

MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

CLINIC

# ENTERPRISE MANAGER SERVICES

HOME &  
MOBILE

BEAUTY

  
**SHORTCUTS**  
SMARTER BUSINESS TECHNOLOGY  
*it suits you*

**Last updated 16 June 2017**

By Erin Lewis

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.

## COMPLETING A SERVICE SEARCH

The service search feature allows you to easily find and select services. It also allows you to export your results into CSV format which can be easily opened in Microsoft Excel. The detailed search option (service search) and keyword search option are available for you to use; however, the custom search feature is for Shortcuts use only.

## DETAILED SEARCH

The detailed search option allows you to search for specific service details.

- 1 Click on the **config management** menu.
- 2 Double click to expand **services**.
- 3 Double click on **service search**.
- 4 Enter your desired search criteria into the relevant field(s).  
**Service:** Enter the service name.  
**Service ID:** Enter the service ID.  
**Category:** Enter the service category name.  
**Region:** Select the relevant region.  
**Service active:** Select the status you want to search for.
- 5 Tick the **search sub regions** box if you want to include the selected region's sub-regions in your search.
- 6 Click **submit** to search.

[illegible]

Click the **reset** button if you want to clear all criteria fields.

Click **export** to export your results into a CSV file.

Your search results will be shown here. You can double click on a service in the search results to open the service details in a new tab.

Page 2

KEYWORD SEARCH

The keyword search feature allows you to search for a word or phrase across all service 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 service in the search results to open the service details in a new tab.

Shortcuts Enterprise Manager - [Service Search]

File View Window Help

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Service Search Keyword Search Custom Search

Keywords

Containing tattoo

Submit

Reset

Export

Hint: You can use the wildcards \* and ? in your queries. To search for a phrase, enclose it in quotation marks (\*\*\*\*).

Service

Service Description

Active

Category

Region

A

Dry Needling/Tattoo Pen Consul		Yes	Dry Needling/Tattoo	Australia
Dry Needling/Tattoo Pen Consul		Yes	Dry Needling/Tattoo	New Zealand
Natural Filler		Yes	Dry Needling/Tattoo	Australia
Natural Filler		Yes	Dry Needling/Tattoo	New Zealand
Scar Correction (10mins)		Yes	Dry Needling/Tattoo	Australia
Scar Correction (10mins)		Yes	Dry Needling/Tattoo	New Zealand
Tattoo Removal (matchbox size)		Yes	Dry Needling/Tattoo	Australia
Tattoo Removal (matchbox size)		Yes	Dry Needling/Tattoo	New Zealand
10mins		No	Tattoo Gun	Edgcliff
5 pack 10mins		No	Tattoo Gun	Edgcliff
Tattoo Removal		No	Tattoo Gun	Edgcliff
Scar Relaxing		No	Dry Needling/Tattoo	Brisbane
Scar Relaxing Consultation		No	Dry Needling/Tattoo	Brisbane
Tattoo Removal Consultation		No	Dry Needling/Tattoo	Brisbane
Tattoo Removal Session		No	Dry Needling/Tattoo	Brisbane
Tattoo Removal Consultaion		No	Nurse ONLY	MacArthur
Tattoo Removal Session		No	Nurse ONLY	MacArthur
Tattoo Removal Consult		No	Tattoo Removal	Cronulla
Tattoo Removal Small		No	Tattoo Removal	Cronulla
Tattoo Removal Small		No	Dry Needling/Tattoo	Miranda
Cigarette Box Size		No	Dry Needling/Tattoo	Parramatta
Extra Large		No	Dry Needling/Tattoo	Parramatta
Extra Small		No	Dry Needling/Tattoo	Parramatta
Tattoo Removal 10 minutes		No	Dry Needling/Tattoo	Parramatta
Tattoo Removal 15 minutes		No	Dry Needling/Tattoo	Parramatta
Tattoo Removal 20 minutes		No	Dry Needling/Tattoo	Parramatta
Tattoo Removal 25 minutes		No	Dry Needling/Tattoo	Parramatta
Tattoo Removal 5 minutes		No	Dry Needling/Tattoo	Parramatta
Tattoo Removal Consultation		No	Dry Needling/Tattoo	Parramatta
Eyebrow Tattooing		Yes	Dry Needling/Tattoo	Parramatta
Eyebrow Tattooing Follow Up		Yes	Eyebrow Tattooing	Canberra
Eyebrow Tattooing Consult		Yes	Eyebrow Tattooing	Canberra

