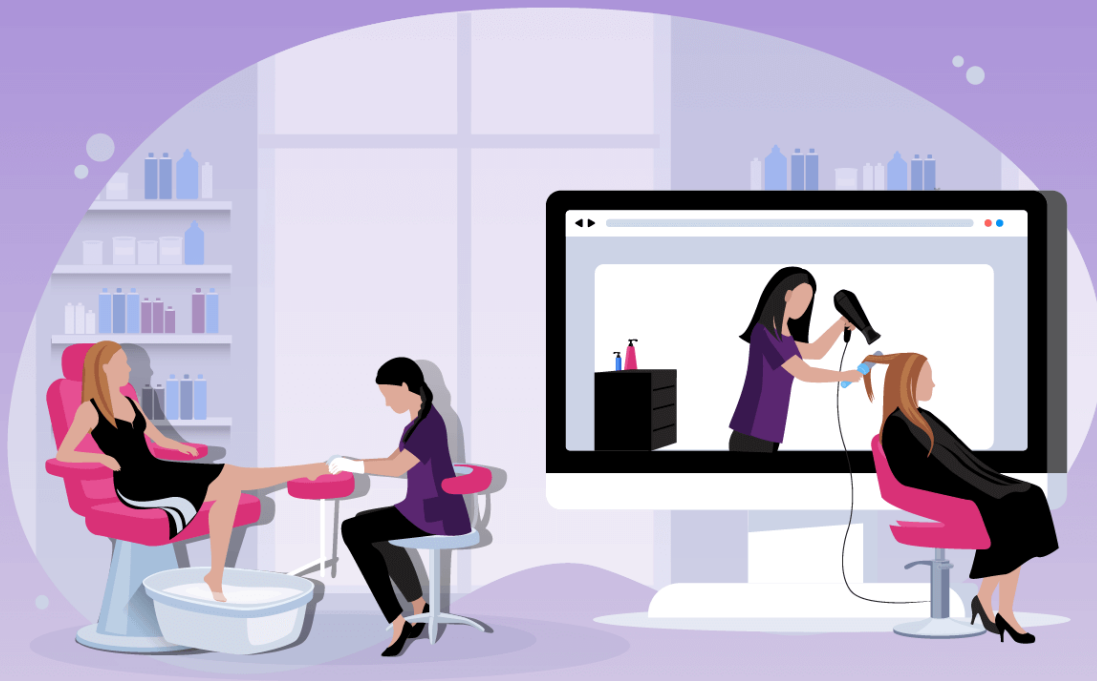


USER GUIDE

Spa-Salon Management System



SERPENT
CONSULTING SERVICES PVT. LTD.

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Demo Link

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Introduction

“Taking care of your looks is a WORSHIP !” - Indeed. Taking care of how you look & be is now considered a part of the efforts you are putting in to maintain your health & wellness. It's less about how you present yourself but more about how you want to be & feel about YOU! In other words, Spa & Salon owners & therapists parallelly have been coming up with products, exercises & practices to make their customers relaxed. This has created a kind of a rush at Spa/Salons. Salon owners & managers are in an active search for the right technology to manage customers, services, employees (Mostly beauticians), billing and other related things. Also, it's not only about how we manage our customers & their experiences but also how we promote our salon to get new customers while retaining the existing ones.

So let's talk about one such solution here. We are going to have a brief look inside our Spa-Salon Management Solution. We are going to have a detailed study of our solution. The best part here is that this document exactly discusses its functionalities by following a practical-functional sequence. This means We will start discussing how we get it configured how we process things in our integrated POS to how we work with reporting techniques.

Key Features:

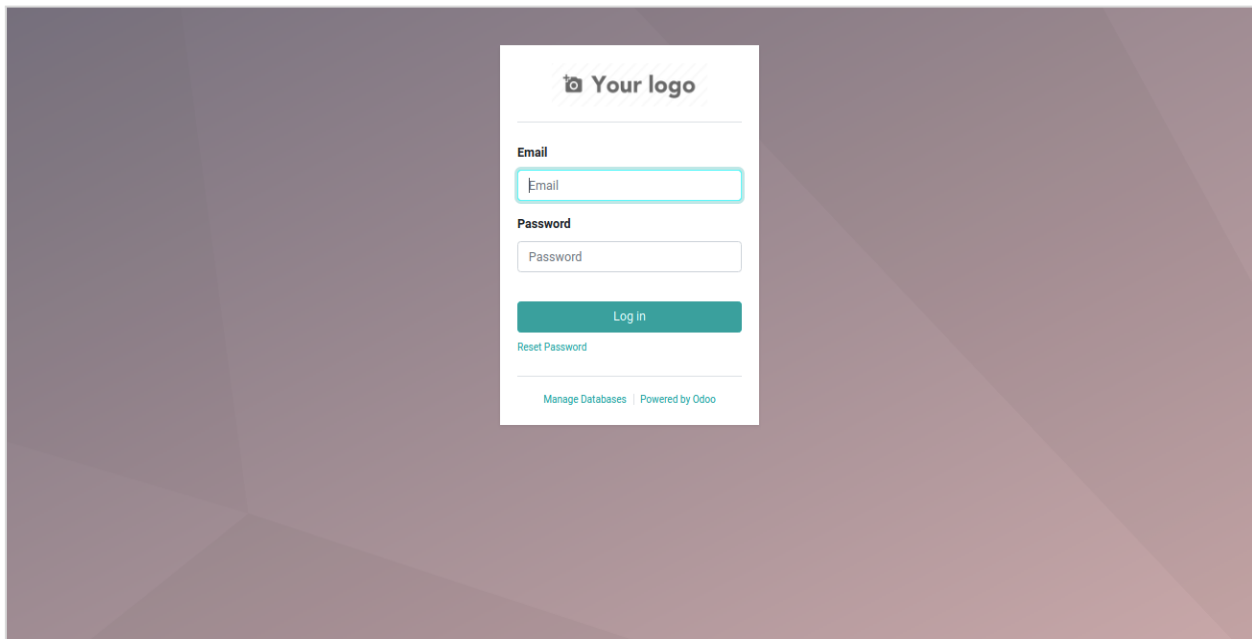
- Can be used for the Spa/Salon business owners & members
- Easy UI/UX with extensive features with easy operations
- Integrated POS facility to manage billing & invoicing
- Easy to configure & manage data
- Membership types & schemes

1 : Getting In

This document talks about the features & functionalities of one of our Custom-Made Solutions developed to address the operational requirements of Spa & Salon owners & managers. We will discuss its features with screenshots explaining the functional flow of the solution. Will start with Login through the features to the Reporting thing at last.

