

MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

# ENTERPRISE MANAGER

## CONFIGURATION

DISCOUNT REASONS,  
PAYMENT TYPES, VISIT NOTE  
TYPES, REASONS

CLINIC

HOME &  
MOBILE

BEAUTY



**SHORTCUTS**

SMARTER BUSINESS TECHNOLOGY

*it suits you*

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By Erin Lewis

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Country: Australia

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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.

## ADDING A DISCOUNT REASON

Discount reasons are used to keep track of why prices have been reduced at the Point of Sale. Any reason why a client would not pay full price for an item at the Point of Sale should be set up as a discount reason. For example, if clients receive a discount on their birthday, you can set up a 'birthday' discount reason. This allows you to control the discount amount, and ensures that discounts can only be applied for authorised reasons.

### ADDING DISCOUNT REASON DETAILS

1 Click on the **config management** menu.

2 Double click to expand **configuration**.

3 Double click on **discount reasons**.

! To maintain consistency it is recommended that discount reasons are configured at the highest regional level possible. For example, if a discount reason is consistent across all sites, configure it at the global level.

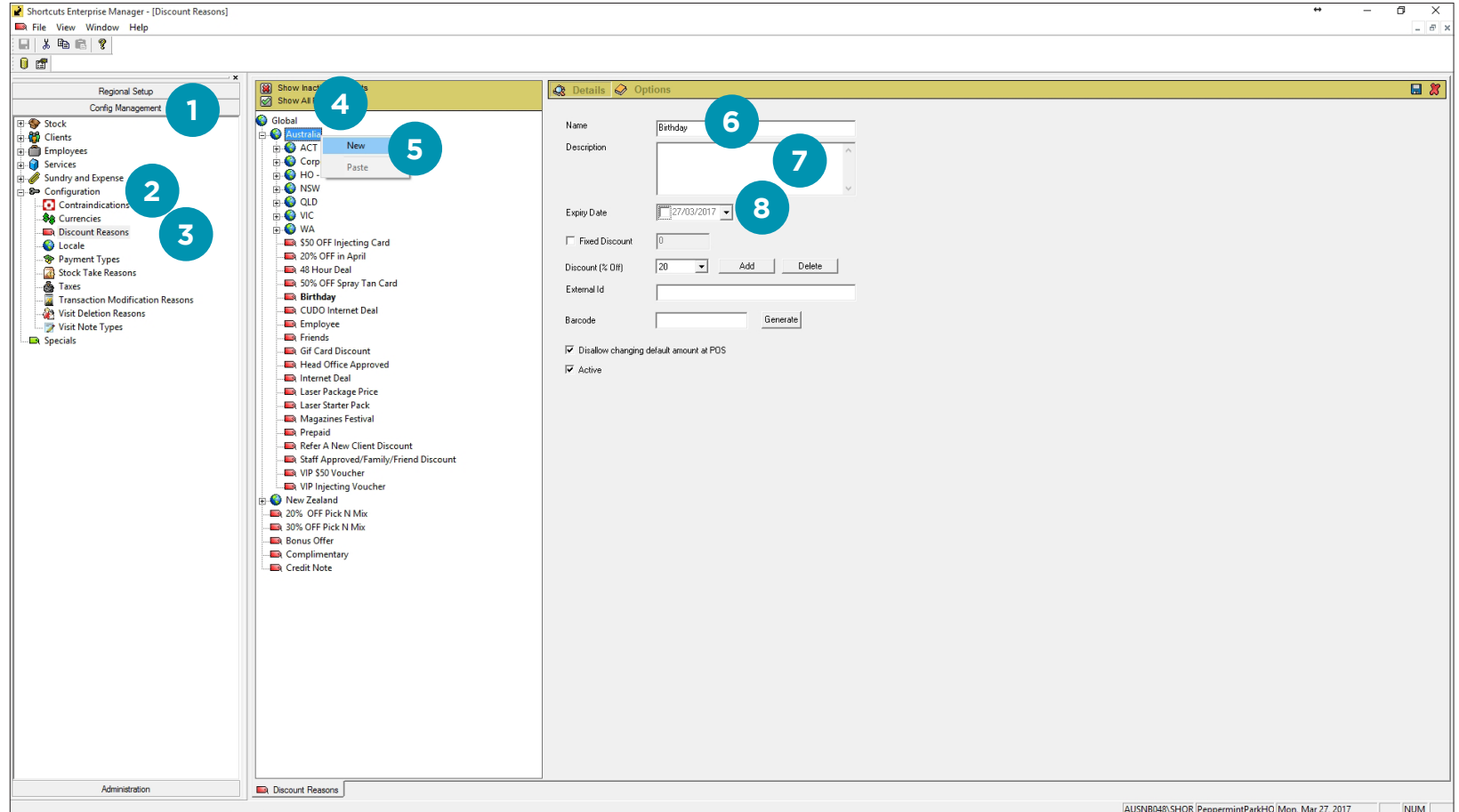
4 Right click on the region you want to add a discount reason for.

5 Select **new**.

6 Enter the name of the discount reason.

7 **Optional:** Enter a description.

8 **Optional:** Select an expiry date.



9

If this is a fixed amount discount (e.g. \$20), tick the **fixed discount** box and enter the discount amount.

10

If this is a percentage discount, select the default percentage from the drop-down list, or press the **add** button to enter a new percentage.

11

**Optional:** Enter a barcode for the discount reason. Alternatively, click the **generate** button to automatically generate a barcode.