Administration

Service Search

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ADDING A SERVICE

ADDING SERVICE DETAILS

- 1 Click on the **config management** menu.
- 2 Double click to expand **services**.
- 3 Double click on **services**.
- 4 Right click on the relevant service category.
- 5 Select **new service**.

Shortcuts Enterprise Manager - [Services and Categories - Australia]

File View Window Help

Regional Setup

Config Management

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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"/>
93	Hair Colouring			<input checked="" type="checkbox"/>
*				

Administration

Services and Categories - Australia

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NUM

6

Enter the name of the service.

7

**Optional:** Enter a description.

8

Tick the **active** box.

9

Tick **available for walk-in** if the service is available to walk-in clients.

10

Tick **available for booking** if the service can be booked.

11

Tick **require visit details** if the service requires history notes to be recorded.

12

Tick **can be booked via web** if the service is available for online booking or self check-in.

13

If this is a class service (e.g. a makeup class or yoga class) tick the **class** box.

14

If you ticked the **class** box, enter the maximum number of attendees in the **class capacity** field.

Shortcuts Enterprise Manager - [Services and Categories - New Service]

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Crystalite  
Dry Needling/Tattoo  
Facials  
Extraction  
Micro with Vitamin Infusion  
Microdermabrasion  
Mini Facial  
Cleansing Facial  
Vitamin Facial  
Vitamin Infusion  
Hair Colouring  
Injecting  
IPL Skin Rejuvenate  
KTP Red Vein Removal  
Laser Hair Female  
Laser Hair Male  
Meso Needling  
Mole & Skin Tag Remo  
Peels  
Pixel Skin Resurface  
Promotions  
Radiofrequency  
Sclerotherapy  
SGA  
Skin Consultations  
Skin Needling  
Skin Work  
Spray Tans  
Test Category  
Test Category 1234  
Ultrashape  
Waxing  
New Zealand  
<Unknown>

Service Details Service Tax Series

Service ID 3680 ☒ Active  
Service Cleansing Facial  
Description  
☒ Available for Walk-in  
☒ Available for Booking  
☐ Require Visit Details  
☒ Can be booked via web  
☐ Class  
Class Capacity 0  
Main Service Block 1  
External Id

Block	Block Name	Block Break (minutes)	Finishing
1	New Block 1	0	<input type="checkbox"/>
*			

Administration

Services and Categories - New Service

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A

By default, the first service block is set as the main block for the service. If you are creating a multiple block service where the first block is not the main block, enter the relevant block number into the **main service block** field. Note: This should be done after the service already has 2 or more blocks set up.

15

Click **save**.

Shortcuts Enterprise Manager - [Services and Categories - New Service]

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Facials  
Extraction  
Micro with Vitamin Infusion  
Microdermabrasion  
Mini Facial  
Cleansing Facial  
Vitamin Infusion  
Hair Colouring  
Injecting  
IPL Skin Rejuvenate  
KTP Red Vein Removal  
Laser Hair Female  
Laser Hair Male  
Meso Needling  
Mole & Skin Tag Remo  
Peels  
Pixel Skin Resurface  
Promotions  
Radiofrequency  
Sclerotherapy  
SGA  
Skin Consultations  
Skin Needling  
Skin Work  
Spray Tans  
Test Category  
Test Category 1234  
Ultrashape  
Waxing  
New Zealand  
<Unknown>

Service Details Service Tax Series

Service ID 3680 ☒ Active  
Service Cleansing Facial  
Description  
☐ Available for Walk-in  
☒ Available for Booking  
☐ Require Visit Details  
☒ Can be booked via web  
☐ Class  
Class Capacity 0  
Main Service Block 1  
External Id

Block	Block Name	Block Break (minutes)	Finishing
1	New Block 1	0	<input type="checkbox"/>
*			

Administration

Services and Categories - New Service

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15

SELECTING SERVICE TAX

By default, when a new service is added, the default service tax will be linked to the service.

