

MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

CLINIC

ENTERPRISE LIVE

ROLES & EMPLOYEE MANAGEMENT

HOME &
MOBILE

BEAUTY


SHORTCUTS
SMARTER BUSINESS TECHNOLOGY
it suits you

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By Erin Lewis

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Country: Australia

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ABOUT THIS DOCUMENT

Enterprise Live is the web-based interface for Enterprise Manager. Enterprise Live allows users such as regional managers and owners to log in remotely, enabling you to view reports and manage your sites from anywhere in the world. With Enterprise Live, users can access and update configuration items such as discounts, promotions, product pricing information, employee details and much more!

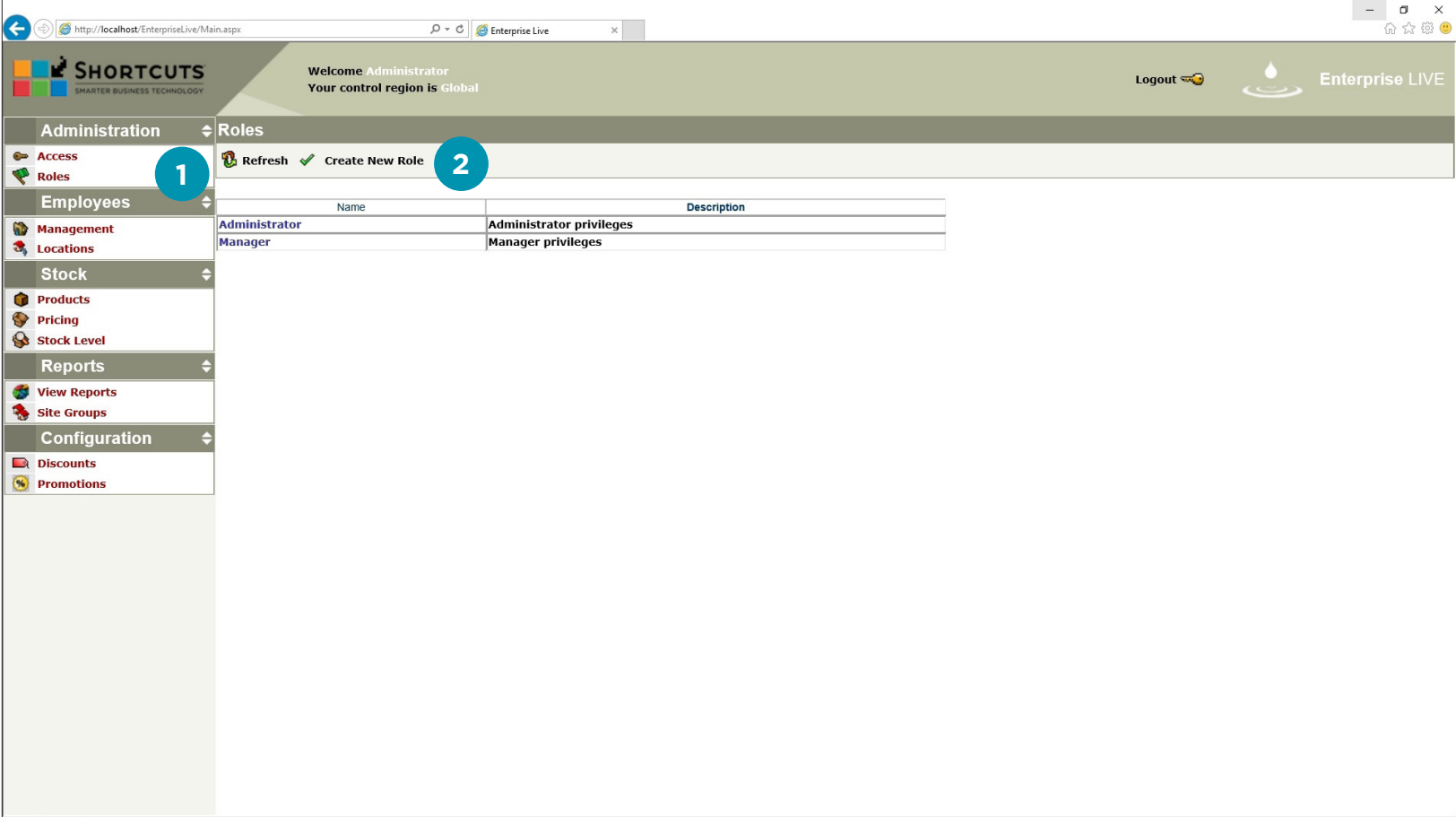
This document is designed to give you a helping hand when it comes to managing your sites and performing daily tasks in Enterprise Live.

