

# Last updated 16 June 2017

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Product: Enterprise Manager

Software version no: 8.0.20

Document version no: 1.0

Country: Australia

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# **ABOUT THIS DOCUMENT**

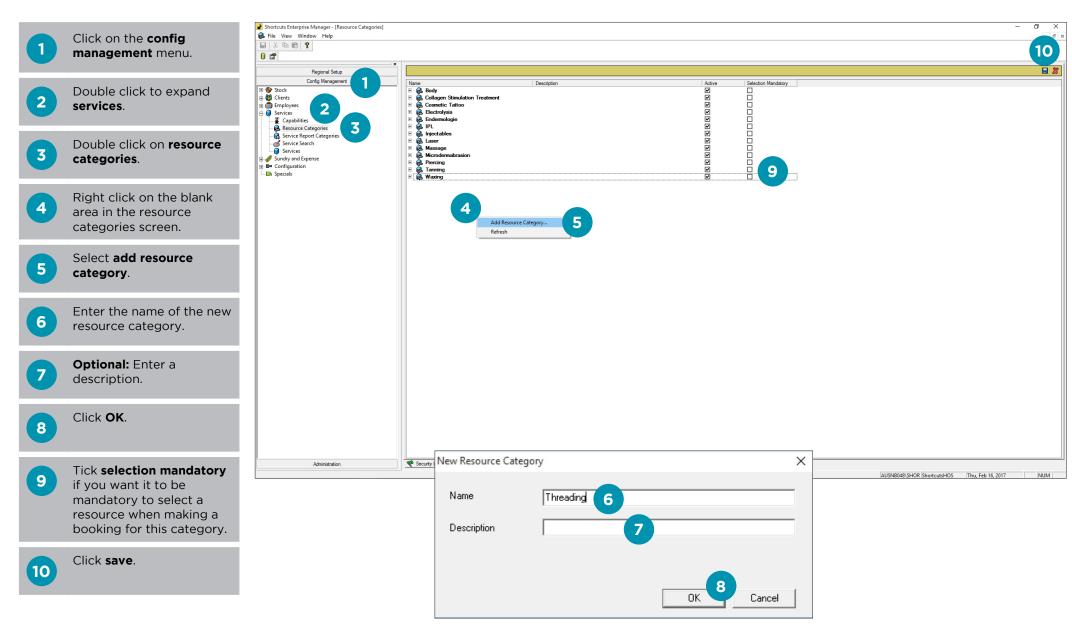
Working hand in hand with Shortcuts Fusion at your individual sites, Enterprise Manager provides you with the power and flexibility to make fast and intelligent decisions to enhance and grow your business.

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 RESOURCE CATEGORY

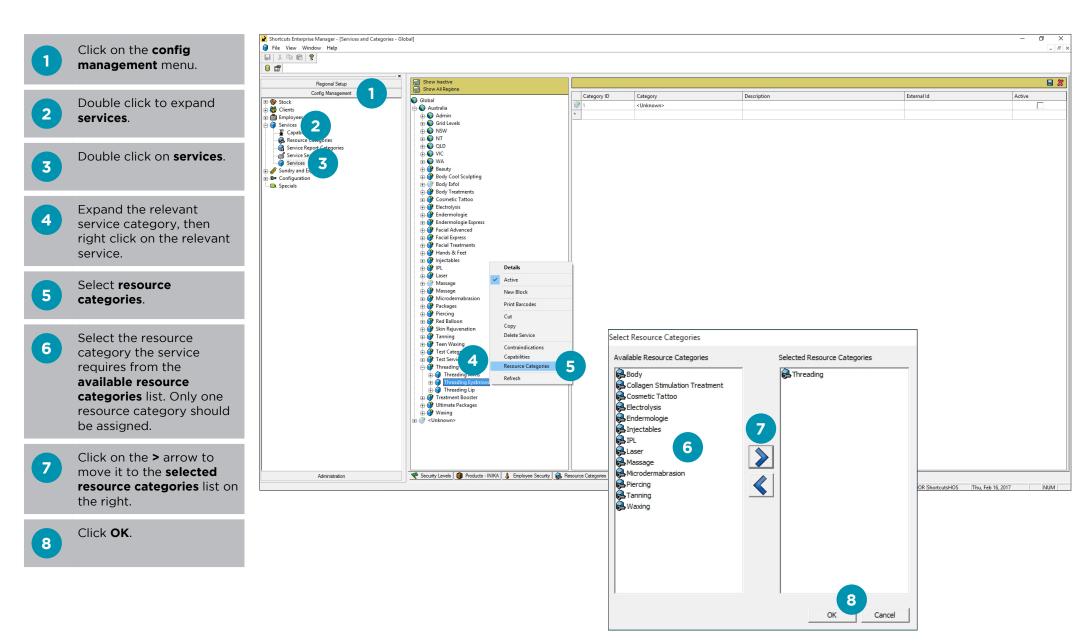
A resource is a room or a piece of equipment used to provide particular services (e.g. massage room). Shortcuts allows you to keep track of resource availability which helps to ensure that no clashes occur when scheduling appointments. Resources are created in Shortcuts Fusion, however they must be assigned to resource categories, which are created in Enterprise Manager. Resource categories must also be assigned to services in Enterprise Manager. Once this is configured the resource category acts as a link between the services and the resources, meaning when you schedule an appointment for a service it will prompt you to select the appropriately linked resource.