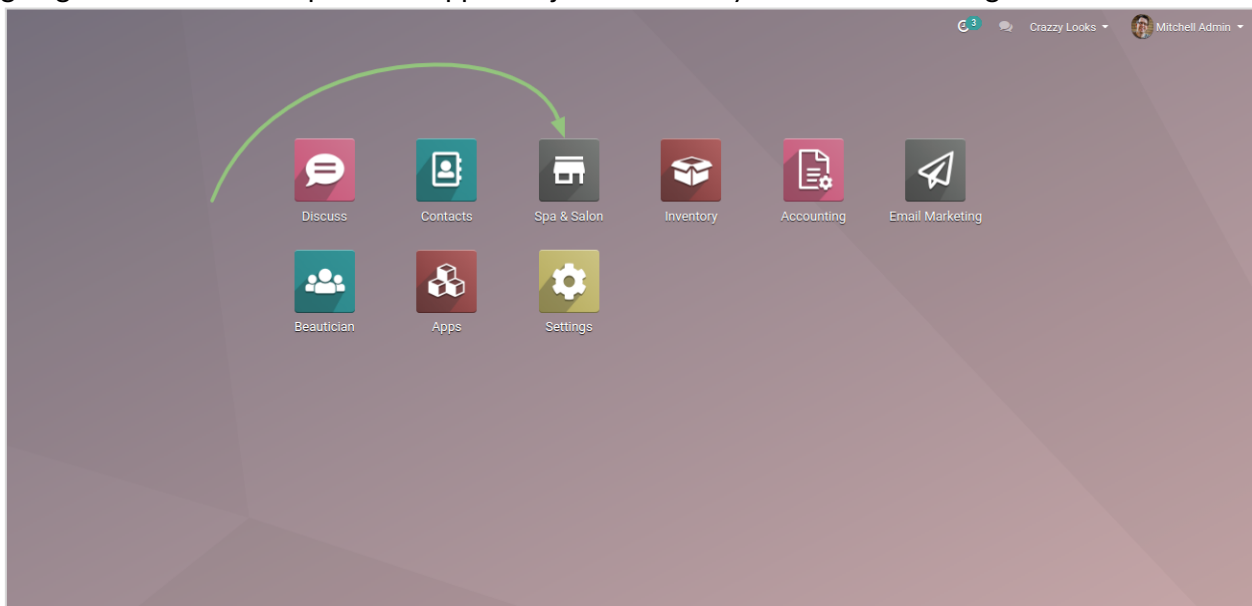
1.1 : Login Screen

So users will log-in from this screen. It has two-factor authentication applied to take care of secured operations & transactions.



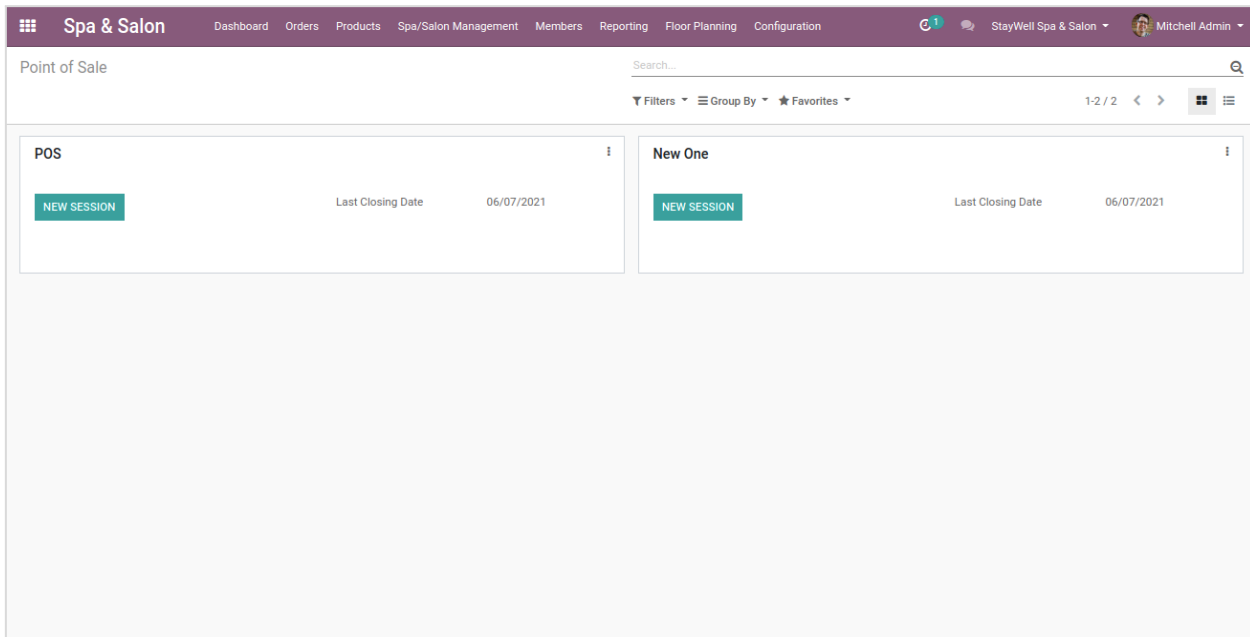
1.2 : Home Screen

This is how a homescreen welcomes us with the Spa-Salon Module & other supporting Apps. We are going to work with the Spa-Salon App in major as shown by an arrow in an image below.