- 1 Click on the **service tax** button.
- 2 Select the relevant tax rate in the **service tax** column.
- A If you want to set a future tax rate, click on the blank **service tax** cell at the bottom of the grid and select the tax rate. Then select the effective date on the left.
- 3 Click **save**.

Shortcuts Enterprise Manager - [Services and Categories - 1/2 Head Highlights]

File View Window Help

1

3

2

A

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Facials  
Hair Colouring  
1/2 Head Highlights  
1/2 Head Highlights  
Finish  
1/4 Head Highlights  
Full Head Highlights  
Full Head Highlights  
Finish  
Full Head Semi  
Injecting  
IPL Skin Rejuvenate  
KTP Red Vein Removal  
Laser Hair Female  
Laser Hair Male  
Meso Needling  
Mole & Skin Tag Remo  
Peels  
Pixel Skin Resurface  
Promotions  
Radiofrequency  
Sclerotherapy  
SGA  
Skin Consultations  
Skin Needling  
Skin Work  
Spray Tans  
Test Category  
Test Category 1234  
Ultrashape  
Waxing  
New Zealand  
<Unknown>

Service Details  
Service Tax  
Series

Effective Date  
9/03/2017

Service Tax  
Service Sell Tax

Block  
Block Name  
Block Break (minutes)  
Finishing

1  
2  
x

1/2 Head Highlights  
Finish  
45  
0  
[x]

Administration

Services and Categories - 1/2 Head Highlights

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## ADDING/EDITING DETAILS FOR AN EXISTING SERVICE BLOCK

A service block refers to an individual section within a service. Each time you add a new service, you must then configure the service block details such as the name, time, break, price, cost and points.



When a new service is added, by default it creates one block called **new block 1**. This block needs to be properly configured before adding any additional blocks. It is important to set up service blocks in the order that they will occur.

1

Double click on the service block you want to edit.

2

Enter the name of the service block.

3

If the service block requires a break after it is complete, enter the break time (minutes).

4

Tick **finishing block** if this block will be used to finish the service (e.g. rinse off, dry off). If this box is ticked, then the finishing block will be omitted if it is followed by another service.

5

Enter the level time (block duration in minutes), employee points, sell price and service costs for the **<none>** employee level in the grid.

Shortcuts Enterprise Manager - [Services and Categories - 1/4 Head Highlights]

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Dry Needling/Tattoo  
Facials  
Hair Colouring  
1/2 Head Highlights  
Full Head Highlights  
1/4 Head Highlights  
<none>  
Injecting  
IPL Skin Rejuvenate  
KTP Red Vein Removal  
Laser Hair Female  
Laser Hair Male  
Meso Needling  
Mole & Skin Tag Remo  
Peels  
Pixel Skin Resurface  
Promotions  
Radiofrequency  
Sclerotherapy  
SGA  
Skin Consultations  
Skin Needling  
Skin Work  
Spray Tans  
Test Category  
Test Category 1234  
Ultraschape  
Waxing  
New Zealand  
<Unknown>

Block Details  
Service Report Categories

Block Name  
1/4 Head Highlights

Break  
30

☐ Finishing Block  
This block will be omitted if followed by another service during the booking process

Level Name	Level Time	Employee Points	Sell Price	Service Costs
<none>	30	0	45	0

Administration

Services and Categories - 1/4 Head Highlights

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6

If you are using employee levels, you may need to set up different details for each level. To do this, click on the **level name** cell of the blank row at the bottom of the grid and select the relevant employee level from the drop-down list. Then enter the level time, employee points, sell price and service costs for that employee level.

7

Click **save**.

8

Click on the **service report categories** button.

