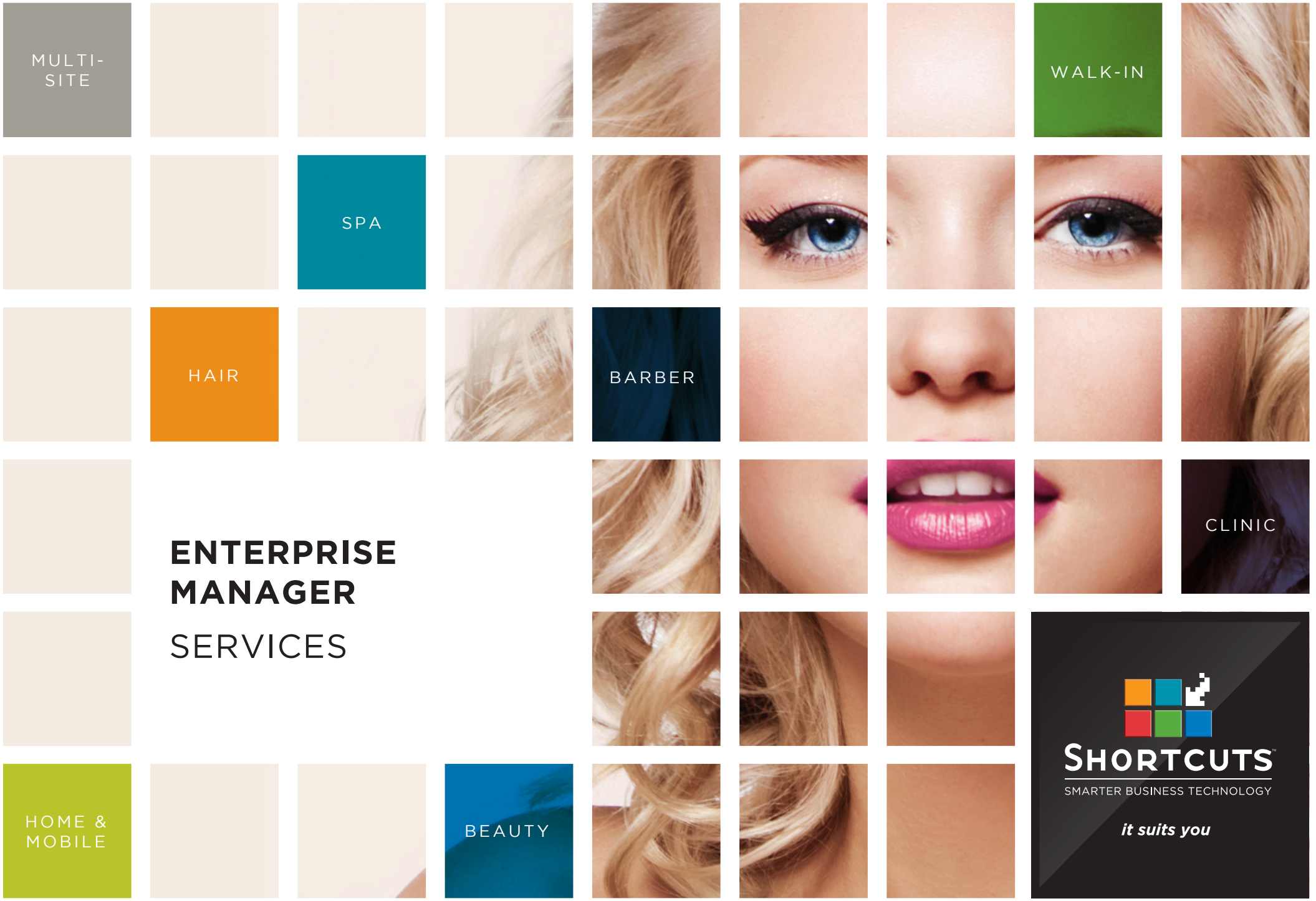

ENTERPRISE MANAGER

SERVICES

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).

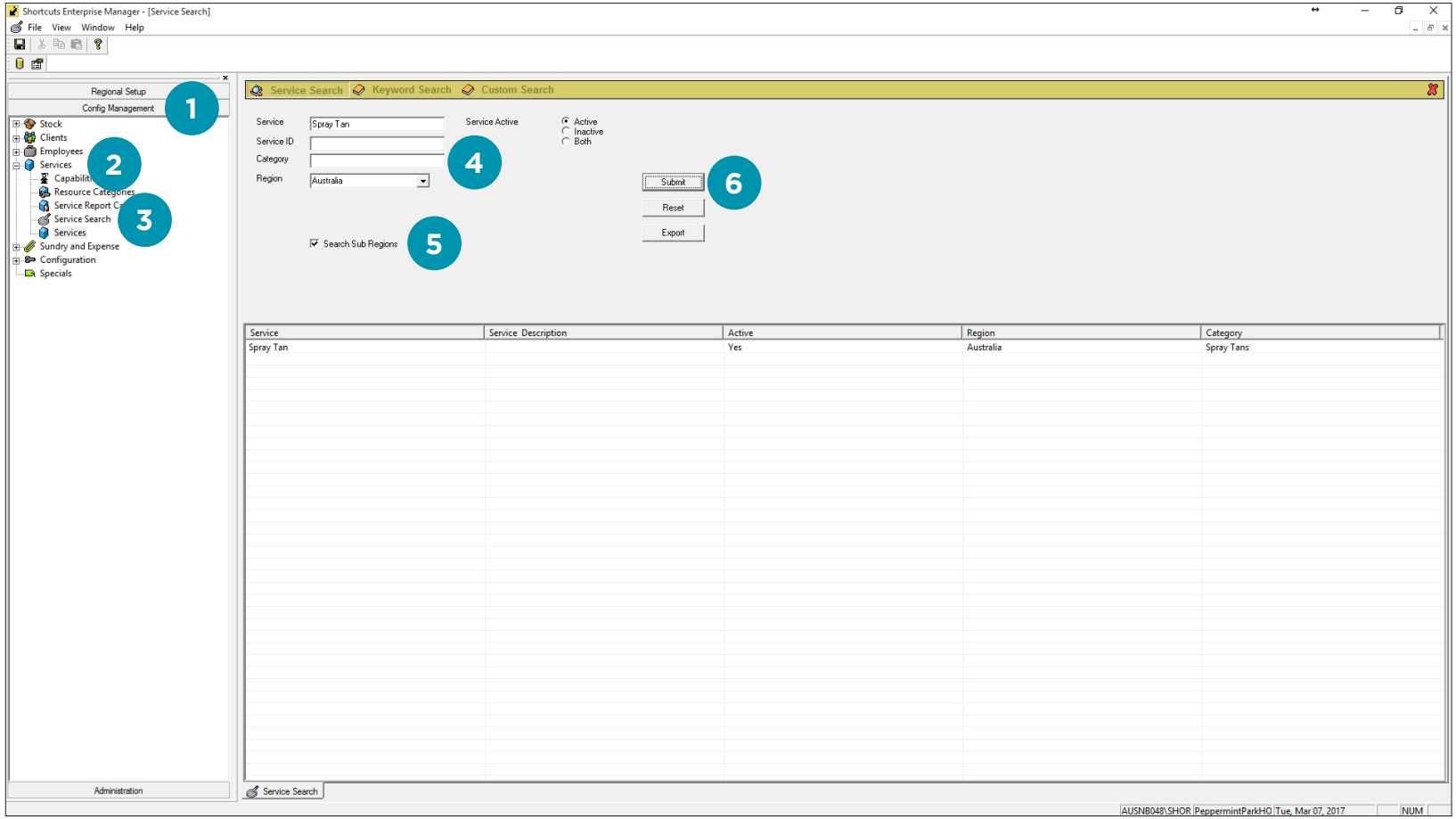
   Service: Enter the service name.

   Service ID: Enter the service ID.

   Category: Enter the service category name.

   Region: Select the relevant region.

