MULTI-SITE

SPA

HAIR

ENTERPRISE MANAGER

CONFIGURATION

DISCOUNT REASONS, PAYMENT TYPES, VISIT NOTE TYPES, REASONS

HOME & MOBILE

SHORTCUTS™

SMARTER BUSINESS TECHNOLOGY

it suits you

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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

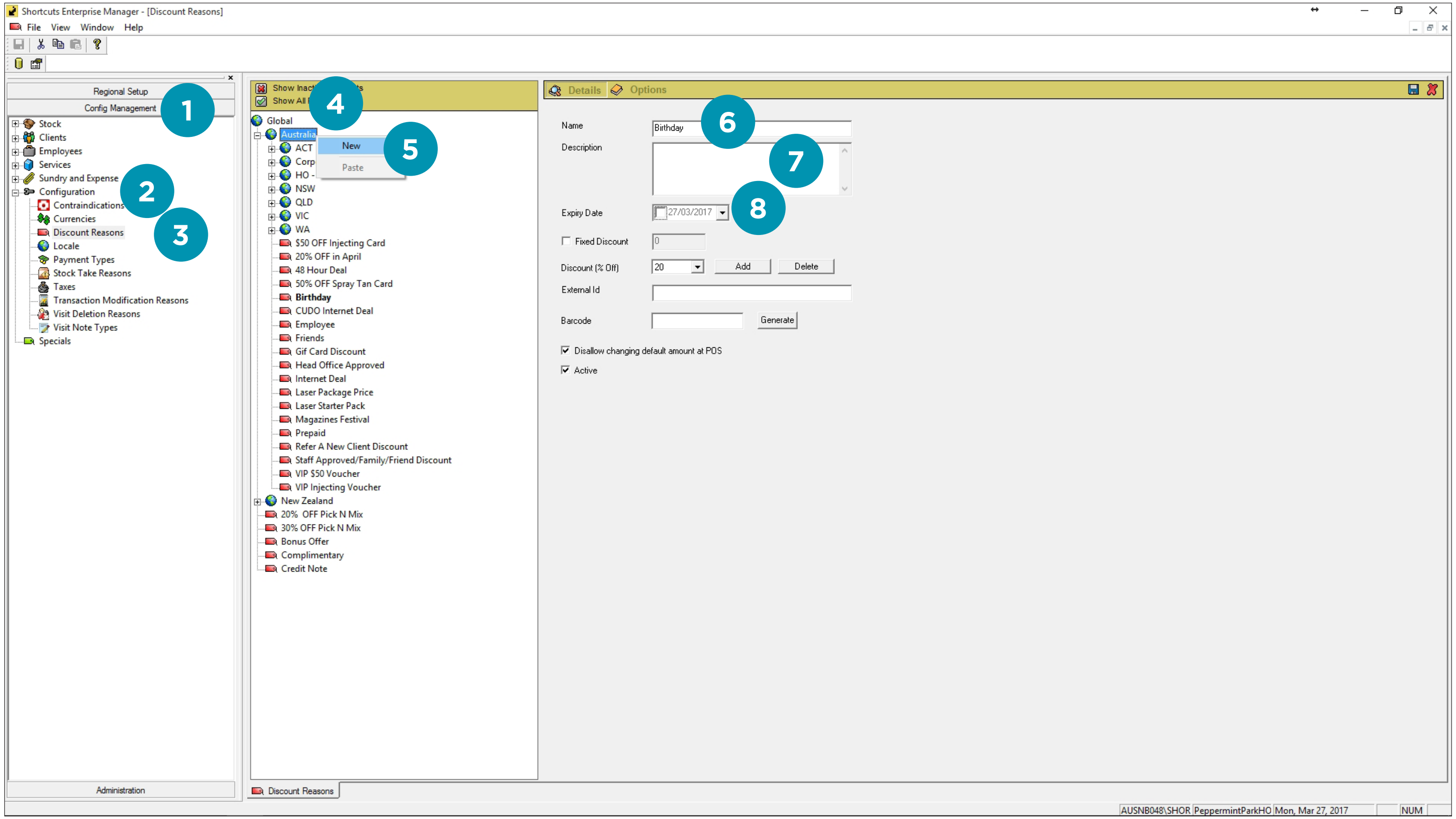
Discount reasons are used to keep track of why prices have been reduced at the Point of Sale. Any reason why a client would not pay full price for an item at the Point of Sale should be set up as a discount reason. For example, if clients receive a discount on their birthday, you can set up a 'birthday'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

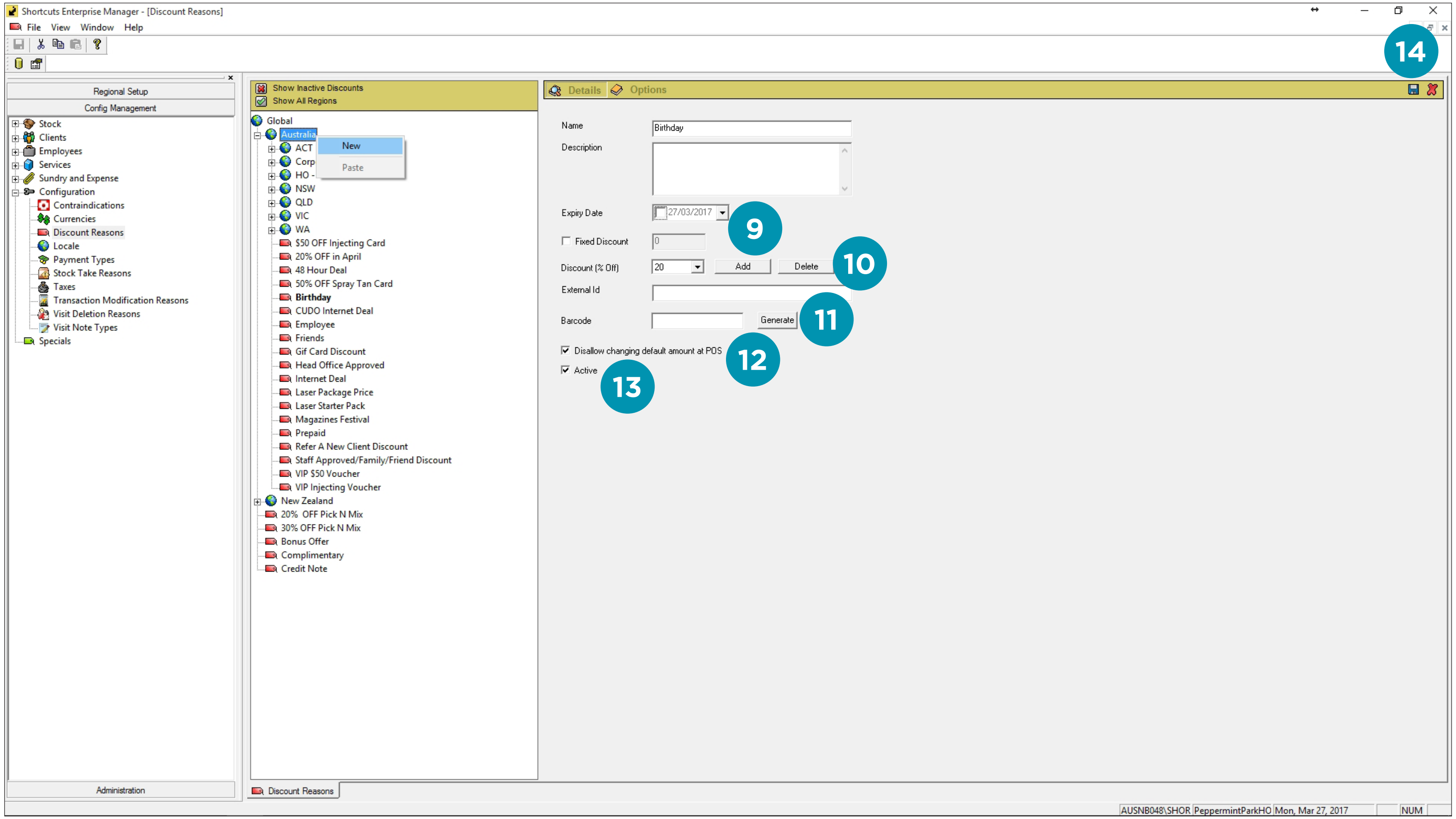
10. If this is a percentage discount, select the default percentage from the drop-down list, or press the **add** button to enter a new percentage.

