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Last updated 19 June 2017

By Erin Lewis

Product: Enterprise Live

Software version no: 8.0.20.1

Document version no: 1.0

Country: Australia

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ABOUT THIS DOCUMENT

The promotions feature gives you the freedom to set up your own specials and other client benefits. You can create anything from a 'buy 1 get 1 free' promotion, to even the most detailed and complex promotions.

The promotions feature allows you to determine what makes a client eligible for a promotion, based on which items they purchase or how much they spend. You can also choose to apply the promotion to the entire sale or to specific products/services.

There are 3 main steps in the promotion setup process:

- 1. Specify general promotion details:** What is the promotion? When is it available? Who is it available to? How many times can the promotion be used?
- 2. Specify eligibility criteria:** What does the client need to buy (or how much do they need to spend) to become eligible for the promotion?
- 3. Specify promotion benefits:** What benefits will the client receive when they participate in the promotion?

Promotions are created via a 'promotions wizard' which will guide you step by step through the process of setting up a promotion.

PROMOTIONS

CREATING A NEW PROMOTION

ADDING GENERAL PROGRAM DETAILS

- 1 Click on the **promotions** button in the **configuration** menu.
- 2 Select the region you wish to create a promotion for.
- 3 Click **create new promotion**. The promotion setup screen will appear.

The screenshot shows the Enterprise LIVE interface. The left navigation menu is expanded to 'Configuration', where the 'Promotions' option is highlighted with a blue circle containing the number '1'. The main content area is titled 'Promotions' and features a search bar with 'Region' set to 'Bondi' (circled with a blue '2') and a 'Name' field. Below the search bar are buttons for 'Search', 'Reset', and 'Display 10 Promotions', along with a 'Create New Promotion' button (circled with a blue '3'). A status bar indicates 'Searched for promotions under the Bondi region with name All'. A table below displays a list of promotions:

Name	Max Sales Per Site	Start Date	Finish Date	Region	Status	Revert to Parent
Coffee Card				Australia	In Progress	<input type="checkbox"/>
Gift Card Promo				Australia	In Progress	<input type="checkbox"/>
Membership Promo 3				Australia	In Progress	<input type="checkbox"/>
PAYG Waxing x4				Australia	In Progress	<input type="checkbox"/>
Staff Promotion				Australia	In Progress	<input type="checkbox"/>
Test Membership Promo				Australia	In Progress	<input type="checkbox"/>

- 4 Enter the name of the promotion into the **promotion name** field.
- 5 **Optional:** Enter a description.
- 6 If your clients will need to present a coupon for this promotion, tick the **require coupon** box and enter the coupon barcode into the **barcode** field.
- 7 If you want this promotion to be available to all your clients, select **<general promotion>** from the drop-down menu.
- 8 If you want this promotion to be exclusive to members of a club, choose **related club**, then select the relevant club from the drop-down menu.
- 9 If you want this promotion to be exclusive to members of a membership or loyalty program, choose **related program**, then select the relevant program from the drop-down menu.

The screenshot shows the 'Promotion Details - New Promotion' form in the Enterprise LIVE system. The form is divided into several sections:

- Administration:** Includes a navigation menu on the left with options like Access, Roles, Employees, Management, Locations, Stock, Products, Pricing, Stock Level, Reports, View Reports, Site Groups, Configuration, Discounts, and Promotions.
- Promotion Details:**
 - Promotion Status:** Pending
 - Active:**
 - Promotion Name:** 20% off Spray Tans (marked with a blue circle 4)
 - Region Name:** Australia
 - Description:** Clients receive 20% off all spray tans. (marked with a blue circle 5)
 - Require Coupon:** Barcode (marked with a blue circle 6)
 - Related Club/Program:** Club < General Promotion > (marked with a blue circle 7)
 - Client Points Earned / \$100 (over-rides club points):** (marked with a blue circle 9)
 - Days Applicable After Membership:** No Limit
 - Maximum Sale Count (per site):** No Limit
- Valid Days:** Available For All Dates
- Valid Hours:** Available At All Times
- Week of Month:** Available Every Week
- Discounted Amount counts towards...:**

	Products	Services	Sundry
Employee Dollars	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee Points	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Income	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

At the bottom right, there are four navigation buttons: Previous, Next, Done, and Cancel.

