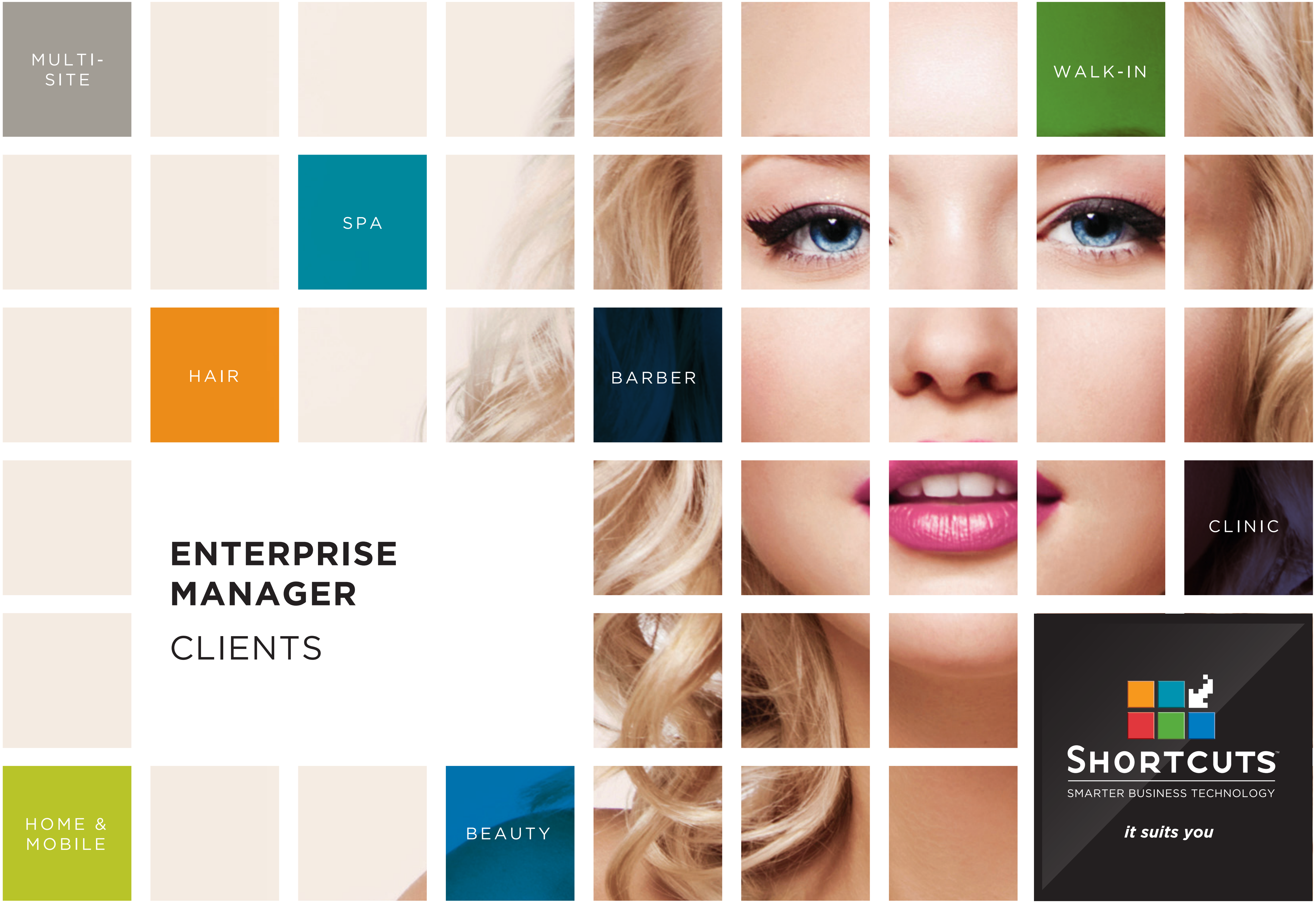
ENTERPRISE MANAGER

CLIENTS



Last updated 16 June 2017

By Erin Lewis

Product: Enterprise Manager

Software version no: 8.0.20

Document version no: 1.0

Country: Australia

CONTENTS

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!

