

security

The security feature enables you to secure specific locations and track which staff members are using which functions.

Securing Locations

1. From the SalonBiz®/SpaBiz® menu bar, click on the Blueprints icon.
2. Click on the Security button.
3. Identify the area you wish to secure.
4. Double click in the security column next to the location that you wish to enable security. Or click once in the security column next to the location, and then click the Security button.
5. Notice that the field has changed from “No Security” to “Security”. A location is secure when “Security” is displayed.

Location	Emma	George	Gele	John	Mal	Melanie	Prod	RA
Appt. Book - Enter	Access	Access	Access	Access	Access	Access	Access	h
Appt. Book - Allow/Prevent Booking	No Access	No Access	No Access	No Access	No Access	No Access	No Access	h
Appt. Book - Block/Unblock Time	Access	Access	Access	Access	Access	Access	Access	h
Appt. Book - Change Appointment	Access	Access	No Access	No Access	Access	No Access	No Access	h
Appt. Book - Delete Appointment	Access	Access	No Access	Access	Access	No Access	No Access	h
Appt. Book - Make Appointment	Access	Access	No Access	Access	Access	No Access	No Access	h
Appt. Book - Move Appointment	Access	Access	Access	No Access	Access	No Access	No Access	h
Appt. Book - Waiting List	Access	Access	No Access	No Access	Access	No Access	No Access	h
BookOffice - Products	No Access	Access	No Access	No Access	Access	No Access	No Access	h
BookOffice - Remake Inventory Count	No Access	Access	No Access	No Access	Access	No Access	No Access	h
BookOffice - Reports	No Access	Access	No Access	No Access	Access	No Access	No Access	h
BookOffice - Take Ticket	No Access	Access	No Access	No Access	Access	No Access	No Access	h

Enabling Access

1. From the SalonBiz®/SpaBiz® menu bar, click on the Blueprints icon.
2. Click on the Security button.
3. Identify the staff members (by staff code) allowed to have access or those denied access to the secure area.
4. Highlight by clicking once in the corresponding staff column and Location row.
5. Click the Access button to award access to the staff member. Or click the No Access button to deny access to the particular function. Note: Make sure at least one person has access to every location.
6. This can also be accomplished by double clicking next to the location, under the staff member's code.
7. A staff member has access when the location row and staff column displays “Access”.

Assigning Password

1. From the SalonBiz®/SpaBiz® menu bar, click on the Blueprints icon.
2. Click on the Staff & Book button.
3. In the Table to Edit box, highlight by clicking once on Staff.
4. Select a staff member from the staff list.
5. Click the Edit button.
6. Click on the Information tab.
7. Place a check in the “Allowed to use SalonBiz?” box.
8. Type in a password in the Password field.
9. Re-type the password in the Verify field.
10. Click the Save Password button.
11. A message will alert you, “Your password has been updated.”
12. Click the OK button.



recommended settings

Location	Secure Areas	Tech/Service Team Access	Booking Center Access	Front Desk Team Access	Open/Close Team Access	Manager/Owner Access
Appt. Book - Enter						
Appt. Book - Allow Powerbooking	Yes					X
Appt. Book - Block/Unblock Time	Yes		X	X	X	X
Appt. Book - Change Appointment	Yes		X	X	X	X
Appt. Book - Delete Appointment	Yes		X	X	X	X
Appt. Book - Make Appointment	Yes		X	X	X	X
Appt. Book - Move Appointment	Yes		X	X	X	X
Appt. Book - Waiting List						
Blueprints - Accounting						
Blueprints - Category						
Blueprints - Computer System						
Blueprints - Customer						
Blueprints - Enter	Yes					X
Blueprints - Inventory	Yes					X
Blueprints - Payment Types	Yes					X
Blueprints - Price Book						
Blueprints - Reports						
Blueprints - Salon / Spa						



Location	Secure Areas	Tech/Service Team Access	Booking Center Access	Front Desk Team Access	Open/Close Team Access	Manager /Owner Access
Blueprints - Security	Yes					X
Blueprints - Service						
Blueprints - Staff & Book	Yes					X
Blueprints - Ticket						
Check In/Out - Enter						
Check In/Out - Check In App						
Check In/Out - Check Out						
Communications - Marketing/Mailings	Yes				X	X
Communications - WordBiz	Yes				X	X
Confirmation - Change Status	Yes		X	X	X	X
Credit Cards - Add Card on File	Integration Only					
Credit Cards - Prior Authorization	Integration Only					
Credit Cards - Returns	Integration Only					
Credit Cards - Settle Batch	Integration Only					
Credit Cards - Update Tip	Integration Only					
Credit Cards - Use Card on File	Integration Only					
Credit Cards - View Batch	Integration Only					
Credit Cards - Void Transaction	Integration Only					
Customer File - Change Balance	Yes					X
Customer File - Custom Info						
Customer File - Delete	Yes					X



