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CLINIC

ENTERPRISE MANAGER

CONFIGURATION
CONTRAINDICATIONS

HOME &
MOBILE

BEAUTY


SHORTCUTS
SMARTER BUSINESS TECHNOLOGY

it suits you

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By Erin Lewis

Product: Enterprise Manager

Software version no: 8.0.20

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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.

CONTRAINDICATIONS

ADDING A CONTRAINDICATION

A contraindication is a factor that increases the risks involved in using a certain product or having a particular service done. Some common examples of contraindications include allergies, pregnancy or the failure of a skin patch test. The contraindications feature allows you to set up products and services so that Shortcuts will prompt the user to check contraindications before bookings or purchases can be made.

1 Click on the **config management** menu.

2 Double click to expand **configuration**.

3 Double click on **contraindications**.

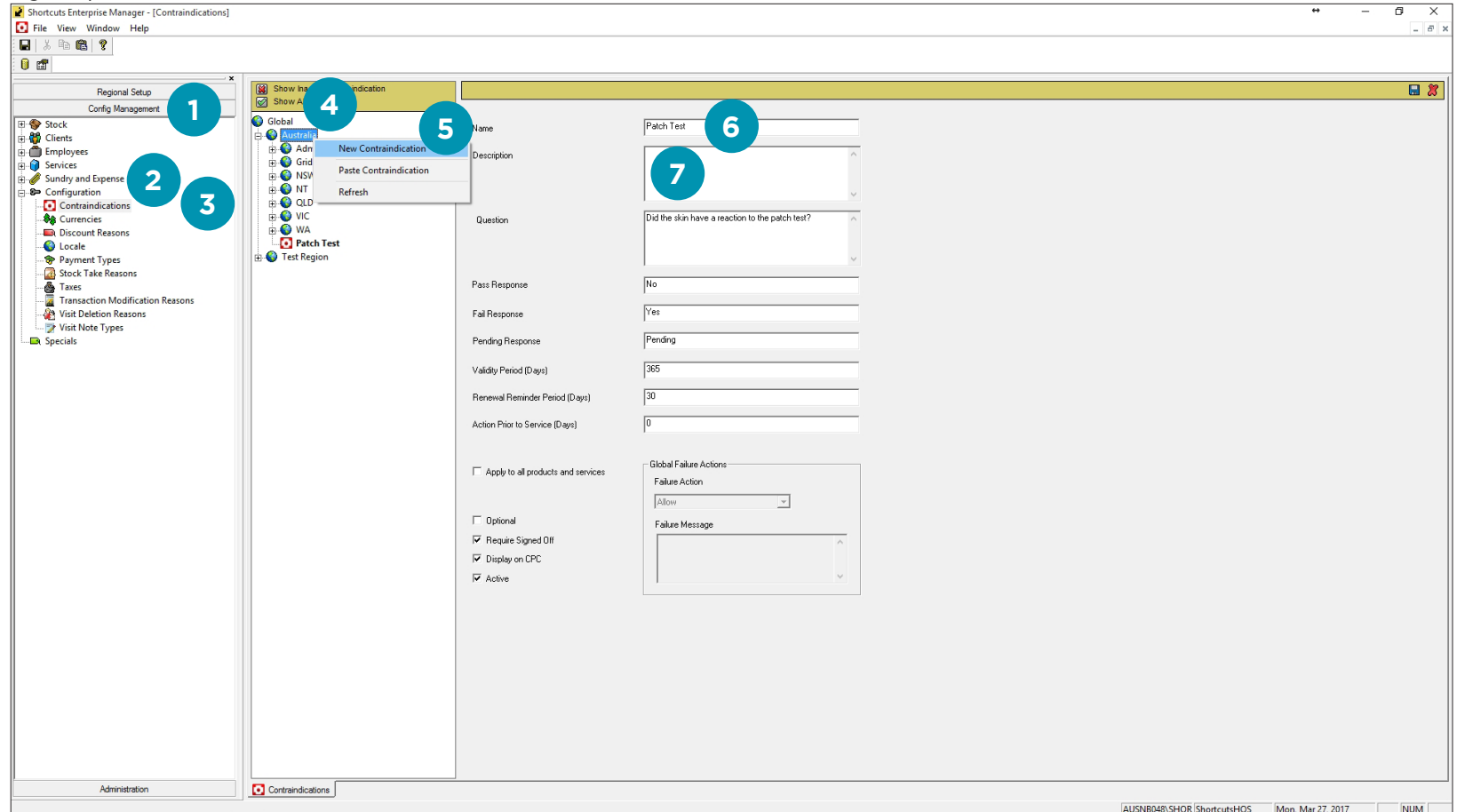
! To maintain consistency it is recommended that contraindications are configured at the highest regional level possible. For example, if a contraindication is consistent across the country, configure it at country level.