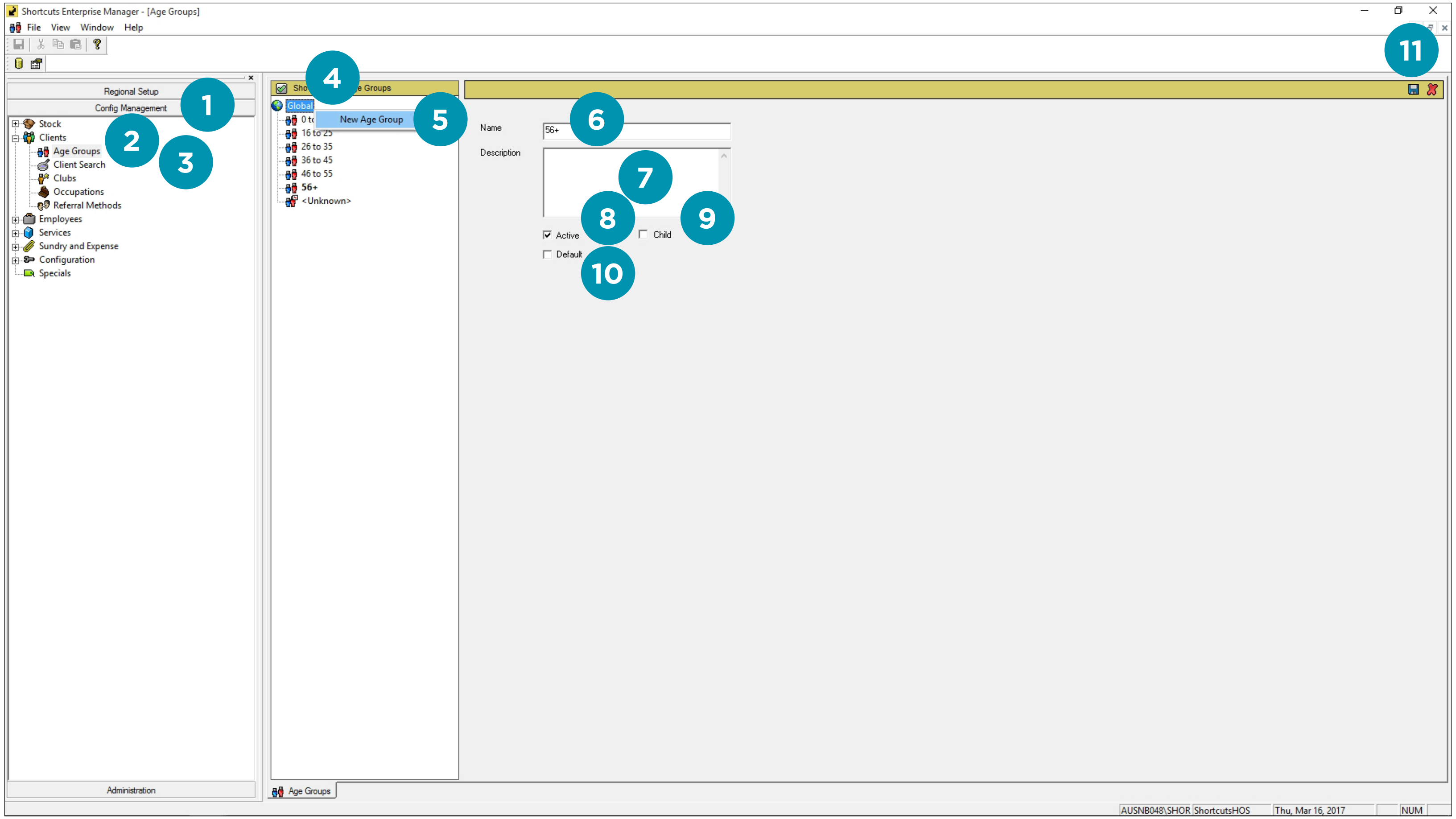
This document is designed to give you a helping hand when it comes to setting up and managing your sites in Enterprise Manager.

CLIENTS

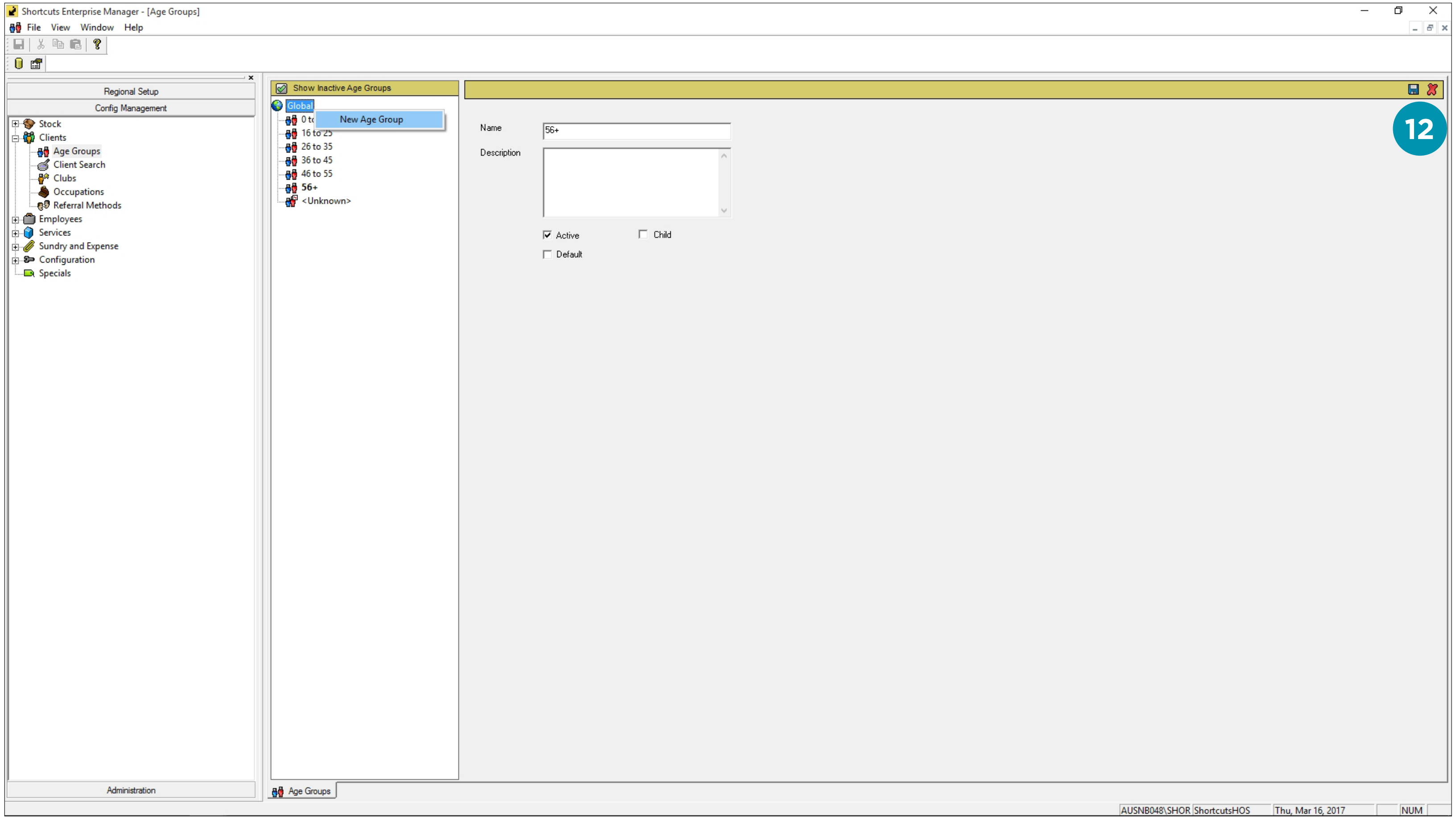
ADDING AN AGE GROUP

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**.