12

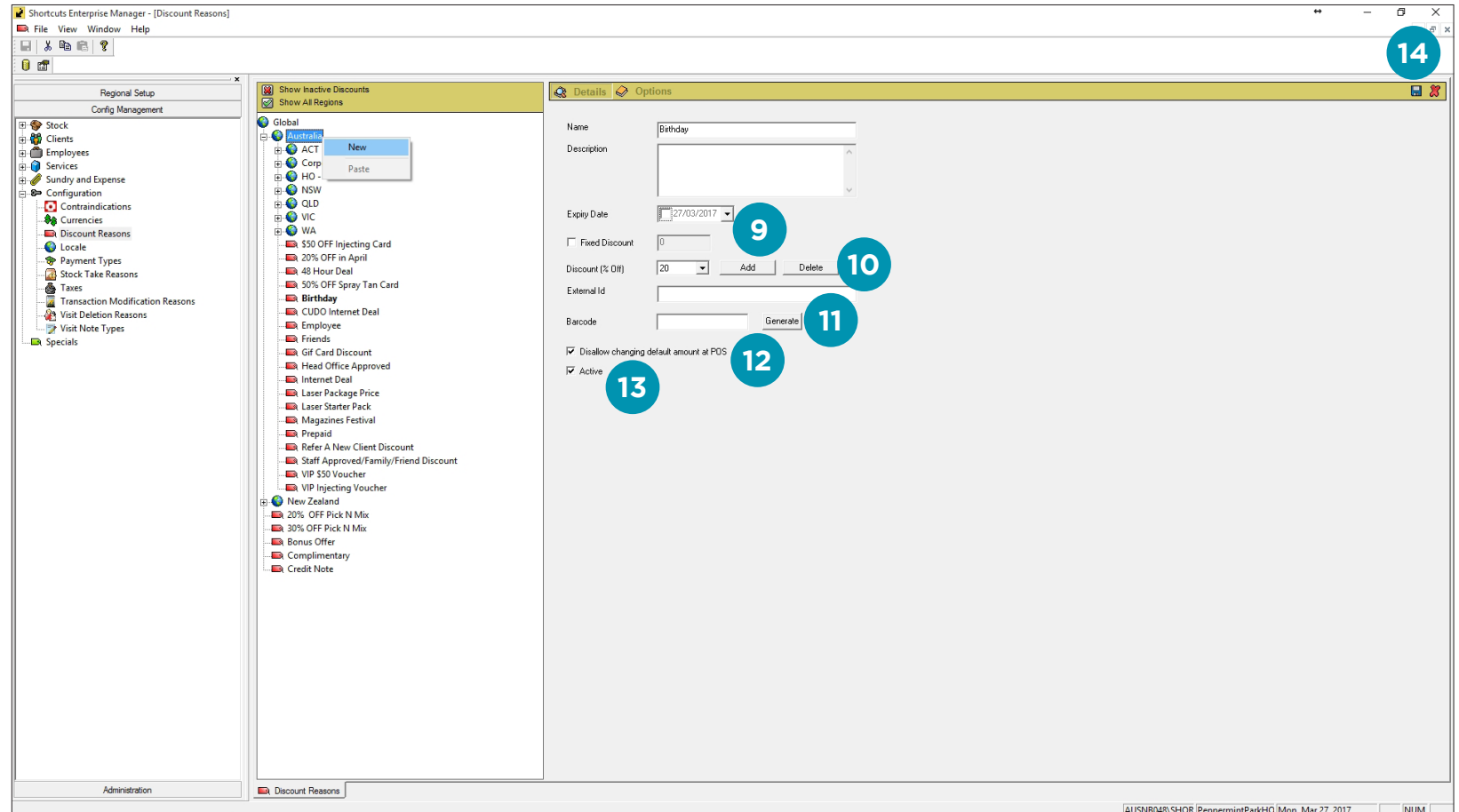
If you do not want the user to be able to change the default discount amount at the Point of Sale, tick the **disallow changing default amount at POS** box.

13

Tick the **active** box.

14

Click **save**.



## CONFIGURING DISCOUNT REASON OPTIONS

1

Click on the **options** tab.

2

Tick the boxes in areas where you want sales to be credited at their full price prior to the discount. Leaving a box unticked means that employees will receive credit for sales at their price after the discount has been applied.

3

Tick the relevant boxes to indicate which items this discount reason can be applied to.

4

Click **save**.

5

Close tab.

Shortcuts Enterprise Manager - [Discount Reasons]

File View Window Help

Regional Setup  
Config Management

Stock  
Clients  
Employees  
Services  
Sundry and Expense  
Configuration  
Contraindications  
Currencies  
Discount Reasons  
Locale  
Payment Types  
Stock Take Reasons  
Taxes  
Transaction Modification Reasons  
Visit Deletion Reasons  
Visit Note Types  
Specials

Show Inactive Discounts  
Show All Regions

Global  
Australia  
ACT  
Corporate Store group 1  
HO - Admin  
NSW  
QLD  
VIC  
WA  
\$50 OFF Injecting Card  
20% OFF in April  
48 Hour Deal  
50% OFF Spray Tan Card  
Birthday  
CUDO Internet Deal  
Employee  
Friends  
GF Card Discount  
Head Office Approved  
Internet Deal  
Laser Package Price  
Laser Starter Pack  
Magazines Festival  
Prepaid  
Refer A New Client Discount  
Staff Approved/Family/Friend Discount  
VIP \$50 Voucher  
VIP Injecting Voucher  
New Zealand  
20% OFF Pick N Mix  
30% OFF Pick N Mix  
Bonus Offer  
Complimentary  
Credit Note

Details Options

Discounted Amount counts towards...

	Products	Services	Sundry
Employee Dollars	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee Points	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Income	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Discount can be applied to...