4 Right click on the region you want to add a contraindication for.

5 Select **new contraindication**.

6 Enter the name of the contraindication.

7 **Optional:** Enter a description.



8

Enter the question that needs to be answered for this contraindication (e.g. are you pregnant?).

9

In the **pass response** field, enter the response that will allow the client to proceed with the product or service.

10

In the **fail response** field, enter the response that will prevent the client from proceeding with the product or service.

11

In the **pending response** field, enter the response for when a client's answer is still pending. For example, if the client has not yet come in for a patch test, the receptionist would select the 'pending' response.

12

In the **validity period** field, enter the number of days the client's answer stays valid for (i.e. how often their answer needs to be renewed). If this contraindication only needs to be answered once, leave this blank.

Shortcuts Enterprise Manager - [Contraindications]

File View Window Help

Regional Setup
Config Management

- Stock
- Clients
- Employees
- Services
- Sundry and Expense
- Configuration
- Contraindications
- Currencies
- Discount Reasons
- Locale
- Payment Types
- Stock Take Reasons
- Taxes
- Transaction Modification Reasons
- Visit Deletion Reasons
- Visit Note Types
- Specials

Show Inactive Contraindication
Show All Regions

- Global
- Australia
- Admin
- Grid Levels
- NSW
- NT
- QLD
- VIC
- WA
- Patch Test
- Test Region

Name: Patch Test

Description:

Question: Did the skin have a reaction to the patch test? 8

Pass Response: No 9

Fail Response: Yes 10

Pending Response: Pending 11

Validity Period (Days): 365 12

Renewal Reminder Period (Days): 30

Action Prior to Service (Days): 0

Apply to all products and services

Optional

Require Signed Off

Display on CPC

Active

Global Failure Actions

Failure Action: Allow

Failure Message:

Administration | Contraindications | AUSNB048\SHOR | ShortcutsHOS | Mon, Mar 27, 2017 | NUM

13

In the **renewal reminder period** field, enter the number of days in advance you want a reminder to be displayed when a client's contraindication is soon to expire. This will prompt the user to ask the client to renew their contraindication.

14

In the **action prior to service** field, enter the number of days prior to the service this contraindication needs to be completed.

15

If the contraindication applies to all products and services in Shortcuts, tick the **apply to all products and services** box. This will enable the **global failure action** and **global failure message** fields.

!

The **global failure action** and **global failure message** fields are only relevant if this contraindication applies to all products and services. If this contraindication does not apply to all products and services, ignore these fields and go to step 18.

Shortcuts Enterprise Manager - [Contraindications]

File View Window Help

Regional Setup
Config Management

- Stock
- Clients
- Employees
- Services
- Sundry and Expense
- Configuration
 - Contraindications
 - Currencies
 - Discount Reasons
 - Locale
 - Payment Types
 - Stock Take Reasons
 - Taxes
 - Transaction Modification Reasons
 - Visit Deletion Reasons
 - Visit Note Types
- Specials

Show Inactive Contraindication
Show All Regions

- Global
- Australia
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 - Grid Levels
 - NSW
 - NT
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 - WA
 - Patch Test
- Test Region

Name: Patch Test

Description:

Question: Did the skin have a reaction to the patch test?