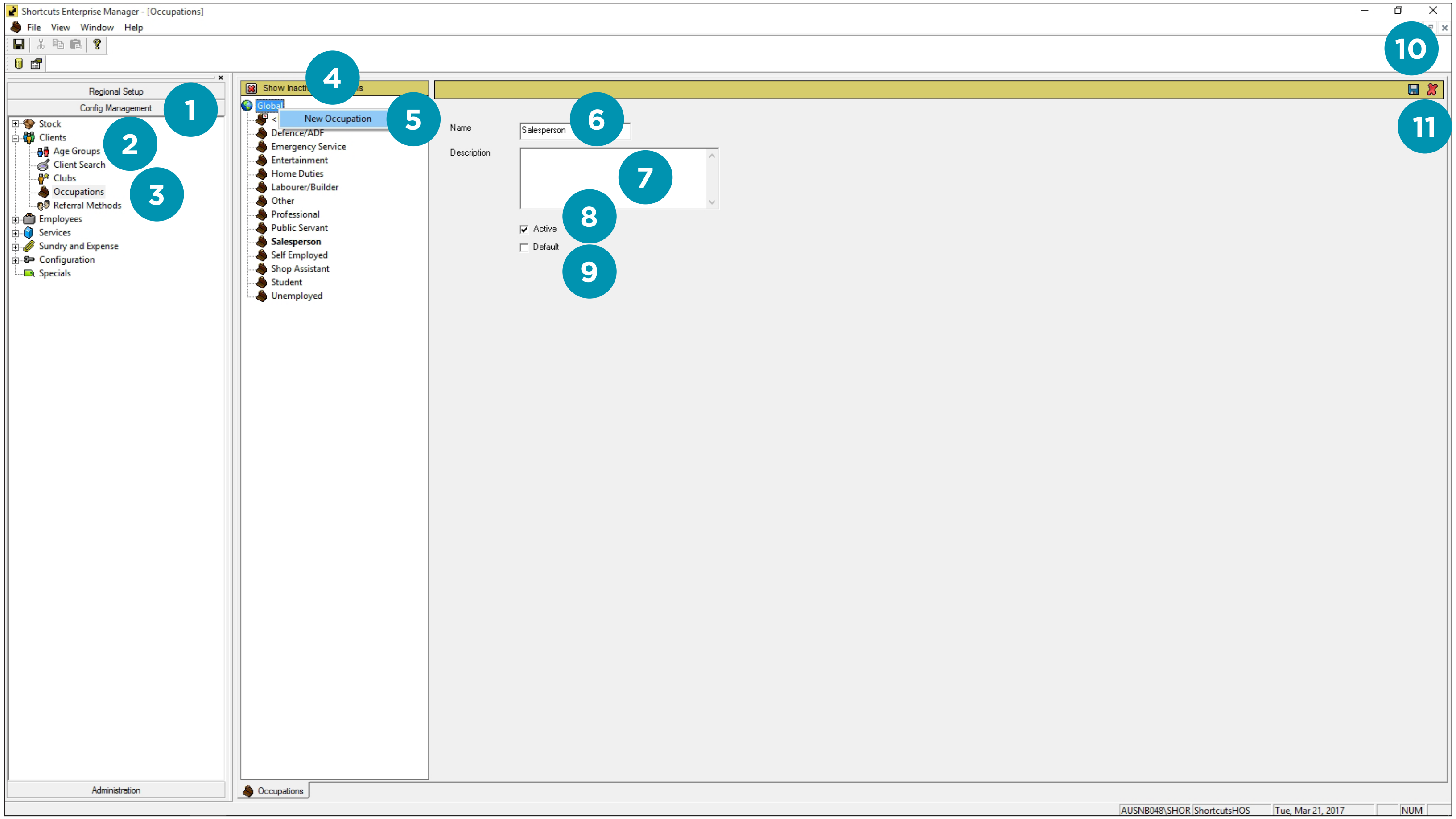
12 Close tab.


Shortcuts Enterprise Manager - [Age Groups]
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
Administration
Show Inactive Age Groups
Global
New Age Group
26 to 35
36 to 45
46 to 55
56+
<Unknown>
Name
56+
Description
Active
Child
Default
12
Age Groups
Thu, Mar 16, 2017
NUM

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.

