

MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

CLINIC

ENTERPRISE MANAGER

SERVICES

SERVICES OVERVIEW,
REPORT CATEGORIES &
SERVICE CATEGORIES

HOME &
MOBILE

BEAUTY



SHORTCUTS

SMARTER BUSINESS TECHNOLOGY

it suits you

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Country: Australia

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ABOUT THIS DOCUMENT

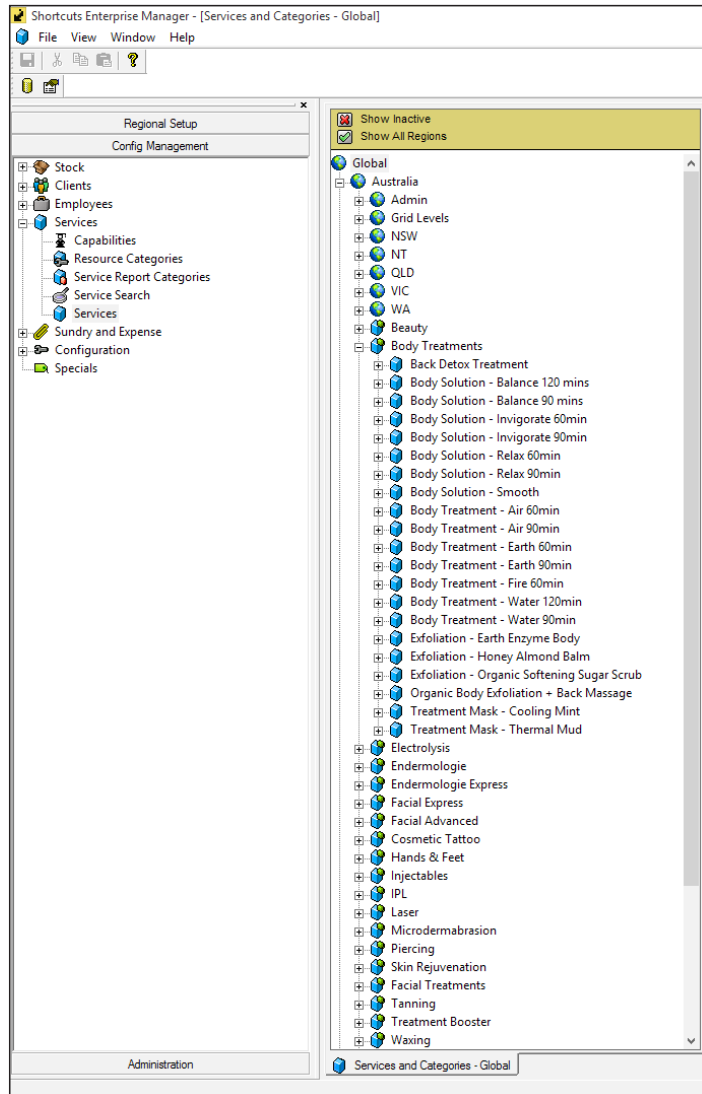
Working hand in hand with Shortcuts Fusion at your individual sites, Enterprise Manager provides you with the power and flexibility to make fast and intelligent decisions to enhance and grow your business.

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.

SERVICES

SERVICES OVERVIEW



Your service settings are located within the **config management** menu, as shown on the left hand side.

Services are configured using the following 3-tier structure: 🌐 Service Categories > 🌐 Services > 🌐 Service Blocks.

Services are grouped into service categories, for ease of selection when booking an appointment or adding services at the Point of Sale. To maintain consistency, it is recommended that service categories and services are configured at the highest regional level possible. For example, if the service setup is fairly consistent across all sites in your country, configure services at country level; or if the service setup differs from state to state, but is fairly consistent within each state, configure services at each state level.