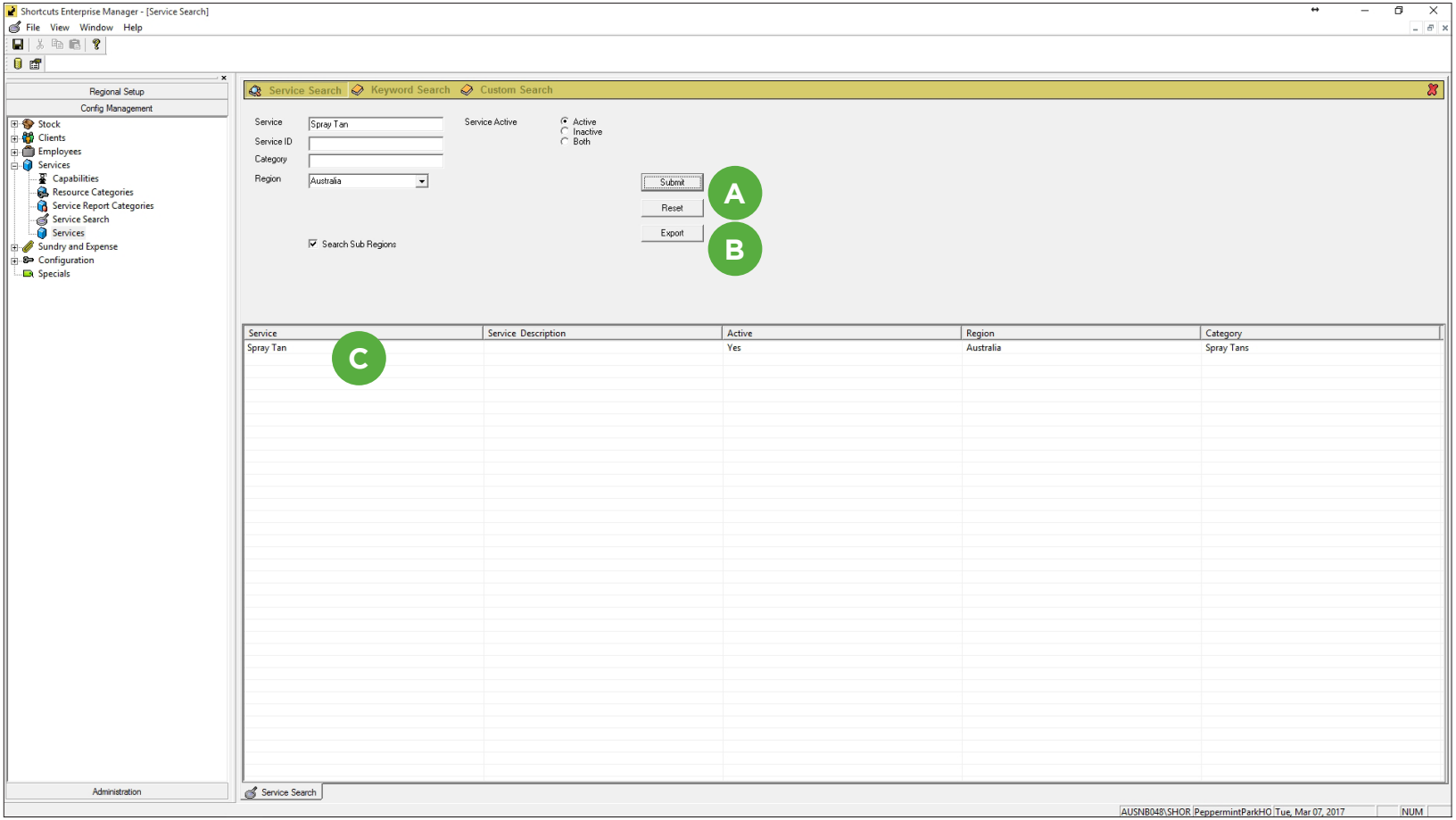
   Service active: Select the status you want to search for.
5. Tick the **search sub regions** box if you want to include the selected region's sub-regions in your search.
6. Click **submit** to search.



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

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

C 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.



KEYWORD SEARCH

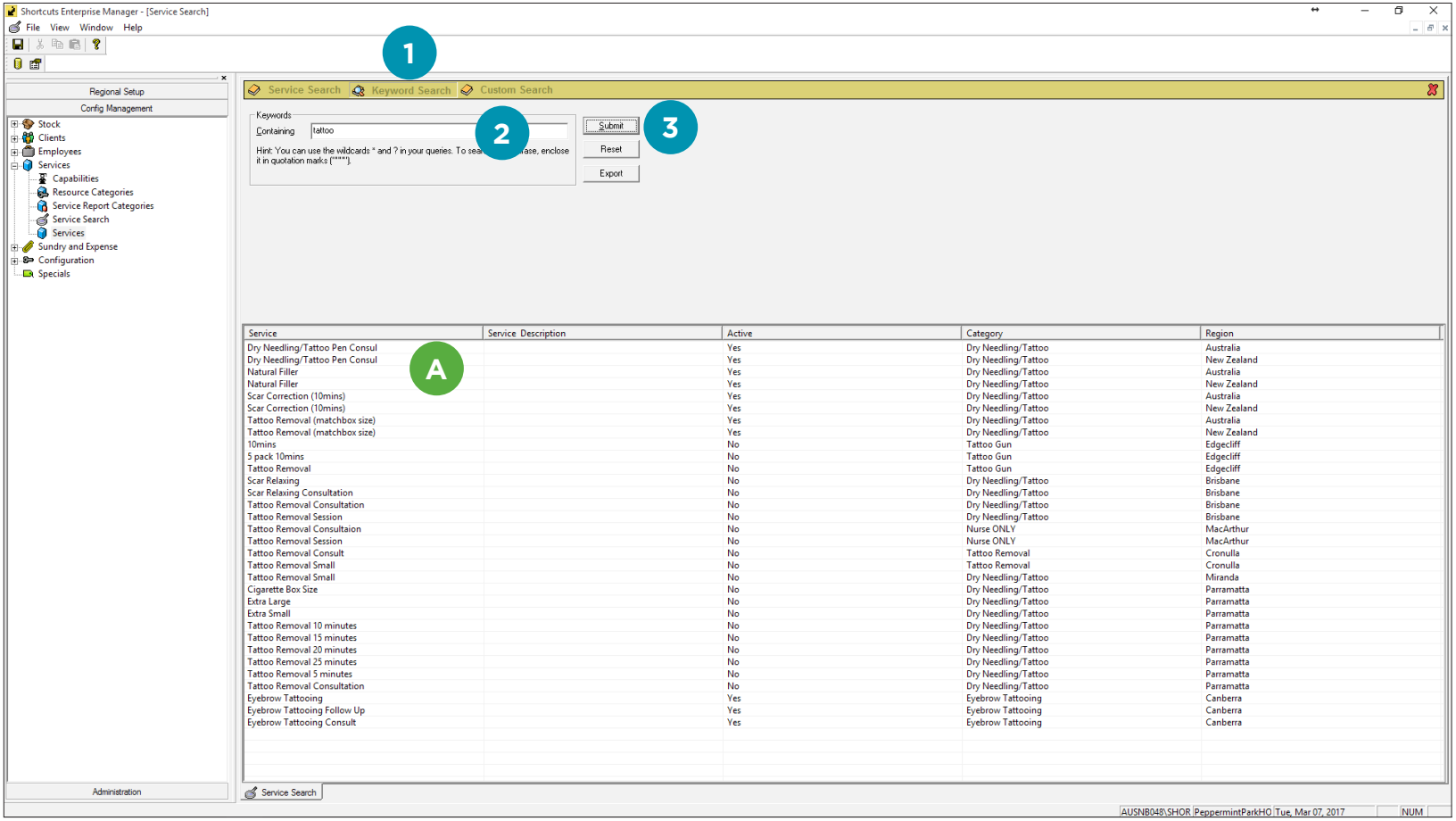
The keyword search feature allows you to search for a word or phrase across all service fields. You can use the wildcards * and ? in your search. To search for a phrase, enclose it in quotations marks.

