulated from this club:
- Active:
- Buttons: OK, Cancel

10

**Optional:** Enter a description.

11

**Optional:** To set an expiry for clients in the club, select the **month** option and enter the number of months.

**OR**

To set an expiry for the entire club, select the **date** option and enter the expiry date.

12

If you want members of this club to receive an automatic discount, enter the relevant discount percentage for services, products, and sundry items.

13

Tick this box if members of this club can buy products at cost price.

14

Click **save**.

The screenshot displays the 'Shortcuts Enterprise Manager - [Clubs]' application window. The interface is divided into several sections:

- Left Panel (Regional Setup):** A tree view showing various configuration categories such as Stock, Clients, Age Groups, Client Search, Clubs, Occupations, Referral Methods, Employees, Services, Sundry and Expense, Configuration, and Specials.
- Center Panel (Show Inactive Clubs):** A list of clubs, including 'Gold Club - SouthBank' which is highlighted.
- Right Panel (Details Points):** A form for configuring the selected club. It includes:
  - Club Name:** 'Gold Club - SouthBank' (Callout 15).
  - Description:** A text area (Callout 10).
  - Club Expiration:** Radio buttons for 'Month' and 'Date'. The 'Date' option is selected with a date of '21/03/2017' (Callout 11).
  - Discount:** Three rows for 'On Services' (0%), 'On Products' (10%), and 'On Sundry Income Items' (0%). The 'On Products' row is highlighted (Callout 12).
  - Can Buy Products At Cost:** A checkbox (Callout 13).

At the bottom right of the window, the status bar shows 'AUSNB048.SHOR.ShortcutsHOS Tue, Mar 21, 2017 NUM'. A 'save' button is located in the bottom right corner of the details pane (Callout 14).

## CONFIGURING CLUB POINTS

1

Click on the **points** tab.

2

Enter the number of points clients will earn for every \$100 they spend on services, products and sundry items.

3

Tick the **include discounts** box if clients will receive points based on the full price of an item, prior to any discounts. Leave this box unticked if points will only accumulate on the spend after the discount.

4

Tick the relevant boxes in this section to indicate what clients can buy with their club points.

5

To set an expiry on club points, enter the number of months that points will stay valid for. Alternatively, leave the value at zero to set no expiry.

!

We advise caution when changing the point expiration of an existing club, as point balances will be updated accordingly based on the date when they were accumulated.

The screenshot displays the 'Shortcuts Enterprise Manager - [Clubs]' application window. The interface is divided into several sections:

- Left Panel:** 'Regional Setup' and 'Config Management' sections with a tree view of categories like Stock, Clients, Age Groups, Client Search, Clubs, Occupations, Referral Methods, Employees, Services, Sundry and Expense, Configuration, and Specials.
- Center Panel:** 'Show Inactive Clubs' listing various club types such as Staff Club-Armidale, Staff Club-Doncaster, Staff Club-Hamilton, Staff Club-POSquare, Staff Club-Toowoomba, Staff-Camberwell, Staff-Charlestown, Staff-Coffs Harbour, Staff-Fannie Bay, Staff-Kalgoorlie, VIP Club-Armidale, VIP Club-Charlestown, VIP Club-Coffs Harb, VIP Club-Doncaster, VIP Club-FannieBay, VIP Club-Hamilton, VIP Club-Kalgoorlie, VIP Club-POSquare, and VIP Club-Toowoomba. The 'Gold Club-SouthBank' is highlighted.
- Right Panel:** 'Details Points' configuration section with the following fields and options:
  - Points credited to the clients account for every \$100 ...**: Three input fields for 'Spent on Services' (value 4), 'Spent on Products' (value 0), and 'Spent on Sundry Income Items' (value 0).
  - When accumulating points...**: A checkbox for 'Include Discounts' (checked).
  - Club points can pay for ...**: Three checkboxes for 'Services' (checked), 'Products' (unchecked), and 'Sundry Income Items' (unchecked).
  - Months time limit on points**: An input field with value 0.
  - Maintain points from previous club membership**: An unchecked checkbox.
  - Points Redemption ...**: A 'Minimum points before redemption' input field with value 10, and a 'Redeemable on:' section with checkboxes for all days of the week (Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday) all checked.

Red circular callouts with numbers 1 through 5 are overlaid on the screenshot to indicate the steps described in the text:

- 1: Points tab in the top right.
- 2: Input fields for points earned per \$100.
- 3: 'Include Discounts' checkbox.
- 4: 'Services' checkbox in the 'Club points can pay for' section.
- 5: 'Months time limit on points' input field.