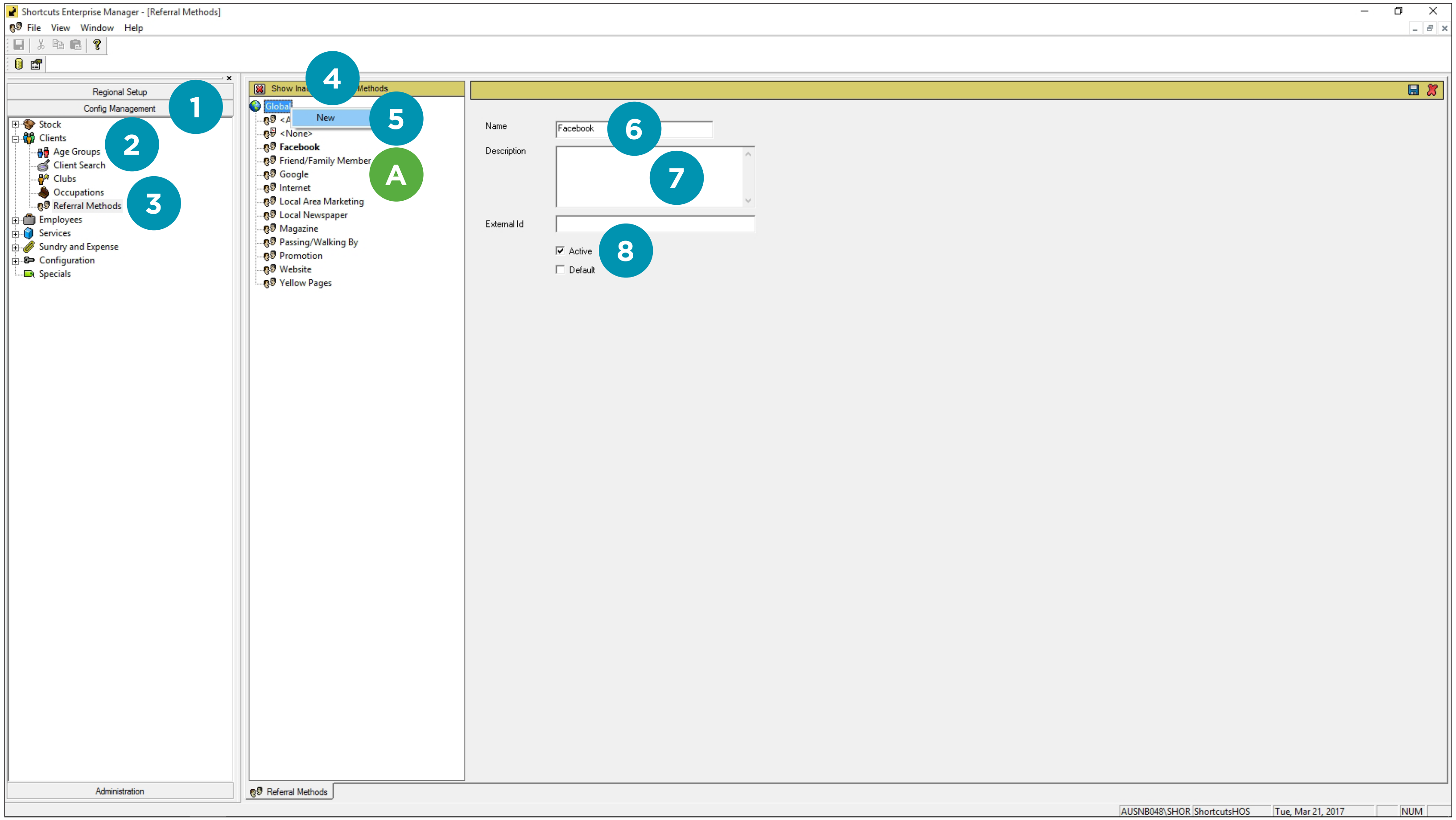
4 Right click on the **global** region.

5 Select **new referral method**.

6 Enter the name of the referral method (e.g. Search Engine).

7 **Optional:** Enter a description.

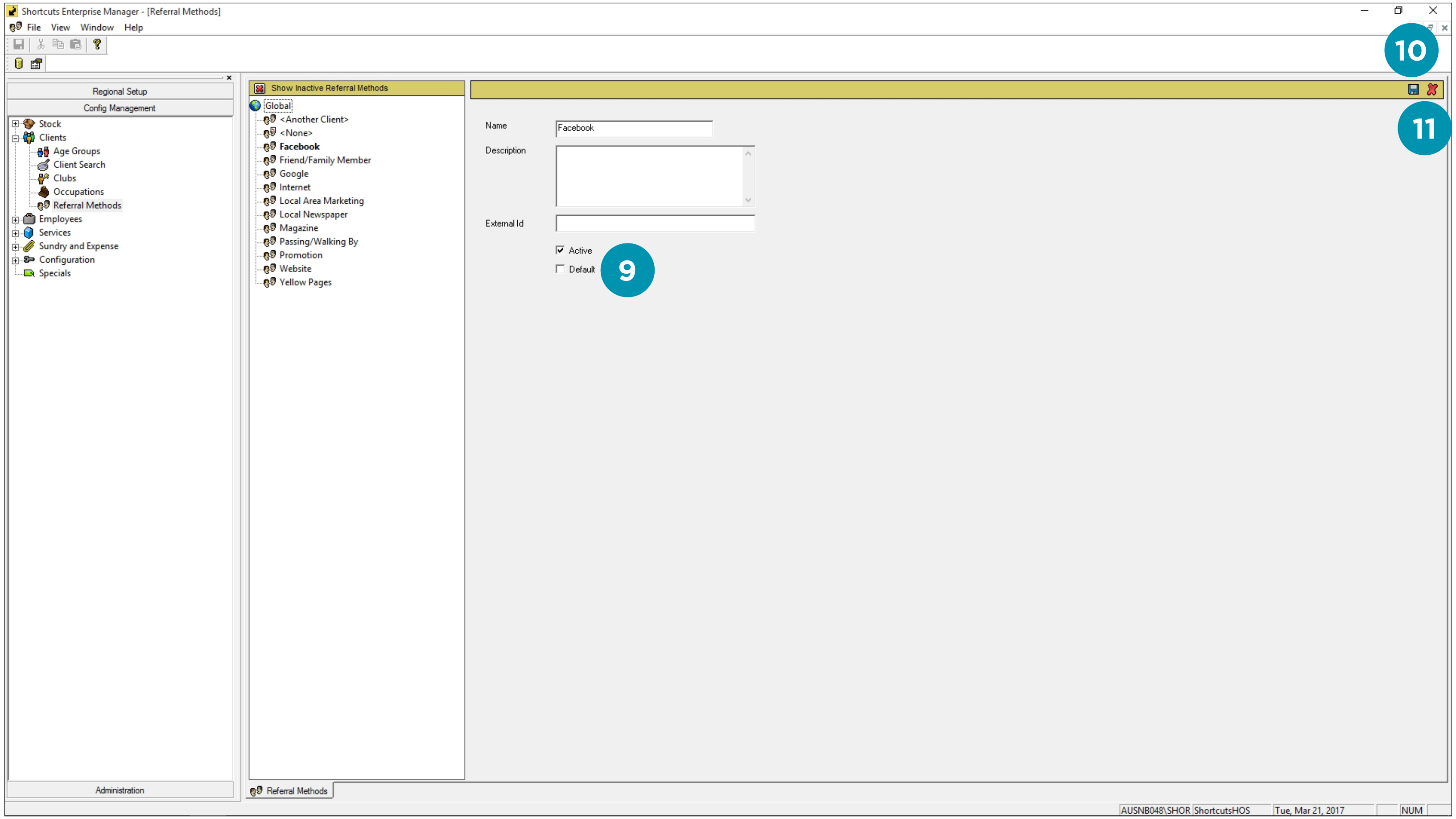
8 Tick the **active** box.



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

10 Click **save**.

11 Close tab.



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**.

