

MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

CLINIC

SHORTCUTS FUSION

ROSTER

LABOUR FORECASTING

HOME & MOBILE

BEAUTY



SHORTCUTS

SMARTER BUSINESS TECHNOLOGY

it suits you

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By Erin Lewis

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ABOUT THIS DOCUMENT

Labour forecasting allows you to sample data from a previous time frame to help calculate your future roster requirements. This feature displays coloured bar graphs of your predicted appointment demand as well as walk-in demand for each day. These graphs can be used as a visual guide to help you see when the peaks and lulls will occur throughout the day. This enables you to plan out your roster more efficiently, and helps to avoid being overstaffed or understaffed on any given day.

ENABLING LABOUR FORECASTING

Labour forecasting is not switched on by default. You will need to enable labour forecasting in your settings before you can complete a forecast.

- 1 Click on the **setup** menu.
- 2 Click on the **configuration** icon.
- 3 Click on the **general** setup menu.
- 4 Click on the **general** icon.
- 5 Tick the **enable labour forecasting** box.
- 6 Click **done**.

The screenshot shows the 'General Setup' screen of a software application. The interface is divided into several sections:

- Left Sidebar:** A vertical menu with icons for Sales, General (highlighted with a red bar and a '3' callout), Security, Business, General (with a '4' callout), Appointment Book, Stock, Clients, Confirmation, Walkin, Roster, Visual Options, and Region.
- Options Section:** A list of checkboxes with the following items:
 - Print Complete CPC
 - Disable Quick New
 - Display Client Details
 - Display Client Dashboard
 - Remember Client Sort Order
 - Check for Duplicate Clients
 - Prompt for Client Details Every (Days) [120]
 - Check for Missing Details (Mandatory Details will always prompt)
 - Re-Check Existing Details
 - Use Barcodes
 - Swipe-Card Client Selection
 - Filter Services By Employee Capability
 - Allow Stock Levels to be Negative
 - Show Photo on Employee Selector
 - Display Transaction Numbers
 - Multi Site Data Sharing
 - Automatically Assign Visit Notes
 - Enable Labour Forecasting (with a '5' callout)
- Word Processor:** A dropdown menu currently set to '<Microsoft Word>'.
- Attachments Folder:** A dropdown menu.
- Default Club:** A dropdown menu set to '<none>'.
- Default Club ID:** A text input field.
- Club Expiry Warning(Days):** A text input field set to '0'.
- Minimum Entry Height:** A text input field set to '24'.
- Protect logs for (Months):** A text input field set to '6'.
- Business Identifier:** A dropdown menu set to 'Business'.
- Employee Identifier:** A dropdown menu set to 'Employee'.
- Employees Identifier:** A dropdown menu set to 'Employees'.
- Client Identifier:** A dropdown menu set to 'Client'.
- Default Client Gender:** A dropdown menu set to 'Female'.
- Calendar Start Day:** A dropdown menu set to 'Sunday'.
- Printing Preferences:** A table with columns for Report Name, Size, and Source.

	Size	Source
Reports	A4	
CPC	A5	
- Date Range Default:** A dropdown menu with options for 'Calendar' and 'Business'.
- Bottom Right:** An 'Edit Keys' button and a large green 'Done' button with a checkmark and a '6' callout.
- Right Sidebar:** A vertical menu with icons for SHORTCUTS, 12:03 PM Thu, 25 Aug '16, Main, Tools, Stock, Setup (with a '1' callout), Configuration (with a '2' callout), Employees, Employee Groups, Capabilities, Services, Series, and Contraindications. At the bottom, it shows the user's name 'Anna Owner' and a 'Log Off' button.

LABOUR FORECASTING

By completing a forecast you are able to compare sample data from a previous time frame to help calculate your future roster requirements. Coloured bar graphs of your predicted appointment demand and walk-in demand are displayed for each day. These graphs can be used as a visual guide to help you see when the peaks and lulls will occur throughout the day. This enables you to plan out your roster more efficiently, and helps to avoid being overstaffed or understaffed on any given day.

- 1 Click on the **tools** menu.
- 2 Click on the **roster / schedule** icon.
- 3 Click on the **forecast** button.
- 4 Enter your forecast period. This is the date range for which labour will be forecasted.
- ! When entering your forecast period and comparison period, you must enter the end date before the start date.
- 5 Enter your comparison period. This is the time period you wish to sample data from. Labour demand from this time period will be used to calculate future demand.
- 6 **Optional:** Enter the uplift percentage you wish to apply. This is the increase in business activity since the comparison period.
- 7 Click **compute**.