Before setting up services you must configure the following:

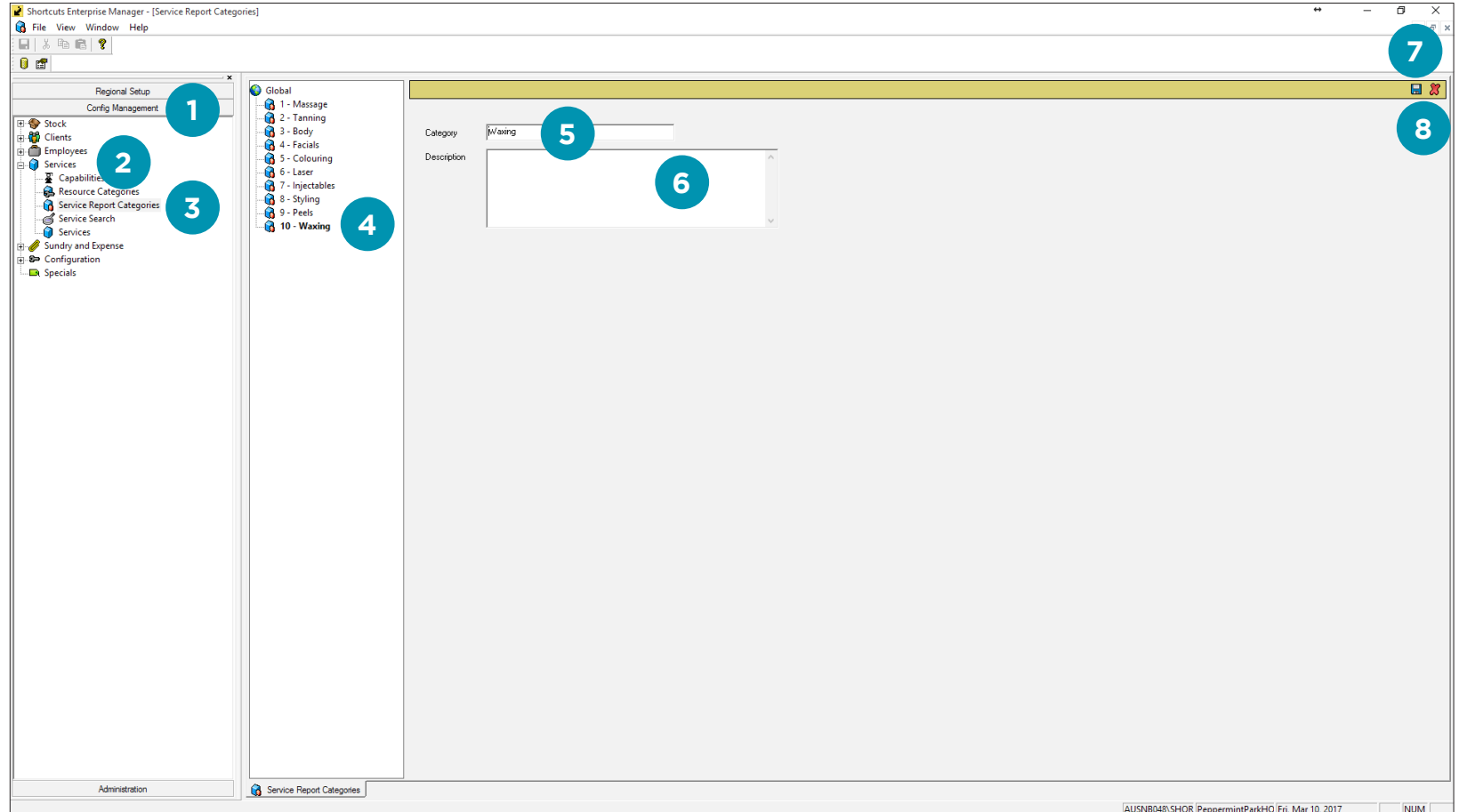
- Employee Levels
- Taxes
- Service Report Categories
- Service Categories

A service can consist of one or more service blocks. A service block refers to an individual section within a service. Each service block contains a name, time, break, price, cost and points. Service blocks are generally used to allow different employees to be booked for individual sections of the same service, or to allow a break (e.g. processing time) in the middle of a service. A service with only one service block is referred to as a single block service. A service that contains more than one block is referred to as a multiple block service. A multiple block service can have up to 6 individual service blocks.