Product  
 Services  
 Sundry

Administration

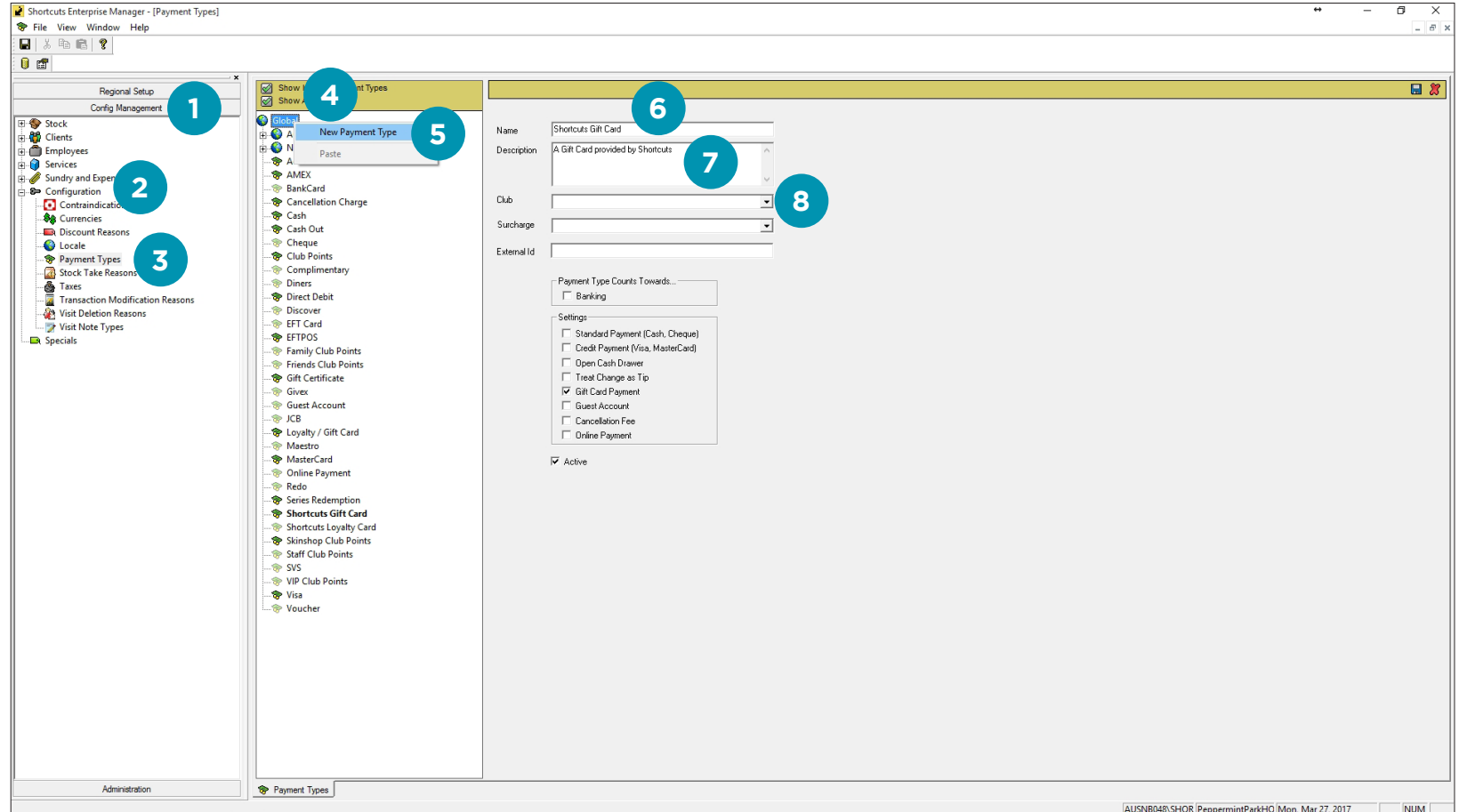
Discount Reasons

AUSNB048.SHOR | PeppermintParkHO | Mon, Mar 27, 2017 | NUM

## ADDING A PAYMENT TYPE

Payment types need to be configured in Enterprise Manager. However, additional settings for credit cards may need to be configured via the payment types screen in Shortcuts Fusion. Initially payment types are configured at the global level. However, you can configure payment types for individual sub-regions if required. The following 15 payment types are compulsory and must always exist at the global level: Cash, Cheque, Gift Certificate, Account, Cash Out, AMEX, Diners, Visa, MasterCard, BankCard, Complimentary, Redo and Voucher. These payment types cannot be deleted or renamed, but they can be made inactive if they are not used.

- 1 Click on the **config management** menu.
- 2 Double click to expand **configuration**.
- 3 Double click on **payment types**.
- ! To maintain consistency it is recommended that payment types are configured at the highest regional level possible. For example, if a payment type is consistent across all sites, configure it at the global level.
- 4 Right click on the region you want to add a payment type for.
- 5 Select **new payment type**.
- 6 Enter the name of the payment type.
- 7 **Optional:** Enter a description.
- 8 If the payment type is associated with a club, select the relevant club.



9

If this payment type is associated with a surcharge, select the relevant surcharge.

10

Tick the **banking** option if this payment type will count towards end of day banking. Example payment types that count towards banking include cash, credit cards and cheques. Payment types that do not count towards banking are usually payment types such as charges to client accounts and the redemption of points.

11

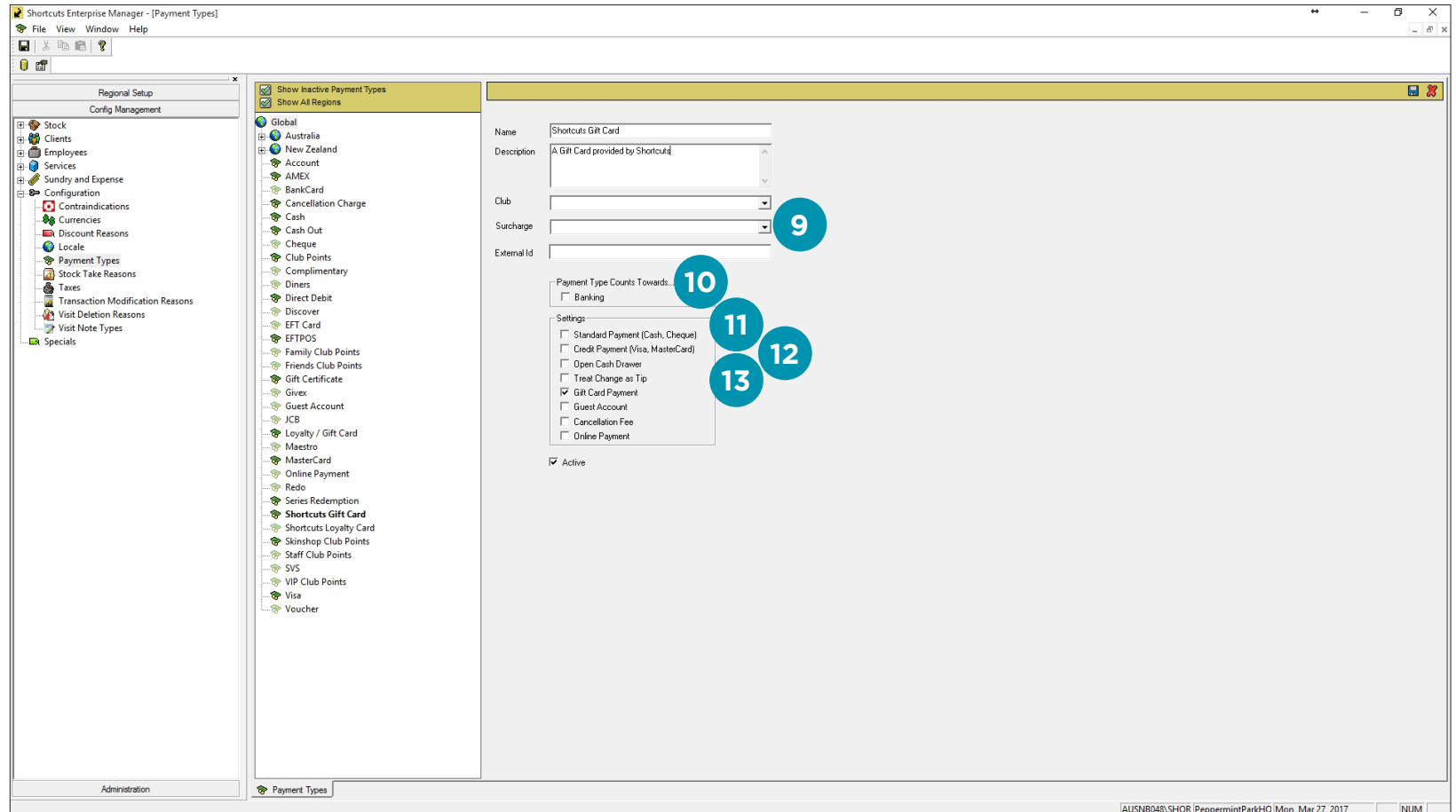
If the payment type is a standard payment (e.g. cash, cheque), tick the **standard payment** box.