Employee Roster

Search Employee

Select Roster Date

Mark Cells

Appt

Wait

Anna

Lucy

Chris

James

Katie

		8:00 AM	2:00 PM	8:00 AM	5:00 PM	8:00 AM	5:00 PM	2:00 PM	5:00 PM	8:00 AM	5:00 PM
Tue	3/05/2016										
Wed	4/05/2016										
Thu	5/05/2016										
Fri	6/05/2016										
Sat	7/05/2016										
Sun	8/05/2016										
Mon	9/05/2016										
Tue	10/05/2016										
Wed	11/05/2016										
Thu	12/05/2016										
Fri	13/05/2016										
Sat	14/05/2016										
Sun	15/05/2016										
Mon	16/05/2016										
Tue	17/05/2016										
Wed	18/05/2016										
Thu	19/05/2016										
Fri	20/05/2016										
Sat	21/05/2016										
Sun	22/05/2016										
Mon	23/05/2016										
Tue	24/05/2016										
Wed	25/05/2016										
Thu	26/05/2016										
Fri	27/05/2016										

Hours for Week: 15/05/2016 To 21/05/2016

All Staff 165 Hours 0 Minutes

Anna 48 Hours 0 Minutes

Average Sales per Labour Hour

All Staff 8.91 \$/hour

Anna 16.77 \$/hour

3

Forecast

Wrench icon

Commission

SHORTCUTS

12:00 PM

Mon, 16 May '16

Main

Tools 1

Reports

Backup

Marketing

Roster 2

Forecast Labour

Forecast Period

This is the future time period for which labour is to be forecasted.

Select Start Date 4

Select End Date !

Comparison Period

This is the same period last year, or another period to draw labour demand from.

Select Start Date 5

Select End Date

Uplift

Uplift is the percentage increase in business since the comparison period.

Enter the uplift value you wish to apply to the comparison period to calculate the forecast period figures.

Uplift 6 %

7

Compute

8

Done

8 Navigate to the time period for which you have forecasted labour.

A A preview of your forecast will be displayed next to each date on the roster. The 'appt' column shows labour demand for appointments, and the 'wait' column displays labour demand for walk-ins.

9 Click on any employee's shift to view a full-size labour forecast for that day.

10 Choose whether you wish to view appointment demand or walk-in demand.

B The graph will show your forecasted demand for each hour of the day from left to right.

C The height of each bar indicates how busy you are expected to be; the higher the bar, the more clients are expected to visit during this time.

Employee Roster

A
 8

	Mark	Cells	Appt	Wait	Anna	Lucy	Chris	James	Katie
Wed	1/06/2016				8:00 AM - 5:00 PM	1:00 PM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	1:00 PM 8:00 AM - 5:00 PM
Thu	2/06/2016				8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	2:00 PM - 5:00 PM	8:00 AM - 5:00 PM
Fri	3/06/2016				8:00 AM - 5:00 PM	1:00 PM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	1:00 PM 8:00 AM - 5:00 PM
Sat	4/06/2016				8:00 AM - 2:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	2:00 PM - 5:00 PM	8:00 AM - 5:00 PM
Sun	5/06/2016								
Mon	6/06/2016				1:00 PM - 5:00 PM	1:00 PM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	1:00 PM 8:00 AM - 5:00 PM
Tue	7/06/2016				8:00 AM - 2:00 PM	9:00 AM - 12:00 PM	8:00 AM - 5:00 PM	2:00 PM - 5:00 PM	8:00 AM - 5:00 PM
Wed	8/06/2016				8:00 AM - 5:00 PM	1:00 PM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	1:00 PM 8:00 AM - 5:00 PM
Thu	9/06/2016				8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	2:00 PM - 5:00 PM	8:00 AM - 5:00 PM
Fri	10/06/2016				8:00 AM - 5:00 PM	1:00 PM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	1:00 PM 8:00 AM - 5:00 PM
Sat	11/06/2016				8:00 AM - 2:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	2:00 PM - 5:00 PM	8:00 AM - 5:00 PM
Sun	12/06/2016								
Mon	13/06/2016				8:00 AM - 1:00 PM	9:00 AM - 5:00 PM	8:00 AM - 5:00 PM	5:00 PM - 11:00 AM	5:00 PM 2:00 PM - 5:00 PM
Tue	14/06/2016				8:00 AM - 2:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	2:00 PM - 5:00 PM	8:00 AM - 5:00 PM
Wed	15/06/2016				8:00 AM - 5:00 PM	1:00 PM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	1:00 PM 8:00 AM - 5:00 PM
Thu	16/06/2016				8:00 AM - 1:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM		
Fri	17/06/2016				8:00 AM - 5:00 PM	1:00 PM - 5:00 PM	8:00 AM - 5:00 PM		
Sat	18/06/2016				8:00 AM - 2:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM		
Sun	19/06/2016								
Mon	20/06/2016				8:00 AM - 5:00 PM	1:00 PM - 5:00 PM	8:00 AM - 5:00 PM		
Tue	21/06/2016				8:00 AM - 2:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM		
Wed	22/06/2016				8:00 AM - 5:00 PM	1:00 PM - 5:00 PM	8:00 AM - 5:00 PM		
Thu	23/06/2016				8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM		
Fri	24/06/2016				8:00 AM - 5:00 PM	1:00 PM - 5:00 PM	8:00 AM - 5:00 PM		
Sat	25/06/2016				8:00 AM - 2:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM		