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.

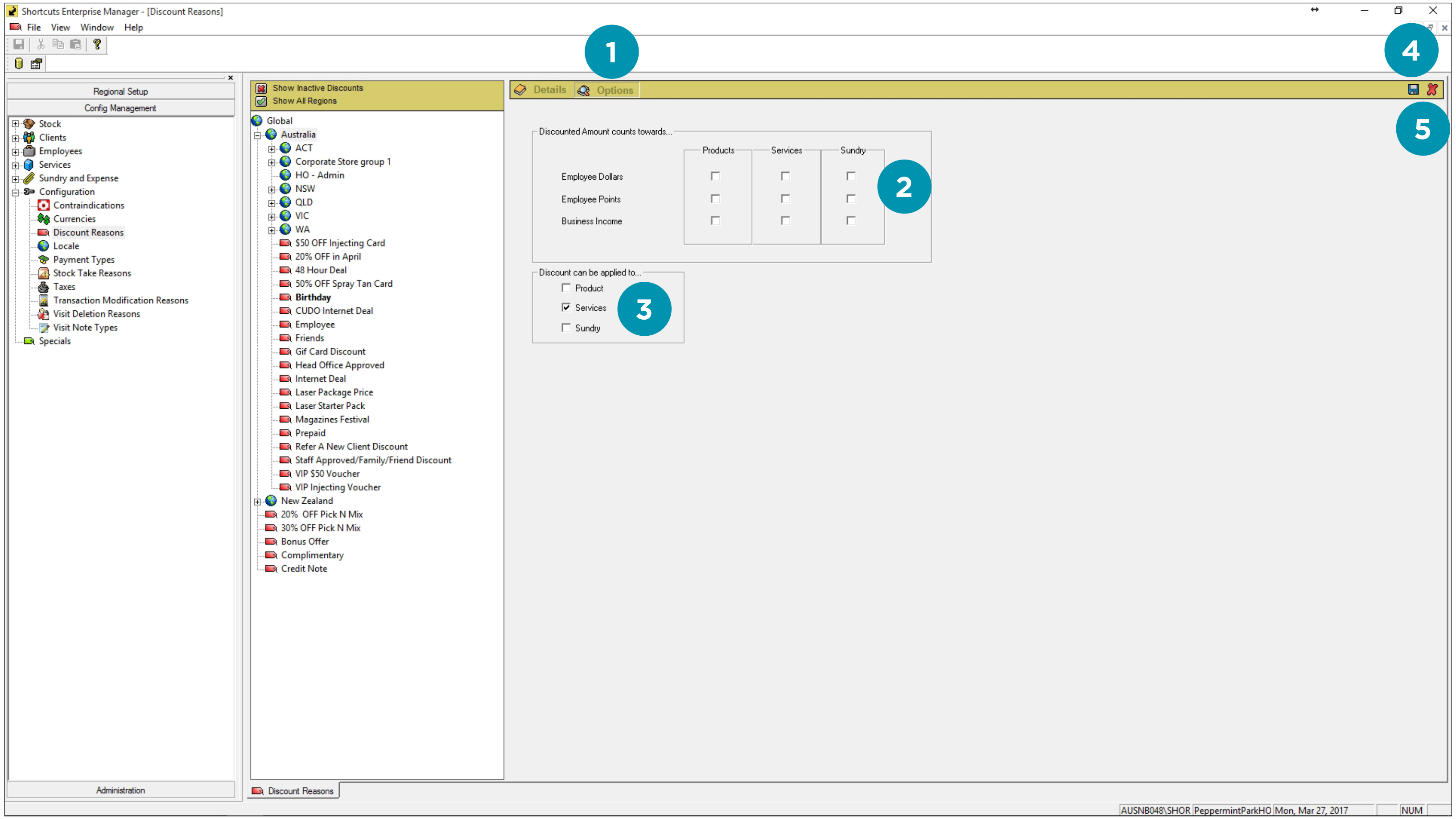
13. Tick the **active** box.

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.