SETTING UP SERVICE REPORT CATEGORIES

Service report categories refer to a list of ten categories that your service blocks count towards for reporting purposes. When setting up services, Shortcuts allows you to specify which service report category each service block counts towards. Initially, the default service report categories are named Cat1 to Cat10. There are ten available service report categories, and none can be added or deleted. The service report category names can be edited to suit the needs of your business. Service report categories are configured at the global level (consistent across all sites).

- 1 Click on the **config management** menu.
- 2 Double click to expand **services**.
- 3 Double click on **service report categories**.
- 4 Double click on a category to select it.
- 5 Enter the desired category name.
- 6 **Optional:** Enter a description.
- 7 Click **save**.
- 8 Close tab.



ADDING A SERVICE CATEGORY

1

Click on the **config management** menu.

2

Double click to expand **services**.

3

Click on **services**.

4

Right click on the region you want to add a service category for.

5

Select **new category**.

The screenshot shows the 'Shortcuts Enterprise Manager' interface for 'Services and Categories - Australia'. The 'Regional Setup' tree on the left has 'Services' expanded. The 'Services and Categories' tree in the middle has 'Australia' selected, and a context menu is open with 'New Category' highlighted. The data table on the right lists existing categories with columns for Category ID, Category, Description, External Id, and Active.

Category ID	Category	Description	External Id	Active
2	Beauty			<input checked="" type="checkbox"/>
3	Body Treatments			<input checked="" type="checkbox"/>
4	Electrolysis			<input checked="" type="checkbox"/>
5	Endermologie			<input checked="" type="checkbox"/>
6	Endermologie Express			<input checked="" type="checkbox"/>
7	Facial Express			<input checked="" type="checkbox"/>
8	Facial Advanced			<input checked="" type="checkbox"/>
9	Cosmetic Tattoo			<input checked="" type="checkbox"/>
10	Hands & Feet			<input checked="" type="checkbox"/>
11	Injectables			<input checked="" type="checkbox"/>
12	IPL			<input checked="" type="checkbox"/>
13	Laser			<input checked="" type="checkbox"/>
15	Microdermabrasion			<input checked="" type="checkbox"/>
16	Piercing			<input checked="" type="checkbox"/>
17	Skin Rejuvenation			<input checked="" type="checkbox"/>
18	Facial Treatments			<input checked="" type="checkbox"/>
19	Tanning			<input checked="" type="checkbox"/>
20	Treatment Booster			<input checked="" type="checkbox"/>
21	Waxing			<input checked="" type="checkbox"/>
22	Ultimate Packages			<input checked="" type="checkbox"/>
30	Red Balloon			<input checked="" type="checkbox"/>
49	Packages			<input checked="" type="checkbox"/>
58	Body Cool Sculpting			<input checked="" type="checkbox"/>
67	Test Service Cat			<input checked="" type="checkbox"/>
68	Teen Waxing			<input checked="" type="checkbox"/>
69	Threading			<input checked="" type="checkbox"/>
71	Test Category Site A			<input checked="" type="checkbox"/>
72	Massage			<input checked="" type="checkbox"/>
*				

- 6 Enter the name of the new category.
- 7 **Optional:** Enter a description.
- 8 Tick the **active** box.
- 9 Click **save**.
- 10 Close tab.

The screenshot shows the 'Shortcuts Enterprise Manager' application window titled '[Services and Categories - Hair Styling]'. The interface is divided into several panes:

- Left Pane:** 'Regional Setup' and 'Config Management' sections with a tree view of system settings.
- Center Pane:** A tree view of categories under 'Show All Regions'. The 'Hair Styling' category is selected.
- Right Pane:** 'Category Details' form for the selected category. It includes fields for 'Category ID' (91), 'Active' checkbox (checked), 'Category' (Hair Styling), 'Description', and 'External Id'. Below the form is a table with columns: Service ID, Service Name, Description, Main Service Block, Web, Class, Class Capacity, and Active.