12

If the payment type is a credit card, tick the **credit payment** box.

13

If you want the cash drawer to automatically open when this payment type is used at the Point of Sale, tick the **open cash drawer** box.





- 14 If this payment type is a gift card or loyalty card, tick the **gift card payment** box.
- 15 If this payment type is for cancellations, tick the **cancellation fee** box.
- 16 If this payment type is for online payments (i.e. payment is collected upfront when booking online), tick the **online payment** box.
- 17 Tick the **active** box.
- 18 Click **save**.
- 19 Close tab.

The screenshot shows the 'Shortcuts Enterprise Manager - [Payment Types]' application window. The interface includes a menu bar (File, View, Window, Help), a toolbar, and a 'Regional Setup' dialog box. The main area is divided into a left-hand tree view and a right-hand configuration panel.

**Tree View:** A hierarchical tree view on the left shows various categories like 'Stock', 'Clients', 'Employees', 'Services', 'Sundry and Expense', 'Configuration', 'Contraindications', 'Currencies', 'Discount Reasons', 'Locale', 'Payment Types', 'Stock Take Reasons', 'Taxes', 'Transaction Modification Reasons', 'Visit Deletion Reasons', 'Visit Note Types', and 'Specials'. Under 'Payment Types', several options are listed, including 'Shortcuts Gift Card', which is highlighted.

**Configuration Panel:** The right-hand panel is titled 'Shortcuts Gift Card' and contains the following fields and options:

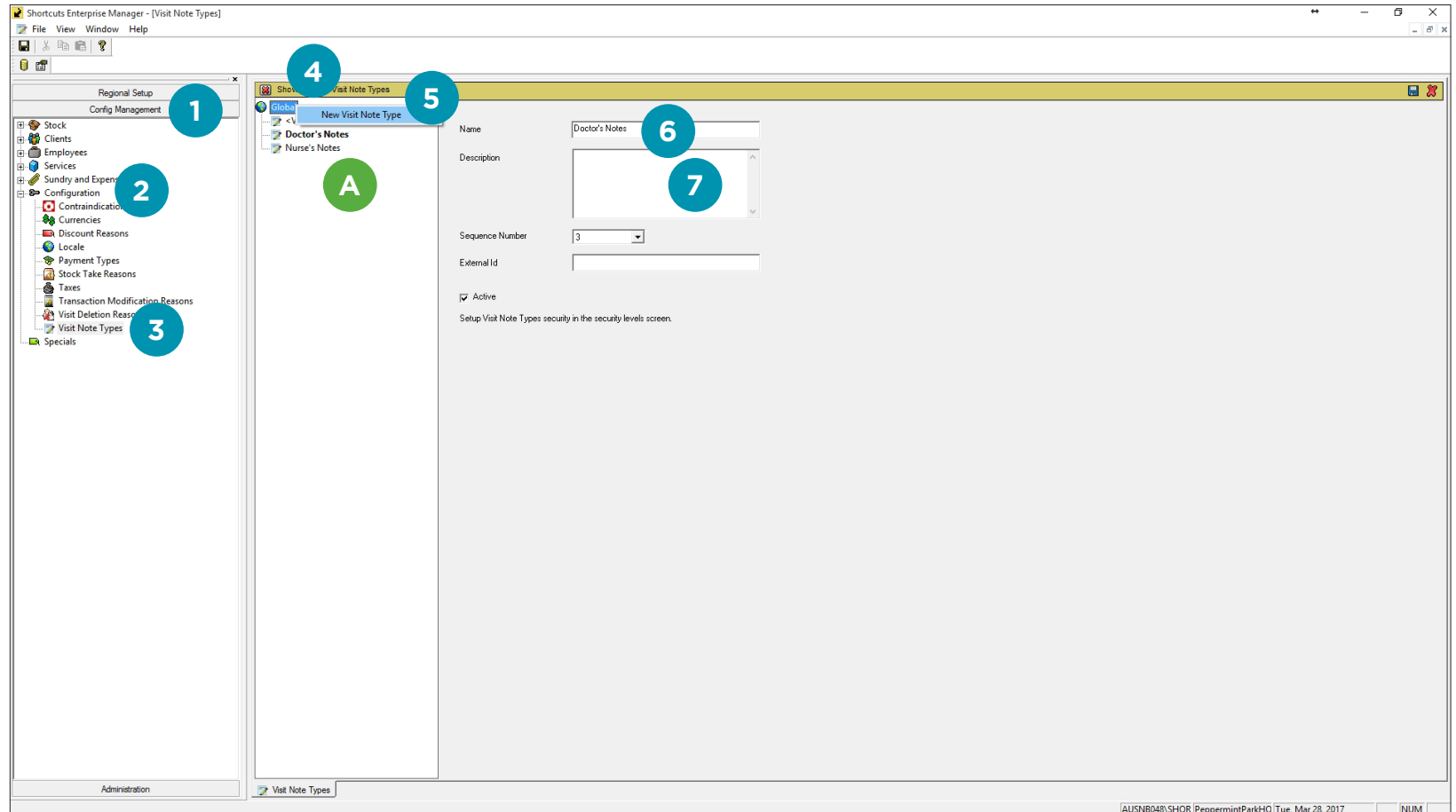
- Name:** Shortcuts Gift Card
- Description:** A Gift Card provided by Shortcut
- Club:** (Dropdown menu)
- Surcharge:** (Dropdown menu)
- External Id:** (Text field)
- Payment Type Counts Towards...:**  Banking
- Settings:**
  - Standard Payment (Cash, Cheque)
  - Credit Payment (Visa, MasterCard)
  - Open Cash Drawer
  - Treat Change as Tip
  - Gift Card Payment (14)
  - Guest Account
  - Cancellation Fee (15)
  - Online Payment (16)
- Active:**  (17)