Shortcuts Enterprise Manager - [Services and Categories - New Block (3)]

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1/2 Head Highlights  
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Test Category  
Test Category 1234  
Ultraschape  
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New Zealand  
<Unknown>

Block Details  
Service Report Categories

Block Name  
Break

Finish  
0  
Finishing Block  
This block will be omitted if followed by another service during the booking process

Level Name	Level Time	Employee Points	Sell Price	Service Costs
<none>	15	0	0	0
*				

Administration

Services and Categories - New Block (3)

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9

Select the relevant service report category for this block. If you do not select a report category some reports will not include this service block.

A

If you want to set a future service report category, tick the relevant box to select a service report category in the bottom row of the grid. Then select the effective date on the left.

10

Click **save**.

Shortcuts Enterprise Manager - [Services and Categories - Finish]

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Crystalite  
Dry Needling/Tattoo  
Facials  
Hair Colouring  
1/2 Head Highlights  
1/2 Head Highlights  
Finish  
<none>  
1/4 Head Highlights  
Full Head Highlights  
Injecting  
IPL Skin Rejuvenate  
KTP Red Vein Removal  
Laser Hair Female  
Laser Hair Male  
Meso Needling  
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Radiofrequency  
Sclerotherapy  
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Skin Consultations  
Skin Needling  
Skin Work  
Spray Tans  
Test Category  
Test Category 1234  
Ultrashape  
Waxing  
New Zealand  
<Unknown>

Block Details  
Service Report Categories

Effective Date  
9/03/2017

Message  
Tanning  
Body Treatments  
Facials  
Hair  
Hair Removal  
Injectables  
Cat 8  
Cat 9  
Cat 10

A

Level Name	Level Time	Employee Points	Sell Price	Service Costs
<none>	15	0	0	0

Administration

Services and Categories - Finish

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10

# ADDING A NEW SERVICE BLOCK

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.

!

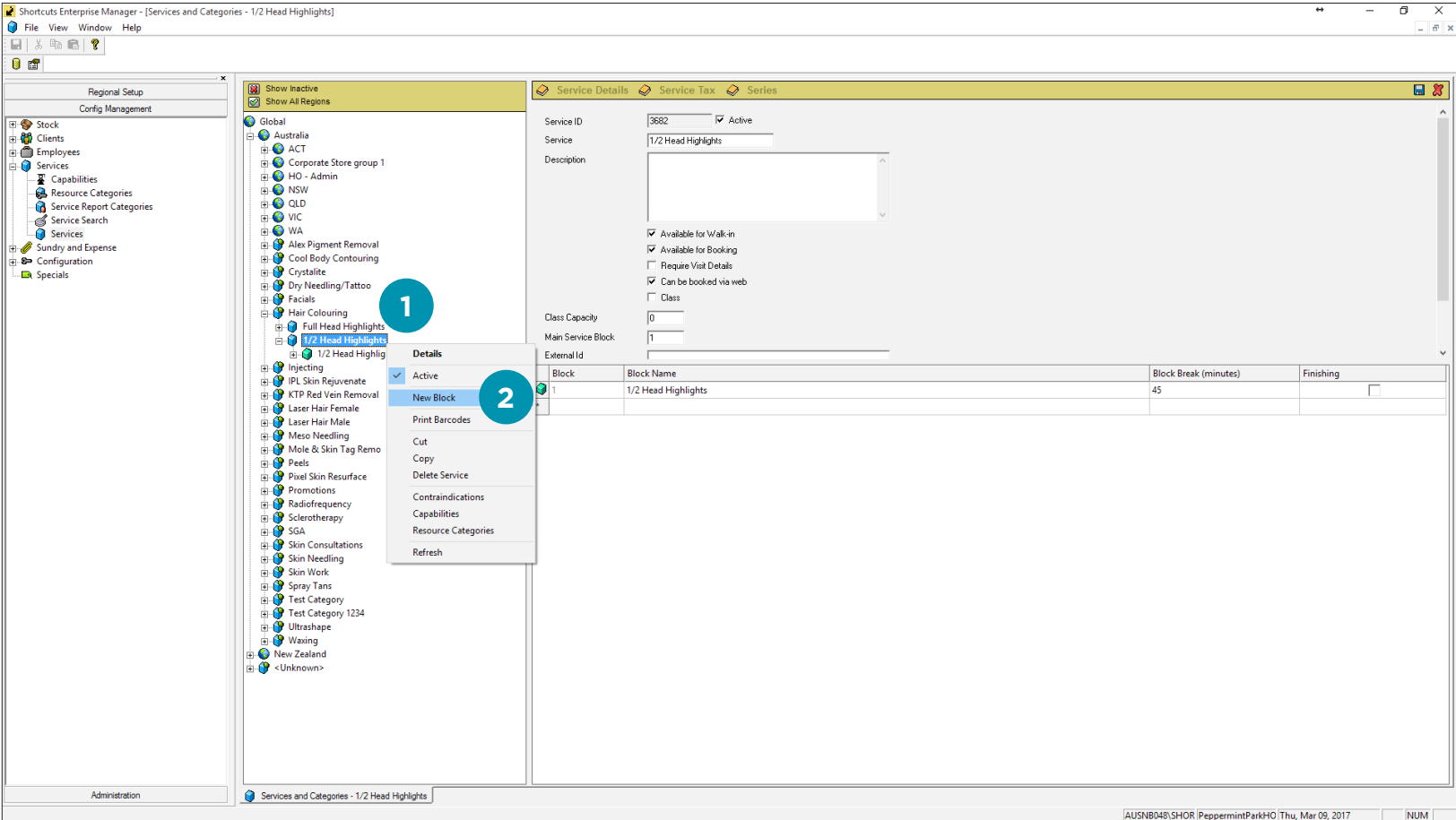
When a new service is added, by default it creates one block called **new block 1**. This block needs to be properly configured before adding any additional blocks. It is important to set up service blocks in the order that they will occur.