1.3 : Dashboard

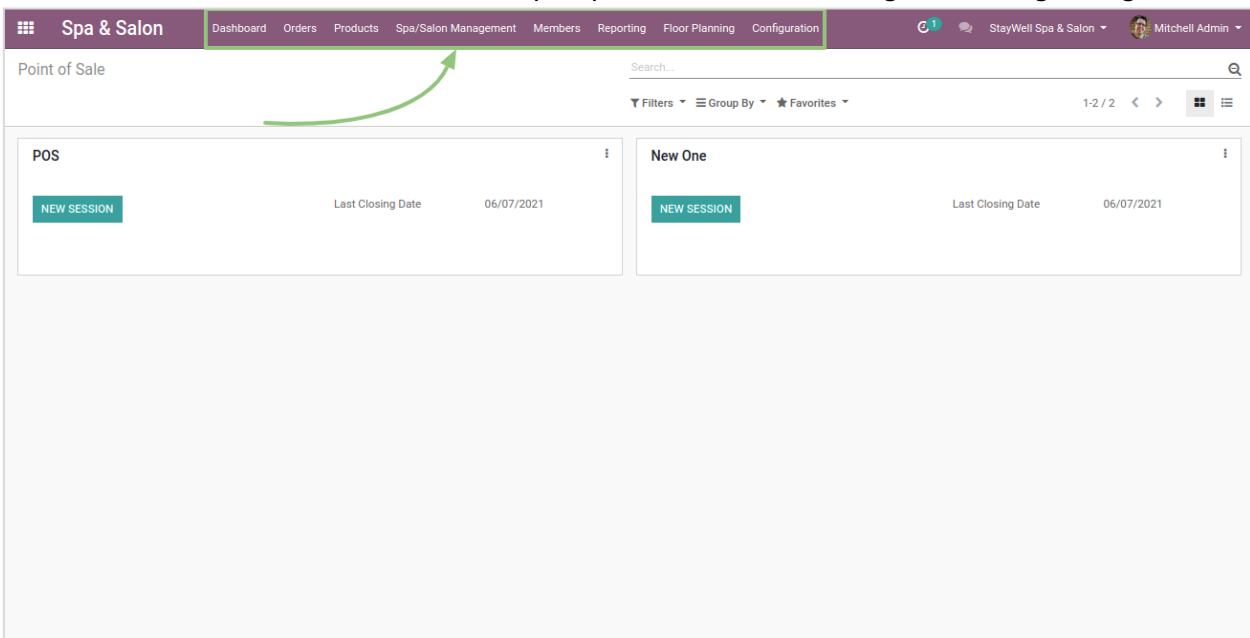
By clicking on the Spa-Salon App in a Home-Page, We will be taken directly to the dashboard. The Dashboard has POS Sessions listed as we are extensively working with POS here.



1.4 : Navigation

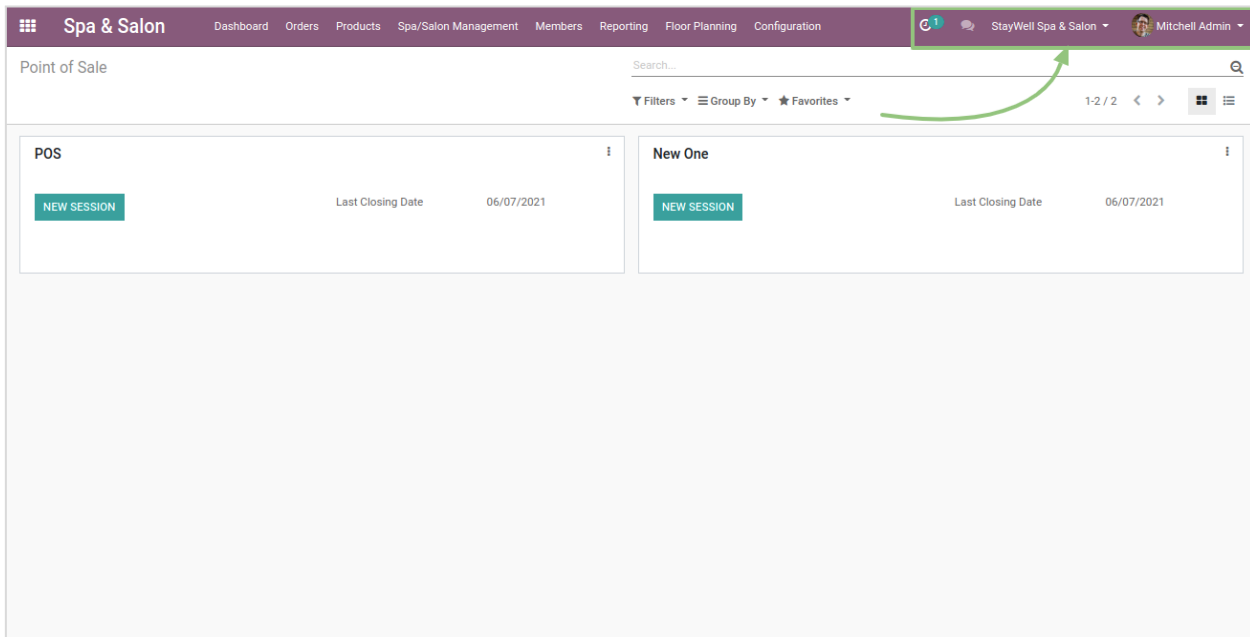
1.4A : [Navigation] Menu Items

These are our major menu items shown in the box. It will have further options in the form of sub-menus to take care of various functions which help a Spa-Salon owner / manager to manage things well.



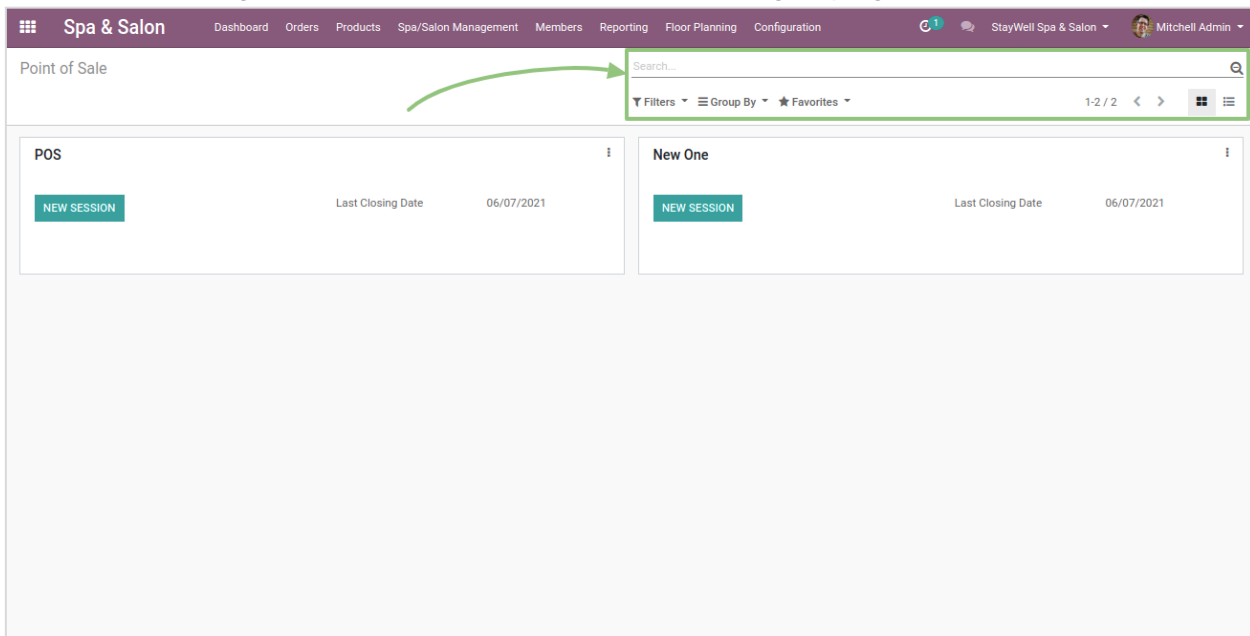
1.4 B : [Navigation] Notification & User

With these options, users will see notifications, the user can change company (In case of the Multi-company environment) & will have further options to manage profile as a user.