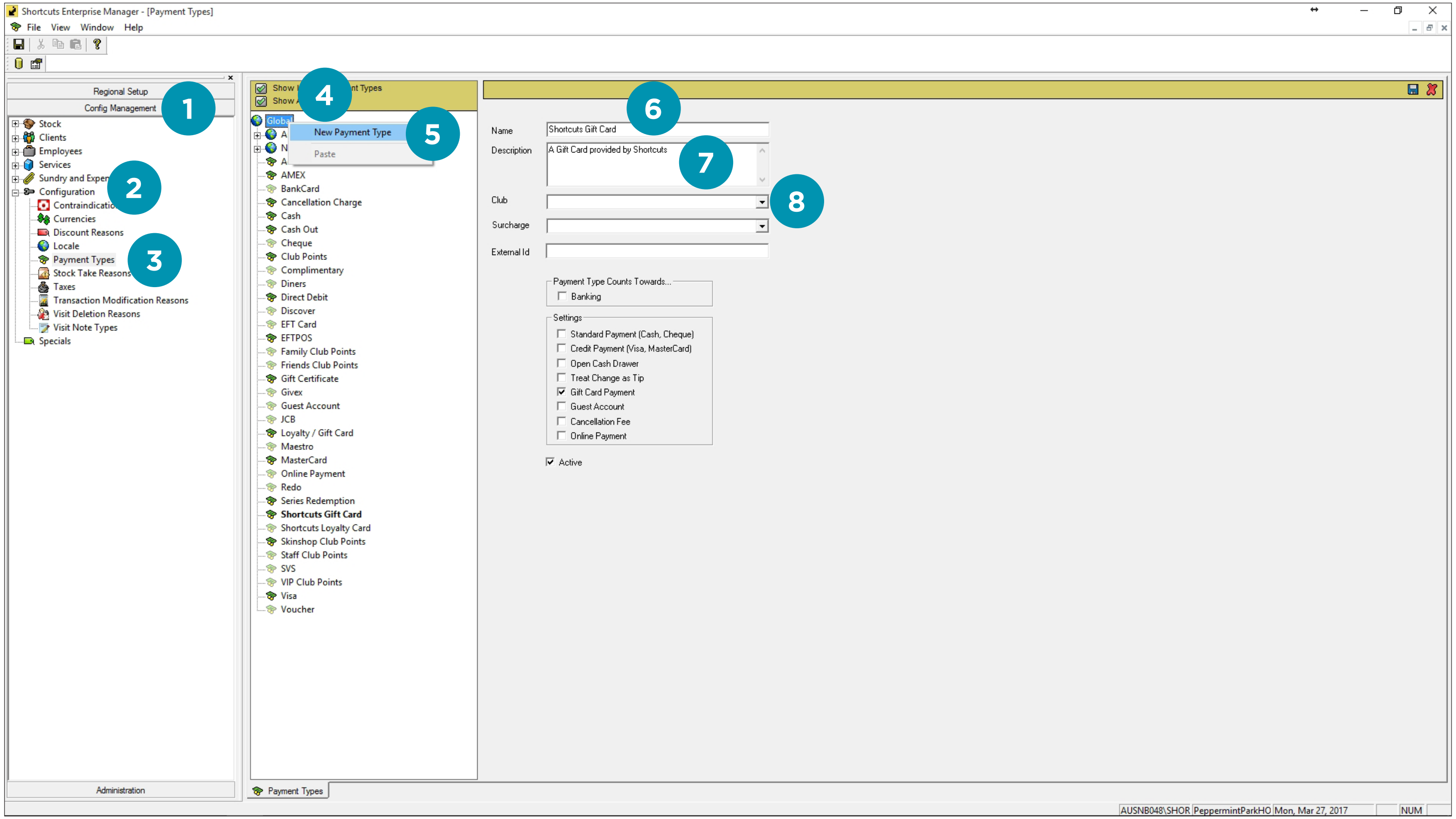
ADDING A PAYMENT TYPE

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.



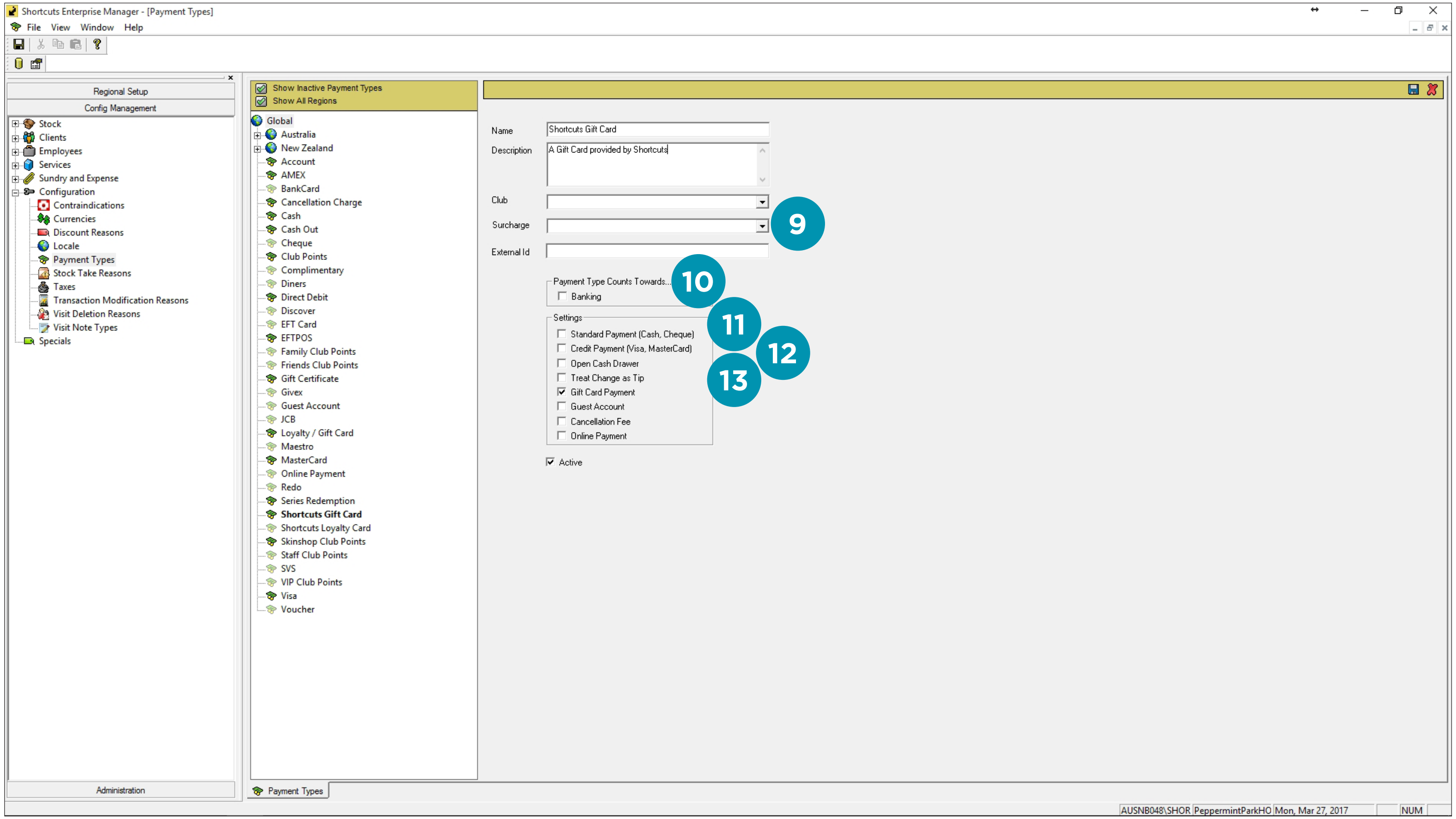
9 If this payment type is associated with a surcharge, select the relevant surcharge.

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.