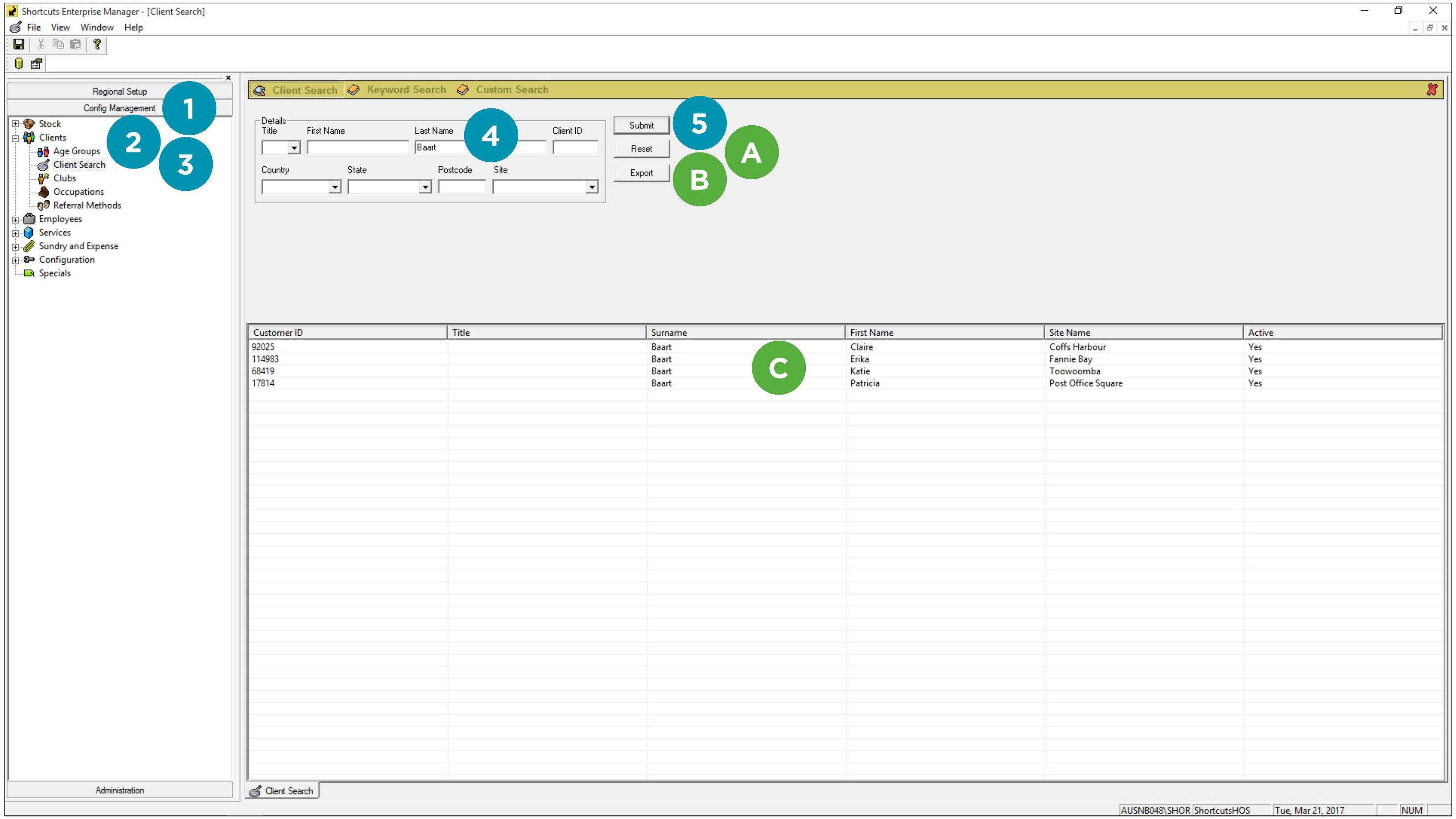
4 Enter your desired search criteria into the relevant field(s).

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.



KEYWORD SEARCH

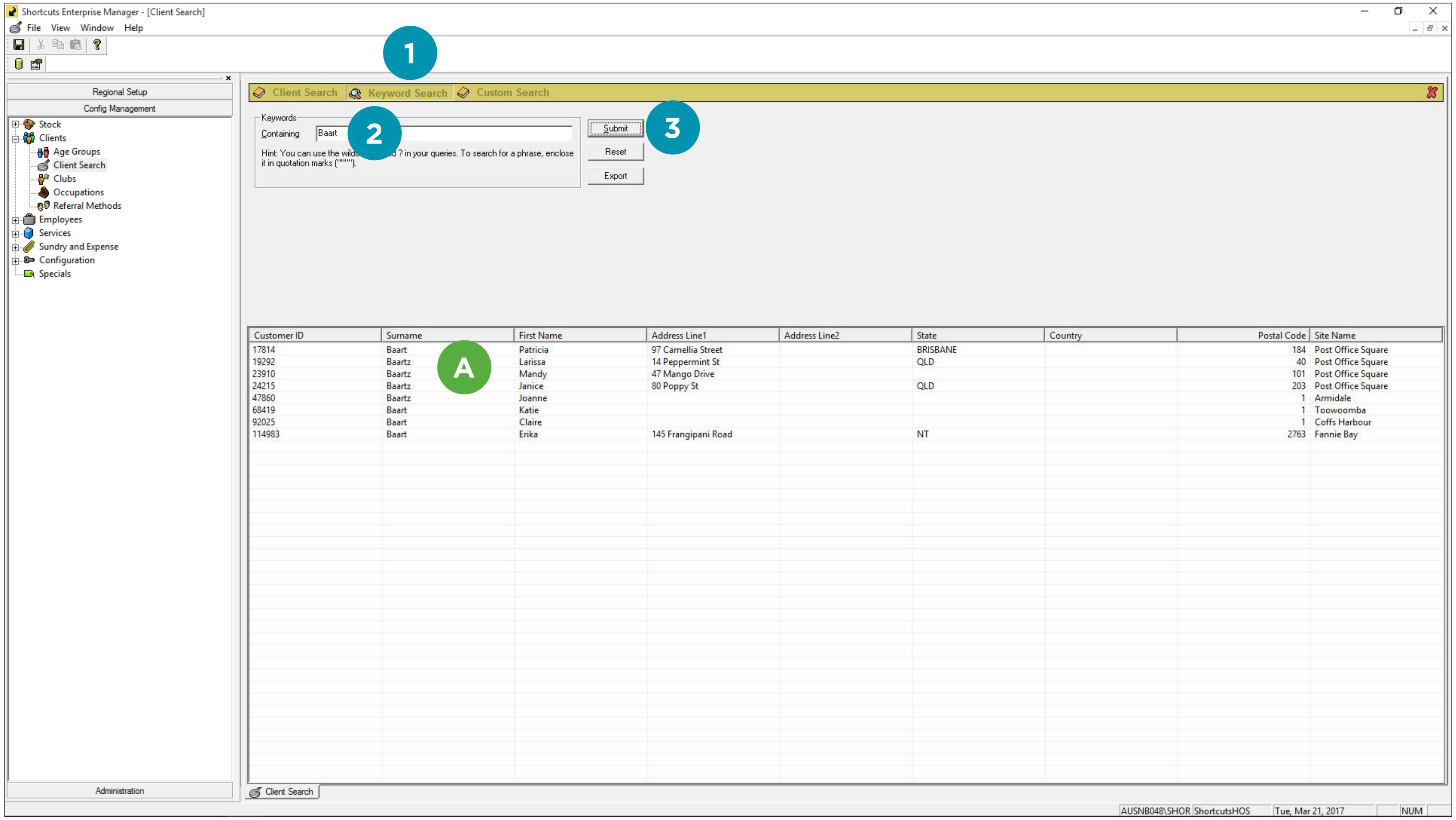
The keyword search feature allows you to search for a word or phrase across all client fields. You can use the wildcards * and ? in your search. To search for a phrase, enclose it in quotations marks.