The bottom status bar shows 'Administration', 'Clubs', 'AUSNB048\SHOR ShortcutsHOS', 'Tue, Mar 21, 2017', and 'NUM'.

6

Tick this option If you want to allow clients to keep their accumulated points from a previous club, when they switch to this new club.

7

If members need to accumulate a minimum number of points before they can redeem them, enter the number of points here.

8

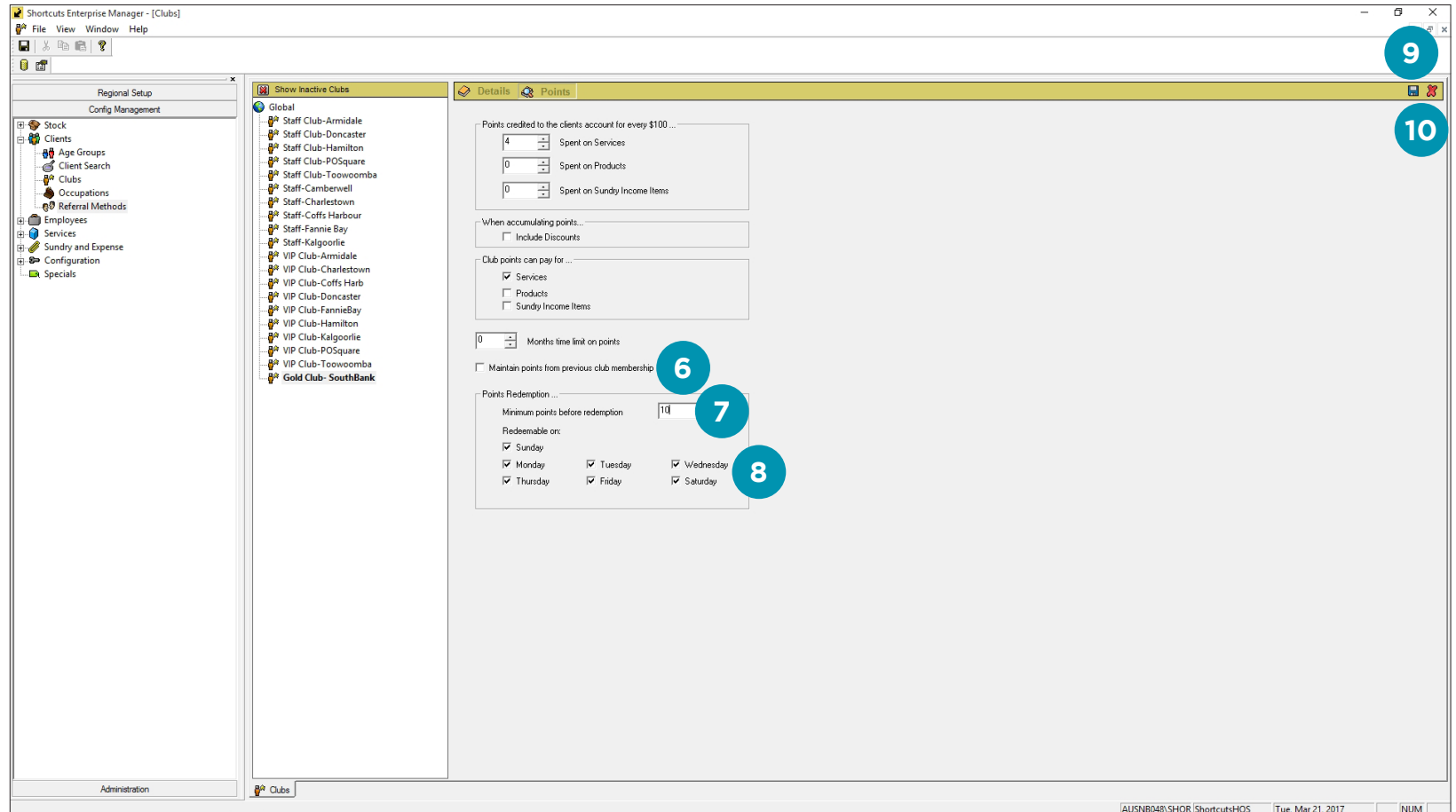
Tick the relevant boxes to indicate which days of the week club points can be redeemed on.

9

Click **save**.

10

Close tab.





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