1 Click on the **keyword search** button.

2 Enter the relevant keyword or phrase in the **containing** field.

3 Click **submit**.

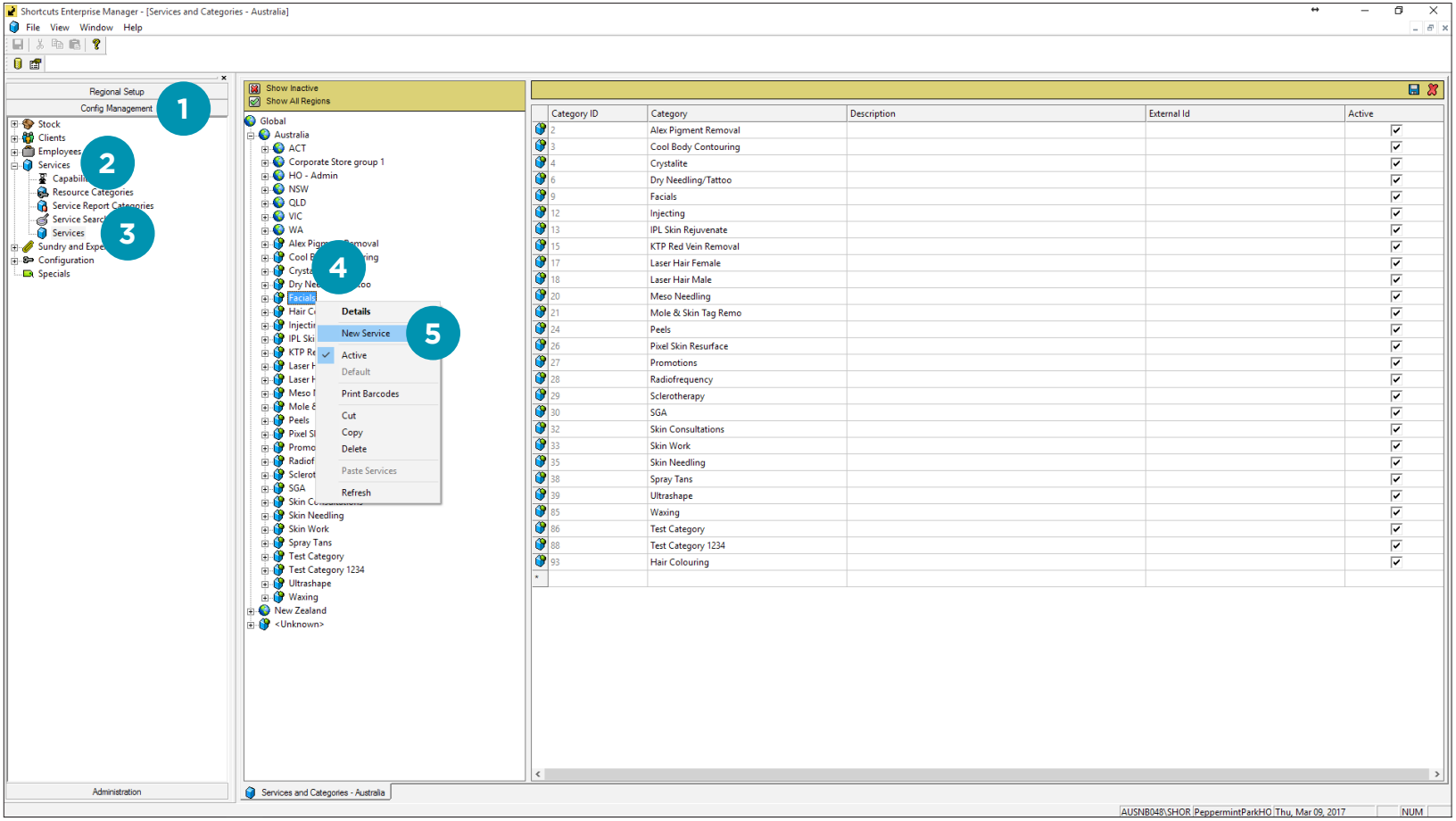
A Your search results will be shown here. You can double click on a service in the search results to open the service details in a new tab.



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**.



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.

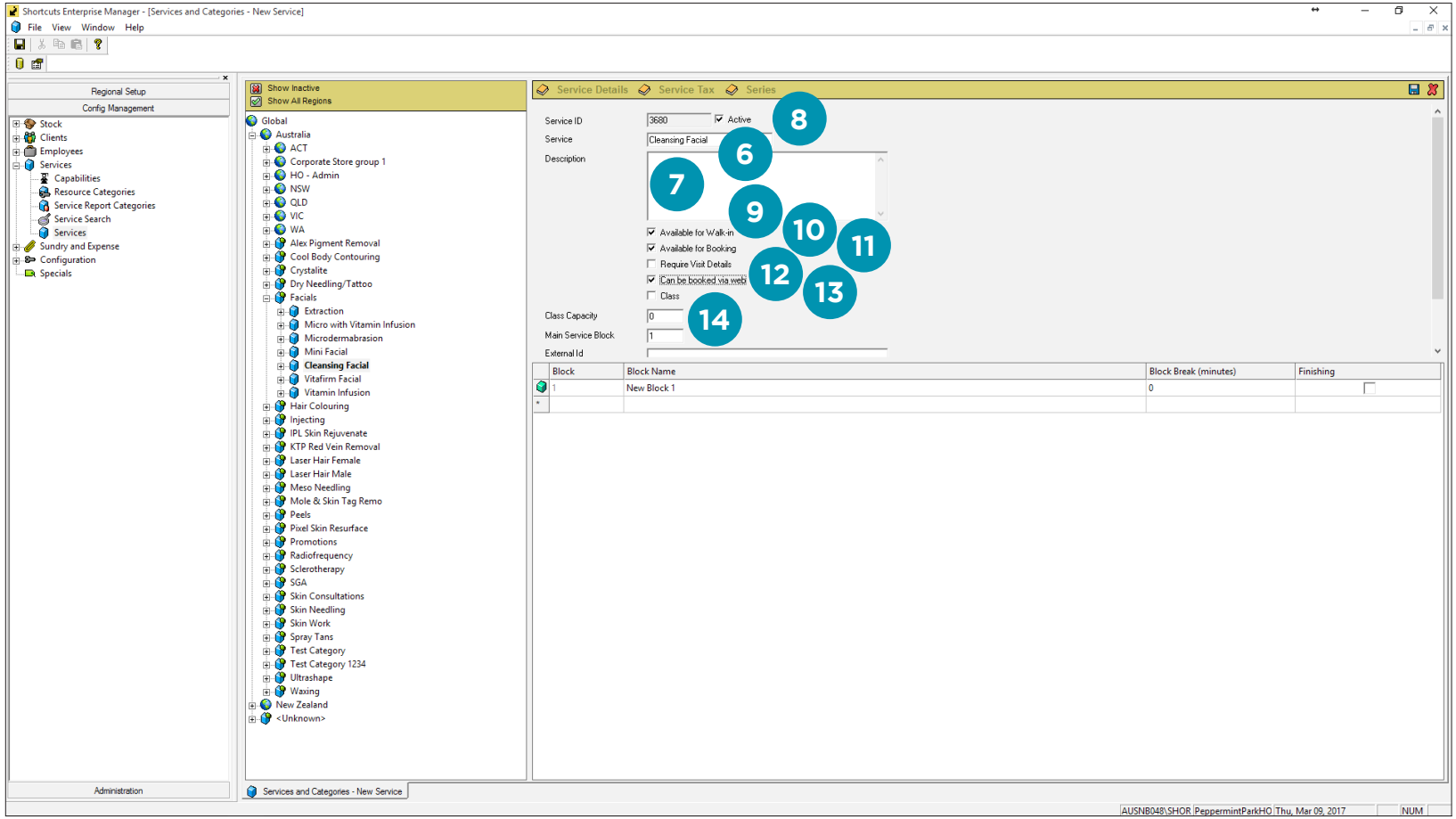
10 Tick **available for booking** if the service can be booked.

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.