ROLES

ADDING A NEW ROLE

The roles screen allows you to set up one or more Enterprise Live roles. A role is similar to a security level in Shortcuts Fusion in that a role determines which screens and functions an Enterprise Live user can and cannot access. When creating Enterprise Live accounts, each user must be assigned a role.

- 1 Click on the **roles** button in the **administration** menu.
- 2 Click **create new role**.



3

Enter the name of the role.

4

Optional: Enter a description.

5

Tick the boxes for areas that you want the role to have access to. A tick indicates that the role will have access to the relevant screen/function. No tick indicates that the role will not have access.

6

Click **save**.

The screenshot shows the 'Role' management page in the Enterprise LIVE application. The interface includes a left-hand navigation menu with categories like Administration, Employees, Stock, Reports, and Configuration. The main area is titled 'Role' and contains a form for creating or editing a role. The form has a 'Name' field (callout 3) with the value 'Franchisee', a 'Description' text area (callout 4), and a 'Function Access' section (callout 5) with various checkboxes. The 'Function Access' section includes options like 'Enterprise Live Access', 'Access Roles', 'Employee Management', 'Employee Locations', 'Product Pricing', 'Products', 'Product Stock Level', 'View Reports', 'Site Groups', 'Discounts', and 'Promotions'. At the bottom of the form are 'Save', 'Delete', and 'Back' buttons (callout 6). The top of the page shows a welcome message for the Administrator and a 'Logout' button.

EDITING AND DELETING ROLES

You can easily make changes a role by clicking on the name of the role. For example, you may wish to edit the role’s access to certain functions, or you may wish to delete a role that is no longer in use.