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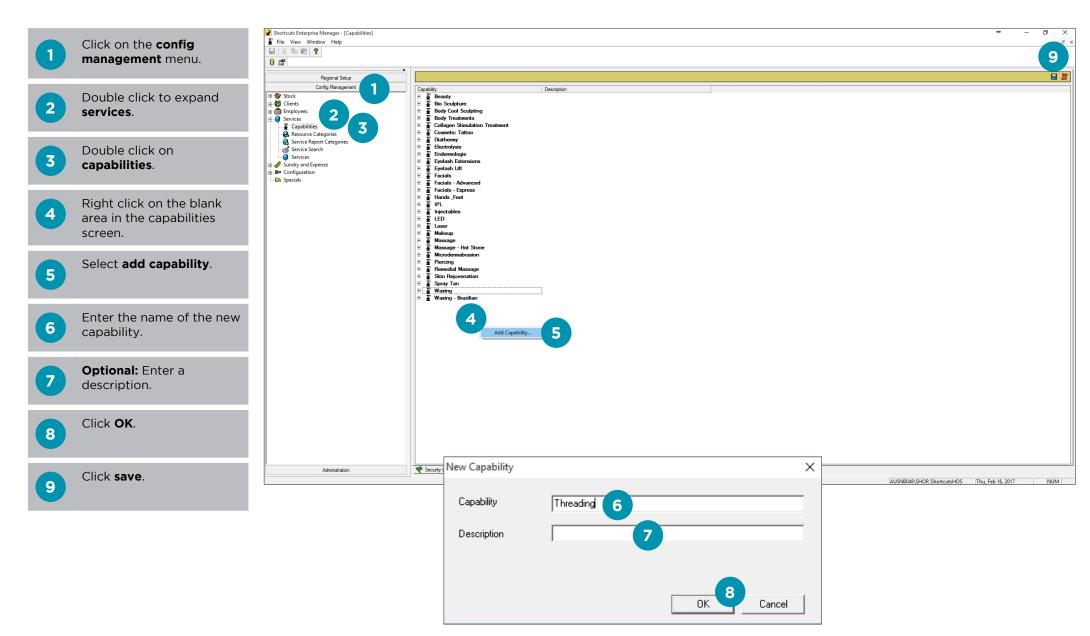
## ASSIGNING RESOURCE CATEGORIES TO SERVICES

Once you have added your resource categories, you will need to link these categories to the relevant services.