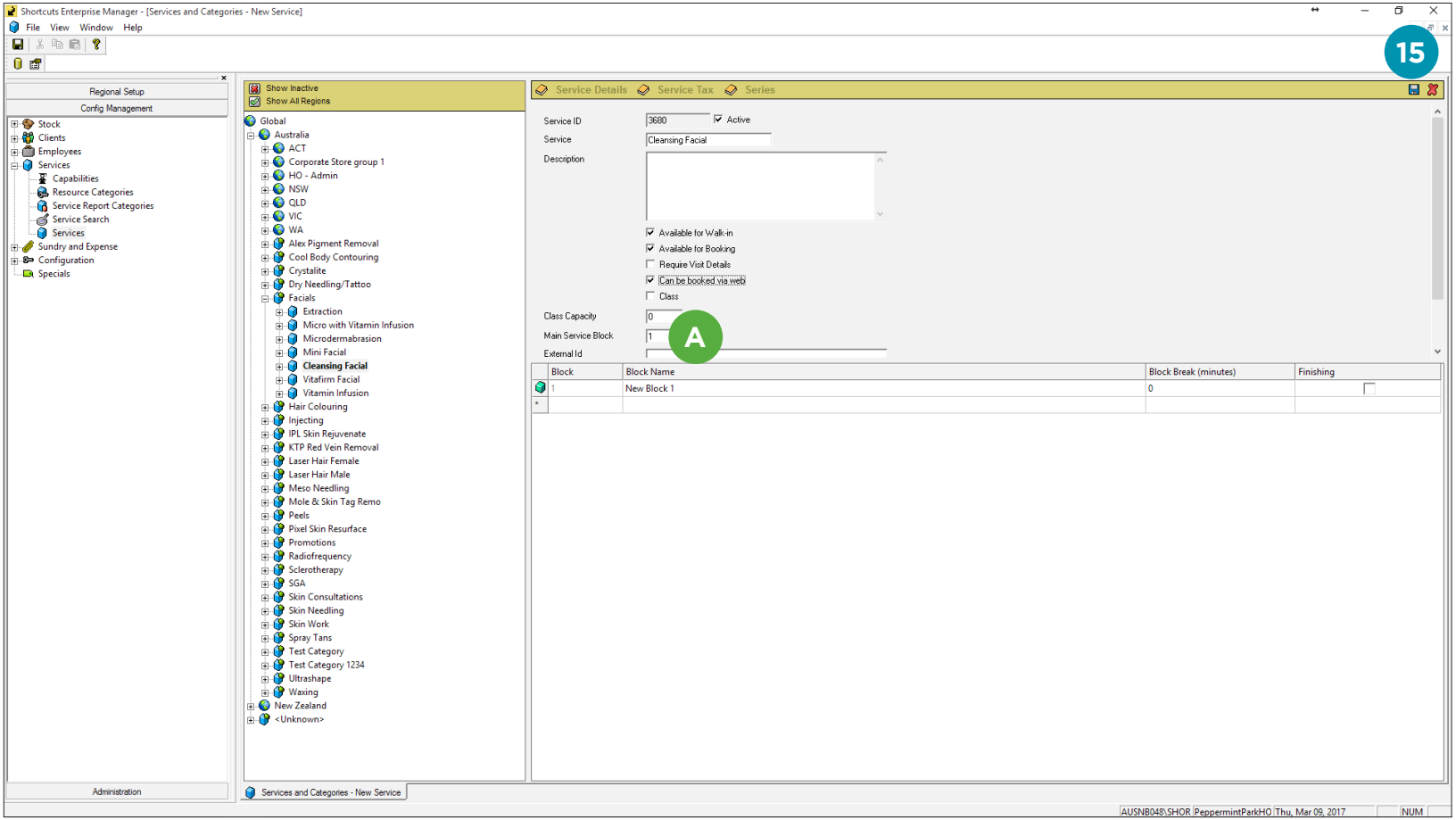
13 If this is a class service (e.g. a makeup class or yoga class) tick the **class** box.

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



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**.



SELECTING SERVICE TAX

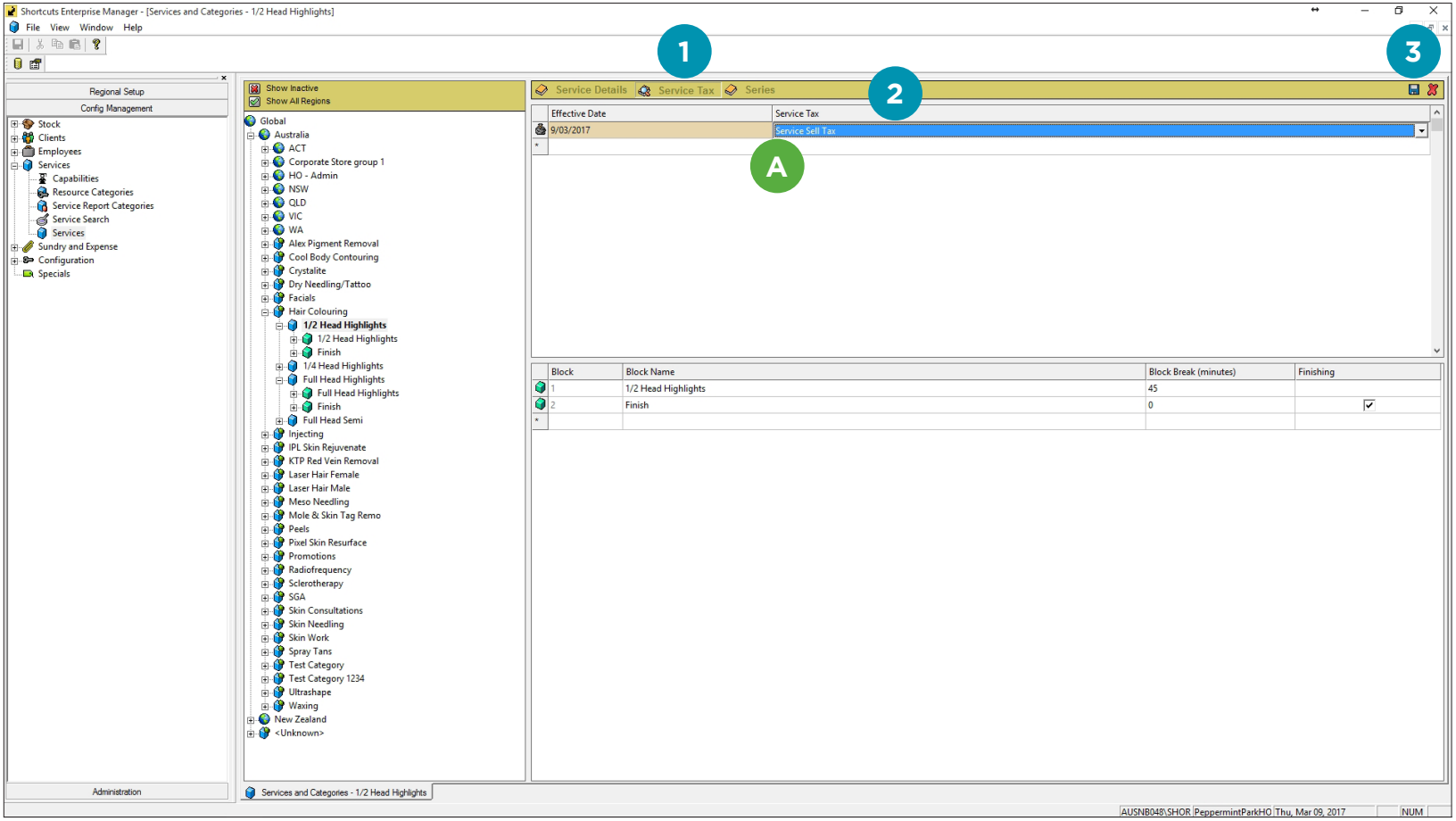
By default, when a new service is added, the default service tax will be linked to the service.

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**.



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.