- 1

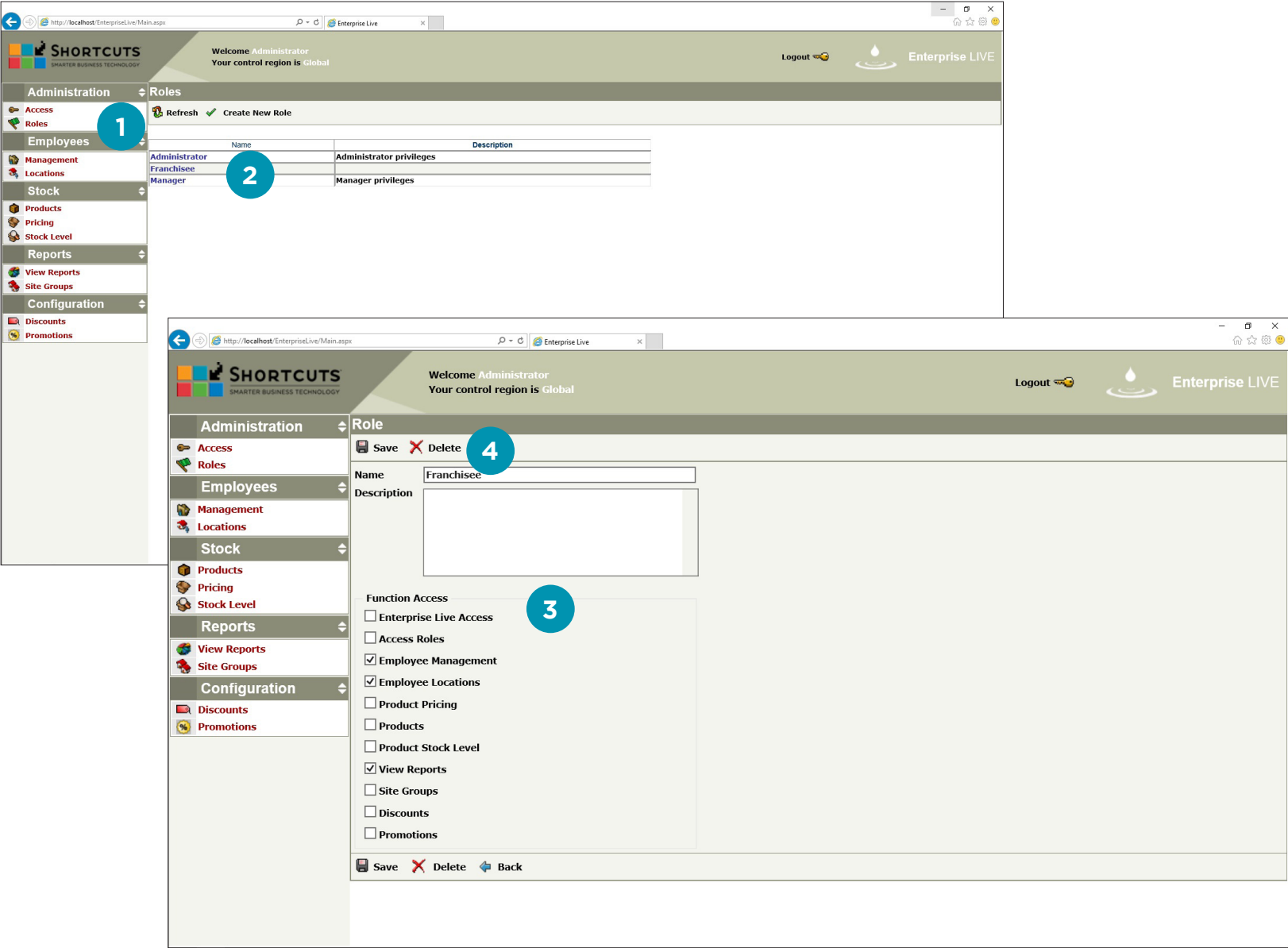
Click on the **roles** button in the **administration** menu.
- 2

Click on the role you wish to edit or delete.
- 3

To edit the role, make your desired changes in the relevant areas. Then click **save**.
- 4

To delete the role, click **delete**.
- !

A role cannot be deleted if it is being used.



EMPLOYEE MANAGEMENT

USING THE EMPLOYEE MANAGEMENT SCREEN

1

Click on the **management** button in the **employees** menu.

A

You can search for employees by selecting the relevant region and site.

B

You can search for an employee by entering their first name, last name and alias.

C

You can tick the **show inactive** box to include inactive employees in the search.

D

You can choose the number of employees you want to display.

2

Once you have entered your desired criteria, click **search**.

E

You can click **reset** to clear the search criteria.

F

The employee list will be displayed here.

G

You can click on the **view employee locations** icon (building icon) to view location information.

Administration

- Access
- Roles
- Employees
- Management
- Locations
- Stock
- Products
- Pricing
- Stock Level
- Reports
- View Reports
- Site Groups
- Configuration
- Discounts
- Promotions

Welcome Administrator
Your control region is global

Logout

Enterprise LIVE

Employee Management

Region: QLD
Site: Carindale
☐ Show Inactive
Search: [] Reset: [] Display 50 Employees: [] Create New Employee: []

Save Refresh Searched for employees under QLD region and site: Carindale.