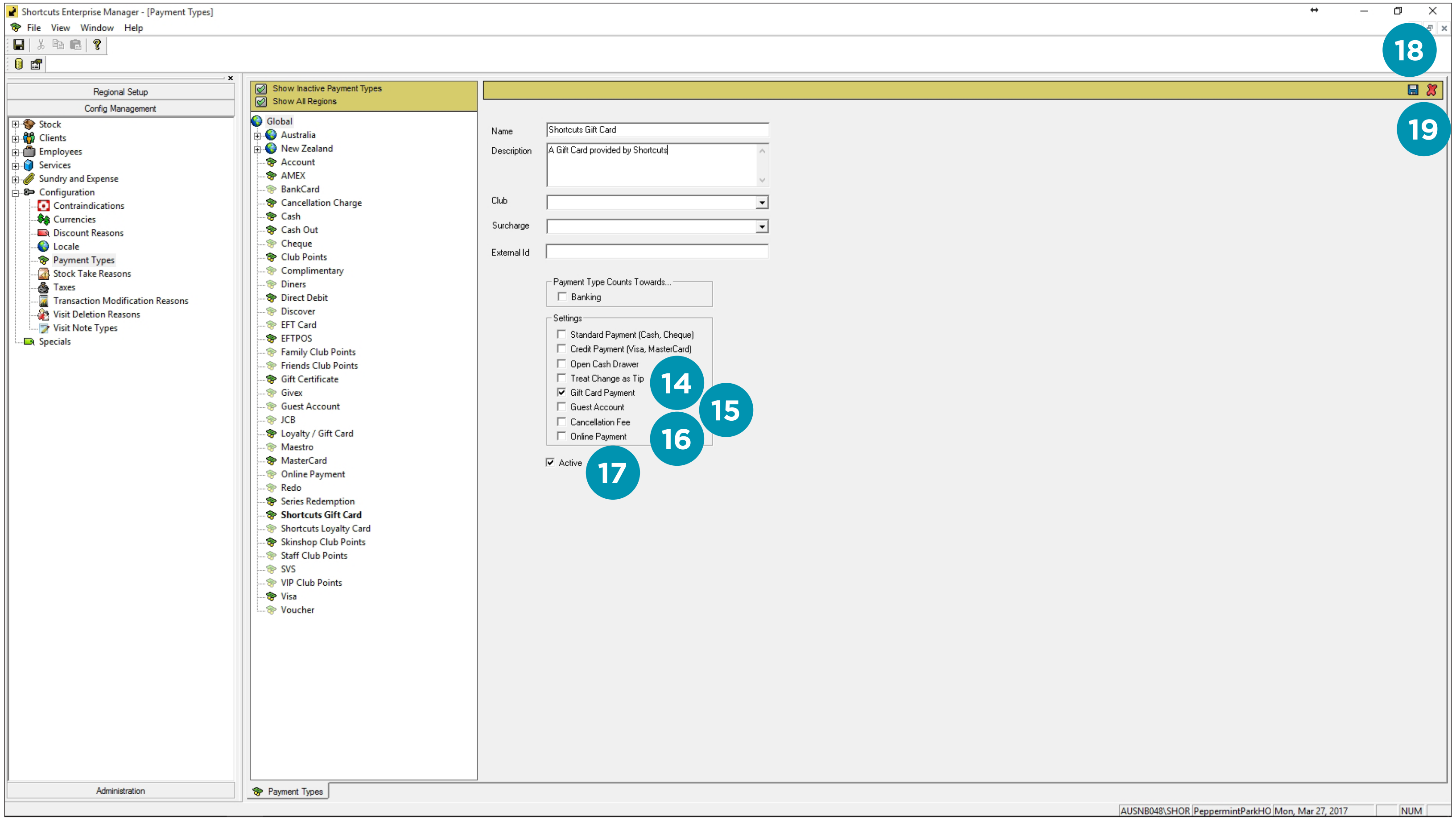
15 If this payment type is for cancellations, tick the **cancellation fee** box.

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.



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**.

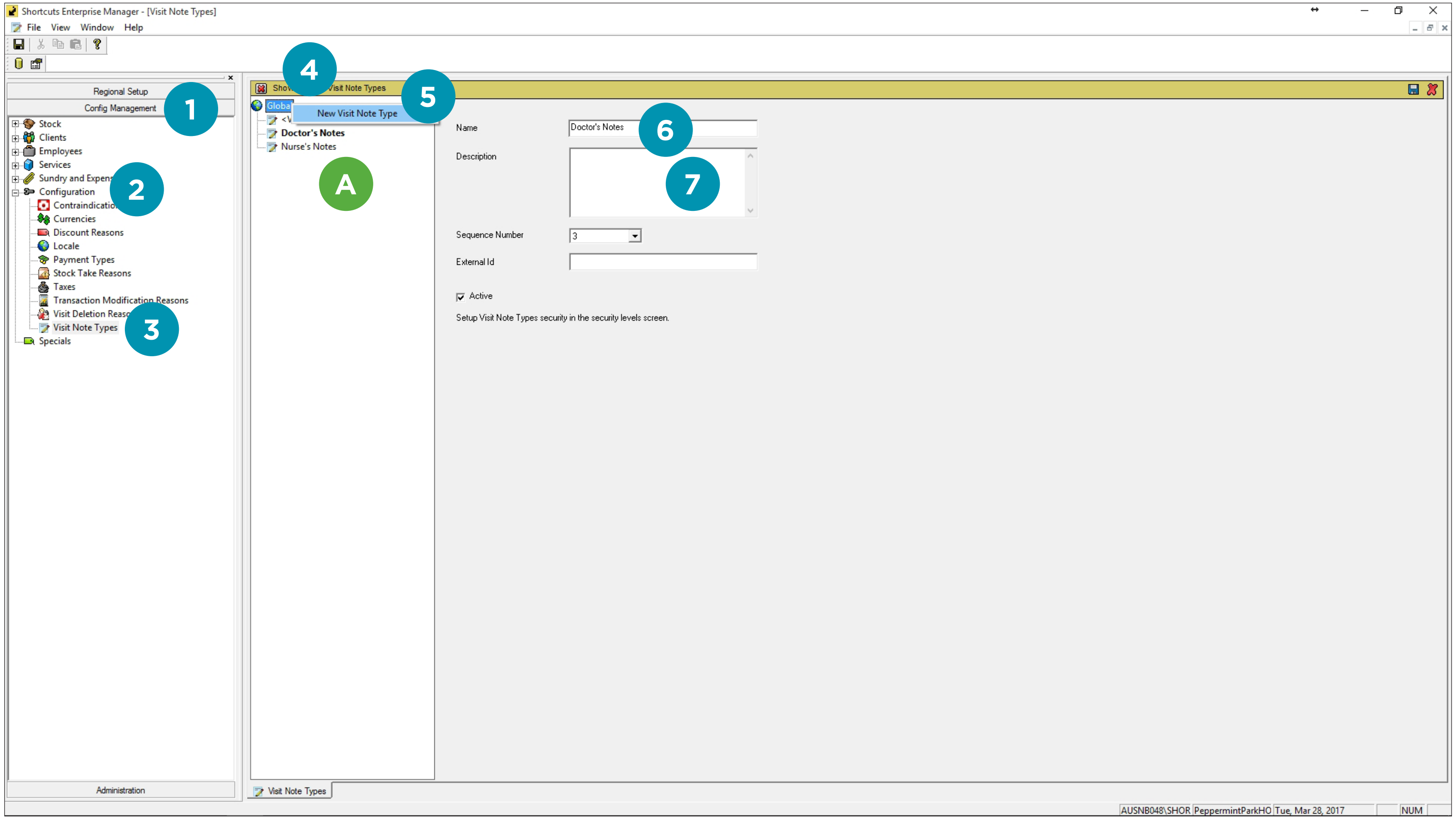
A There is a standard note type called **<visit notes>**. This note type cannot be edited or deleted. It is used for general visit notes.

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.