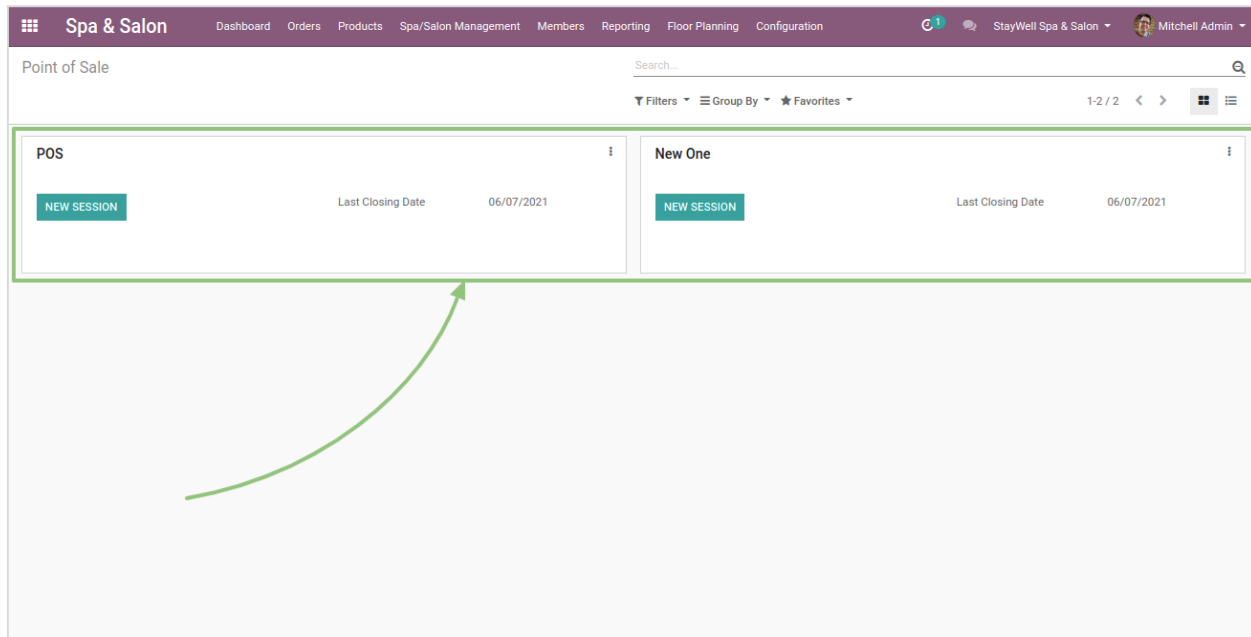
1.4 C : [Navigation] Data Search, Filtration & Grouping

We have very strong search functionality. Users can also have some data filtration & groupings here as shown in an image below. Search results & data filtration / groupings can be saved as favourites too.



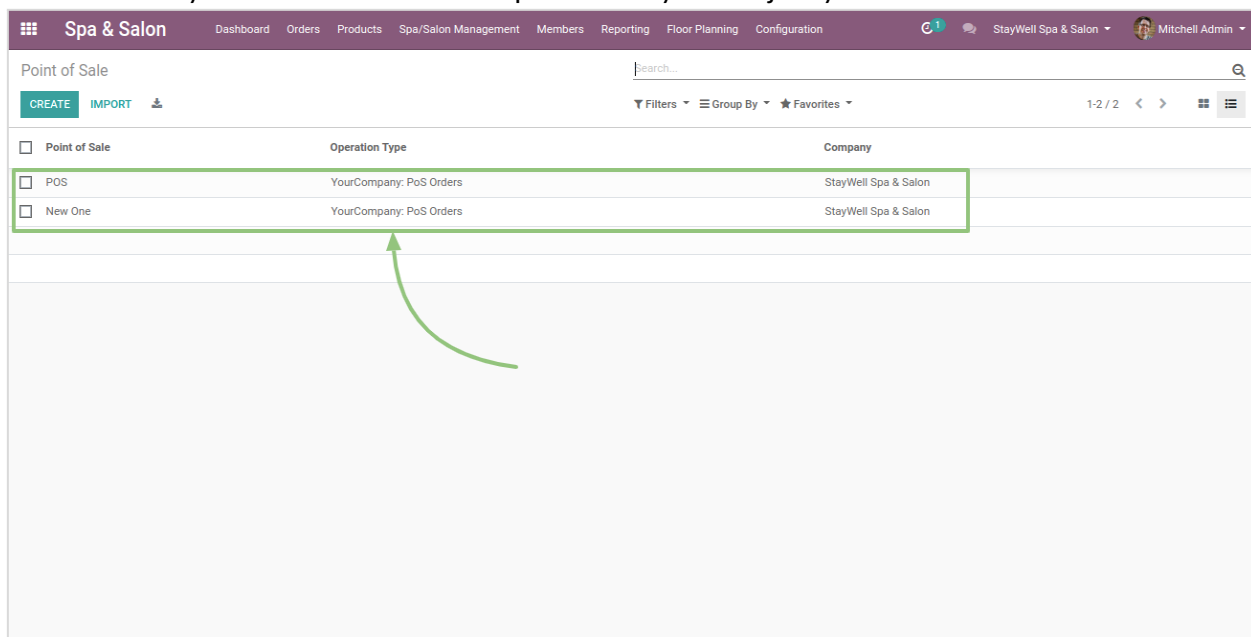
1.5 POSessions [Kanban View]

This is actually a Dashboard showing the configured POS Sessions. Kanban view will present things like this. We have a toggle button at the top-right corner to change it to a Listview if you want.



