

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.

Categories

Return to Previous Screen

Category Groups
Discount
Package
Product
Service
Staff

Category
Description
Holiday
Intelligent Nutrients
Lilibere
Lifestyle Product
Makeup
Personal Blends
PrePacks
Purefume
Purefume & Body Care
Shampoo

Name
Personal Blends

Category Code

PB

G/L Account

Add Update Delete

Print

Sub-Category
Absolute
Body Care
Colour Concentrates
Hair Care
Key Elements
Spint

Name
Absolute

Category Code
Pb Abs

Add Update Delete

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 on the category name for which you wish to create the sub-category. It will be highlighted in yellow.
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 would 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 the word Product in the Category Group field.
4. Click on the category name for which you wish to delete the sub-category. It will be highlighted in yellow.
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.

Categories

Return to Previous Screen

Category Groups
Discount
Package
Product
Service
Staff

Category
Description
Customer
Employee
Friends/family

Name
Friends/family

Category Code

Add Update Delete

Print

Sub-Category



303 S. Pine St. < Hammond, LA 70403

extendedtechnologies.com

: < 888.809.2802 sales < 800.632.5527

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)

Customer Support 888.809.2802

Our Customer Support team is ready to assist you.