#### **ADDING A CAPABILITY**

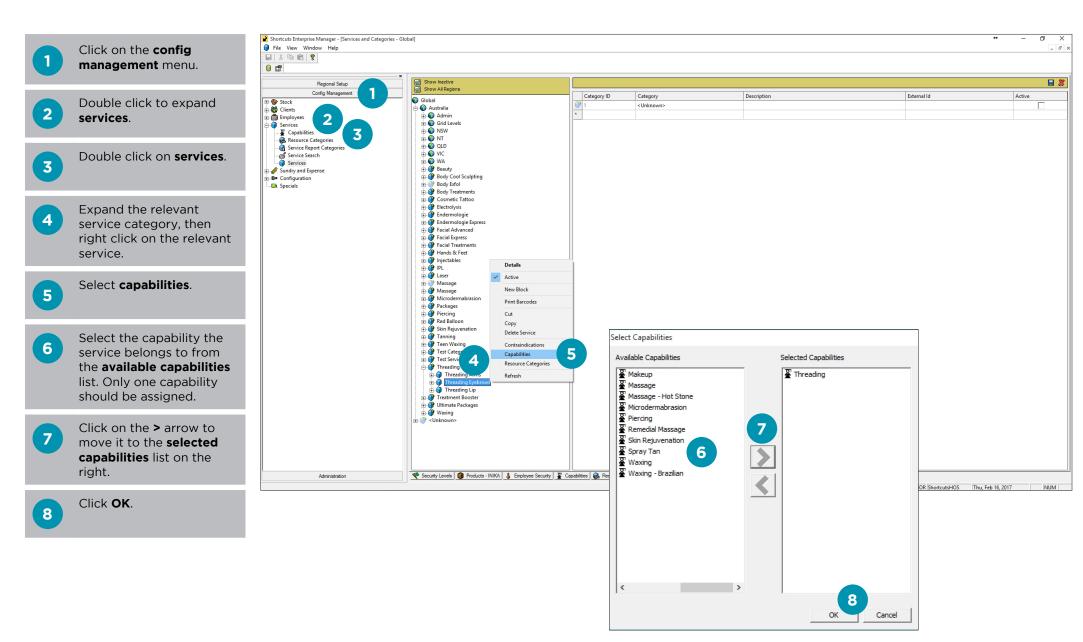
The capabilities feature allows you to set up certain skills (e.g. waxing, tanning, cutting, foiling) that are needed to perform services in your business. These capabilities can then be assigned to the relevant employees. Each employee can be assigned to multiple capabilities, but only one capability should be assigned to each service. Setting up capabilities ensures that services are only allocated to employees who are capable of performing the service. Capabilities are set up in Enterprise Manager, but must be assigned to employees through Shortcuts Fusion.



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# **ASSIGNING CAPABILITIES TO SERVICES**

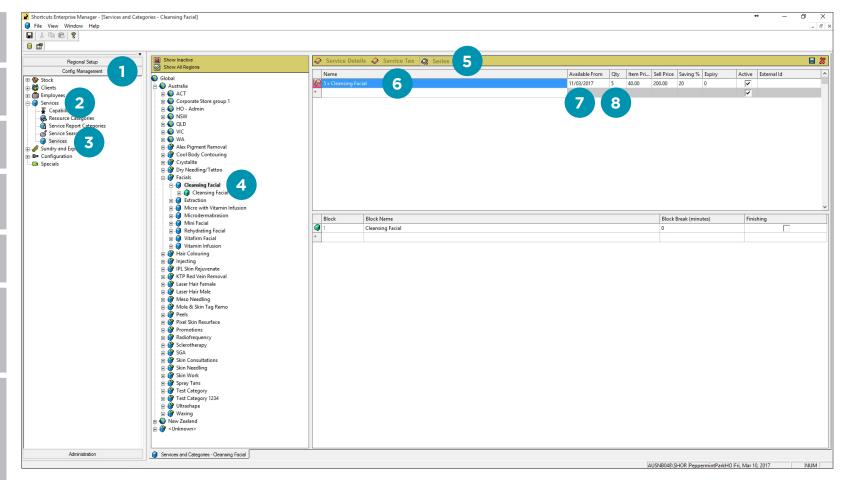
Once you have added your capabilities, you will need to link them to the relevant services.



## **ADDING A SERIES**

A series is two or more of the same service sold as one combined package, often at a discounted price for the client. You can create multiple series for a single service; for example, you could create a series of 5 manicures, and a series of 10 manicures. When a client purchases a series, the series is purchased upfront and the services are then redeemed over time. Shortcuts will keep track of how many services a client has remaining in their series at any time.