Location	Secure Areas	Tech/ Service Team Access	Booking Center Access	Front Desk Team Access	Open/ Close Team Access	Manager /Owner Access
Customer File - Edit Special Pricing						
Customer File - Enter	Yes				X	X
Customer File - Personal Tab						
Customer File - View Address	Yes		X	X	X	X
Customer File - View History						
Customer - Merge	Yes				X	X
Customer Query	Yes					X
Day - Close	Yes				X	X
Day - Open	Yes				X	X
Drawer Entry - New	Yes					X
Drawer Entry - View	Yes					X
Drawer Entry - Void	Yes					X
Email Center						
Gift Certificate - Allow X in Serial Number	Yes					X
Gift Certificate - Change Auto Serialized Number						
Gift Certificate-Change Customer	Yes				X	X
Gift Certificate - Expiration Date Change	Yes					X
Gift Certificate - Make Value & Price Different						
Gift Certificate - Recharge						
Gift Certificate - Void	Yes					X



Location	Secure Areas	Tech/ Service Team Access	Booking Center Access	Front Desk Team Access	Open/ Close Team Access	Manager /Owner Access
Instant Messages - View History						
Inventory - Adjustment	Yes				X	X
Inventory - Count Process	Yes				X	X
Inventory - Count Start	Yes				X	X
Inventory - Enter	Yes				X	X
Inventory - Purchase Order	Yes				X	X
Inventory - Receiving Order						
Not Active 1 Min.						
Package - Add						
Package - Delete						
Package - Edit						
Pay Gratuity - Non-Cash	Yes				X	X
Pay Tips	Yes					X
Payroll - Tab in Staff Folder	Yes	X	X	X	X	X
Payroll - Time Clock Check In & Out						
Product - Add Item						
Product - Change Cost/Retail						
Product - Change Min/Max						
Product - Change Product Information						
Product - Edit						
Product - View Cost/Retail	Yes					X



Location	Secure Areas	Tech/Service Team Access	Booking Center Access	Front Desk Team Access	Open/Close Team Access	Manager /Owner Access
Promo Credit - Issue	Yes				X	X
Reports - Enter						
SB Image - Enter	Yes					X
Series - Void						
Service - Add Staff						
Service - Delete						
Service - Edit						
Service - Enter						
Service - Remove Staff	Yes				X	X
Shift - Change the Starting Balance	Yes				X	X
Shift - Close Shift	Yes				X	X
Shift - Open Shift	Yes				X	X
Shift - Reconcile Shift	HA Only					
Staff File - Assign Security Category						
Standing - Delete Standings						
Start SalonBiz	HA Only					
Store - Allow Toggle	SpaBiz Only			X	X	X
Ticket - Add Ticket To Master Bill	Yes					X
Ticket - Allow Change Over	Yes					X
Ticket - Cash Change on Non-Cash Payment	SpaBiz Only			X	X	X



Location	Secure Areas	Tech/ Service Team Access	Booking Center Access	Front Desk Team Access	Open/ Close Team Access	Manager /Owner Access
Ticket - Create Master Bill					X	X
Ticket - Delete Product	Yes				X	X
Ticket - Delete Service	Yes				X	X
Ticket - Discount						
Ticket - Edit	Yes				X	X
Ticket - Edit Tax on Ticket	Yes					X
Ticket - Make New						
Ticket - Make Walk-in						
Ticket - Merge Ticket						
Ticket - Process	Yes			X	X	X
Ticket - Return Item	Yes				X	X
Ticket - Use Cust Owes Pay Type	Yes				X	X
Ticket - Use GC for Customer not Issued	Yes				X	X
Ticket - Use Store Credit Pay Type	Yes				X	X
Ticket - Void Processed Ticket	Yes				X	X
Ticket - Void Unprocessed Ticket	Yes				X	X
View Salon and Staff Sales Summary	Yes			X	X	X