Pass Response: No

Fail Response: Yes

Pending Response: Pending

Validity Period (Days): 365

Renewal Reminder Period (Days): 30

Action Prior to Service (Days): 0

Apply to all products and services

Global Failure Actions

Failure Action: Allow

Optional

Require Signed Off

Display on CPC

Active

Failure Message:

Administration | Contraindications | AUSNB048\SHOR | ShortcutsHOS | Mon, Mar 27, 2017 | NUM

16

From the **global failure action** drop-down list, choose what Shortcuts will do if the client fails the contraindication.

Allow: Shortcuts will allow the client to book the appointment or purchase the product even if they fail the contraindication.

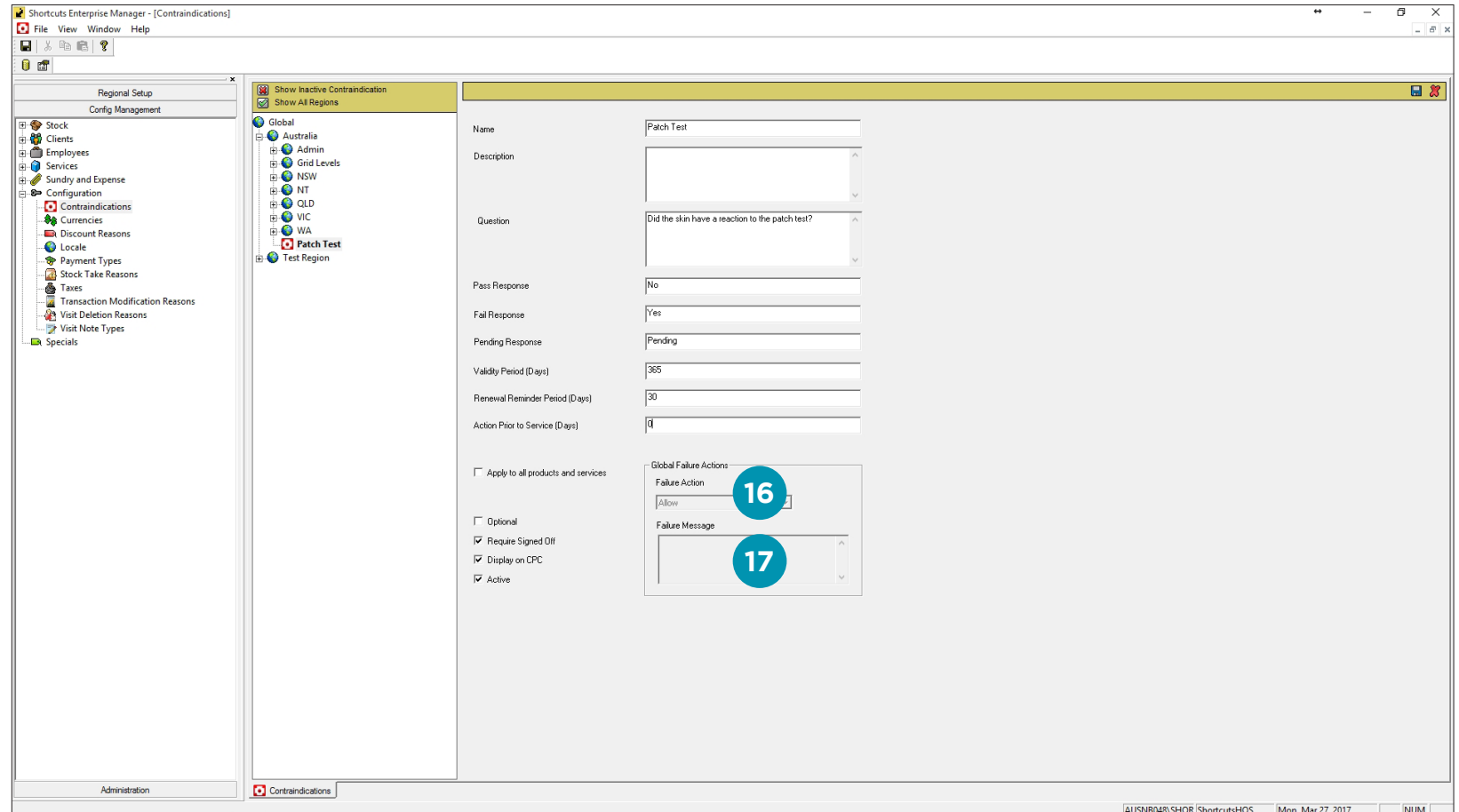
Warn: Shortcuts will display a warning message, but will not prevent the client from booking the appointment or purchasing the product. If you choose this option, you'll also need to enter the **global failure message** in the **global failure message** field.