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.



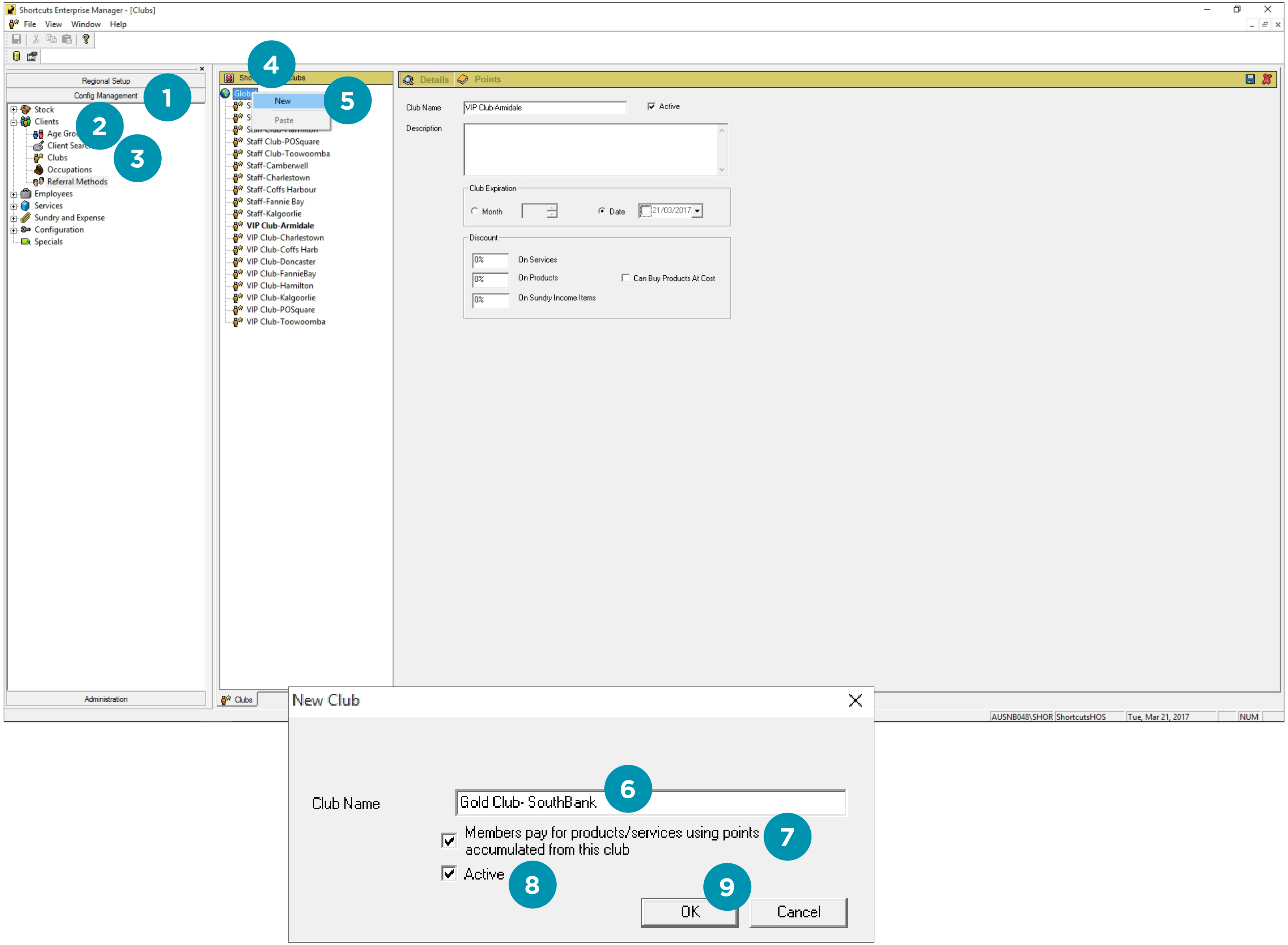
Customer ID	Surname	First Name	Address Line1	Address Line2	State	Country	Postal Code	Site Name
17814	Baart	Patricia	97 Camellia Street		BRISBANE		184	Post Office Square
19292	Baartz	Larissa	14 Peppermint St		QLD		40	Post Office Square
23910	Baartz	Mandy	47 Mango Drive				101	Post Office Square
24215	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

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**.