At the bottom of the window, the status bar shows 'Administration' and 'Payment Types' tabs, along with the system information: 'AUSNB048:SHOR | PeppermintParkHG | Mon, Mar 27, 2017 | NUM |'.

## ADDING A VISIT NOTE TYPE

Visit note types allow you to organise and separate client visit notes into different categories. For example, a clinic may want to create different note types for nurse's notes and doctor's notes. Visit note types are global (available across all sites) in Enterprise. In order for a visit note type to become usable, visit note type security must be configured via the security levels screen in Enterprise Manager. Security settings can be customised for each individual note type.

- 1 Click on the **config management** menu.
- 2 Double click to expand **configuration**.
- 3 Double click on **visit note types**.
- A There is a standard note type called **<visit notes>**. This note type cannot be edited or deleted. It is used for general visit notes.
- 4 Right click on the **global** region.
- 5 Select **new visit note type**.
- 6 Enter the name of the visit note type.
- 7 **Optional:** Enter a description.



8

If you have 2 or more custom note types, you can select the desired sequence number from the drop-down list. This determines the order in which note types are displayed in Shortcuts Fusion. The standard **<visit notes>** will always be in position 1.

9

Ensure that the **active** box is ticked.

10

Click **save**.

11

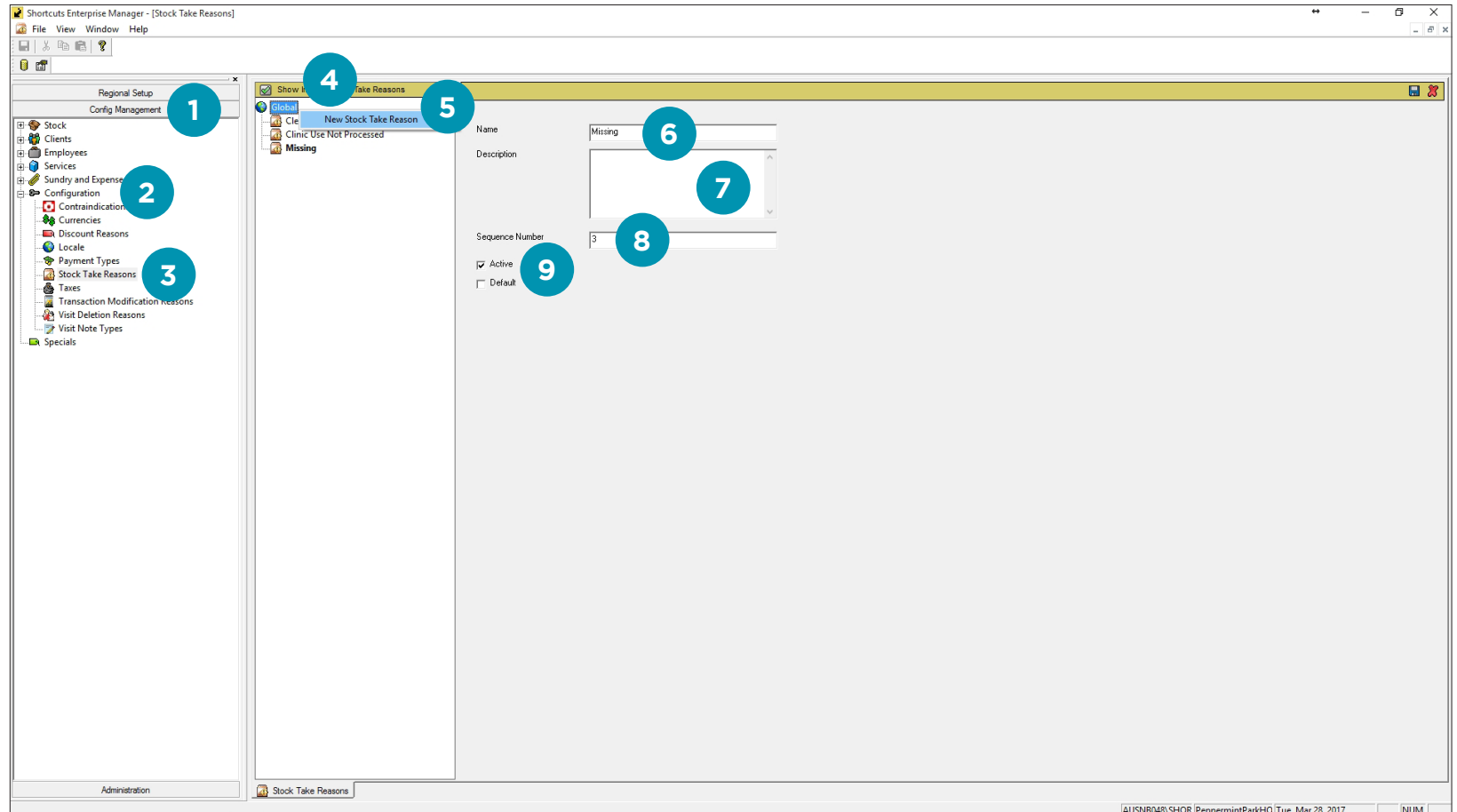
Close tab.