Waiver: The client must sign a waiver before Shortcuts will allow the appointment or transaction to proceed.

Deny: Shortcuts will not allow the appointment or transaction to proceed.

17

If you selected **warn** as the failure action, enter the warning message into the **global failure message** field.



18

If this contraindication doesn't apply to all clients, tick the **optional** box. Ticking this box will allow the user to bypass the contraindication when it doesn't apply to the client.

19

Tick the **require signed off** box if the client must sign off on the contraindication before they can proceed with their appointment or transaction.

20

Tick **display on CPC** if you want notes for this contraindication to be included on the client's CPC (client profile card).

21

Ensure that the **active** box is ticked.

22

Click **save**.

The screenshot shows the 'Shortcuts Enterprise Manager - [Contraindications]' window. The left sidebar contains a 'Regional Setup' tree with categories like Stock, Clients, Employees, Services, Sundry and Expense, Configuration, Contraindications, Currencies, Discount Reasons, Locale, Payment Types, Stock Take Reasons, Taxes, Transaction Modification Reasons, Visit Deletion Reasons, Visit Note Types, and Specials. The main area is divided into a tree view on the left showing a hierarchy from Global to Australia to Admin to Grid Levels to NSW to NT to QLD to VIC to WA to Patch Test, and a configuration panel on the right. The configuration panel includes fields for Name, Description, Question, Pass Response, Fail Response, Pending Response, Validity Period (Days), Renewal Reminder Period (Days), and Action Prior to Service (Days). It also has checkboxes for 'Apply to all products and services', 'Optional', 'Require Signed Off', 'Display on CPC', and 'Active'. A 'Global Failure Actions' section contains a 'Failure Action' dropdown and a 'Failure Message' text area. The status bar at the bottom shows 'Administration', 'Contraindications', and system information: 'AUSNB048\SHOR | ShortcutsHOS | Mon, Mar 27, 2017 | NUM |'. Callout boxes 18 through 22 are placed over the 'Optional', 'Require Signed Off', 'Display on CPC', 'Active', and 'Save' (implied) areas respectively.

ASSIGNING PRODUCTS/SERVICES TO A CONTRAINDICATION

A contraindication must have products or services assigned to it in order to work. If your contraindication is global (applies to all products and services), then you may skip this section.

- 1 Click on the **config management** menu.
- 2 Double click to expand **configuration**.
- 3 Double click on **contraindications**.
- 4 Right click on the relevant contraindication.
- 5 Select either the **product mapping** or **service mapping** option, as required.
- 6 Select the product(s)/service(s) this contraindication relates to from the **available product/service** list.
- 7 Click on the > arrow to move your selection to the **selected product/service** list on the right.
- 8 Click **OK**.

The screenshot displays the 'Shortcuts Enterprise Manager - [Contraindications]' window. The left-hand navigation pane shows the 'Config Management' tree expanded to 'Contraindications'. A right-click context menu is open over the 'Patch Test' contraindication, with 'Service Mapping' selected. The main panel shows the configuration for 'Patch Test', including fields for Name, Description, Question, and various response options. A modal dialog titled 'Available Service' is open, showing a list of services on the left and a 'Selected Service' list on the right. The 'Available Service' list includes items like 'Hands (including fingers)', 'Hyperhidrosis', and 'Injectable Consult'. The 'Selected Service' list contains '1/2 Head Highlights', 'Full Head Highlights', and 'Full Head Semi'. The dialog has 'OK' and 'Cancel' buttons at the bottom.