Hours for Week: 12/06/2016 To 18/06/2016

All Staff	142 Hours	0 Minutes
Anna	35 Hours	0 Minutes

Average Sales per Labour Hour

All Staff	0.00 \$/hour
Anna	0.00 \$/hour

Shifts for Anna for Thu (09/Jun/16)

Shift 1 of 1 | Shift Type: Normal

Work Times	Break Times
Start: 8 : 00 AM	Start: 12 : 00 AM
Finish: 5 : 00 PM	Finish: 12 : 00 AM
Break: <none>	

Forecast Demand

Appointment Demand

Walk-in Demand

New
Delete
Done
Cancel
Help

D

The colours on the graph represent how effectively your rostered labour will fulfill forecasted labour demands.

Red indicates that forecasted demand heavily exceeds rostered labour. You may wish to increase the number of staff rostered at this time.

Orange indicates that forecasted demand slightly exceeds rostered labour. You may wish to increase the number of staff rostered at this time.

Green indicates that rostered labour will successfully meet forecasted demands.

Blue indicates that rostered labour exceeds forecasted demands. You may wish to reduce the number of staff rostered at this time.

11

Once you are finished viewing your labour forecast for a particular day, click **done**. At this point, you may wish to make changes to your roster.

Employee Roster

Search Employee: Select Roster Date:

	Mark Cells	Appt	Wait	Anna	Lucy	Chris	James	Katie
Wed	1/06/2016			8:00 AM - 5:00 PM	1:00 PM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	1:00 PM 8:00 AM - 5:00 PM
Thu	2/06/2016			8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	2:00 PM - 5:00 PM	8:00 AM - 5:00 PM
Fri	3/06/2016			8:00 AM - 5:00 PM	1:00 PM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	1:00 PM 8:00 AM - 5:00 PM
Sat	4/06/2016			8:00 AM - 2:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	2:00 PM - 5:00 PM	8:00 AM - 5:00 PM
Sun	5/06/2016							
Mon	6/06/2016			1:00 PM - 5:00 PM	1:00 PM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	1:00 PM 8:00 AM - 5:00 PM
Tue	7/06/2016			8:00 AM - 2:00 PM	9:00 AM - 12:00 PM	8:00 AM - 5:00 PM	2:00 PM - 5:00 PM	8:00 AM - 5:00 PM
Wed	8/06/2016			8:00 AM - 5:00 PM	1:00 PM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	1:00 PM 8:00 AM - 5:00 PM
Thu	9/06/2016			8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	2:00 PM - 5:00 PM	8:00 AM - 5:00 PM
Fri	10/06/2016			8:00 AM - 5:00 PM	1:00 PM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	1:00 PM 8:00 AM - 5:00 PM
Sat	11/06/2016			8:00 AM - 2:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	2:00 PM - 5:00 PM	8:00 AM - 5:00 PM
Sun	12/06/2016							
Mon	13/06/2016			8:00 AM - 1:00 PM	9:00 AM - 5:00 PM	8:00 AM - 5:00 PM	11:00 AM - 5:00 PM	2:00 PM - 5:00 PM
Tue	14/06/2016			8:00 AM - 2:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	2:00 PM - 5:00 PM	8:00 AM - 5:00 PM
Wed	15/06/2016			8:00 AM - 5:00 PM	1:00 PM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	1:00 PM 8:00 AM - 5:00 PM
Thu	16/06/2016			8:00 AM - 5:00 PM	1:00 PM - 5:00 PM	8:00 AM - 5:00 PM		8:00 AM - 5:00 PM
Fri	17/06/2016			8:00 AM - 5:00 PM	1:00 PM - 5:00 PM	8:00 AM - 5:00 PM		8:00 AM - 5:00 PM
Sat	18/06/2016			8:00 AM - 2:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM		8:00 AM - 5:00 PM
Sun	19/06/2016							
Mon	20/06/2016			8:00 AM - 5:00 PM	1:00 PM - 5:00 PM	8:00 AM - 5:00 PM		8:00 AM - 5:00 PM
Tue	21/06/2016			8:00 AM - 2:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM		8:00 AM - 5:00 PM
Wed	22/06/2016			8:00 AM - 5:00 PM	1:00 PM - 5:00 PM	8:00 AM - 5:00 PM		8:00 AM - 5:00 PM
Thu	23/06/2016			8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM		8:00 AM - 5:00 PM
Fri	24/06/2016			8:00 AM - 5:00 PM	1:00 PM - 5:00 PM	8:00 AM - 5:00 PM		8:00 AM - 5:00 PM
Sat	25/06/2016			8:00 AM - 2:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM		8:00 AM - 5:00 PM