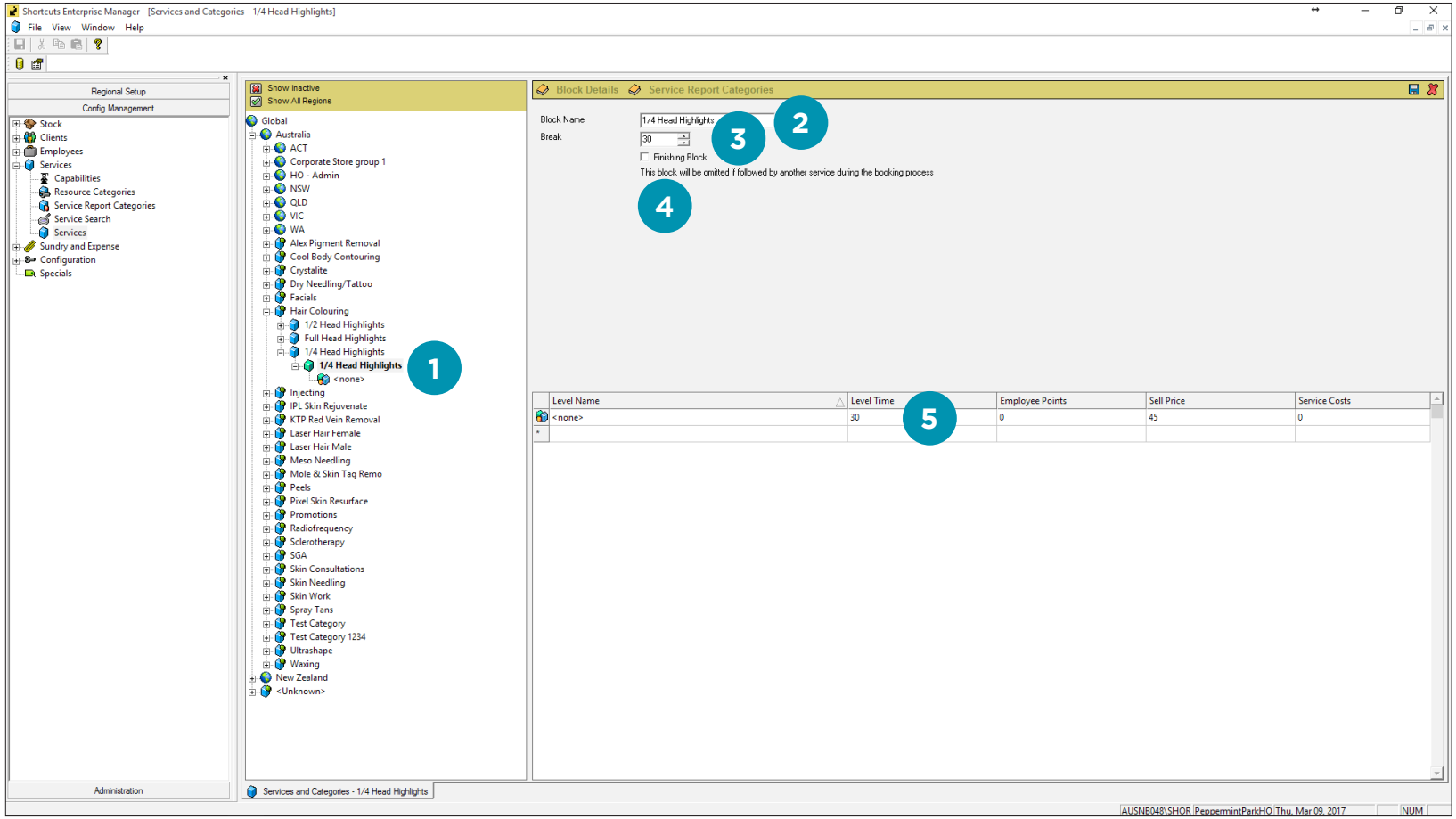
1 Double click on the service block you want to edit.

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.

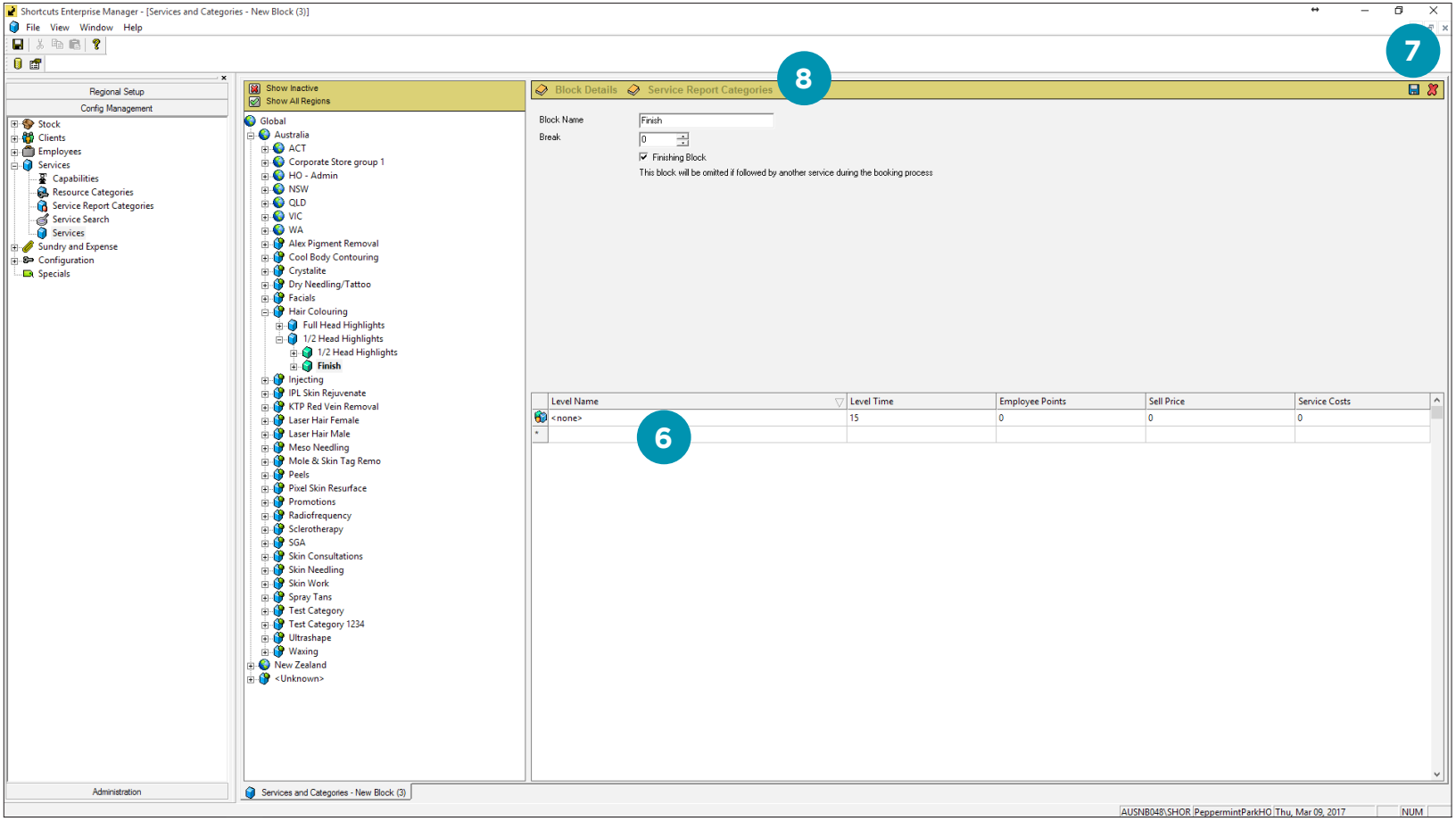
5 Enter the level time (block duration in minutes), employee points, sell price and service costs for the **<none>** employee level in the grid.



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**.

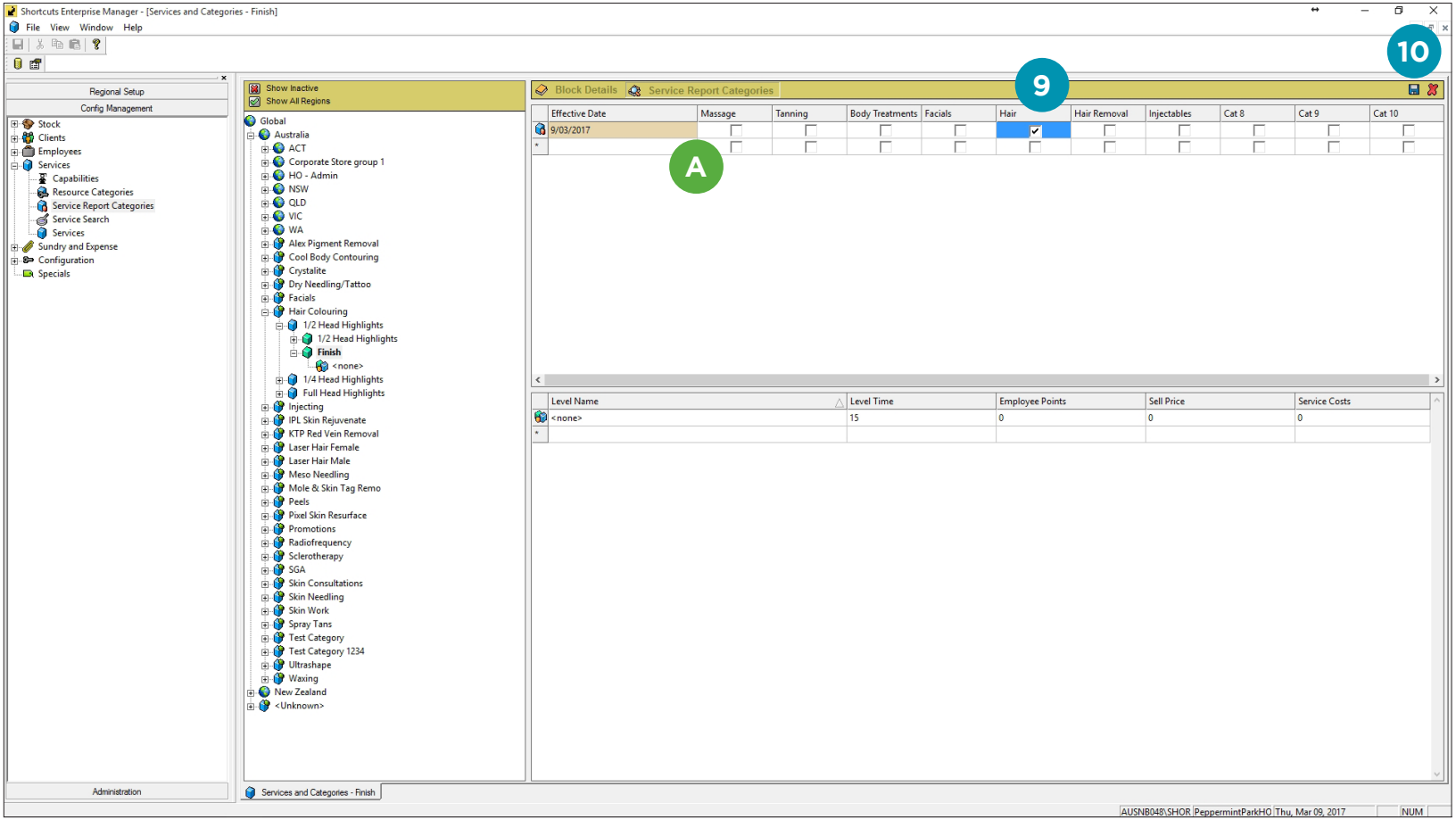
8 Click on the **service report categories** button.