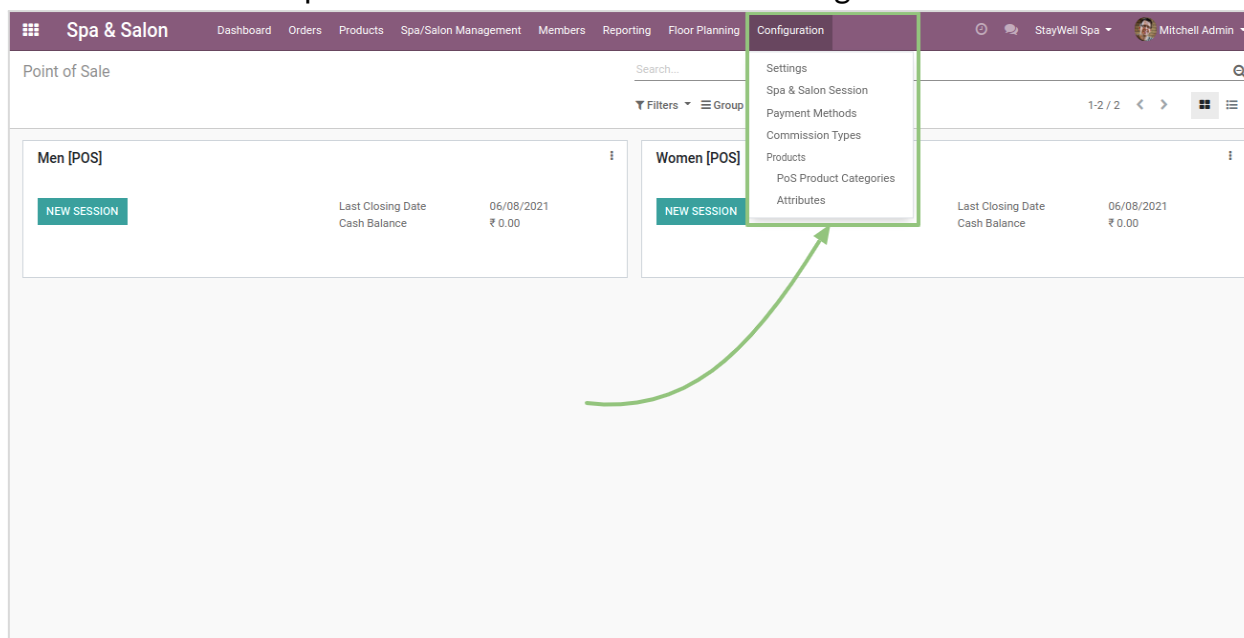
1.6 : POS Sessions [List View]

As said, by using a toggle button at the top-right corner, we can view our POS Session in a Listview like this. Mostly the Kanban view will be preferred by the majority of users.



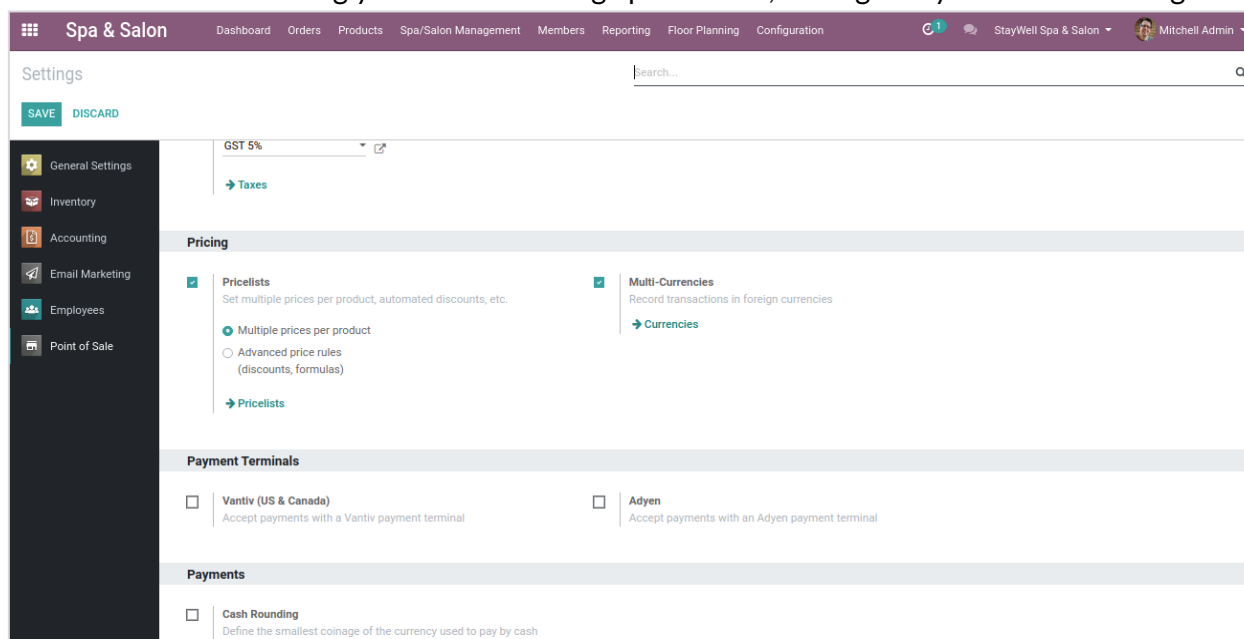
2.0 : [Menu] Configuration

This is one of the major manu-items. Help is configuring our solution with all the data we are going to work with. These are going to be the one-time configurations to use this solution. Will talk about each option listed under this menu in the image below.



2.1 [Configuration] Settings

Settings, as the word suggests, helps us in defining some of the general settings to prepare our solution to use it accordingly. It includes setting up the Taxes, Pricing & Payment related things.



2.2 [Configuration] Session

Sessions are actually the POS-Sessions we want to use. Sessions we see on our Dashboard are the ones which have been created and configured here from this page. Opening up any one of them will again ask us to configure the session with more options.

Spa & Salon		
Dashboard Orders Products Spa/Salon Management Members Reporting Floor Planning Configuration		
Spa & Salon Session		
CREATE IMPORT Filters Group By Favorites 1-2 / 2		
Point of Sale	Operation Type	Company
☐ Men [POS]	My Company (Chicago): Delivery Orders	StayWell Spa
☐ Women [POS]	My Company (Chicago): Delivery Orders	StayWell Spa

