

# adding staff

Follow these detailed steps to add service staff.

## Create a Schedule Template

1. From the SalonBiz®/SpaBiz® menu bar, click on the Blueprints icon.
2. Click the Staff & Book button.
3. In the Table to Edit box, highlight by clicking once on Schedule Template.
4. Click on the Add button.
5. Type in the name of staff member whose schedule you wish to create.
6. Click on the Add button.
7. If you utilize mask times, enter in the mask time length in the Mask Time field if the staff member books services in time increments. For example books every hour, the mask time would be one hour. If you do not use mask times simply leave zeros in the Mask Time field.
8. From the Not Working Reason drop down menu, select a default not working reason from the list.
9. From the Lunch drop down menu, select a default lunch reason from the list.
10. Uncheck the days that the staff member is NOT working.
11. If the staff member does not take a set scheduled lunch break uncheck all of the Lunch boxes.
12. If the staff member does take a set scheduled lunch, keep the Lunch box checked and enter in the time that they are blocked out to go to lunch. This will show that they are unavailable for appointments during this time.
13. Enter in the working times for the staff member. This is the time that they are available for appointments.
14. Double check the working schedule including lunches if any.
15. Click on the Rebuild the Schedule Template button.
16. Answer Yes to the message “Warning: All of your settings will be deleted and reset! If you need to make a small change you should manually edit the template. Are you sure you wish to continue?”
17. Review the schedule, if changes need to be made click on the Return to Edit button and make any necessary corrections.
18. Review the schedule if everything is correct click on the Return to Previous Screen button.

|          | Sun         | Mon         | Tue   | Wed   | Thu   | Fri   | Sat   |
|----------|-------------|-------------|-------|-------|-------|-------|-------|
| 8:00 AM  | Not Working | Not Working | Open  | Open  | Open  | Open  | Open  |
| 9:00 AM  | Not Working | Not Working | Open  | Open  | Open  | Open  | Open  |
| 10:00 AM | Not Working | Not Working | Open  | Open  | Open  | Open  | Open  |
| 11:00 AM | Not Working | Not Working | Open  | Open  | Open  | Open  | Open  |
| 12:00 PM | Not Working | Not Working | Lunch | Lunch | Lunch | Lunch | Lunch |
| 1:00 PM  | Not Working | Not Working | Open  | Open  | Open  | Open  | Open  |
| 2:00 PM  | Not Working | Not Working | Open  | Open  | Open  | Open  | Open  |
| 3:00 PM  | Not Working | Not Working | Open  | Open  | Open  | Open  | Open  |
| 4:00 PM  | Not Working | Not Working | Open  | Open  | Open  | Open  | Open  |
| 5:00 PM  | Not Working | Not Working | Open  | Open  | Open  | Open  | Open  |
| 6:00 PM  | Not Working | Not Working | Open  | Open  | Open  | Open  | Open  |
| 7:00 PM  | Not Working | Not Working | Open  | Open  | Open  | Open  | Open  |
| 8:00 PM  | Not Working | Not Working | Open  | Open  | Open  | Open  | Open  |
| 9:00 PM  | Not Working | Not Working | Open  | Open  | Open  | Open  | Open  |
| 10:00 PM | Not Working | Not Working | Open  | Open  | Open  | Open  | Open  |



## Create a Staff File

1. From the SalonBiz®/SpaBiz® menu bar, click on the Blueprints icon.
2. Click on the Staff & Book button.
3. From the Table to Edit box, click on Staff.
4. Click the Add button.
5. Type in the staff member's first and last name then type in a staff code. Such as initials, employee number or simply their first name.
6. Click the Add button.
7. Staff Information tab

- Enter a Book Name, this will appear on the appointment book
- Fill out their personal information.
- From the Category drop down menu select the correct category for this staff member.
- Check off the days you wish their schedules to print and if you would like their travelers to print with them.
- Check off if they are allowed to use SalonBiz®/SpaBiz®.
- If the staff is allowed to use SalonBiz®/SpaBiz® and/or will be required to clock in and out assign a password and verify, click the Save Password button when finished.

## 8. Staff Schedule tab

- Go to the right hand side of the tab, and type in the date to start their schedule on the book. (This has to be a Sunday)
- Click the drop down arrow under the Template field and choose the template for that staff member
- Click the Add button. If this is done correctly, the template name will appear in the white box above.
- Type in the From Date at the bottom right
- Click the Rebuild Now! button.

## 9. Staff Service List tab

- Add in the services that the staff member performs by either:
  - Clicking on the Select Service button, choosing the service, and clicking the Add button.
  - Choosing a category of services from the Category drop down menu, then click on the Add Category button.
- If necessary adjust service times and prices:
  - Highlight the service and check off set time and/or set price in the bottom left hand corner.
  - Type in the correct time and/or price and click the Update button.



## 10. Staff Payroll Tab

- If the staff member is required to clock in/out, check off the corresponding box at the top left hand corner.
- If the staff member gets paid a certain wage, choose hourly, monthly, or yearly and type in the amount.
- If the staff member gets paid by commission, choose their service and/or product commission

11. Staff Pop-Up Info Tab gives you the ability to enter in important information regarding the particular staff member.

12. Staff Software Usage Tab is a behind the scenes managerial review function which tracks the staff member's usage of the software.

13. Click on the Return to Previous Screen button.

## Adding to a Schedule Group

1. From the SalonBiz®/SpaBiz® menu bar, click on the Blueprints icon.
2. Click on the Staff & Book button.
3. Choose Schedule Group from the Table to Edit box.
4. Double click on the group you wish to add the staff member to.
5. Click the Add Staff button.
6. Choose the staff member from the list and click the Select button.
7. Click the Return to Previous Screen button.