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**.



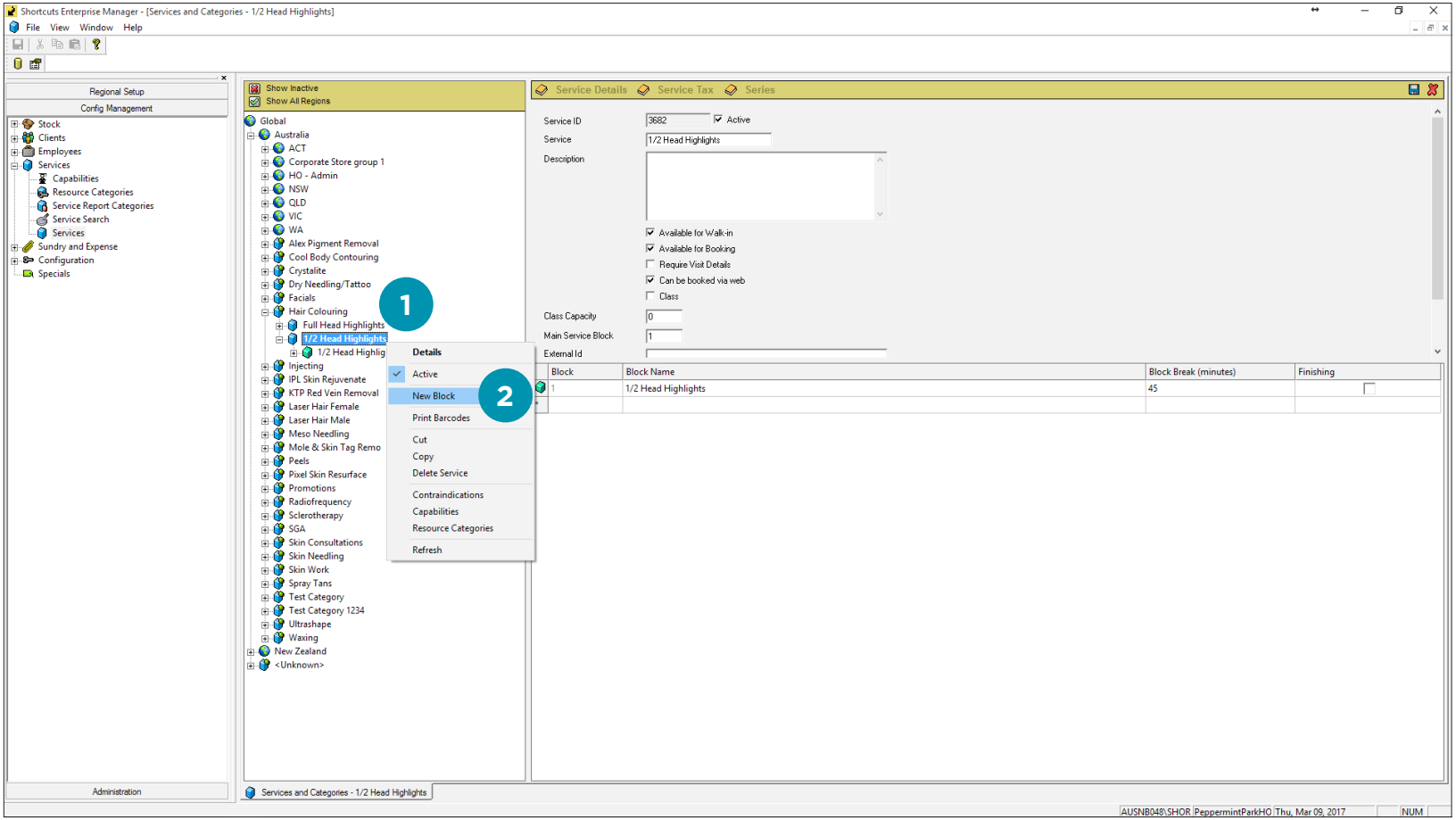
ADDING A NEW SERVICE BLOCK

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**.



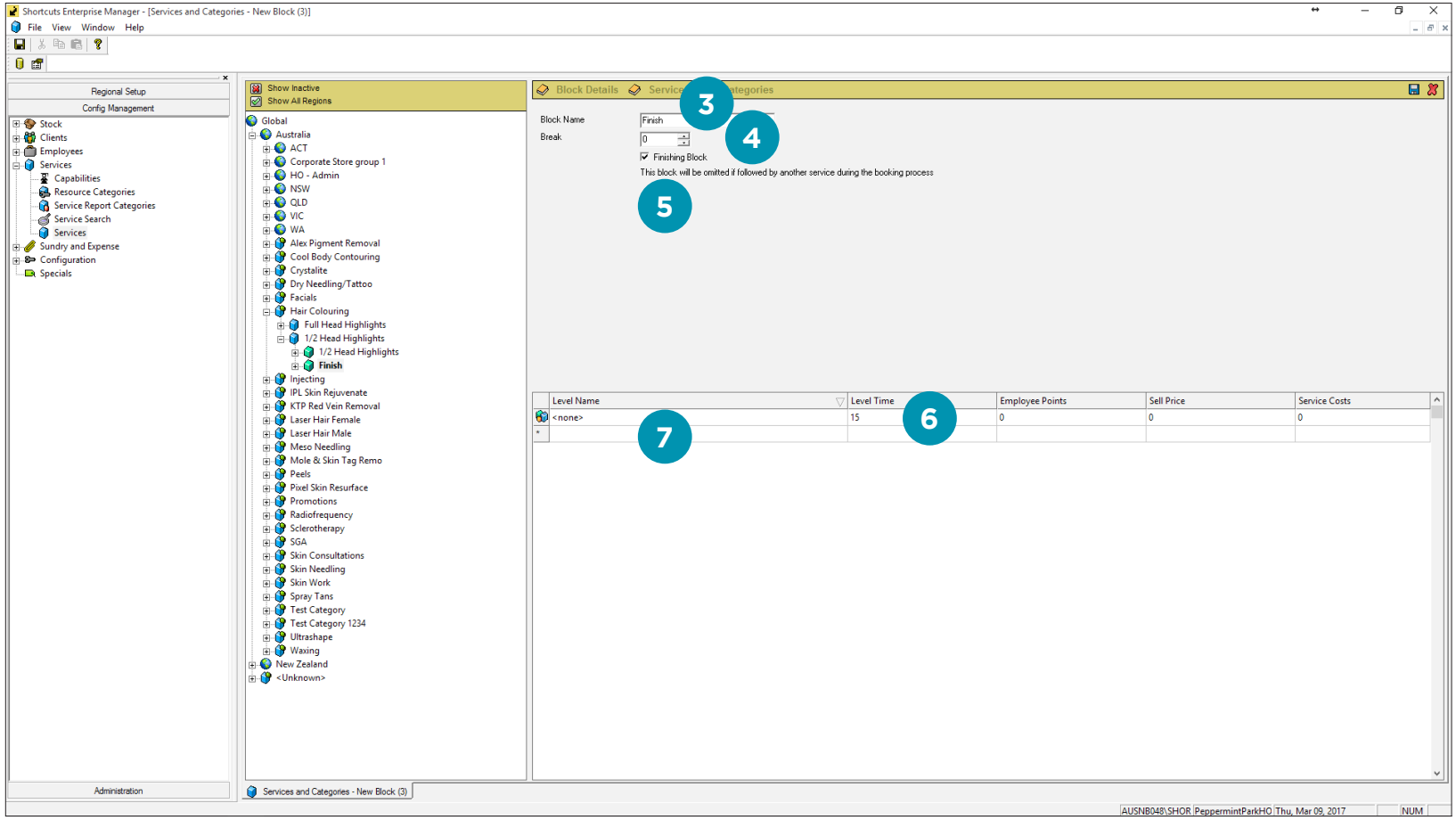
3 Enter the name of the block.