SPECIFYING FAILURE ACTIONS AND MESSAGES FOR A CONTRAINDICATION

Once you have assigned products/services to your contraindication, you need to specify the failure actions and messages for the contraindication. Each product/service linked to a contraindication will have an individual failure action. If your contraindication is global (applies to all products and services), then you may skip this section.

- 1 Click on the **config management** menu.
- 2 Double click to expand **configuration**.
- 3 Double click on **contraindications**.
- 4 Double click to expand the relevant contraindication.
- 5 Double click on either the **product** or **service** folder, as required. A list of all products/services assigned to the contraindication will appear.

The screenshot shows the 'Shortcuts Enterprise Manager - [Contraindications]' application window. The interface is divided into several panes. On the left, a 'Regional Setup' pane shows a tree view of configuration categories. A 'Config Management' pane is open, showing a tree view of regions and products/services. A 'Contraindications' pane is also open, showing a list of contraindications. A table on the right displays the failure actions and messages for the selected contraindication.

Service ID	Service Name	Failure Action	Failure Message
126	1/2 Head Highlights	Deny	
124	Full Head Highlights	Deny	
125	Full Head Semi	Deny	

6

For each product/service, click on the **failure action** drop-down list and choose what Shortcuts will do if the client fails the contraindication.

Allow: Shortcuts will allow the client to book the appointment or purchase the product even if they fail the contraindication.

Warn: Shortcuts will display a warning message, but will not prevent the client from booking the appointment or purchasing the product. If you choose this option, you'll also need to enter the warning message in the **failure message** field.

Waiver: The client must sign a waiver before Shortcuts will allow the appointment or transaction to proceed.

Deny: Shortcuts will not allow the appointment or transaction to proceed.

7

Repeat step 6 for each product/service linked to the contraindication.

The screenshot shows the Shortcuts Enterprise Manager interface for managing contraindications. The left pane displays a tree view of regions, including Australia (ACT, NSW, QLD, VIC, WA), New Zealand, and Specials. The right pane shows a table of services with their failure actions and messages. A blue circle with the number 6 highlights the 'Deny' dropdown menu in the 'Failure Action' column for the 'Full Head Semi' service.

Service ID	Service Name	Failure Action	Failure Message
126	1/2 Head Highlights	Deny	
124	Full Head Highlights	Deny	
125	Full Head Semi	Deny	

8 For each item where you selected **warn** as the failure action, enter the appropriate warning message into the **failure message** field.

9 Click **save**.

10 Close tab.

The screenshot shows the 'Shortcuts Enterprise Manager - [Contraindications]' application. On the left is a tree view under 'Regional Setup' with categories like Stock, Clients, Employees, Services, Sundry and Expense, Configuration, Contraindications, Currencies, Discount Reasons, Locale, Payment Types, Stock Take Reasons, Taxes, Transaction Modification Reasons, Visit Deletion Reasons, Visit Note Types, and Specials. The 'Contraindications' category is expanded to show a list of regions: Global, Australia (ACT, Corporate Store group 1, HO - Admin, NSW, QLD, VIC, WA), Patch Test, Product, Service (1/2 Head Highlights, Full Head Highlights, Full Head Semi), and New Zealand. On the right is a table with the following data:

Service ID	Service Name	Failure Action	Failure Message
126	1/2 Head Highlights	Deny	
124	Full Head Highlights	Deny	
125	Full Head Semi	Deny	

At the bottom of the window, there are tabs for 'Administration' and 'Contraindications'. The status bar at the bottom right shows 'AUSNB048.SHOR |PeppermintParkHQ |Mon, Mar 27, 2017 | NUM |'.



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