

alternating schedules

Follow these detailed steps to create alternating schedules for service staff.

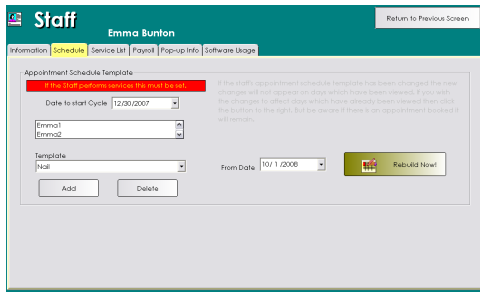
Create an Alternating Schedule Template

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. Since we are creating alternating schedules, differentiate the name of each schedule for example Nancy1 and Nancy2.
6. Click on the Add button.
7. If you utilize mask times enter in the mask time length in the Mask Time field. 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 reason from the list.
9. From the Lunch Reason drop down menu, select a default 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 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.
19. Follow steps 1-18 above to build the second schedule template.

The screenshot shows the 'Schedule Templates' form for a staff member named 'Emma1'. The form includes fields for Name, Mask Time (000), Not Working Reason (Not Working), and Lunch Reason (Lunch). Below these are seven columns representing days of the week (Sunday through Saturday). Each column has a 'Working' checkbox, a 'Lunch' checkbox, and a 'Lunch Reason' dropdown. The 'Working' checkboxes are checked for all days. The 'Lunch' checkboxes are also checked for all days. The 'Lunch Reason' dropdown is set to 'Lunch'. The form also includes fields for Starting Time and Ending Time for each day, and a 'Mask Time' field. At the bottom, there are buttons for 'Rebuild the Schedule Template' and 'Show and Edit Schedule'.

The screenshot shows the 'Schedule Templates' form for a staff member named 'Emma2'. The form includes fields for Name, Mask Time (000), Not Working Reason (Not Working), and Lunch Reason (Lunch). Below these are seven columns representing days of the week (Sunday through Saturday). Each column has a 'Working' checkbox, a 'Lunch' checkbox, and a 'Lunch Reason' dropdown. The 'Working' checkboxes are checked for all days. The 'Lunch' checkboxes are unchecked for all days. The 'Lunch Reason' dropdown is set to 'Lunch'. The form also includes fields for Starting Time and Ending Time for each day, and a 'Mask Time' field. At the bottom, there are buttons for 'Rebuild the Schedule Template' and 'Show and Edit Schedule'.





Linking Schedules to the Staff File for New Staff

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. Double click on the staff member with the alternating schedule.
5. Click on the Staff Schedule tab.
6. 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)
7. Click the drop down arrow under the Template field and choose the first template for that staff member.
8. Click the Add button. If this is done correctly, the template name will appear in the white box above.
9. Click the drop down arrow under the Template field and choose the second template for that staff member.
10. Click the Add button. If this is done correctly, both template names will appear in the white box above.
11. Type today's date (current date) in the From Date at the bottom right.
12. Click the Rebuild Now! button.

Linking Schedules to the Staff File for Existing Staff

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. Double click on the staff member with the alternating schedule.
5. Click on the Staff Schedule tab. There should already be a current template in the white box.
6. Click the drop down arrow under the Template field and choose the second template for that staff member.
7. Click the Add button. If this is done correctly, both template names will appear in the white box above. *Remember, the order the templates are put in needs to correspond with the date this alternating schedule starts (From Date).*
8. If the alternating schedules start today, type today's date (current date) in the From Date at the bottom right. If not, choose the date it should start and type it into the From Date.
9. Click the Rebuild Now! button.

