

categories/sub-categories

Adding new categories for products, services, discounts etc.

Adding Categories

1. From the SalonBiz®/SpaBiz® menu bar, click the Blueprints icon.
2. Click the Category button.
3. Click on Product in the Category Groups field.
4. Click the Add button in the Category area.
5. Type in the name of the category.
6. Type in the category code.
7. Click the Add button.

The screenshot shows the 'Categories' interface with three main sections: 'Category Groups', 'Category', and 'Sub-Category'. The 'Category Groups' list includes Discount, Package, Product, Resource, Service, and Staff. The 'Category' section has a list of categories with 'Product' selected. Below the list are input fields for Name, Description, Category Code, and SQL Account, along with 'Add', 'Update', 'Delete', and 'Print' buttons. The 'Sub-Category' section is currently empty.

Adding Sub-Categories

1. From the SalonBiz®/SpaBiz® menu bar, click the Blueprints icon.
2. Click the Category button.
3. Click on the word Product in the Category Group field.
4. Click the category name associated with the new sub-category. It will be highlighted.
5. Click the Add button in the Sub-Category field.
6. Type in the name of the sub-category.
7. Type in the code – For example: the first initial of each word of the category with the first initials of the sub-category - Supplies Professional category with the sub-category Hair Color: the code for the sub-category could be SPHC.
8. Click the Add button.

Deleting Categories

1. From the SalonBiz®/SpaBiz® menu bar, click the Blueprints icon.
2. Click the Category button.
3. Click on Product in the Category Group field.
4. Click the category name of the sub-category that you are deleting, it will be highlighted.
5. Click on the Sub-Category name you wish to delete.
6. Click the Delete button in the Sub-Category field.
7. Answer Yes to the message “Are you sure you wish to delete this category?”
8. Follow steps 5 –7 to delete all sub-categories.
9. Once all of the sub-categories are deleted highlight by clicking once on the category you wish to delete.
10. Click the Delete button.

This screenshot shows the 'Categories' interface with the 'Sub-Category' section populated. The 'Category' list remains the same. The 'Sub-Category' list shows several entries, with 'Candle Falls' selected. Below the list are input fields for Name, Description, Category Code, and SQL Account, and 'Add', 'Update', 'Delete', and 'Print' buttons. The 'Delete' button is highlighted in yellow.



frequently asked questions

How do I add discount categories?

Simply follow the steps above, instead of clicking on Products in the Category Groups field you will click on Discounts.

What if it gives me an error message when I try to delete a sub-category?

If you receive an error message stating that you still have data which uses the category or sub-category that you are trying to delete you need to either re-link the product, service, discount etc. to a different category or delete it completely

How can I find what products are linked to a sub-category I am trying to delete?

The best way to find a product still linked to your sub-category is to run the report called Current Status of Inventory All items. There is no need to print this report rather scroll thru and find the products. Then you can either delete the product from your inventory or re-link it to a different sub-category. (Report icon, Inventory Sub-Category, Select Product Type All)

