

resource setup - access

Resources are used when you need to reserve a room or equipment to perform a service in addition to a team member.

Questions	Answer
Allow for Resource booking with Services?	Yes

Allowing Resource Booking

1. From the SalonBiz®/SpaBiz® menu bar, click on the Blueprints icon.
2. Click on the Service button.
3. Click on the Set Default Settings button.
4. Click on the question “Allow for Resource booking with Services”.
5. In the drop down menu at the top of the screen, select ‘Yes’.
6. Click the Save Answer button.
7. Click the Return to Previous Screen button.

Table to Edit	Resource
Schedule Group	
Resource Name	Resource Code

Naming the Resources

1. From the SalonBiz®/SpaBiz® menu bar, click on the Blueprints icon.
2. Click on the Staff & Book button.
3. Choose Resource in the Table to Edit field.
4. Click the Add button.
5. Type the name of the resource (for example: Spa Room). Note: If you have more than one room you may want to number them or name them so that you can distinguish between each room.
6. Type a resource code in the Resource Code field. The code should be no longer than three characters so that you will be able to read it on the appointment book.
7. Click the Add button.
8. Click the Return to Previous Screen button.

Service Information	Service Times	Tax Information
Service Price: 100.00	Time Length: 1:00	Is the service taxable? (No (no tax is charged))
Product Charge: 9.00	Process Time: 0:00	GL Account
Net: \$109.00	Finish Time: 0:00	Resource needed for service: Massage Room 2

Linking the Resource to the Service

1. From the SalonBiz®/SpaBiz® menu bar, click on the Blueprints icon.
2. Click on the Service button.
3. Choose Service in the Table to Edit box.
4. Select the service you wish to link to a resource and double click on it.
5. In the Resource needed for service drop down menu (lower right corner of the screen), choose the resource you wish to link to this service.
6. Click the Add button.
7. Repeat step 5-6 for all resources that can be utilized to perform the selected service.
8. Repeat steps 2-6 for all services that require resources.



frequently asked questions

Why do I need resources?

Resources are important when you require a room or a piece of equipment to perform a service and the room or equipment is limited, or if you have more staff than you do resources. For example, if everyone on your staff can perform a pedicure but you only have two pedicure stations setting resources will ensure that only two pedicures can be booked at the same time.

Why do I have to link every possible resource to a service?

It is important to link each possible resource to the service to provide every option to properly reserve an appointment.

Do I have to do something special to reserve an appointment that requires a resource?

No, when you reserve an appointment on the team member's book, the resource will automatically be reserved as well.

Can I change the resource after the appointment is made?

Yes, simply double click on the Res column of an open appointment and select the resource you would like to use. If you receive a message saying all resources are being used, you will have to select a resource that is available.

Should I create resources for my hair staff?

It is not necessary to create resources for your hair services unless you split shift or your stylists share stations.

What order are the resources reserved?

The resources are reserved in the order that you link them in the service. So if you have a wet room and can possibly perform facial services in the room but prefer not to, you should link your wet room to the service last.