	First Name	Last Name	Alias	Phone	Mobile	Email	Goal	Active in one site or more
	Chris	Glasshouse	Chris		0411222333	chris.glasshouse@email.com		<input checked="" type="checkbox"/>
	Crystal	Madden	Crystal M		0404444004		0	<input checked="" type="checkbox"/>
	Emma	Collins	Emma C			emmacollins26634@email.com	0	<input checked="" type="checkbox"/>
	HEAD OFFICE	HEAD OFFICE	HEAD OFFICE		0400333000		0	<input checked="" type="checkbox"/>
	Jessyka	Humphrey	Jessyka			j.humphrey193734@email.com	0	<input checked="" type="checkbox"/>
	Josephine	Lane	Josephine		0404000444		0	<input checked="" type="checkbox"/>
	Kathy	Mosby	Kathy M		0400000111			<input checked="" type="checkbox"/>
	Kristina	Andrews	Kristina				0	<input checked="" type="checkbox"/>
	Lia	Davids	Lia		0411222222			<input checked="" type="checkbox"/>
	Mandy	Brown	Mandy			mandyb445@email.com	0	<input checked="" type="checkbox"/>
	Melinda	Melinda	Melinda				0	<input checked="" type="checkbox"/>
	Rowan	Patterson	Rowan		0401000111	rowan.j.patts@email.com	0	<input checked="" type="checkbox"/>
	Sally	Chalmers	Sally		0499000999		0	<input checked="" type="checkbox"/>