10

If the promotion is club-specific, you can change the number of client points a client will earn for every \$100 they spend. If you wish to change it, enter the number of points clients will earn per \$100 spent. This will override the points value specified in the club setup screen.

!

If your promotion is linked to a club, clients will still receive their normal club discounts on top of the promotion.

11

If you want to make the promotion exclusive to new members of the club (i.e. a “welcome” promotion), enter the number of days after signing up that a new member will be eligible for the promotion. Skip this step if the promotion is not club-specific.

12

If you only want this promotion to be applied to a limited number of sales per site, enter the number into the **maximum sale count** field.

Enterprise LIVE

Welcome Administrator
Your control region is global

Administration

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

Promotion Details - New Promotion

Specify the promotion name, description, valid dates and times...

Promotion Status: Pending

Valid Days: Available For All Dates

Active:

Promotion Name: 20% off Spray Tans

Valid Hours: Available At All Times

Region Name: Australia

Week of Month: Available Every Week

Description: Clients receive 20% off all spray tans.

Discounted Amount counts towards...

	Products	Services	Sundry
Employee Dollars	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee Points	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Income	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Require Coupon: Barcode

Related Club: Club < General Promotion >

Related Program: < General Promotion >

Client Points Earned / \$100 (over-rides club points): 10

Days Applicable After Membership: No Limit 11

Maximum Sale Count (per site): No Limit 12

Previous Next Done Cancel

13

Select the valid dates and times from the drop-down menus. If you want the promotion to be available at all times, simply leave this section as is.

14

Tick the boxes in areas where you want employees to receive credit prior to the promotional discount.

15

Click **next**. The promotion eligibility screen will appear.

Enterprise LIVE

Welcome Administrator
Your control region is global

Administration

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

Promotion Details - New Promotion

Specify the promotion name, description, valid dates and times...

Promotion Status Pending

Active

Promotion Name
20% off Spray Tans

Region Name
Australia

Description
Clients receive 20% off all spray tans.

Require Coupon Barcode

Related Club Club < General Promotion >

Related Program

Client Points Earned / \$100 (over-rides club points)

Days Applicable After Membership No Limit

Maximum Sale Count (per site) No Limit

Valid Days Available For All Dates

Valid Hours Available At All Times

Week of Month Available Every Week

Discounted Amount counts towards...

	Products	Services	Sundry
Employee Dollars	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee Points	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Income	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Previous Next Done Cancel

SPECIFYING ELIGIBILITY CRITERIA

1

Select the type of eligibility this promotion is based on. This is the condition the client must meet in order to receive the promotion.

Specific items in the sale:

The client will be eligible if they buy a specific number of certain items.

Total spend of specific items in the sale:

The client will be eligible if they spend a certain amount on specific items.

Total spend of the sale:

The client will be eligible if they spend a certain total amount.

Purchased specific items over time:

The client will be eligible if they buy a specific number of certain items. These purchases need not be made at once, and can accumulate over time.

Total spend on specific items over time:

The client will be eligible if they spend a certain amount on specific items. These purchases need not be made at once, and can accumulate over time.

The screenshot shows the 'Promotion Eligibility - 20% off Spray Tans' configuration page in the Enterprise LIVE system. The page is titled 'Welcome Administrator' and 'Your control region is global'. The left sidebar contains navigation options: Administration, Access, Roles, Employees, Management, Locations, Stock, Products, Pricing, Stock Level, Reports, View Reports, Site Groups, Configuration, Discounts, and Promotions. The main content area is titled 'Promotion Eligibility - 20% off Spray Tans'. It features a dropdown menu for 'Eligibility for this Promotion is Based On...' with 'Specific Items in the Sale' selected and highlighted by a red circle with the number '1'. Below the dropdown is a table with columns for 'All of', 'And any', and 'And any' (repeated). The table is currently empty. At the bottom right, there are four buttons: 'Previous', 'Next', 'Done', and 'Cancel'.

2

You now need to select the products/services/sundry items that the client must purchase in order to be eligible for the promotion (if applicable). Double click on categories to view/hide the contents.