Red callout boxes with numbers 6-10 indicate the following steps:

- 6: Points to the 'Category' text box.
- 7: Points to the 'Description' text box.
- 8: Points to the 'Active' checkbox.
- 9: Points to the 'Save' button.
- 10: Points to the 'Close' button in the top right corner of the window.

The status bar at the bottom shows 'Administration' and 'Services and Categories - Hair Styling'. The system tray includes 'AUSNB048.SHOR | PeppermintParkHQ | Mon, Mar 06, 2017' and 'NUM'.

DEACTIVATING A SERVICE CATEGORY

1

Click on the **config management** menu.

2

Double click to expand **services**.

3

Click on **services**.

4

Right click on the service category you want to deactivate and untick **active** from the popup menu.

A

Alternatively, you can untick the **active** box next to the category.

5

Click **OK** to continue making the service category inactive. This will also make all the services within the category inactive.

6

Click **save**.

7

Close tab.

Shortcuts Enterprise Manager - [Services and Categories - Australia]

Regional Setup
Config Management

Stock
Clients
Employees
Services
Capabilities
Resource Categories
Service Report Categories
Service Search
Services
Sundry and Expenses
Configuration
Specials

Show Inactive
Show All Regions

Global
Australia
ACT
Corporate Store group 1
HO - Admin
NSW
QLD
VIC
WA
Alex Pigment Removal
Cool Body Contouring
Crystalite
Dry Needling/Tattoo
Facials
Injecting
IPL Skin Rejuvenate
KTP Red Vein Removal
Laser Hair Female
Laser Hair Male
Meso Needling
Mole & Skin Tag Removal
Peels
Pixel Skin Resurface
Promotions
Radiofrequency
Sclerotherapy
SGA
Skin Consultations
Skin Work
Skin Needling
Spray Tans
Ultrashape
Waxing
Test Category
Test Category 1234
New Zealand
<Unknown>

Details
New Service
Active
Default
Print Barcodes
Cut
Copy
Delete
Paste Services
Refresh

Category ID	Category	Description	External Id	Active
2	Alex Pigment Removal			<input checked="" type="checkbox"/>
3	Cool Body Contouring			<input checked="" type="checkbox"/>
4	Crystalite			<input checked="" type="checkbox"/>
6	Dry Needling/Tattoo			<input checked="" type="checkbox"/>
9	Facials			<input checked="" type="checkbox"/>
12	Injecting			<input checked="" type="checkbox"/>
13	IPL Skin Rejuvenate			<input checked="" type="checkbox"/>
15	KTP Red Vein Removal			<input checked="" type="checkbox"/>
17	Laser Hair Female			<input checked="" type="checkbox"/>
18	Laser Hair Male			<input checked="" type="checkbox"/>
20	Meso Needling			<input checked="" type="checkbox"/>
21	Mole & Skin Tag Remo			<input checked="" type="checkbox"/>
24	Peels			<input checked="" type="checkbox"/>
26	Pixel Skin Resurface			<input checked="" type="checkbox"/>
27	Promotions			<input checked="" type="checkbox"/>
28	Radiofrequency			<input checked="" type="checkbox"/>
29	Sclerotherapy			<input checked="" type="checkbox"/>
30	SGA			<input checked="" type="checkbox"/>
32	Skin Consultations			<input checked="" type="checkbox"/>
33	Skin Work			<input checked="" type="checkbox"/>
35	Skin Needling			<input checked="" type="checkbox"/>
38	Spray Tans			<input checked="" type="checkbox"/>
39	Ultrashape			<input checked="" type="checkbox"/>
85	Waxing			<input checked="" type="checkbox"/>
86	Test Category			<input checked="" type="checkbox"/>
88	Test Category 1234			<input checked="" type="checkbox"/>

Administration Services and Categories - Australia

AUSNB048.SHOR.PeppermintParkHQ | Mon, Mar 06, 2017 NUM

ShortcutsHOS

Making a category inactive will make all services within the category inactive. Do you wish to continue?

5

OK Cancel



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