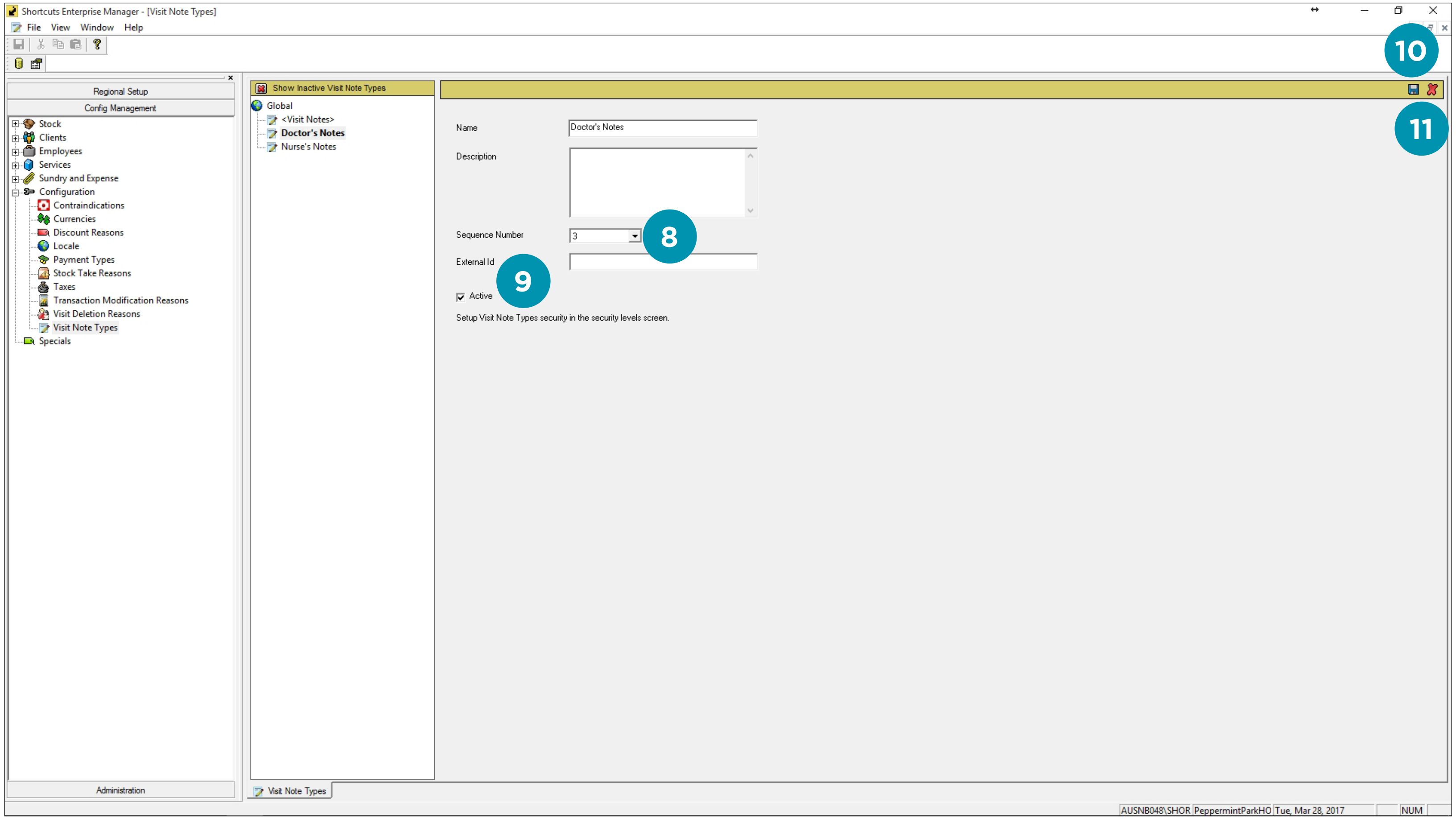


8 If you have 2 or more custom note types, you can select the desired sequence number from the drop-down list. This determines the order in which note types are displayed in Shortcuts Fusion. The standard **<visit notes>** will always be in position 1.

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

10 Click **save**.

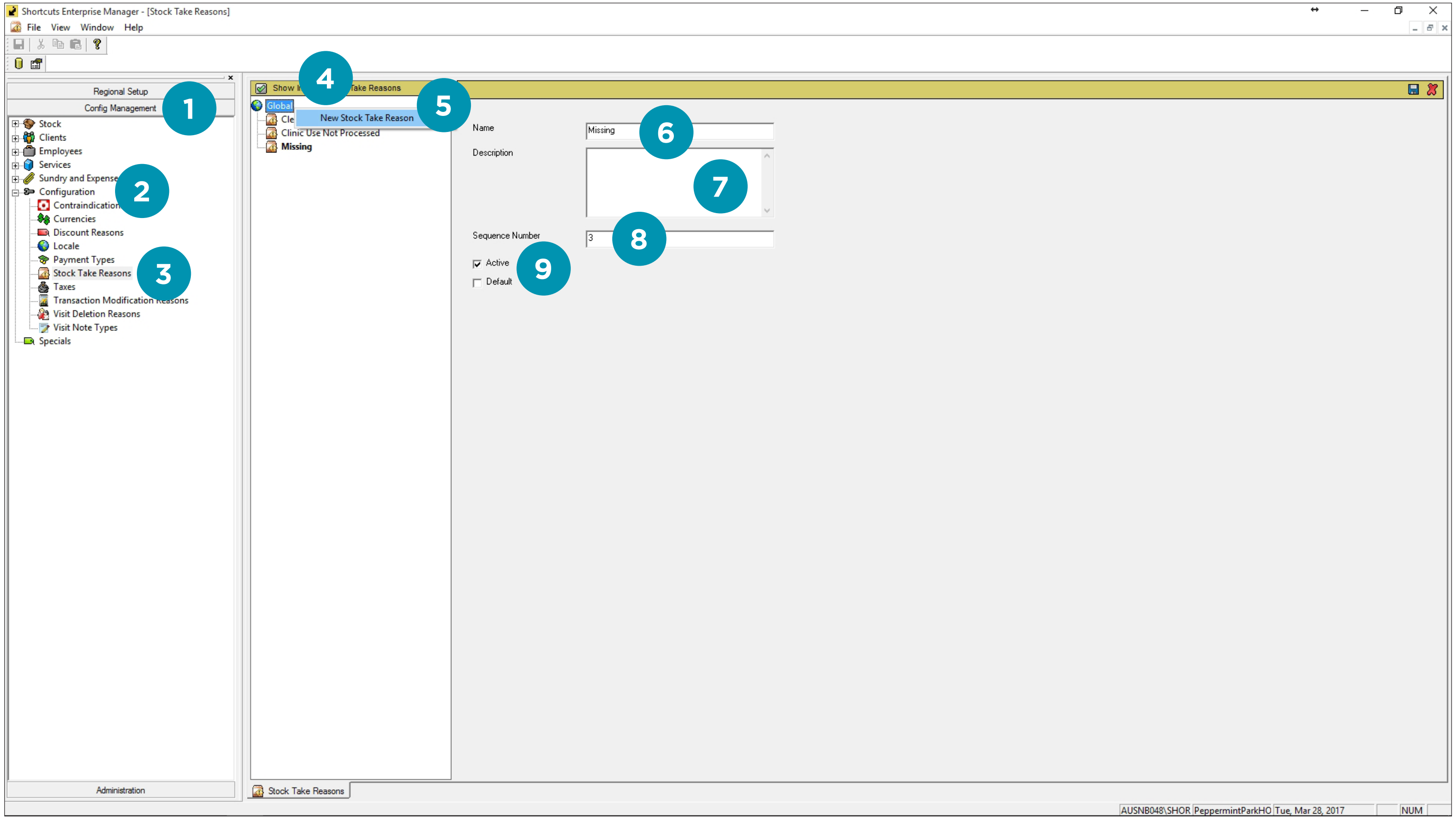
11 Close tab.