A

The numbers you enter in the **all** and **any** columns define how many of each item the client must purchase. You can use combinations of the **any** and **all** columns to create complex promotions.

3

If the client must purchase a specific combination of items (e.g. the client must purchase both a spray tan and a leg wax), enter the number of each item the client must purchase in the **all** column.

4

If the client must buy specific items, but they will be eligible as long as they buy any of these items (e.g. the client must purchase a spray tan, massage, or a leg wax), click inside the first **any** column next to each item and enter the amount the client must purchase.

The screenshot shows the 'Promotion Eligibility - 20% off Spray Tans' configuration screen in the Enterprise LIVE software. The interface includes a navigation menu on the left with categories like Administration, Employees, Stock, Reports, and Configuration. The main content area features a table for selecting items and their quantities. The table has columns for 'Item Name' and various logical operators: 'All of', 'And any', 'And any', 'And', 'And any', 'And any', and 'And any'. The 'All of' column is highlighted with a callout '2'. The first 'And any' column is highlighted with a callout '3'. The second 'And any' column is highlighted with a callout '4'. The 'And' column is highlighted with a callout 'A'. The 'Spray Tans' category is expanded, showing 'Express Spray Tan' and 'Spray Tan' items. The 'Spray Tan' item has a quantity of '1' entered in the 'All of' column. The interface also includes a 'Minimum Total Spend' field and a 'Promo Limit Per Sale' field set to '1'. At the bottom right, there are navigation buttons: 'Previous', 'Next', 'Done', and 'Cancel'.

B

You can apply the promotion to all/any items within a category by entering a value in the category row.

5

If you enter numbers into different **any** columns, then the client must purchase an item (or the specified number of items) from each column. This method can be useful for setting up a promotion where the client must purchase a number of items from various categories.

6

If your promotion is based on one of the 'total spend' options, enter the minimum amount the client must spend to be eligible for the promotion.

7

If you wish to restrict the number of times the promotion can be applied to a particular transaction, enter the limit in the **promo limit per sale** field. Promotions based on 'total spend' can only be applied once per transaction.

8

Click **next**. The promotion benefit screen will appear.

The screenshot shows the 'Promotion Eligibility - 20% off Spray Tans' configuration screen in the Enterprise LIVE system. The interface includes a sidebar menu on the left with categories like Administration, Employees, Stock, Reports, and Configuration. The main area contains configuration options for the promotion, including 'Eligibility for this Promotion is Based On...' (set to 'Specific Items in the Sale'), 'Minimum Total Spend' (set to 1), and 'Promo Limit Per Sale' (set to 1). A table lists various items for selection, with a callout '5' pointing to the 'Any' columns. A callout '6' points to the 'Minimum Total Spend' field, and a callout '7' points to the 'Promo Limit Per Sale' field. A callout 'B' is placed in the table area. At the bottom right, there are navigation buttons: 'Previous', 'Next', 'Done', and 'Cancel', with a callout '8' pointing to the 'Next' button.

SPECIFYING PROMOTION BENEFITS

1

You now need to specify the benefits that are applied to a client's transaction when they are eligible for the promotion. Select what the promotion benefit will be applied to from the drop-down list:

Items purchased under this promotion:

The promotion's benefit will apply to the same items purchased by the client that made them eligible for this promotion.

The entire sale: The promotion's benefit will apply to the client's entire transaction (total price).

Specified items: The promotion's benefit will apply to certain items that you will specify on this screen.

2

If you chose the **specified items** option, continue to step 3. If you chose one of the other two options, skip to step 5.

The screenshot shows the 'Promotion Benefit - 20% off Spray Tans' configuration page. The left sidebar contains a navigation menu with categories: Administration (Access, Roles), Employees, Management (Locations), Stock (Products, Pricing, Stock Level), Reports (View Reports, Site Groups), and Configuration (Discounts, Promotions). The main content area has a title bar 'Promotion Benefit - 20% off Spray Tans'. Below it, there are two dropdown menus: 'This Promotion Benefit Applies To...' and 'Benefit Given'. The 'Benefit Given' dropdown is set to 'Percentage Reduction'. Below these is a text input field 'Enter % Off' with the value '0.00'. A table is displayed with columns 'Maximum', 'Price', and 'Bonus Points'. The table content is as follows:

	Maximum	Price	Bonus Points
Business			
All Products			
All Services			
All Sundry			

At the bottom right, there are four navigation buttons: 'Previous' (left arrow), 'Next' (right arrow), 'Done' (checkmark), and 'Cancel' (red X).