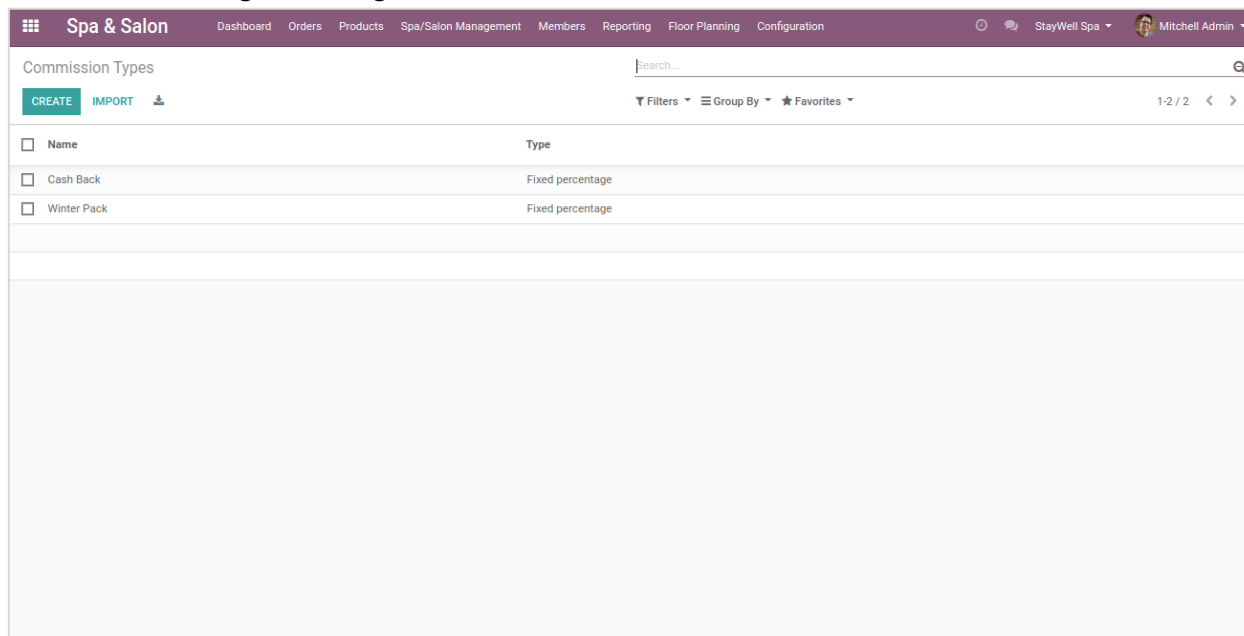
2.3 : Payment Methods

Payment methods are created & managed here. Mostly these two methods shown in an image will be there. We still have an option to add more if we have any other way to accept payments. Again, you can see the toggle button to view these records in Kanban/List views.

Spa & Salon				
Dashboard Orders Products Spa/Salon Management Members Reporting Floor Planning Configuration				
Payment Methods				
CREATE IMPORT Filters Group By Favorites 1-2 / 2 Toggle View				
Payment Method	Intermediary Account	Cash	Use a Payment Terminal	Company
☐ Cash	100410 Debtors (PoS)	☒		StayWell Spa
☐ Bank	100410 Debtors (PoS)	☐		StayWell Spa

2.4 : [Configuration] Commission Type

Commission types for your members & employees can be created & configured here from this screen. There would not be any limit in creating numbers of records here. It is as simple as clicking on the “Create” button & get it configured so that we can use it further.

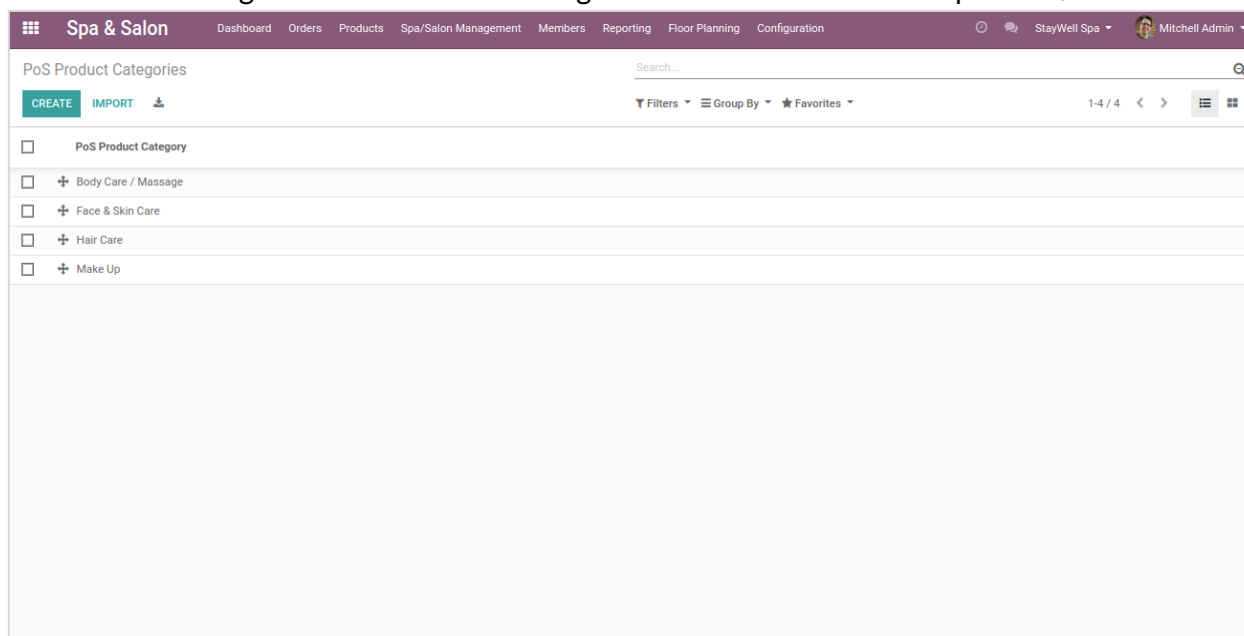


The screenshot shows the 'Commission Types' configuration screen. The header bar includes navigation links: Dashboard, Orders, Products, Spa/Salon Management, Members, Reporting, Floor Planning, and Configuration. The user is logged in as Mitchell Admin. The main content area has a search bar and buttons for CREATE, IMPORT, and a download icon. Below the buttons are tabs for Filters, Group By, and Favorites. The table lists commission types with columns for Name and Type.

Name	Type
Cash Back	Fixed percentage
Winter Pack	Fixed percentage

2.5A : [Config-Products] Categories

Product categories help POS operators to easily navigate through the list of products / services at the time of working on the live sessions. Categories can be defined on each product / service.

