resource setup - oracle

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

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.

Creating Resource Categories

1. From the SalonBiz®/SpaBiz® menu bar, click on the Blueprints icon.
2. Click on the Category button.
3. Click on Resource in the Category Group field.
4. Click the Add button
5. Type the name of the resource category (example: Nail Resources).
6. Enter a Category Code (abbreviation of the name is usually best) in the Category Code field.
7. Click the Add button.
8. Click the Return to Previous Screen button.

Creating a Resource Template

Typically resources are given the schedule of the hours of operation. If you have resources that have different hours, create additional templates.

1. From the SalonBiz®/SpaBiz® menu bar, click on the Blueprints icon.
2. Click on the Staff & Book button.
3. Choose Schedule Template in the Table to Edit field.
4. Click the Add button.
5. Type in the name for the template (for example: Resource Template). The schedule template screen will be displayed.
6. Choose Not Working in the Not Working Reason drop down menu.
7. Choose Lunch in the Lunch Reason drop down menu.
8. Click in the Working boxes of the days you are open.
9. Enter the opening hour as the starting time and the closing hour as the ending time.
10. Uncheck the boxes in the Lunch field.

11. Click the Rebuild the Schedule Template button.
12. 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?"
13. Review the schedule, if changes need to be made click on the Return to Edit button and make any necessary corrections.
14. Review the schedule if everything is correct click on the Return to Previous Screen button.
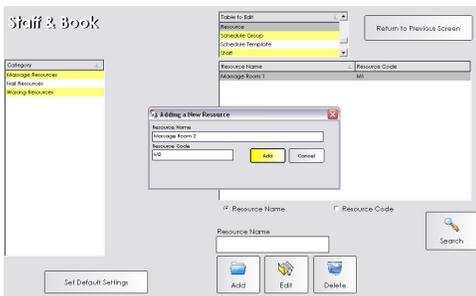
Naming the Resources
1. From the SalonBiz®/SpaBiz® menu bar, click on the Blueprints icon.
2. Click on the Staff & Book button.
3. Choose Resource in the Table to Edit box.
4. Click the Add button.
5. Type the name of the resource (for example: Massage Room). Note: If you have more than one room you may want to number them or name them so that you can distinguish between each room.
6. Enter a Resource Code (**only two characters**) in the Resource Code field.
7. Click the Add button.
8. The Resource file will be displayed.
9. From the Category drop down menu, choose a resource category for this resource.
10. Enter the Book Name, this is the name that will appear on the book for this resource.
11. If you wish to print the schedules for the resource, click in the boxes next to each day that the resource is used. A check mark will appear.
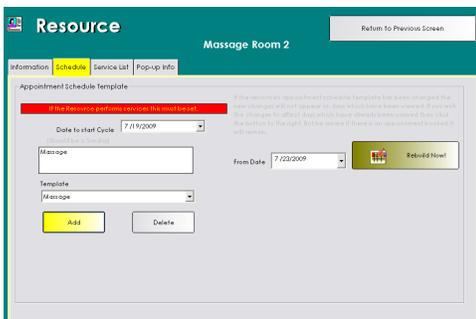
Linking the Resource Template to the Resource
1. From the SalonBiz®/SpaBiz® menu bar, click on the Blueprints icon.
2. Click on the Staff & Book button.
3. Choose Resource in the Table to Edit box.
4. Double click on the resource name.
5. Click on the Schedule tab of the resource.
6. On the left side of the screen, click the Template drop down menu to choose the Resource Template.
7. Click the Add button.
8. Enter the date to build the schedule in the Date to Start Cycle field. This must be a Sunday that has passed and before the schedule should begin.
9. Enter the date to start the schedule in the From Date field of the Rebuild Appointment Schedule Template area.
10. Click the Rebuild Now button on the bottom right hand side to create the schedule.
11. Click Yes to the confirmation message.

Linking Services and Resources
There are two ways to link services and resources:
- By linking the services to the resource
- By linking the resources to the service

## Linking the Services to the Resource
This method can only be used when you have services that do not require a staff member.
1. From the Resource file, click the Service List tab.
2. Click the Select Service button.
3. Double click on a service that is performed in this resource from the Select a Service screen.
4. Click the Add button.
5. Repeat steps 2-4 for all services performed using this resource.
6. Click the Return to Previous Screen button.
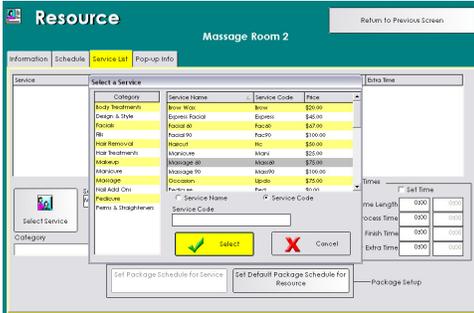
Linking the Resource to the Service
1. From the SalonBiz®/SpaBiz® menu bar, click on the Blueprints icon.
2. Click on the Service button.
3. Choose Service in the Table to Edit.
4. Select the service you wish to link to a resource and double click on it.
5. In the Resource needed for service drop down menu (lower right corner of the screen), choose the resource you wish to link to this service.
6. Click the Add button to link a resource. Add the resources in the order in which you wish the resources to be reserved.
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.
9. Click the Return to Previous Screen button.
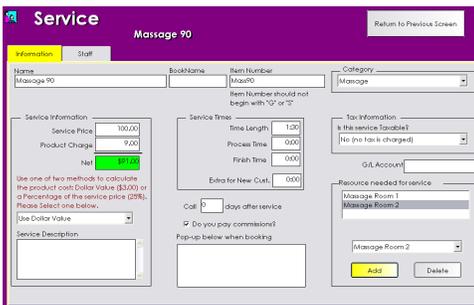
Creating a Schedule Group for Resources
This will enable you to view all of your resources at one time.
1. From the SalonBiz®/SpaBiz® menu bar, click on the Blueprints icon.
2. Click on the Staff & Book button.
3. Choose Schedule Group from the Table to Edit.
4. Click the Add button.
5. Type Resources in the schedule group name field.
6. Click the Add button.
7. Click the Add Resource button.
8. Double click on the resource you wish to add from the list.
9. Repeat steps 7-8 for all resources.
10. Click the Return to Previous Screen button.
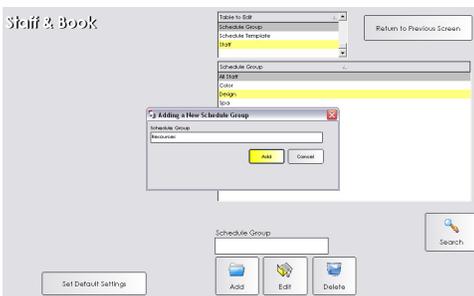
frequently asked questions

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. For example, if you have more staff than you do resources. 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 in 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 you 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.