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.

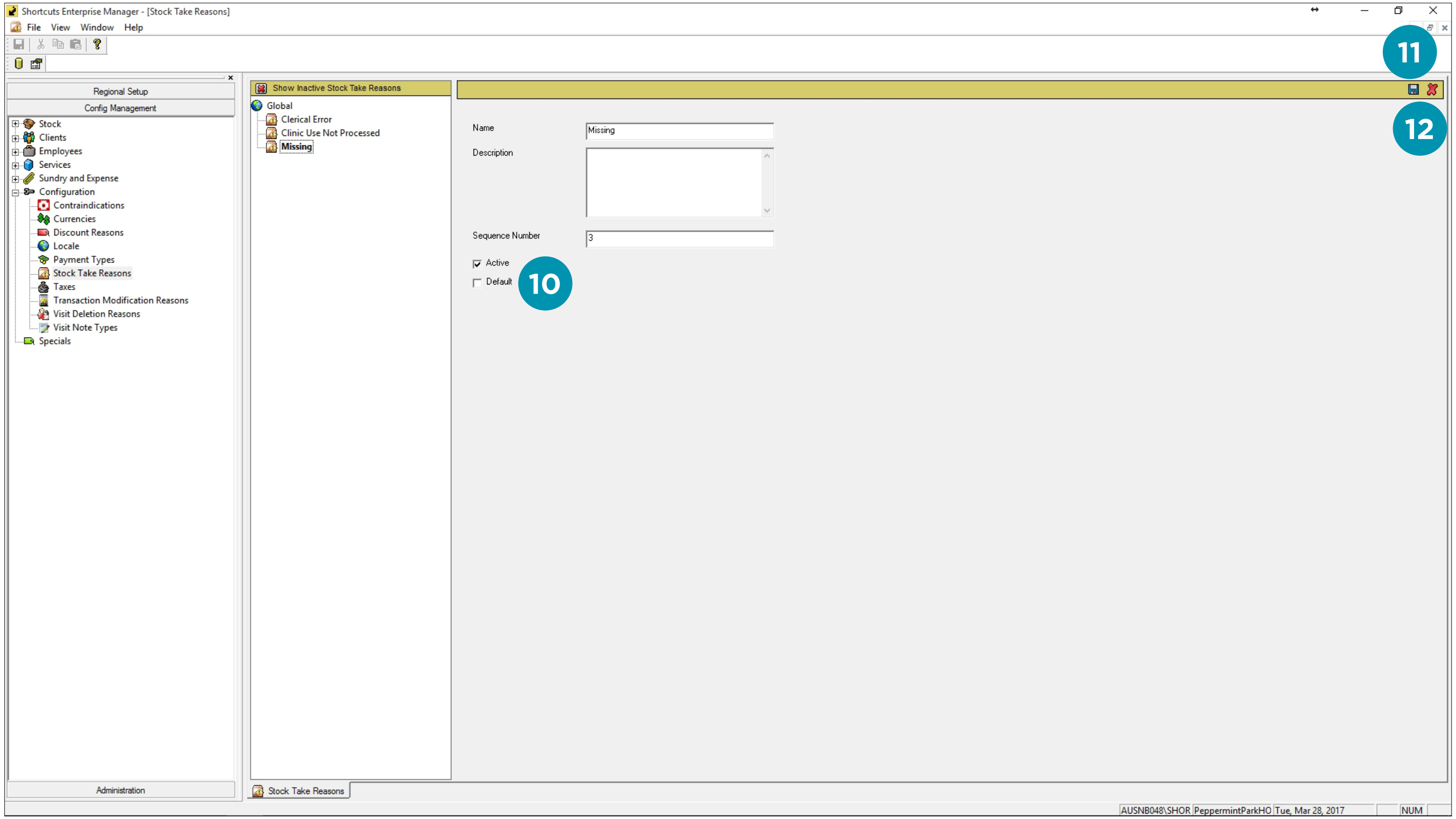
1. Click on the **config management** menu.
2. Double click to expand **configuration**.
3. Double click on **stock take reasons**.
4. Right click on the **global** region.
5. Select **new stock take reason**.
6. Enter the name of the reason (e.g. item expired).
7. **Optional:** Enter a description.
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**.

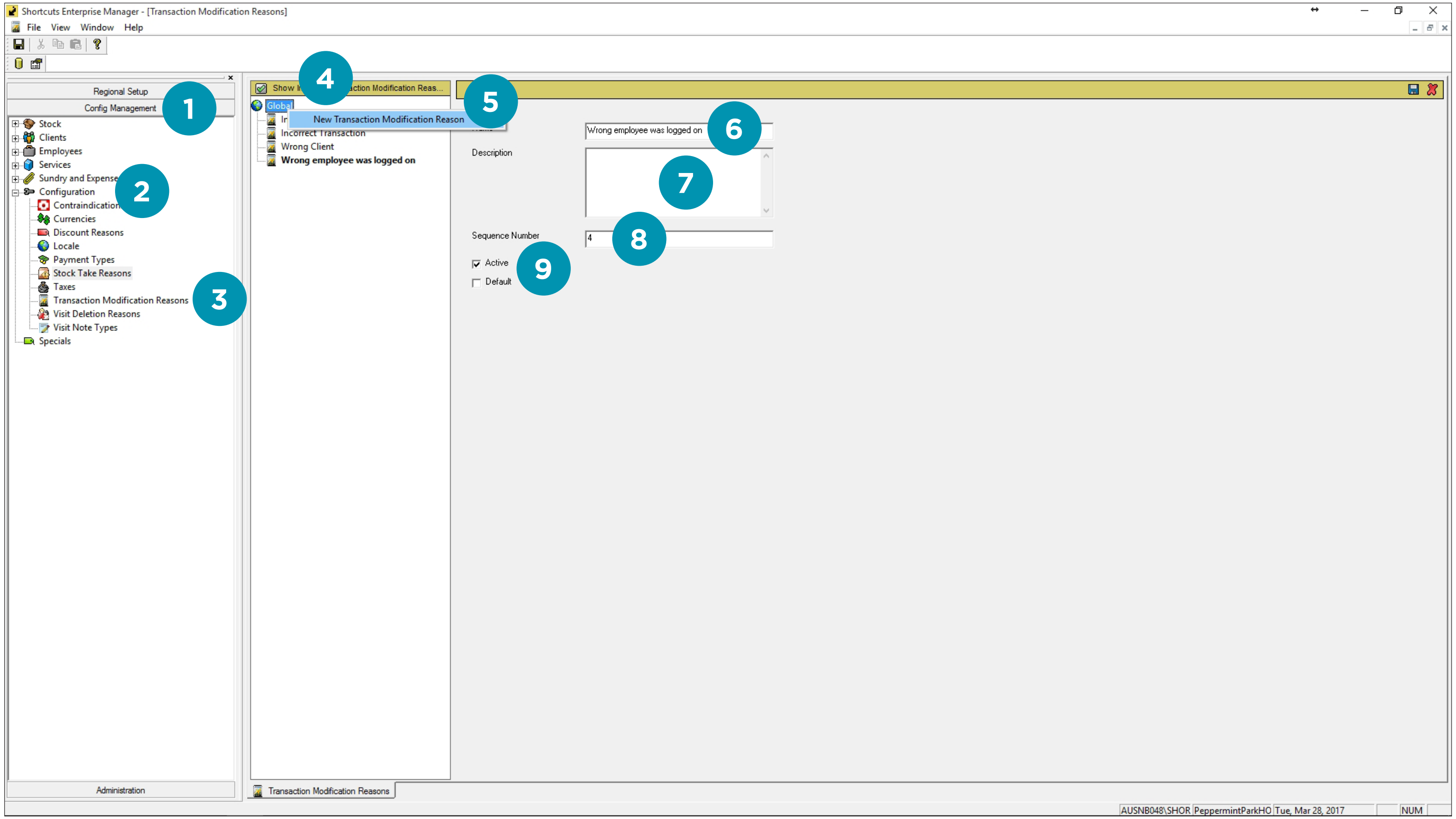
12 Close tab.