1

Right click on the service you want to add another block for.

2

Select **new block**.



3

Enter the name of the block.

4

If this service block requires a break after it is complete, enter the break time (minutes).

5

Tick **finishing block** if this block will be used to finish the service (e.g. rinse off, dry off). If this box is ticked, then the finishing block will be omitted if it is followed by another service.

6

Enter the level time (block duration in minutes), employee points, sell price and service costs for the **<none>** employee level in the grid.

7

If you are using employee levels, you may need to set up different details for each level. To do this, click on the **level name** cell of the blank row at the bottom of the grid and select the relevant employee level from the drop-down list. Then enter the level time, employee points, sell price and service costs for that employee level.

Shortcuts Enterprise Manager - [Services and Categories - New Block (3)]

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1/2 Head Highlights  
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Laser Hair Male  
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Skin Needling  
Skin Work  
Spray Tans  
Test Category  
Test Category 1234  
Ultrashape  
Waxing  
New Zealand  
<Unknown>

Block Details  
Services  
Categories

Block Name  
Break

Finish  
0  
Finishing Block  
This block will be omitted if followed by another service during the booking process

Level Name	Level Time	Employee Points	Sell Price	Service Costs
<none>	15	0	0	0
*				

Administration

Services and Categories - New Block (3)

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8

Click **save**.

9

Click on the **service report categories** button.

10

Select the relevant service report category for this block. If you do not select a report category some reports will not include this service block.

A

If you want to set a future service report category, tick the relevant box to select a service report category in the bottom row of the grid. Then select the effective date on the left.

11

Click **save**.