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.



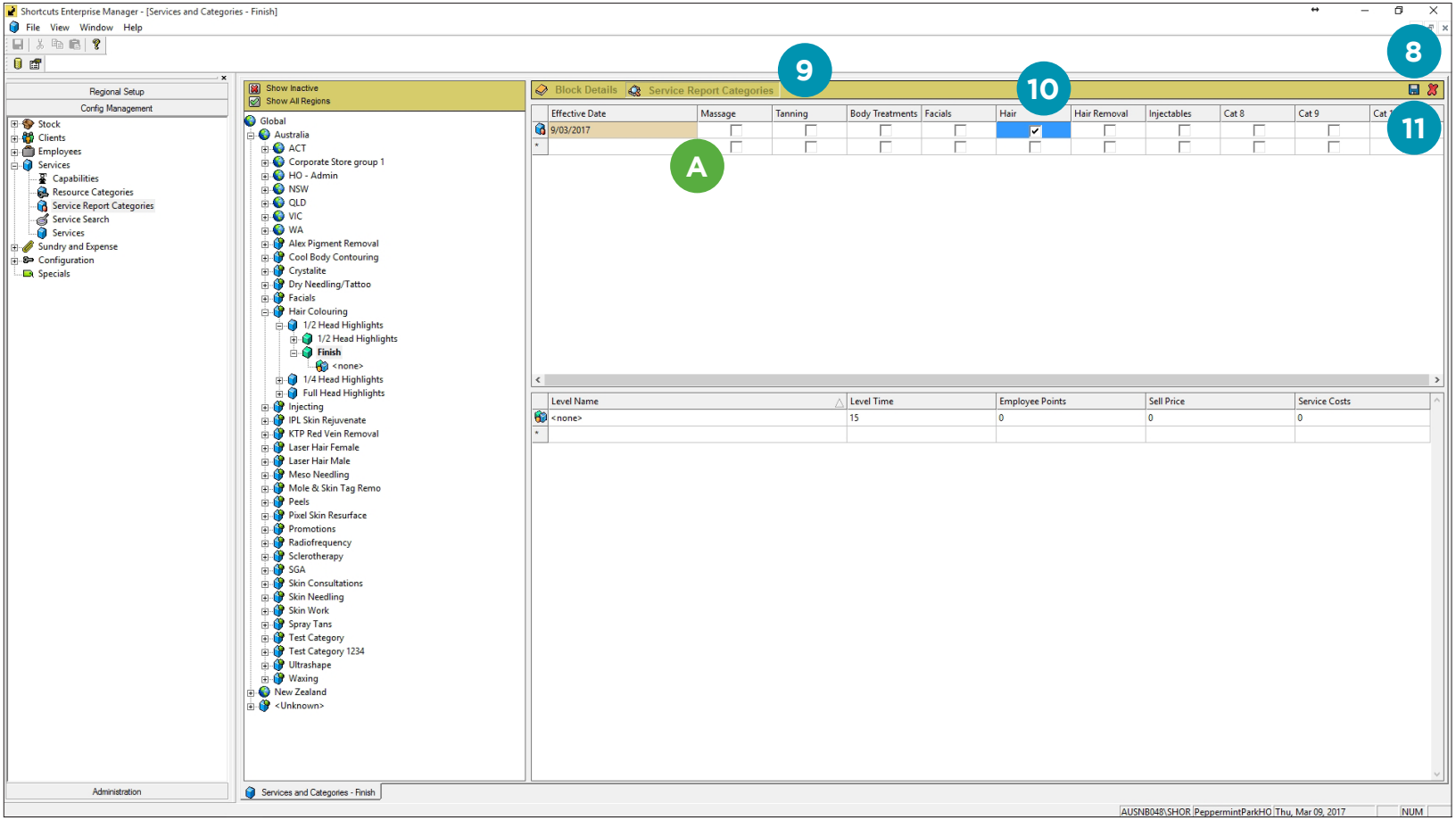
8 Click **save**.

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.

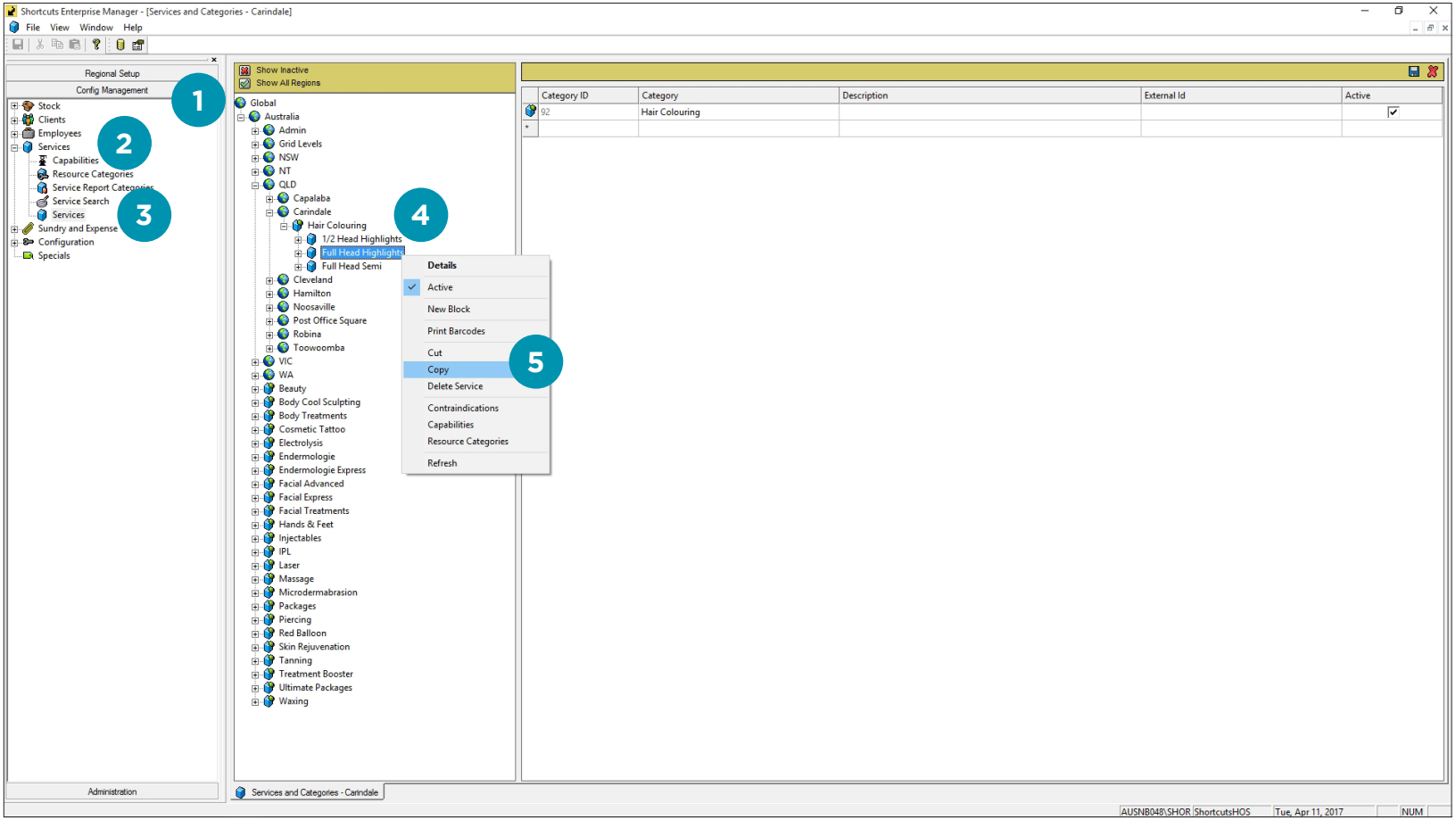
11 Click **save**.