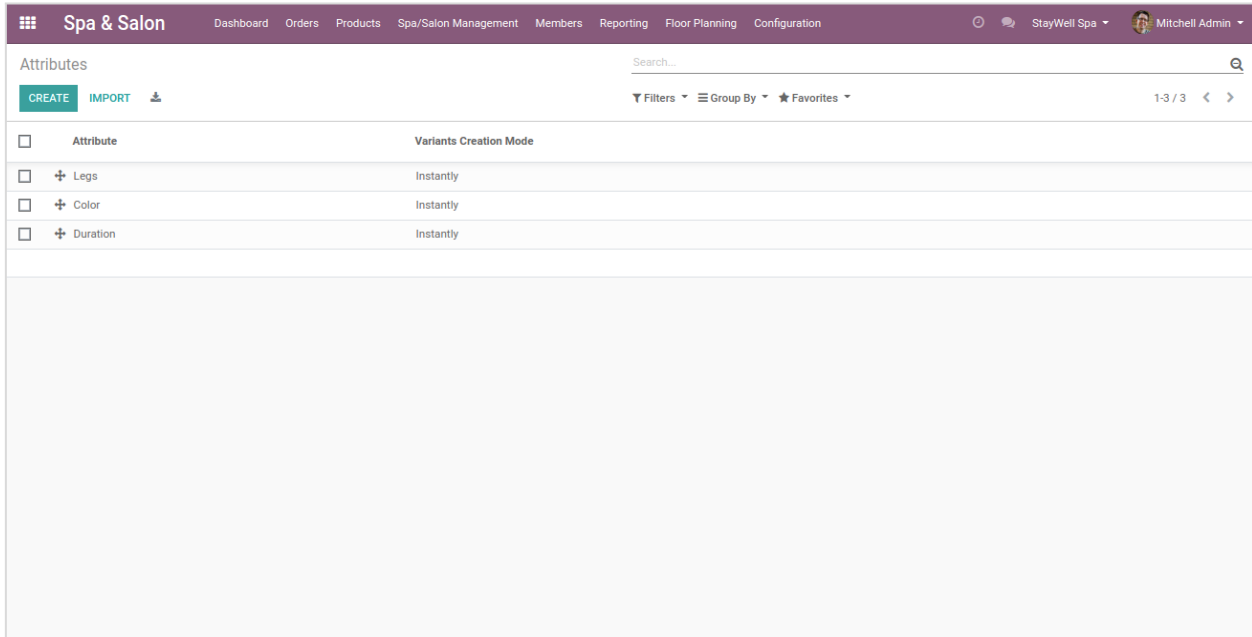


The screenshot shows the 'PoS Product Categories' configuration screen. The header bar is identical to the previous screen. The main content area has a search bar and buttons for CREATE, IMPORT, and a download icon. Below the buttons are tabs for Filters, Group By, and Favorites. The table lists product categories with columns for Name and Type.

PoS Product Category	Type
Body Care / Massage	
Face & Skin Care	
Hair Care	
Make Up	

2.5B : [Config-Products] Attributes

Users can define attributes here to help POS operators to locate any product / service while working on a live session for billing.



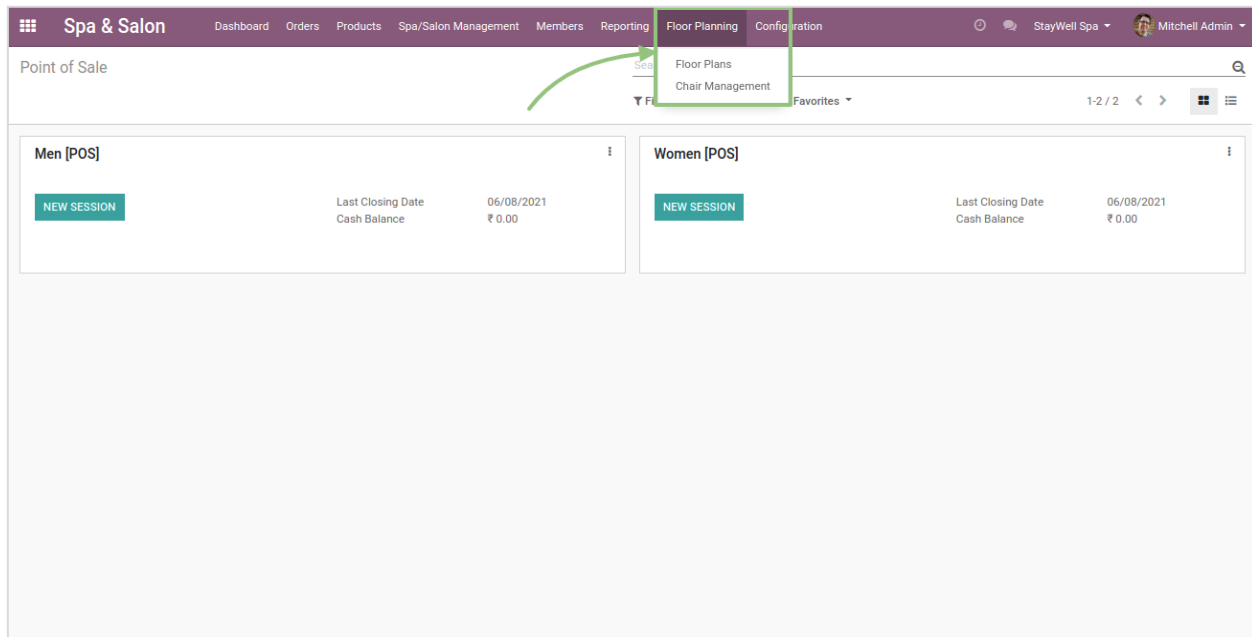
The screenshot displays the 'Attributes' configuration interface. At the top, there's a navigation bar with 'Spa & Salon' and various menu items like 'Dashboard', 'Orders', 'Products', etc. Below this, the 'Attributes' section is active, showing a search bar and buttons for 'CREATE' and 'IMPORT'. A table lists the configured attributes:

Attribute	Variants Creation Mode
Legs	Instantly
Color	Instantly
Duration	Instantly

The table also includes checkboxes for each attribute and a 'Filters' section at the bottom.