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.

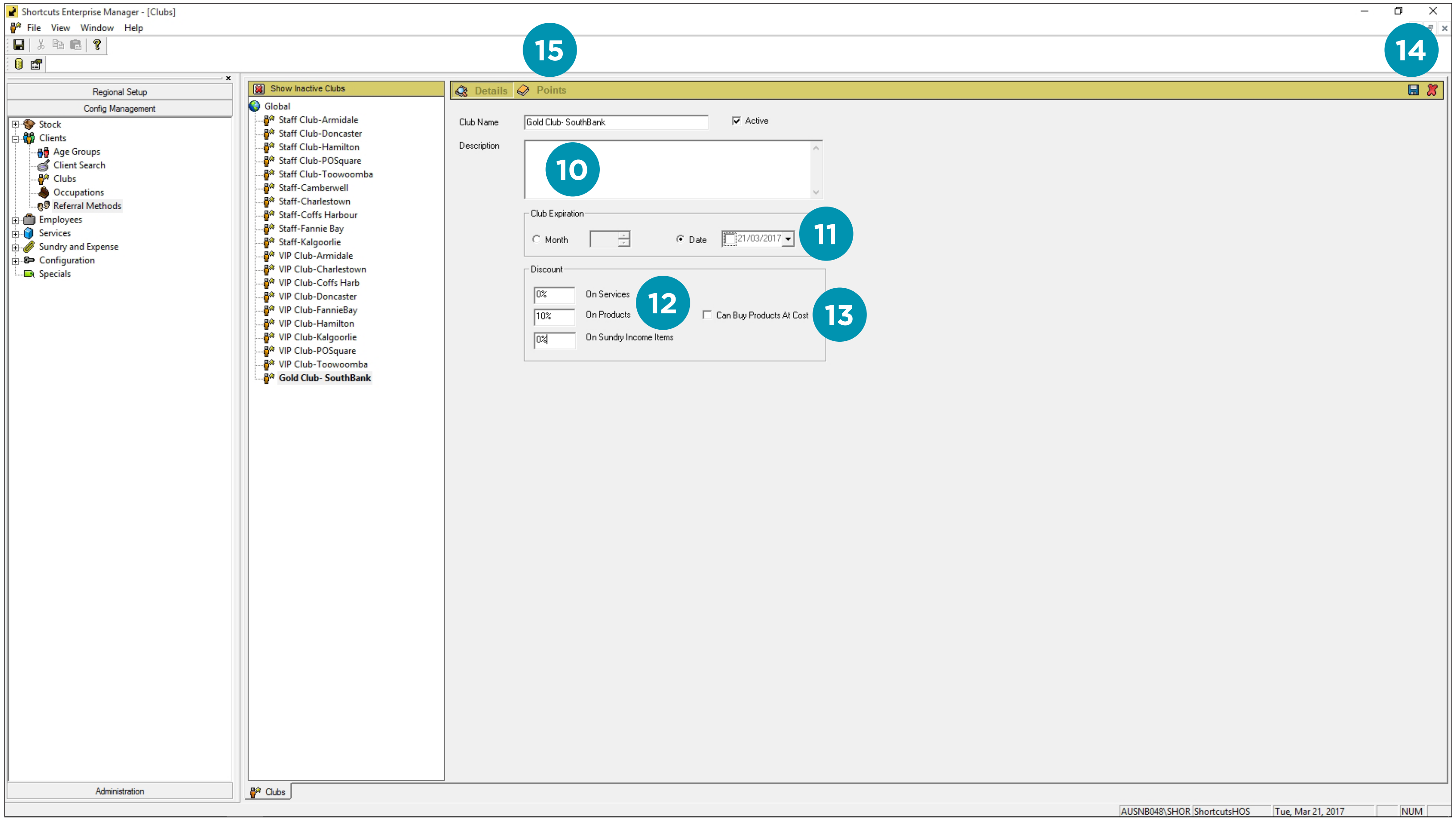
OR

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**.