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.

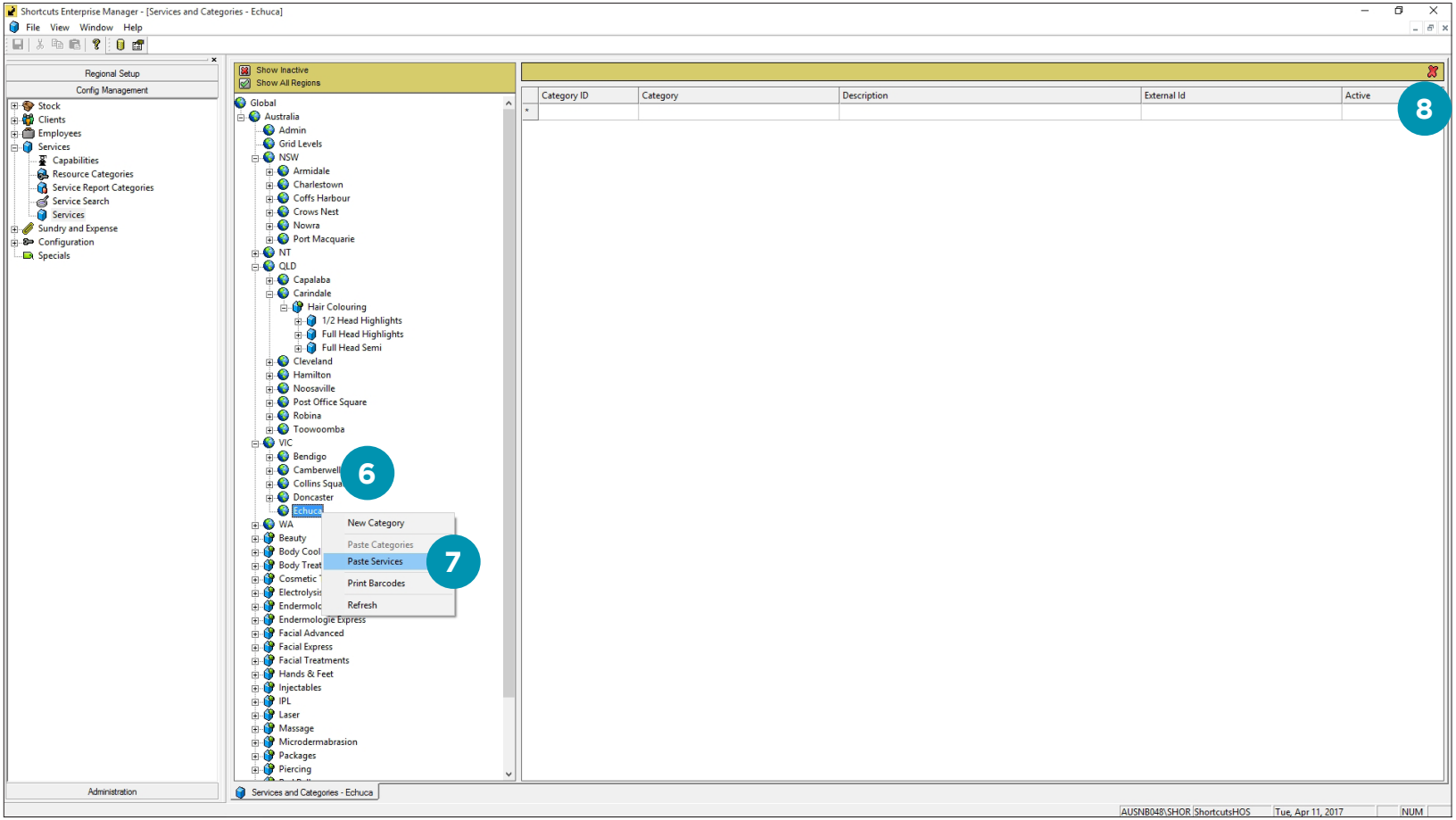
1. Click on the **config management** menu.
2. Double click to expand **services**.
3. Double click on **services**.
4. Right click on the service you want to copy or cut.
5. Select **copy** or **cut**.



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

7 Select **paste service**.

8 Close tab.



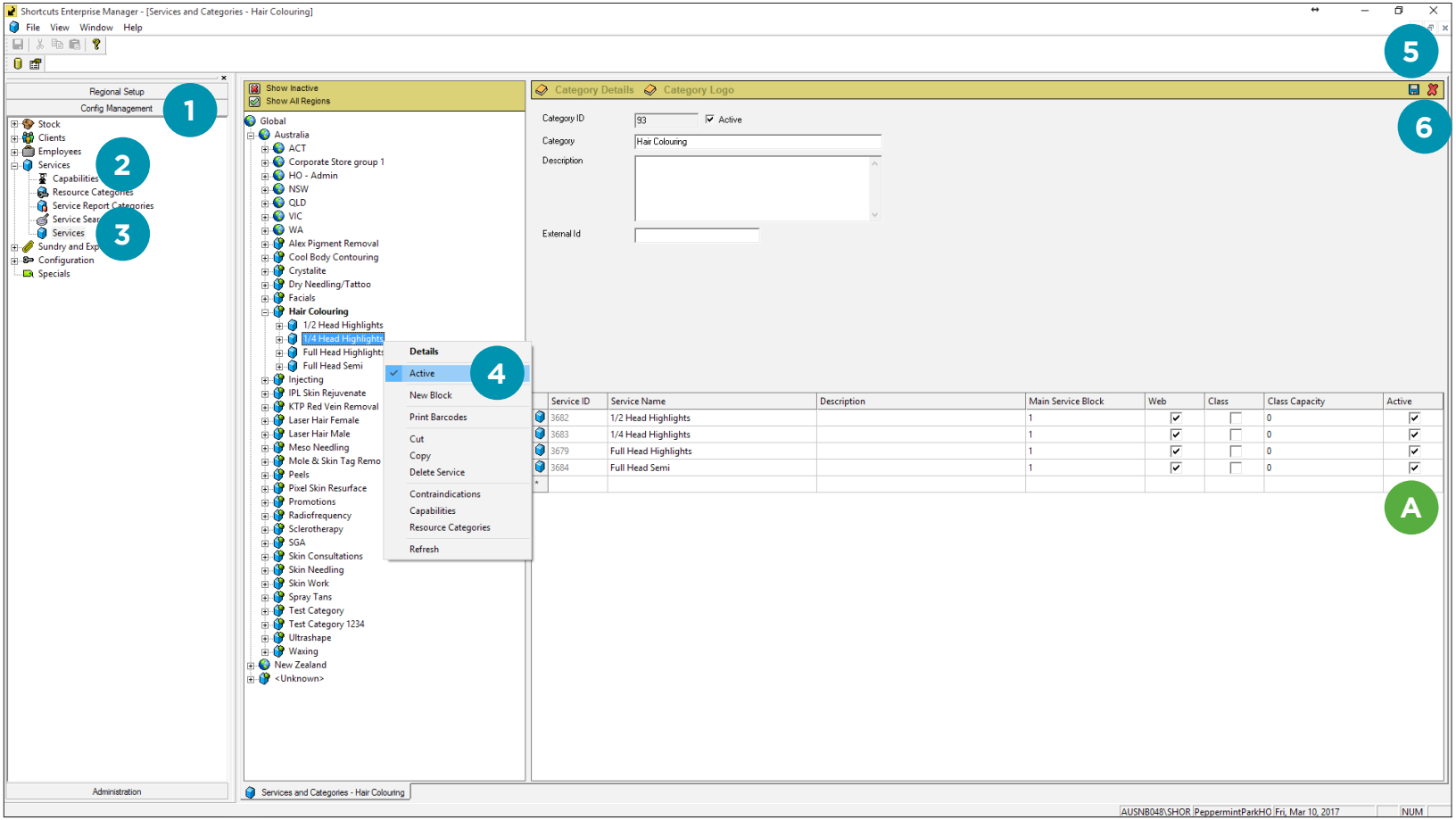
DEACTIVATING A SERVICE

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.



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