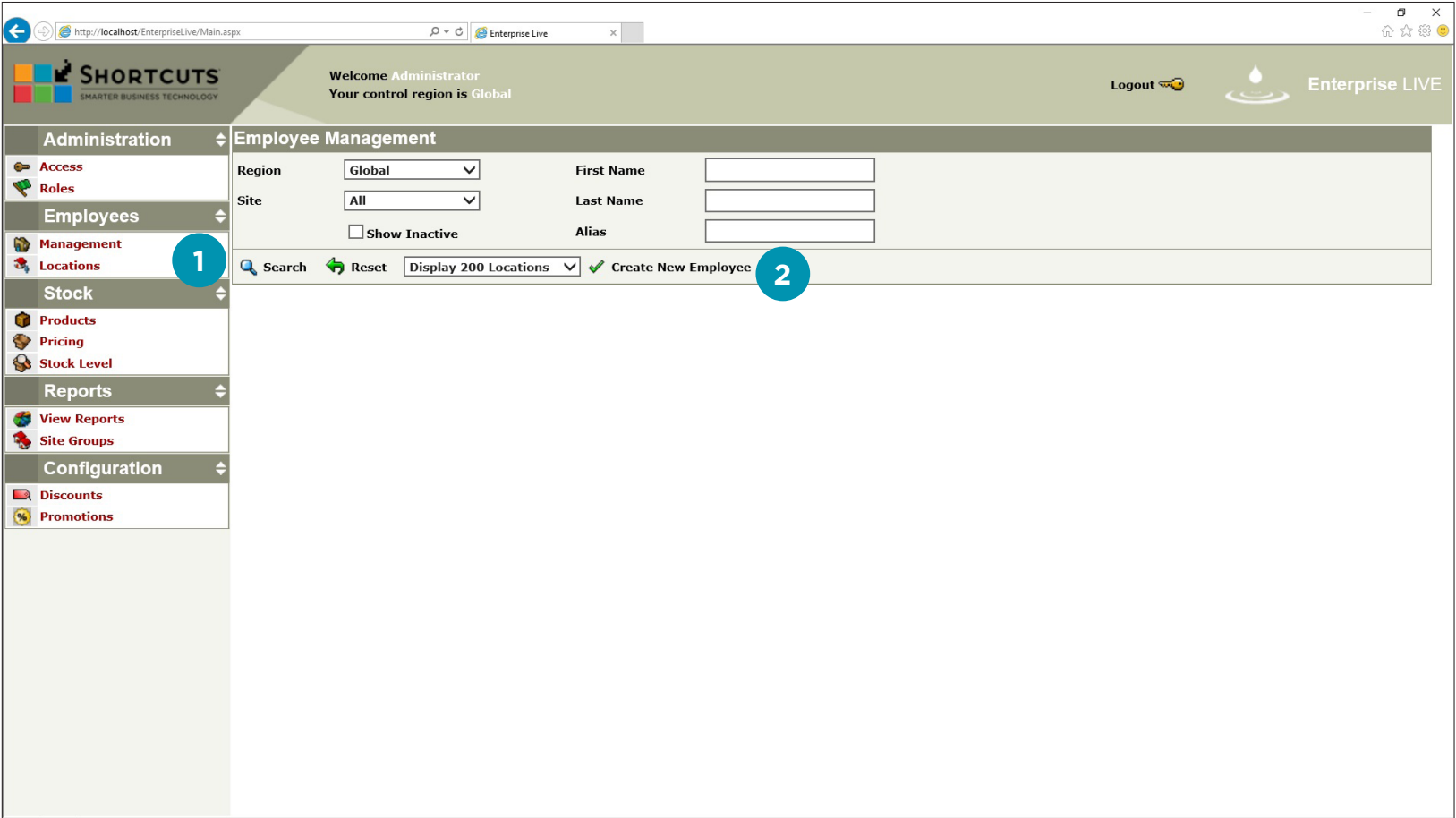
ADDING A NEW EMPLOYEE

You must ensure that all employees using Shortcuts at all sites are entered into Enterprise Manager or Enterprise Live. Enterprise Live only allows you to create employees for Shortcuts Fusion. You must use Enterprise Manager to add head office employees.

- 1

Click on the **management** button in the **employees** menu.
- 2

Click **create new employee**.



3

Enter the employee's first and last name.

4

Enter the employee's tax file number into the **TFN** field.

5

Select the employee's date of birth.

6

Enter a PIN number for the employee. This is the 4 digit number that the employee will use to login to Shortcuts. The same PIN is used for the employee at all sites.

7

Enter an employee alias. This is the name that will appear on the Appointment Book.

8

Enter the employee's contact details and street address into the appropriate fields.

9

Enter a biography, if required. This will be displayed in the app when clients make a booking.

10

To add an employee photo, click the **browse** button and select the image file.

The screenshot shows the 'Employee Management' form in the Shortcuts Enterprise LIVE application. The form is divided into two main sections: a left sidebar with navigation links and a main content area for the employee details. The sidebar includes links for Administration (Access, Roles), Employees (Management, Locations), Stock (Products, Pricing, Stock Level), Reports (View Reports, Site Groups), and Configuration (Discounts, Promotions). The main content area is titled 'Employee Management' and contains a 'Save' button and a 'Back' link. The form fields are as follows:

- First Name:** Chris (Callout 3)
- Last Name:** Glasshouse (Callout 4)
- TFN:** (Empty field)
- DOB:** 13 / August / 1989 (Callout 5)
- Gender:** Male (Dropdown menu)
- PIN:** 3890 (Callout 6)
- Alias:** Chris (Callout 7)
- External Id:** (Empty field)
- Home Phone:** (Empty field)
- Mobile:** 0411222333 (Callout 8)
- Email:** chris.glasshouse@email.com
- Street Address:** 123 Salon Street
- City:** Peachtown
- State:** QLD
- Postcode:** 4006
- Country:** Australia
- Biography:** Chris is an experienced beauty therapist and has worked in the industry for over 7 years. He specialises in gel nails, facials and microdermabrasion. (Callout 9)
- Photo:** (Empty field with a 'Browse...' button and a 'Delete' button) (Callout 10)

11

Select the date that the employee will commence employment.

12

Select the site that the employee will be based at from the drop-down menu. If required, you can add the employee to another site later.

13

Select the relevant security level.

14

Select the relevant service level.

15

Select the employee's booking interval, if applicable.

16

Select the employee's commission schedule, if applicable.

17

Tick the **online booking** box if you want this employee to be allocated online bookings.

18

Tick the **send confirmations** box if you want clients to receive a confirmation message when they have an appointment booked with this employee.

Enterprise LIVE

Welcome Administrator
Your control region is global

Logout

Administration

- Access
- Roles

Employees

- Management
- Locations

Stock

- Products
- Pricing
- Stock Level

Reports

- View Reports
- Site Groups

Configuration

- Discounts
- Promotions

Mobile: 0411222333

Email: chris.glasshouse@email.com

Street Address: 123 Salon Street

City: Peachtown

State: QLD

Postcode: 4006

Country: Australia

Biography: Chris is an experienced beauty therapist and has worked in the industry for over 7 years. He specialises in gel nails, facials and microdermabrasion.