3

If you only want clients to be able to receive an item of equal or lesser value than their original purchase, tick the **limit to equal or lesser value than eligibility** box.

4

If you want Shortcuts to notify you when a client is eligible for a promotion, tick **alert when benefit is available**.

5

Select the benefit that will be applied to the items from the **benefit given** drop-down list:

Percentage reduction:

Apply a discount percentage.

Reduction by specified amount:

Apply a fixed amount discount.

Fixed price per item:

Specify a fixed price for the discounted item(s).

Cost price:

Sell the discounted item(s) to the client at cost price.

Gross margin % reduction:

Apply a discount by a percentage of the gross profit margin. This option only applies to products.

The screenshot shows the 'Promotion Benefit - 20% off Spray Tans' configuration page in the Shortcuts Enterprise LIVE system. The left-hand navigation menu is expanded to show the 'Promotions' option under the 'Configuration' section. The main content area is titled 'Promotion Benefit - 20% off Spray Tans' and contains the following elements:

- This Promotion Benefit Applies To...**: A dropdown menu labeled 'Specified Items' (3) with a list of items including 'Business', 'All Products', 'All Services', and 'All Sundry'.
- Benefit Given**: A dropdown menu (5) with options: 'Percentage Reduction', 'Reduction By Specified Amount', 'Fixed Price Per Item', 'Cost Price', and 'Gross Margin Percentage Reduction'.
- Limit to Equal or Lesser Value than Eligibility**: A checkbox (3) that is currently unchecked.
- Alert When Benefit is Available**: A checkbox (4) that is currently checked.

At the bottom right of the interface, there are four navigation buttons: 'Previous' (left arrow), 'Next' (right arrow), 'Done' (checkmark), and 'Cancel' (red X).

6

If you chose **percentage reduction, reduction by specified amount, or gross margin % reduction** in step 5, enter the desired discount into this field.

7

If you chose **the entire sale** in step 1, skip to step 10. Otherwise, continue to step 8.

8

Enter a value of 1 or more in the **maximum** column for each item you want to include as a promotional benefit. This is the maximum quantity a client can purchase at the promotional price in one transaction.

9

If you selected **fixed price per item** in step 5, click to select the **price** field beside the relevant item(s) and enter the desired price.

C

If this promotion is linked to a club, you can award clients extra points for an item by entering a value in the **bonus points** field.

10

Click **done** to finish creating your promotion.

Enterprise LIVE

Welcome Administrator
Your control region is global

Logout

Promotion Benefit - 20% off Spray Tans

This Promotion Benefit Applies To...
Items purchased under this promotion

Benefit Given
Percentage Reduction

Enter % Off 20.00

Description	Maximum	Price	Bonus Points
Business	8	9	C
All Services			
Spray Tans	1		

Previous Next Done Cancel

EDITING AND DEACTIVATING PROMOTIONS

1

Click on the **promotions** button in the **configuration** menu.

2

To search for a promotion, enter your desired search criteria, then click **search**.

A

You can search via region by select the relevant region from the drop-down menu.

B

You can search by entering the promotion name into the **name** field.

C

You can tick the **show inactive** and **show complete** boxes to include inactive and complete (past) promotions in the search.

D

You can select the number of promotions you want to display.

E

You can click on the **reset** button to clear the selected criteria.

3

Once you have found the relevant promotion, click on the name.

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

Promotions

Region: Australia Show Complete Show Inactive

Name:

Search Display 10 Promotions

Searched for promotions under the Australia region with name All

Name	Max Sales Per Site	Start Date	Finish Date	Region	Status	Revert to Parent
50% off Spray Tans				Australia	In Progress	<input type="checkbox"/>
Gift Card Promo				Australia	In Progress	<input type="checkbox"/>
Membership Promo 3				Australia	In Progress	<input type="checkbox"/>
PAYG Waxing x4				Australia	In Progress	<input type="checkbox"/>
Staff Promotion				Australia	In Progress	<input type="checkbox"/>
Test Membership Promo				Australia	In Progress	<input type="checkbox"/>
20% off Spray Tans	100	26/05/2016	25/07/2016	Australia	Pending	<input type="checkbox"/>
Coffee Card		1/06/2016	1/11/2016	Australia	Pending	<input type="checkbox"/>
Gift Card 50 for 40				Australia	Inactive	<input type="checkbox"/>
Membership Promo 2				Australia	Inactive	<input type="checkbox"/>

4

If you wish to deactivate the promotion, untick the **active** box.