The screenshot displays the 'Shortcuts Enterprise Manager - [Visit Note Types]' application window. The interface includes a menu bar (File, View, Window, Help), a toolbar, and a main workspace. On the left, there is a 'Regional Setup' pane with a 'Config Management' tree view containing categories like Stock, Clients, Employees, Services, Sundry and Expense, Configuration, Contraindications, Currencies, Discount Reasons, Locale, Payment Types, Stock Take Reasons, Taxes, Transaction Modification Reasons, Visit Deletion Reasons, Visit Note Types, and Specials. The 'Visit Note Types' category is expanded, showing a list of note types: '<Visit Notes>', 'Doctor's Notes', and 'Nurse's Notes'. The 'Doctor's Notes' type is selected, and its configuration is shown in the main workspace. The configuration fields include: Name (Doctor's Notes), Description (empty text area), Sequence Number (3, with a drop-down arrow and a callout '8'), External Id (empty text field with a callout '9'), and an 'Active' checkbox (checked, with a callout '9'). Below the 'Active' checkbox is the text 'Setup Visit Note Types security in the security levels screen.' In the top right corner of the application window, there are window control buttons (minimize, maximize, close) and a callout '10'. In the bottom right corner of the application window, there is a status bar with the text 'AUSNB048\SHOR |PeppermintParkHQ |Tue, Mar 28, 2017' and a callout '11'. The bottom of the window shows a taskbar with 'Administration' and 'Visit Note Types' tabs.

## ADDING A STOCKTAKE REASON

Enterprise Manager allows you to create pre-defined stocktake reasons to help you monitor stock variance. The reasons you create will be available for selection during a stocktake, when the entered product counts differ from the current stock on hand. Once reasons are set up, employees MUST select a reason for any stock variance before they can continue with the stocktake. Stocktake reasons are global (available across all sites) in Enterprise. By letting employees or managers choose from a selection of pre-defined, self-explanatory reasons, you can make it easier to analyse unusual events and identify areas of concern.

- 1 Click on the **config management** menu.
- 2 Double click to expand **configuration**.
- 3 Double click on **stock take reasons**.
- 4 Right click on the **global** region.
- 5 Select **new stock take reason**.
- 6 Enter the name of the reason (e.g. item expired).
- 7 **Optional:** Enter a description.
- 8 Enter the desired sequence number. This determines the position the reason is displayed in within the selection drop-down list in Shortcuts Fusion.
- 9 Ensure that the **active** box is ticked.



10 If you want this to be the default stocktake reason, tick the **default** box.

11 Click **save**.

12 Close tab.

Shortcuts Enterprise Manager - [Stock Take Reasons]

File View Window Help

Regional Setup  
Config Management

- Stock
- Clients
- Employees
- Services
- Sundry and Expense
- Configuration
  - Contraindications
  - Currencies
  - Discount Reasons
  - Locale
  - Payment Types
  - Stock Take Reasons
  - Taxes
  - Transaction Modification Reasons
  - Visit Deletion Reasons
  - Visit Note Types
  - Specials

Show Inactive Stock Take Reasons

- Global
- Clerical Error
- Clinic Use Not Processed
- Missing

Name: Missing

Description:

Sequence Number: 3

Active

Default

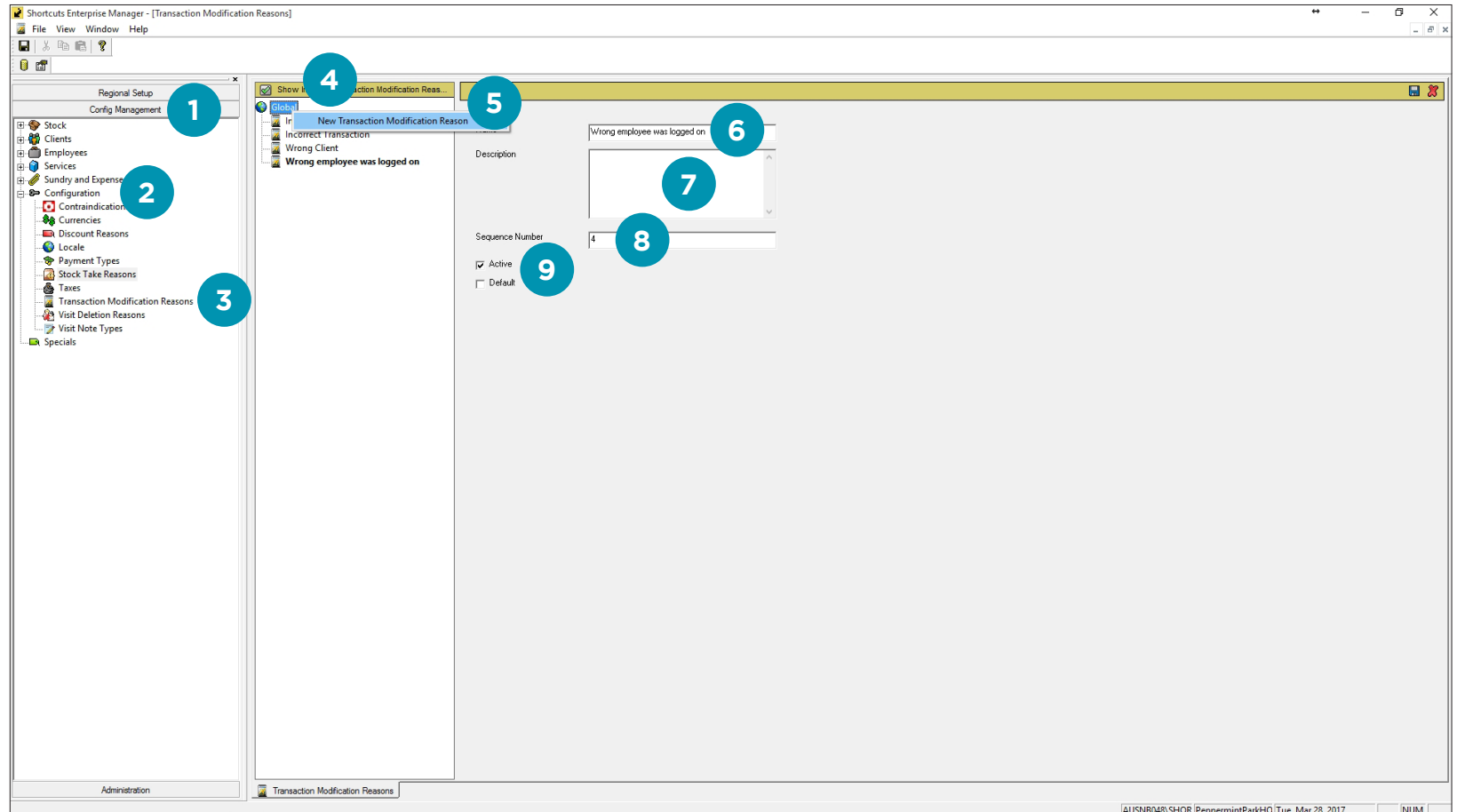
Administration | Stock Take Reasons

AUSNB048\SHOR\PeppermintParkHO | Tue, Mar 28, 2017 | NUM

## ADDING A TRANSACTION MODIFICATION REASON

Enterprise Manager allows you to create pre-defined transaction modification reasons to help you monitor changes to transactional data. The reasons you create will be available for selection at the Point of Sale when a transaction modified. Once reasons are set up, employees **MUST** select a reason before they can continue with modifying a transaction. Transaction modification reasons are global (available across all sites) in Enterprise. By letting employees or managers choose from a selection of pre-defined, self-explanatory reasons, you can make it easier to analyse unusual events and identify areas of concern.

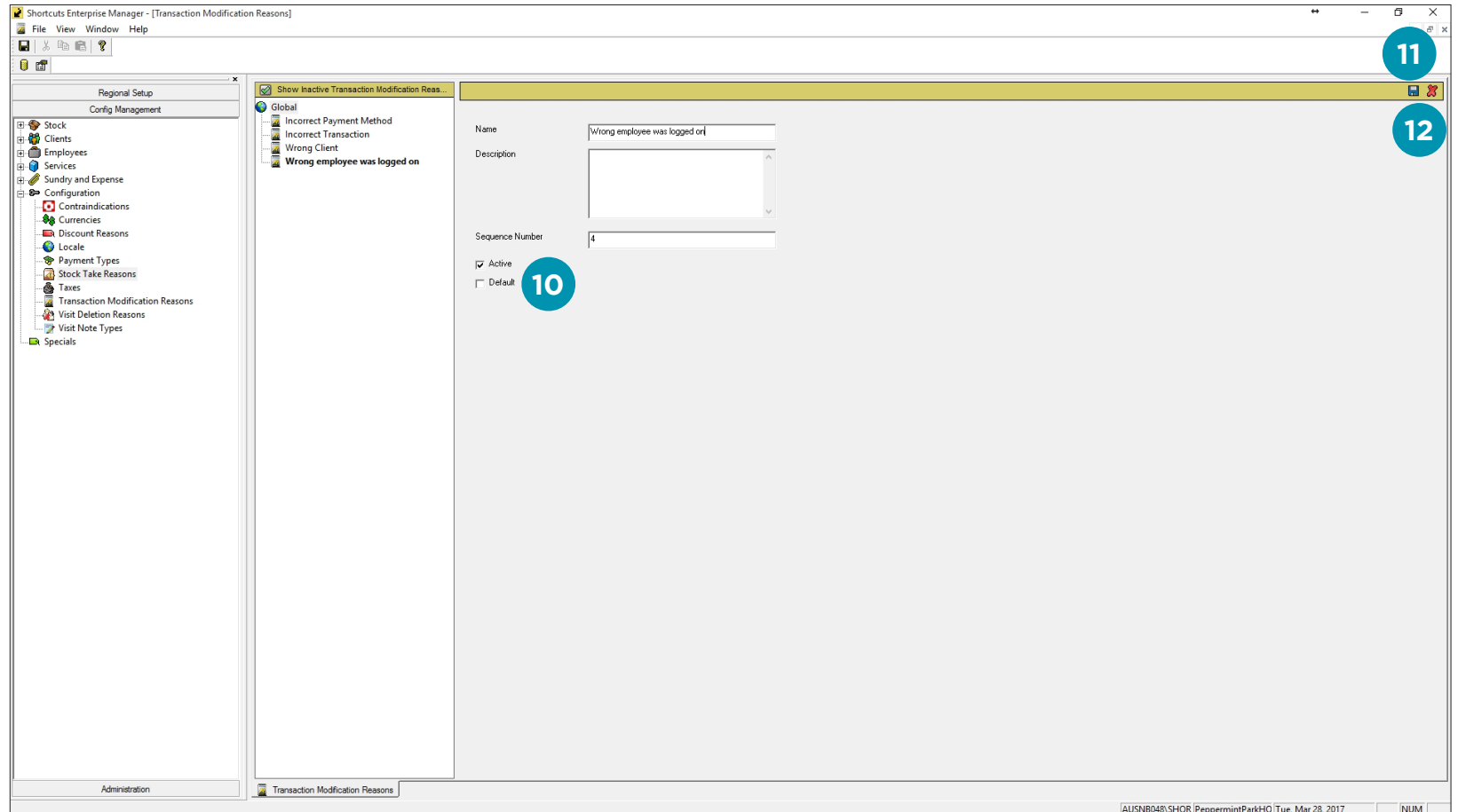
- 1 Click on the **config management** menu.
- 2 Double click to expand **configuration**.
- 3 Double click on **transaction modification reasons**.
- 4 Right click on the **global** region.
- 5 Select **new transaction modification reason**.
- 6 Enter the name of the reason (e.g. wrong payment type).
- 7 **Optional:** Enter a description.
- 8 Enter the desired sequence number. This determines the position the reason is displayed in within the selection drop-down list in Shortcuts Fusion.
- 9 Ensure that the **active** box is ticked.