Photo:

Location

This employee will be active from the date: 18 May 2016

This employee will be based at the site: Carindale

and will have Security Level: Employee

and will have Service Level: Therapist

and will have Booking Interval: 15

and will have Commission Schedule: <none>

☒ Online Booking

☒ Send Confirmations


19

Click **save**.

http://localhost/EnterpriseLive/Main.aspx Enterprise Live

SHORTCUTS
SMARTER BUSINESS TECHNOLOGY

Welcome Administrator
Your control region is global

Logout  Enterprise LIVE

Administration

- Access
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Mobile 0411222333

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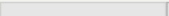

State QLD

Postcode 4006

Country Australia

Biography

Chris is an experienced beauty therapist and has worked in the industry for over 7 years. He specialises in gel nails, facials and microdermabrasion.

Photo  [Browse...](#)  Delete

Location

This employee will be active from the date: 18 May 2016

This employee will be based at the site: Carindale

and will have Security Level: Employee



and will have Service Level: Therapist

and will have Booking Interval: 15

and will have Commission Schedule: <none>

☒ Online Booking

☒ **19** firmations

 Save  Back

EDITING AN EMPLOYEE'S DETAILS

1

Click on the **management** button in the **employees** menu.

2

Enter your desired search criteria and click **search**.

A

Some employee details (e.g. alias, mobile number, email) can be edited directly through the employee list. After making changes to details in the employee list, click the **save** button to finish editing.

3

Click on the **view employee details** icon (book icon to the left of the employee's name). This will allow you to view and edit further details.

Enterprise LIVE

Welcome Administrator
Your control region is global

Logout

Administration

Access

Roles

Employees

Management

Locations

Stock

Products

Pricing

Stock Level

Reports

View Reports

Site Groups

Configuration

Discounts

Promotions

Employee Management

Region: QLD

Site: Carindale

Show Inactive

First Name

Last Name

Alias

Search

Reset

Display 200 Locations

Create New Employee

Save

Refresh

Searched for employees under QLD region and site: Carindale.

First Name	Last Name	Alias	Phone	Mobile	Email	Goal	Active in one site or more
Chris	Glasshouse	Chris		0411222333	chris.glasshouse@email.com		<input checked="" type="checkbox"/>
Crystal	Madden	Crystal M		0404444004		0	<input checked="" type="checkbox"/>
Emma	Collins	Emma C			emmacollins26634@email.com	0	<input checked="" type="checkbox"/>
HEAD OFFICE	HEAD OFFICE	HEAD OFFICE		0400333000		0	<input checked="" type="checkbox"/>
Jessyka	Humphrey	Jessyka			j.humphrey193734@email.com	0	<input checked="" type="checkbox"/>
Josephine	Lane	Josephine		0404000444		0	<input checked="" type="checkbox"/>
Kathy	Mosby	Kathy M		0400000111			<input checked="" type="checkbox"/>
Kristina	Andrews	Kristina				0	<input checked="" type="checkbox"/>
Lia	Davids	Lia		0411222222			<input checked="" type="checkbox"/>
Mandy	Brown	Mandy			mandyb445@email.com	0	<input checked="" type="checkbox"/>
Melinda	Melinda	Melinda				0	<input checked="" type="checkbox"/>
Rowan	Patterson	Rowan		0401000111	rowan.j.patts@email.com	0	<input checked="" type="checkbox"/>
Sally	Chalmers	Sally		0499000999		0	<input checked="" type="checkbox"/>

4

Edit the employee's details as required.

5

Click **save** to finish editing.

Enterprise LIVE

Welcome Administrator
Your control region is Global

Logout

Administration

Employee Management

Save Back

First Name: Chris

Last Name: Glasshouse

TFN:

DOB: 13 August 1989

Gender: Male

PIN: 3890

Alias: Chris

External Id:

Home Phone:

Mobile: 0411222333

Email: chris.glasshouse@email.com

Street Address: 123 Salon Street

City: Peachtown

State: QLD

Postcode: 4006

Country: Australia

Biography: Chris is an experienced beauty therapist and has worked in the industry for over 7 years. He specialises in gel nails, facials and microdermabrasion.

Photo: Browse... Delete

Save Back



it suits you

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