- Click on the config management menu.
- 2 Double click to expand services.
- Double click on **services**.
- Double click on the service you want to add a series for.
- Click on the **series** button.
- Enter the name of the series. We recommend including the quantity in the name of the series (e.g. 5 x Spray Tan).
- 7 Select the first date that this series will be available from. By default this will be set to tomorrow's date. If the series is effective immediately change this to today's date.
- Enter the number of services the series contains in the **qty** column.



9 Enter the price for an individual service in the **item price** column.

## OR

Enter the total price for the entire series in the **sell price** column.

#### OR

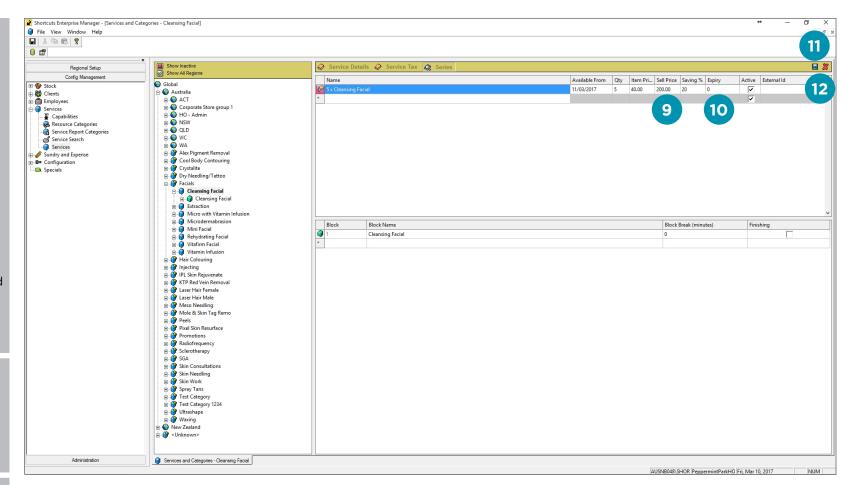
Enter the discount percentage the client will receive compared to the normal price in the **saving** % column.

These 3 fields are all linked to each other, so when you enter a value in one field the other 2 will be calculated automatically.

Enter the number of months that the series is valid for. For example, if the series will expire after 2 years, enter '24' months. To set no expiry, simply leave this field as zero.



Close tab.



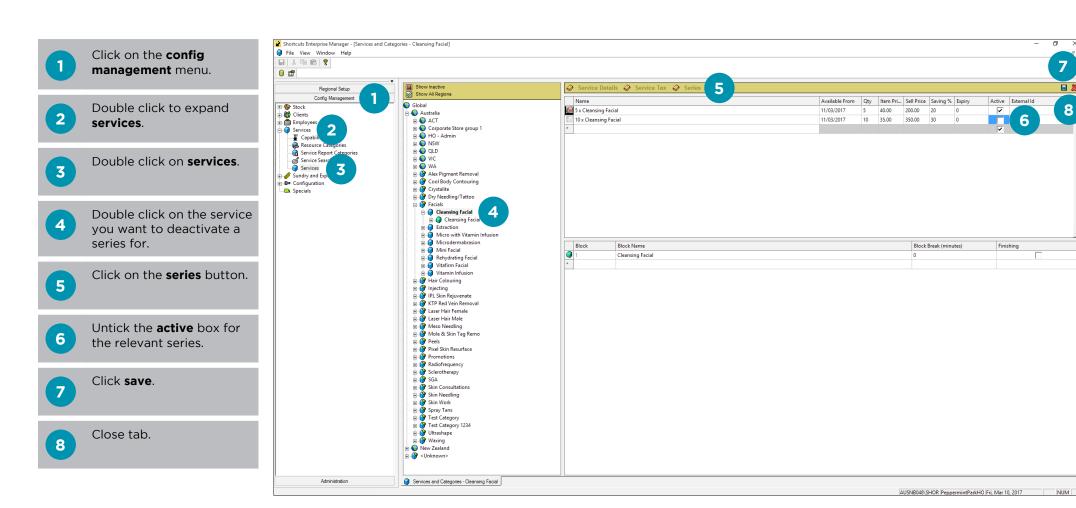
### **DEACTIVATING A SERIES**

Once a series has been deactivated, sites will no longer be able to sell the series. However, clients who have already purchased the series will still be able to redeem services from the series after it has been deactivated.

8

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Finishing





it suits you

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