Shortcuts Enterprise Manager - [Services and Categories - Finish]

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1/2 Head Highlights  
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<none>  
1/4 Head Highlights  
Full Head Highlights  
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Skin Needling  
Skin Work  
Spray Tans  
Test Category  
Test Category 1234  
Ultrashape  
Waxing  
New Zealand  
<Unknown>

Block Details  
Service Report Categories

Effective Date	Massage	Tanning	Body Treatments	Facials	Hair	Hair Removal	Injectables	Cat 8	Cat 9	Cat 10
9/03/2017	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

A

Level Name	Level Time	Employee Points	Sell Price	Service Costs
<none>	15	0	0	0
*				

Administration

Services and Categories - Finish

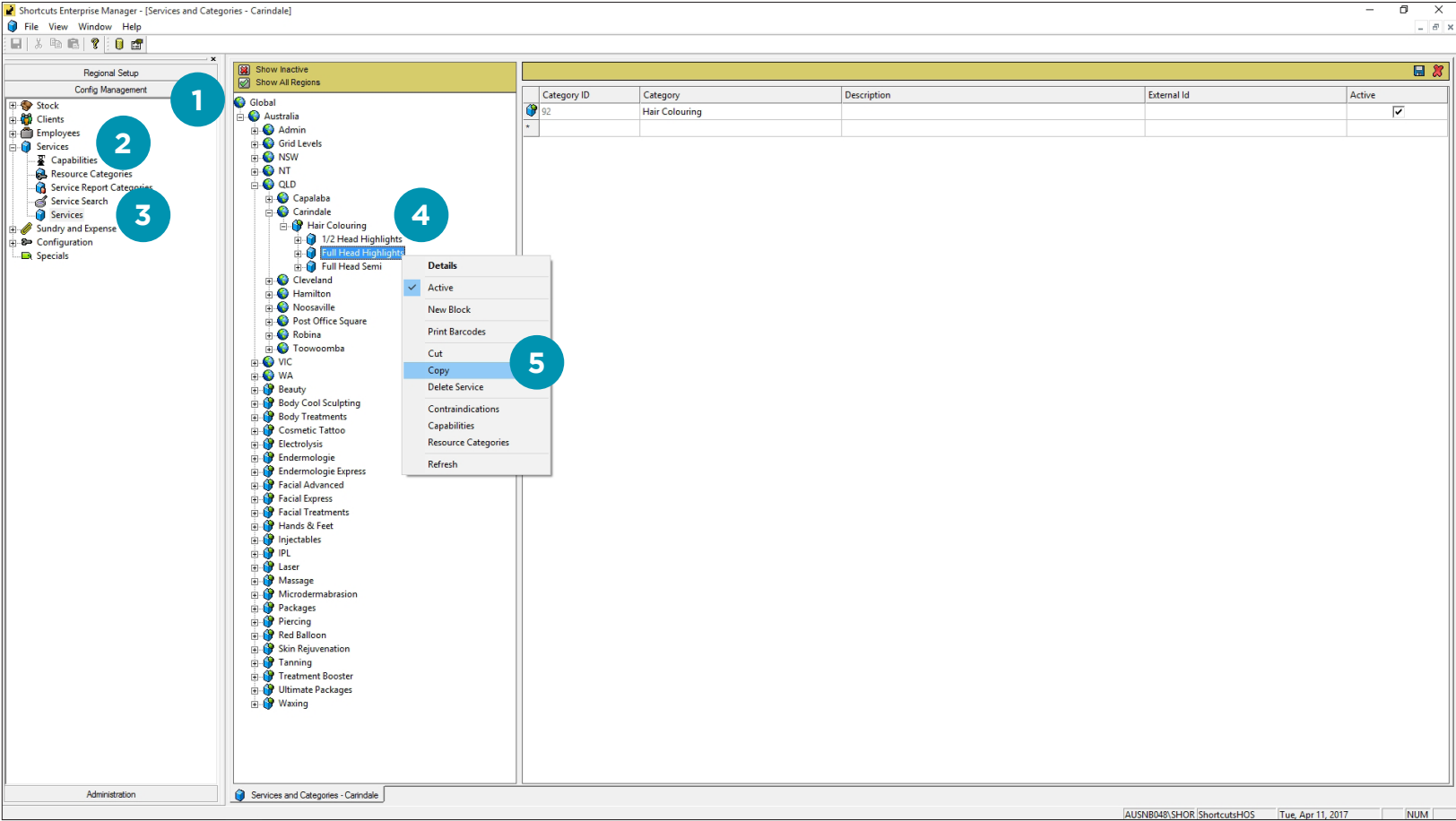
AUSNB048\SHOR\PeppermintParkHQ\Thu, Mar 09, 2017 NUM



# COPYING OR CUTTING A SERVICE TO ANOTHER REGION

Copying a service to another region allows you to change the service's details for that region independently. An example of this would be where a service has been created in the global region, but one region has a different price for that service. To achieve this you would copy the service from global to their region, then adjust the price in their region.