1 Click on the **points** tab.

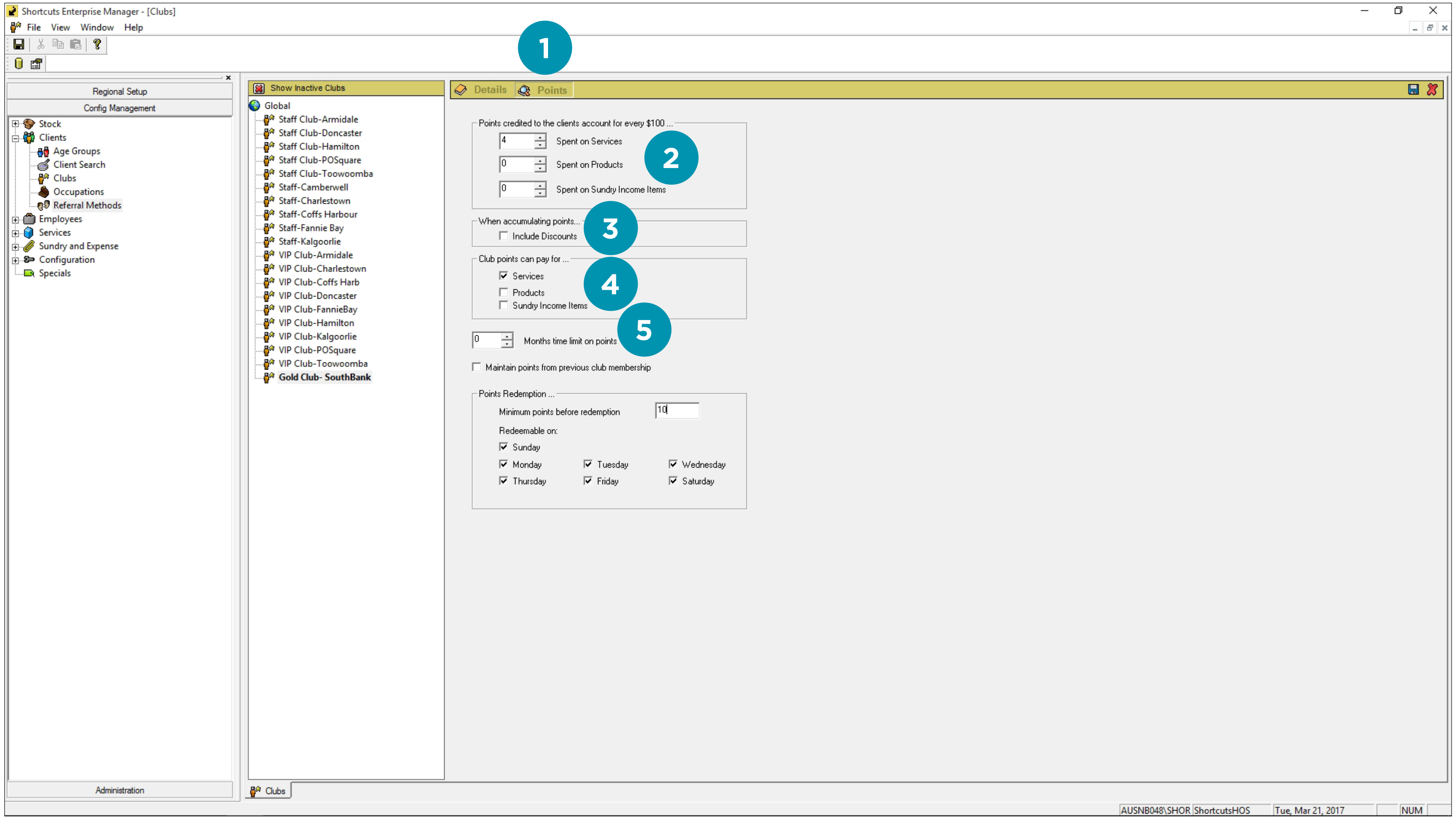
2 Enter the number of points clients will earn for every $100 they spend on services, products and sundry items.

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.



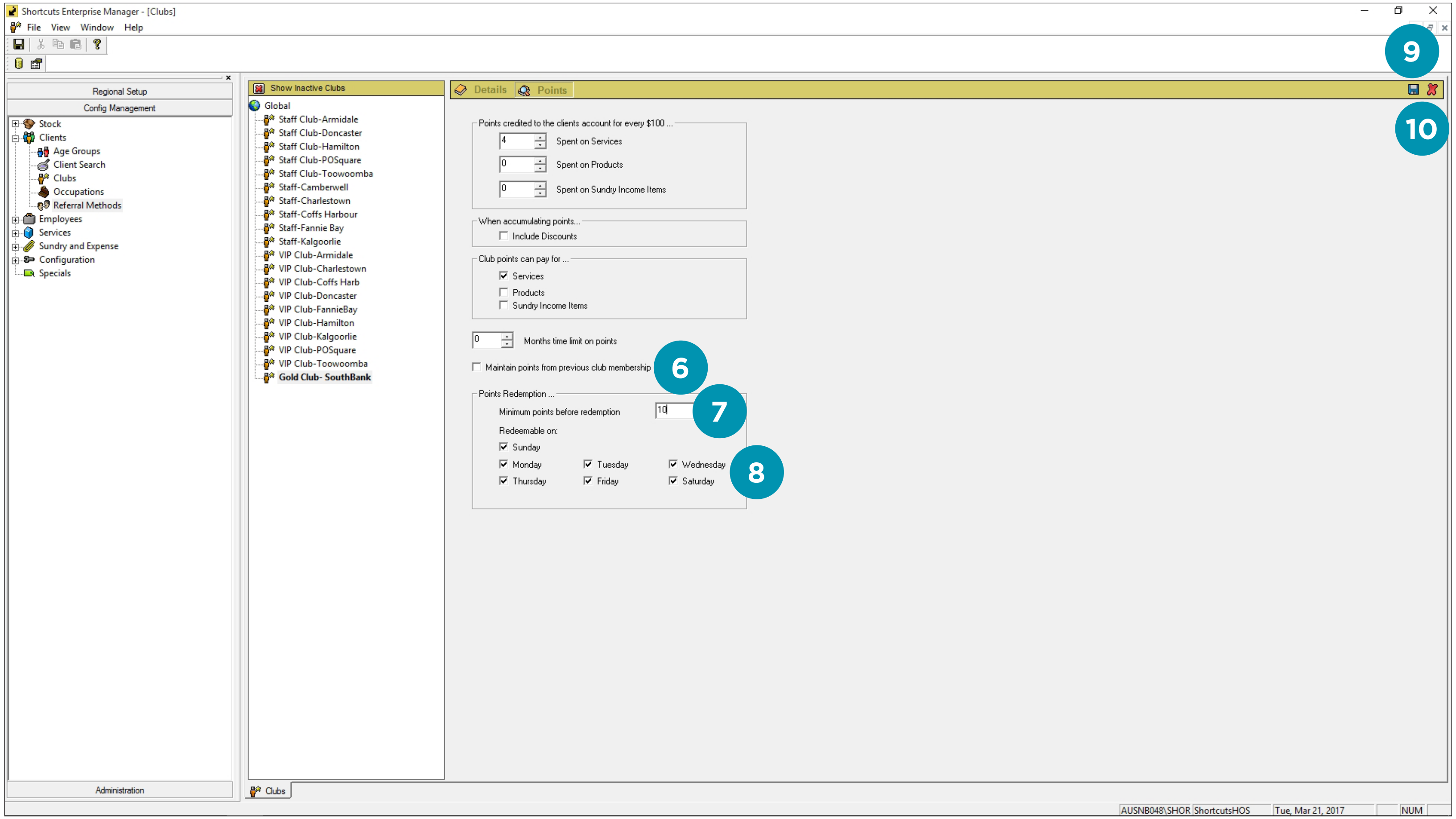
6 Tick this option If you want to allow clients to keep their accumulated points from a previous club, when they switch to this new club.

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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