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.

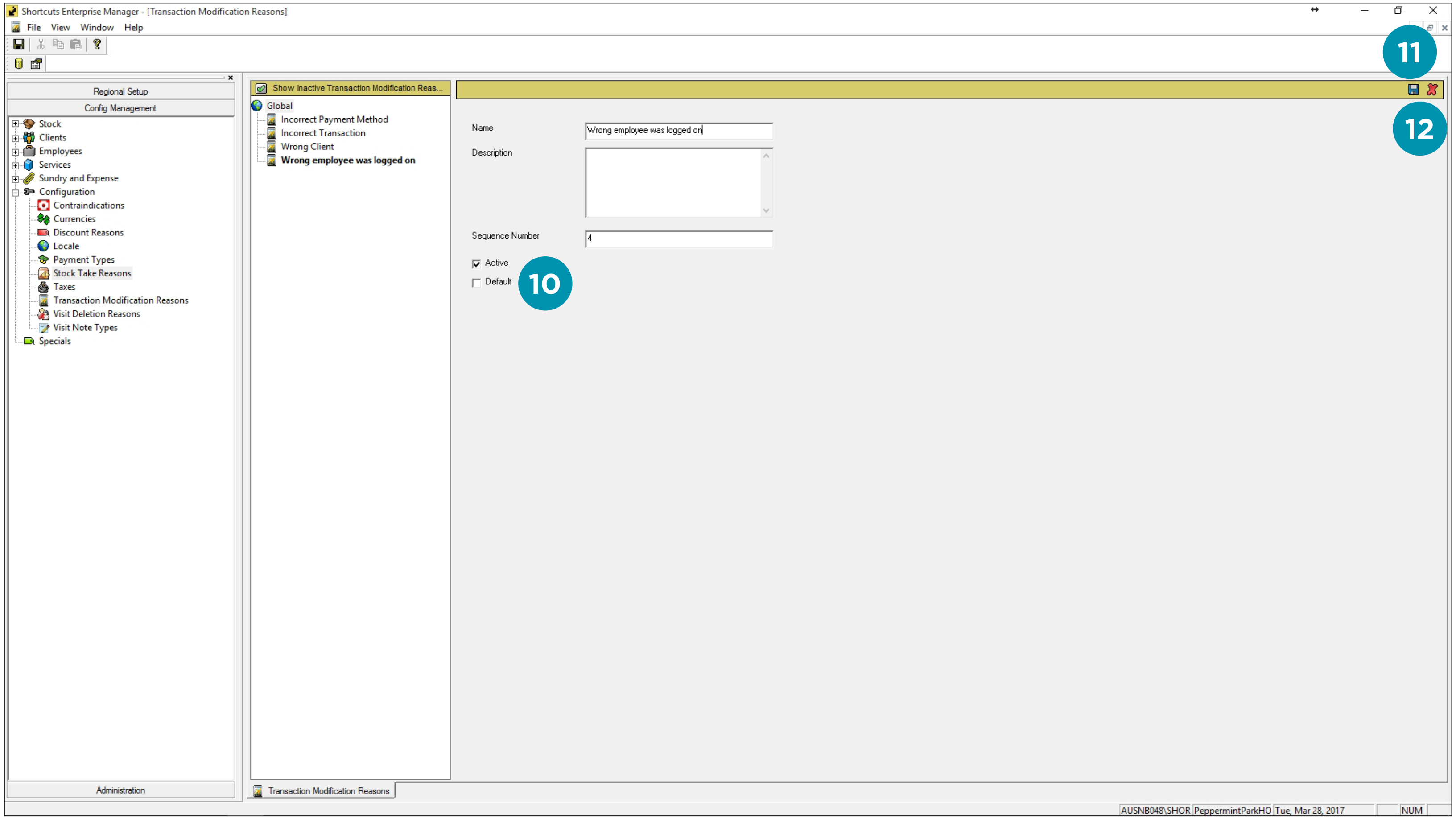
1. Click on the **config management** menu.
2. Double click to expand **configuration**.
3. Double click on **transaction modification reasons**.
4. Right click on the **global** region.
5. Select **new transaction modification reason**.
6. Enter the name of the reason (e.g. wrong payment type).
7. **Optional:** 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**.