5

To edit the promotion, make your desired changes in the relevant areas. Use the **next/previous** buttons to navigate between different promotion screens.

6

Click **done** when you are finished making changes.

The screenshot shows the 'Promotion Details - 50% off Spray Tans' screen in the Enterprise LIVE system. The interface is divided into a left-hand navigation menu and a main content area. The navigation menu includes sections for Administration, Employees, Stock, Reports, and Configuration, with sub-items like Access, Roles, Management, Locations, Products, Pricing, Stock Level, View Reports, Site Groups, Discounts, and Promotions. The main content area contains a form for editing the promotion. At the top of the form, it says 'Specify the promotion name, description, valid dates and times...'. The form fields include: Promotion Status (In Progress), Valid Days (Available For All Dates), Active checkbox (checked, with callout 4), Promotion Name (50% off Spray Tans), Valid Hours (Available At All Times), Region Name (Australia), Week of Month (Available Every Week, with callout 5), Description (with callout 5), Discounted Amount counts towards... (a table with checkboxes for Employee Dollars, Employee Points, Business Income, Products, Services, and Sundry), Require Coupon (Barcode), Related Club (Club < General Promotion >), Client Points Earned / \$100 (over-rides club points), Days Applicable After Membership (No Limit), and Maximum Sale Count (per site) (No Limit). At the bottom right, there is a control bar with four buttons: Previous, Next, Done (with callout 6), and Cancel.

REVERTING PROMOTION DETAILS TO PARENT REGION

If a promotion currently overrides the parent region's promotion and you no longer want it to differ, you can change the promotion back so that it matches the parent region.

- 1 Click on the **promotions** button in the **configuration** menu.
- 2 To search for a promotion, enter your desired search criteria, then click **search**.
- 3 Once you have found the relevant promotion, tick the **revert to parent** box.
- 4 Click **save**.

The screenshot shows the Enterprise LIVE interface for managing promotions. The sidebar menu on the left includes sections for Administration, Employees, Stock, Reports, and Configuration. The 'Promotions' option is selected under Configuration. The main content area shows a search form for the 'Bondi' region. Below the search form is a table of promotions with columns for Name, Max Sales Per Site, Start Date, Finish Date, Region, Status, and Revert to Parent. The 'Gift Card Promo' row is highlighted, and its 'Revert to Parent' checkbox is checked. The 'Save' button is also highlighted.

Name	Max Sales Per Site	Start Date	Finish Date	Region	Status	Revert to Parent
50% off Spray Tans				Australia	In Progress	<input type="checkbox"/>
Gift Card Promo			30/06/2016	Bondi	In Progress	<input checked="" type="checkbox"/>
Membership Promo 3				Australia	In Progress	<input type="checkbox"/>
PAYG Waxing x4				Australia	In Progress	<input type="checkbox"/>
Staff Promotion				Australia	In Progress	<input type="checkbox"/>
Test Membership Promo				Australia	In Progress	<input type="checkbox"/>
20% off Spray Tans	100	26/05/2016	25/07/2016	Australia	Pending	<input type="checkbox"/>
Coffee Card		1/06/2016	1/11/2016	Australia	Pending	<input type="checkbox"/>



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AUSTRALIA AND ASIA

166 Knapp Street
Fortitude Valley
QLD 4006
Tel: +61 7 3834 3232

www.shortcuts.com.au

UK AND EUROPE

Dalton House
Dane Road, Sale
Cheshire M33 7AR
Tel: +44 161 972 4900

www.shortcuts.co.uk

NORTH AMERICA

7711 Center Avenue
Suite 650
Huntington Beach CA 92647
Tel: +1 714 622 6682

www.shortcuts.net

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