Hours for Week: 12/06/2016 To 18/06/2016

All Staff	142	Hours	0	Minutes
Anna	35	Hours	0	Minutes

Average Sales per Labour Hour

All Staff	0.00	\$/hour
Anna	0.00	\$/hour

Shifts for Anna for Thu (09/Jun/16)

Shift 1 of 1 Shift Type Normal

Work Times: Start 8:00 AM, Finish 5:00 PM

Break Times: Start 12:00 AM, Finish 12:00 AM, Break <none>

Forecast Demand Time of Day: 8 (Red), 9 (Orange), 10 (Red), 11 (Green), 12 (Blue), 1 (Blue), 2 (Green), 3 (Orange), 4 (Orange)

Buttons: New, Delete, Done (11), Cancel, Help

SETTING UP WAIT TIMES FOR WALK-IN DEMAND

If you are using the Walk-in Manager, you can specify an optimal wait time and a maximum wait time to be taken into account when forecasting labour demands for walk-in visits.

- 1 Click on the **setup** menu.
 - 2 Click on the **configuration** icon.
 - 3 Click on the **general** setup menu.
 - 4 Click on the **walkin** icon.
 - 5 Enter the optimal wait time (in minutes). This is your ideal wait time for walk-in clients.
 - 6 Enter the maximum wait time (in minutes). This is your desired maximum wait time for walk-in clients.
 - 7 Click **done**.
- A** These values will be used to calculate labour demand for walk-ins. This means that your labour forecasts will be optimised to suit your desired client wait times.

The screenshot displays the 'Walkin Manager' configuration screen. The interface is divided into several sections:

- Operator Input Options:** Includes radio buttons for 'Freehand', 'Keyboard', and 'Automatic Number'. 'Keyboard' is selected.
- General Options:** Includes checkboxes for 'Print Visit Ticket', 'Print In Service Ticket', 'Use Opening Hours', 'Auto Expand Visits In Service', 'Show Groups', 'Show Employee', 'Return to WIM after Checkout', 'Print Visit Identifier on POS Receipt', 'Show Estimated Wait Time', 'Prompt for Visit Tag', and 'Service breaks are bookable'. 'Use Opening Hours', 'Auto Expand Visits In Service', 'Show Groups', 'Show Employee', 'Return to WIM after Checkout', 'Print Visit Identifier on POS Receipt', and 'Service breaks are bookable' are checked.
- Wait Times for Demand Forecasting:** Features two input fields: 'Optimal Wait' (set to 10) and 'Maximum Wait' (set to 20). A green circle with the letter 'A' is placed over the 'Optimal Wait' field.
- Group Input Options:** Includes radio buttons for 'Freehand' and 'Keyboard'. 'Keyboard' is selected.
- Client Data Focus:** Includes radio buttons for 'Predominantly Do Not Collect' and 'Predominantly Collect'. 'Predominantly Do Not Collect' is selected.
- Display Production Value:** Includes radio buttons for 'None', 'Clients per Hour', and 'Service Revenue per Hour'. 'None' is selected.
- Employee Selection Mode:** Includes radio buttons for 'Single employee per visit' and 'Multiple employees allowed per visit'. 'Multiple employees allowed per visit' is selected.
- Estimated Wait Display:** Includes radio buttons for 'Count down from initial estimate' and 'Always show latest estimate'. 'Always show latest estimate' is selected.
- Visit Progress Mode:** Includes radio buttons for 'Manually finish all', 'Manually finish for employee changes and breaks', 'Manually finish for employee changes', and 'Automatic finish'. 'Automatic finish' is selected.

Navigation elements include a left sidebar with icons for Sales, General, Security, Business, General, Appointment Book, Stock, Clients, Confirmation, Walkin, Roster, and Visual Options. A right sidebar shows shortcuts for Main, Tools, Stock, Setup, Configuration, Employees, Employee Groups, Capabilities, Services, Series, and Contraindications. A 'Done' button with a green checkmark is at the bottom right. The top right corner shows the time '1:01 PM' and date 'Mon, 16 May '16'. The bottom right corner shows the user 'Anna Owner' and a 'Log Off' button.



SHORTCUTS™

SMARTER BUSINESS TECHNOLOGY

it suits you

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