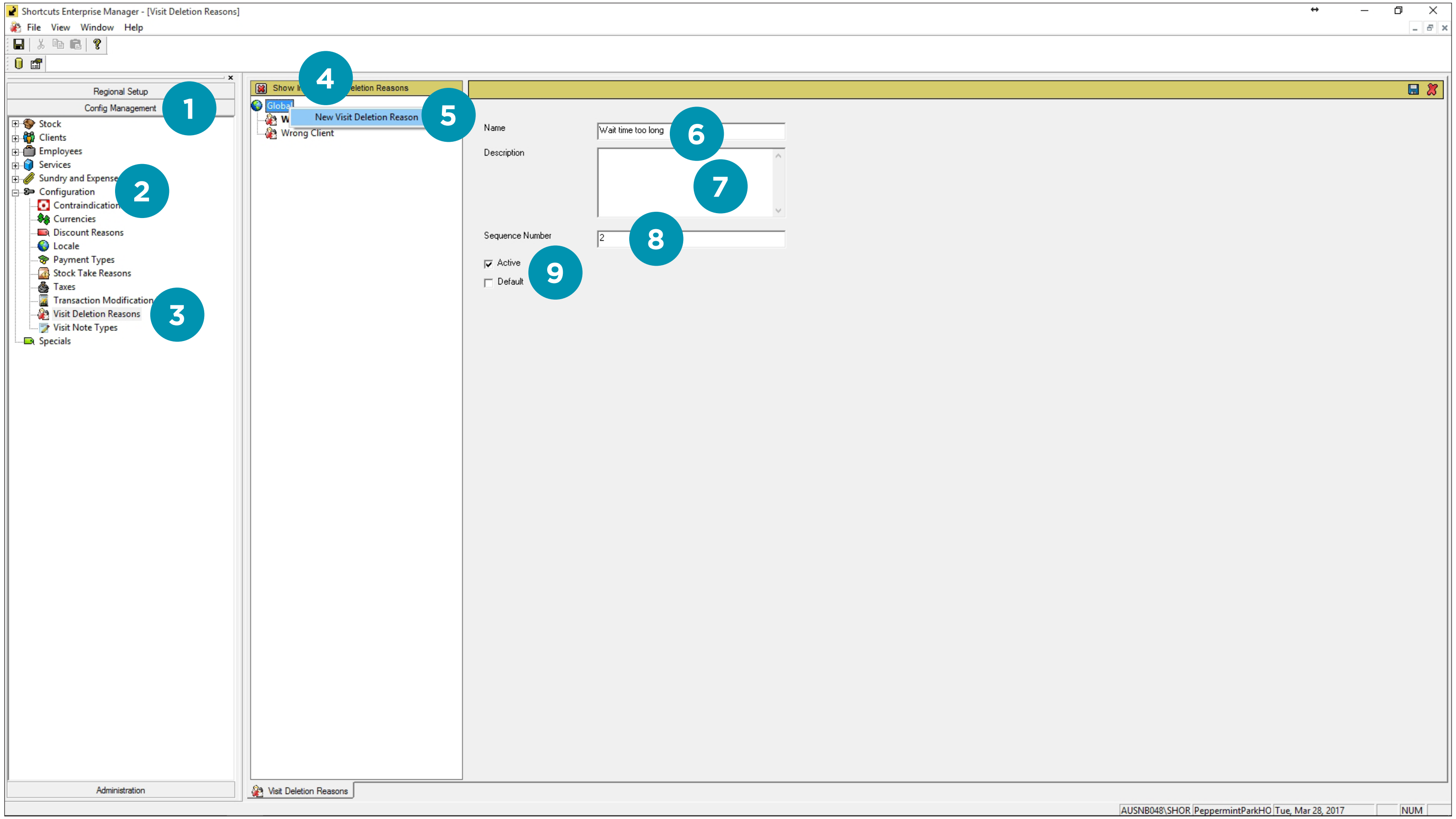
12 Close tab.



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.

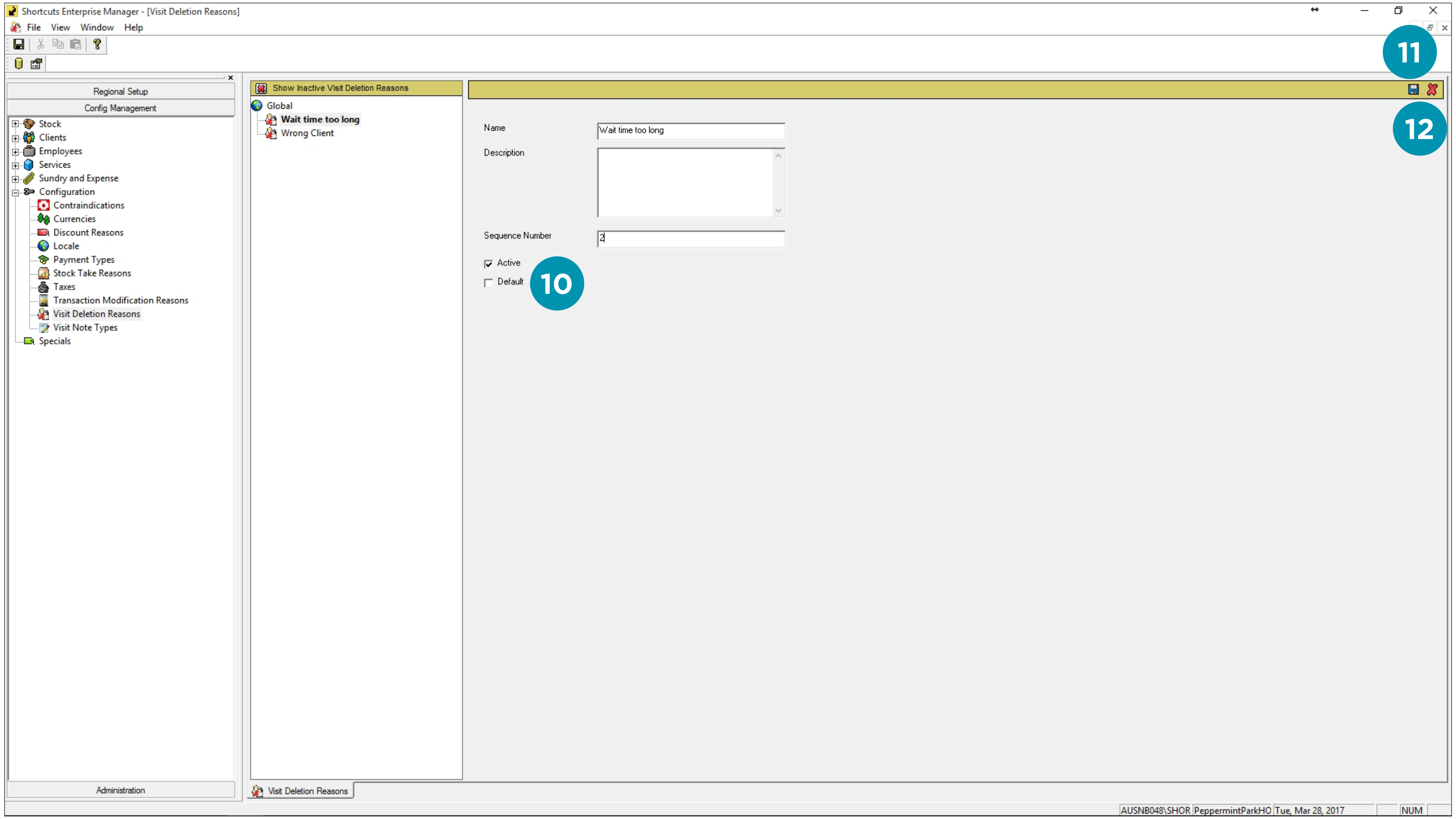
1. Click on the **config management** menu.
2. Double click to expand **configuration**.
3. Double click on **visit deletion reasons**.
4. Right click on the **global** region.
5. Select **new visit deletion reason**.
6. Enter the name of the reason (e.g. wrong client).
7. **Optional:** Enter a description.
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.



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