- 1 Click on the **config management** menu.
- 2 Double click to expand **services**.
- 3 Double click on **services**.
- 4 Right click on the service you want to copy or cut.
- 5 Select **copy** or **cut**.



6

Right click on the region you want to copy or cut the service to.

7

Select **paste service**.

8

Close tab.

Shortcuts Enterprise Manager - [Services and Categories - Echuca]

File View Window Help

Regional Setup  
Config Management

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

Show Inactive  
Show All Regions

Global  
Australia  
Admin  
Grid Levels  
NSW  
Armidale  
Charlestown  
Coffs Harbour  
Crows Nest  
Nowra  
Port Macquarie  
NT  
QLD  
Capalaba  
Carindale  
Hair Colouring  
1/2 Head Highlights  
Full Head Highlights  
Full Head Semi  
Cleveland  
Hamilton  
Noosaville  
Post Office Square  
Robina  
Toowoomba  
VIC  
Bendigo  
Camberwell  
Collins Square  
Doncaster  
Echuca  
WA  
Beauty  
Body Cool  
Body Treat  
Cosmetic  
Electrolysis  
Endermologie  
Endermologie Express  
Facial Advanced  
Facial Express  
Facial Treatments  
Hands & Feet  
Injectables  
IPL  
Laser  
Massage  
Microdermabrasion  
Packages  
Piercing

New Category  
Paste Categories  
Paste Services  
Print Barcodes  
Refresh

Category ID	Category	Description	External Id	Active
*				

Administration Services and Categories - Echuca

AUSNB048\SHOR ShortcutsHOS Tue, Apr 11, 2017 NUM

DEACTIVATING A SERVICE

- 1 Click on the **config management** menu.
- 2 Double click to expand **services**.
- 3 Double click on **services**.
- 4 Right click on the service you want to deactivate and untick **active** from the popup menu.
- A Alternatively, you can untick the **active** box next to the service.
- ! If this service is still on the Appointment Book you may want to turn on the **sell services deactivated since booking** setting.
- 5 Click **save**.
- 6 Close tab.

Shortcuts Enterprise Manager - [Services and Categories - Hair Colouring]

File View Window Help

1

2

3

4

5

6

A

Regional Setup  
Config Management

Stock  
Clients  
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Services  
Capabilities  
Resource Categories  
Service Report Categories  
Service Search  
Services  
Sundry and Exp  
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  
Hair Colouring  
1/2 Head Highlights  
1/4 Head Highlights  
Full Head Highlights  
Full Head Semi  
Injecting  
IPL Skin Rejuvenate  
KTP Red Vein Removal  
Laser Hair Female  
Laser Hair Male  
Meso Needling  
Mole & Skin Tag Remo  
Peels  
Pixel Skin Resurface  
Promotions  
Radiofrequency  
Sclerotherapy  
SGA  
Skin Consultations  
Skin Needling  
Skin Work  
Spray Tans  
Test Category  
Test Category 1234  
Ultrashape  
Waxing  
New Zealand  
<Unknown>

Details  
Active  
New Block  
Print Barcodes  
Cut  
Copy  
Delete Service  
Contraindications  
Capabilities  
Resource Categories  
Refresh

Category Details  
Category Logo

Category ID: 93  
Category: Hair Colouring  
Description:  
External Id:

Active

Service ID | Service Name | Description | Main Service Block | Web | Class | Class Capacity | Active

3682 | 1/2 Head Highlights | | 1 | | | 0 |

3683 | 1/4 Head Highlights | | 1 | | | 0 |

3679 | Full Head Highlights | | 1 | | | 0 |

3684 | Full Head Semi | | 1 | | | 0 |

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