10 If you want this to be the default transaction modification reason, tick the **default** box.

11 Click **save**.

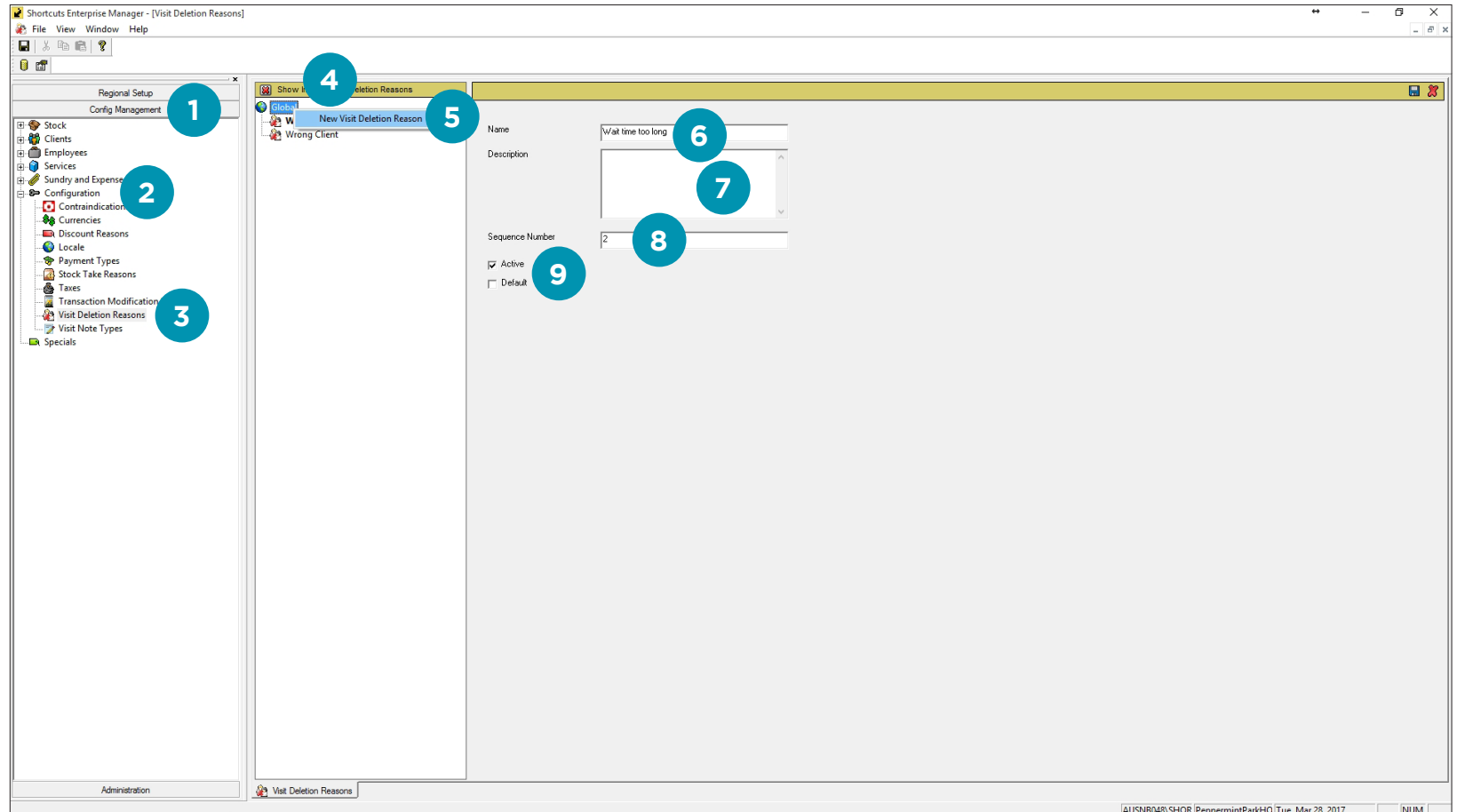
12 Close tab.



## ADDING A VISIT DELETION REASON

Enterprise Manager allows you to create pre-defined visit deletion reasons to help you monitor deleted visits in the Point of Sale or Walk-in Manager. The reasons you create will be available for selection when a client is removed from the Point of Sale or Walk-in Manager. Once reasons are set up, employees **MUST** select a reason before they can continue with deleting a visit. Visit deletion reasons are global (available across all sites) in Enterprise. By letting employees or managers choose from a selection of pre-defined, self-explanatory reasons, you can make it easier to analyse unusual events and identify areas of concern.

- 1 Click on the **config management** menu.
- 2 Double click to expand **configuration**.
- 3 Double click on **visit deletion reasons**.
- 4 Right click on the **global** region.
- 5 Select **new visit deletion reason**.
- 6 Enter the name of the reason (e.g. wrong client).
- 7 **Optional:** Enter a description.
- 8 Enter the desired sequence number. This determines the position the reason is displayed in within the selection drop-down list in Shortcuts Fusion.
- 9 Ensure that the **active** box is ticked.





10 If you want this to be the default visit deletion reason, tick the **default** box.

11 Click **save**.

12 Close tab.

The screenshot shows the 'Shortcuts Enterprise Manager - [Visit Deletion Reasons]' application window. The interface includes a menu bar (File, View, Window, Help), a toolbar, and a left-hand navigation pane under 'Regional Setup' and 'Config Management'. The navigation pane lists various categories such as Stock, Clients, Employees, Services, Sundry and Expense, Configuration, Contraindications, Currencies, Discount Reasons, Locale, Payment Types, Stock Take Reasons, Taxes, Transaction Modification Reasons, Visit Deletion Reasons, Visit Note Types, and Specials. The 'Visit Deletion Reasons' category is expanded, showing a list of reasons: 'Global', 'Wait time too long', and 'Wrong Client'. The 'Wait time too long' reason is selected, and its configuration details are shown in the main area. These details include a 'Name' field with the value 'Wait time too long', a 'Description' field, a 'Sequence Number' field with the value '2', and two checkboxes: 'Active' (checked) and 'Default' (unchecked). A blue circle with the number '10' is overlaid on the 'Default' checkbox. In the top right corner of the application window, there are two blue circles with the numbers '11' and '12'. The status bar at the bottom of the window displays 'Administration', 'Visit Deletion Reasons', and system information: 'AUSNB048\SHOR\PeppermintParkHQ Tue, Mar 28, 2017 NUM'.



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