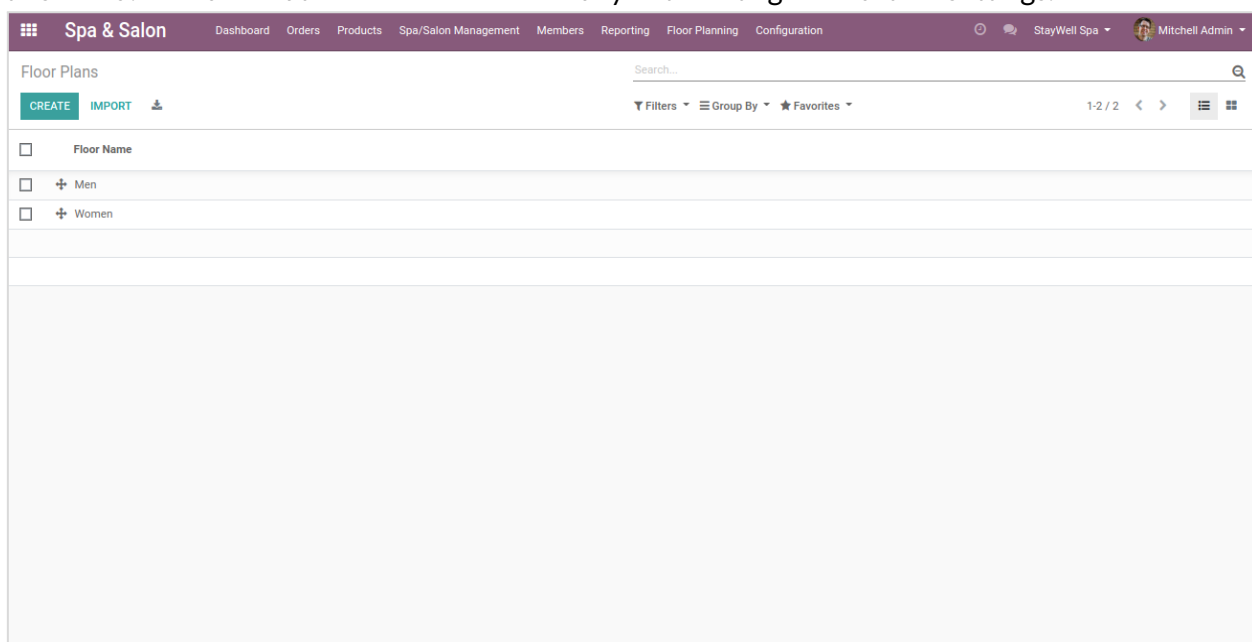
3.0 : [Menu] Floor Planning

A separate menu to take care of your Salon's premises where the services are actually given. Here we can manage our floor plans & chair management for our salon.



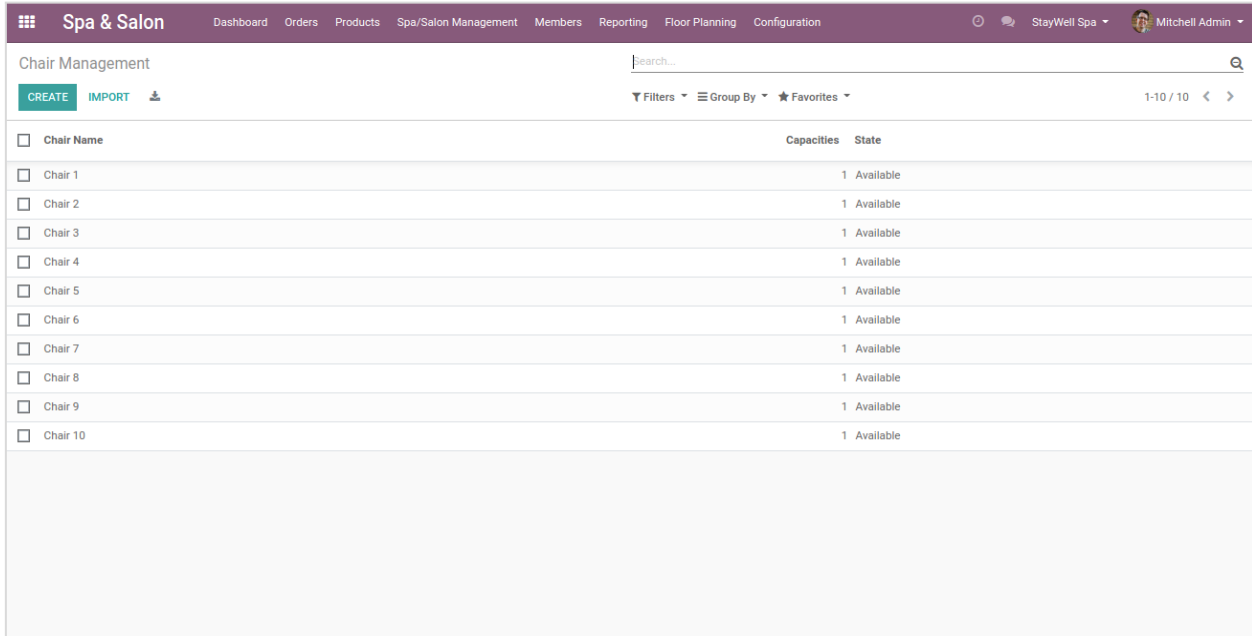
3.1 : [Floor Planning] Floor Plans

Floor plans are actually the salon space with chairs to serve clients. This can be planned here under this menu. We can create new one or click on any of them to go for further settings.



3.2 : [Floor Planning] Chair Management

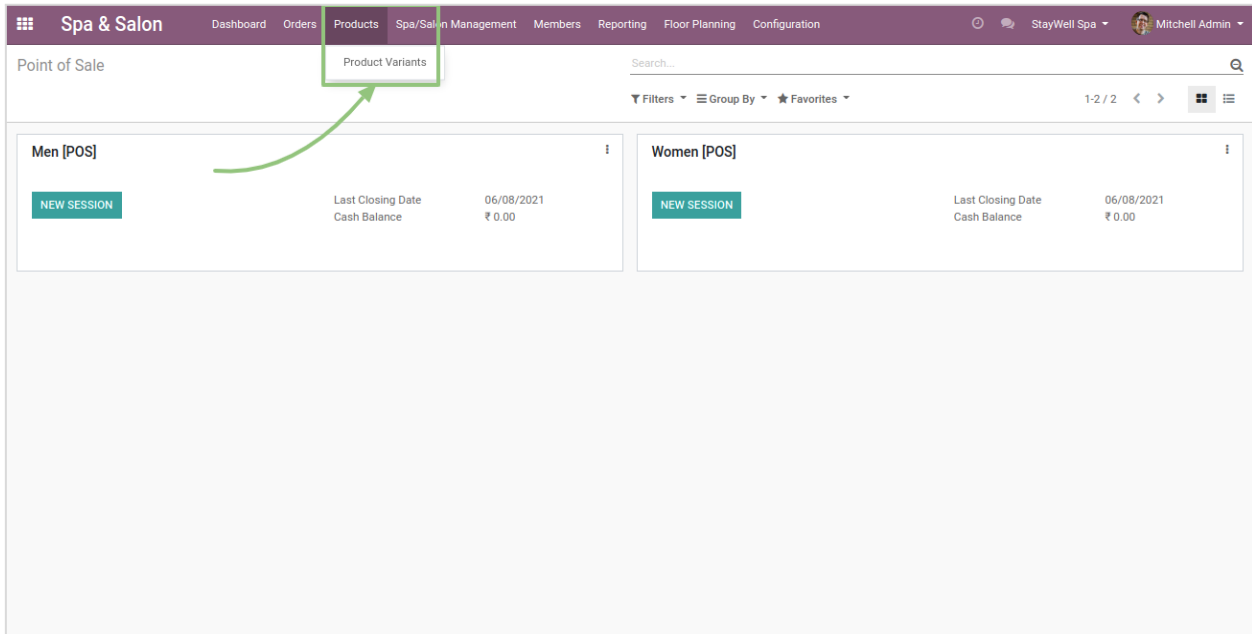
Chairs used to serve customers should be properly created & configured in the system. So that can be done from here in this menu. Even we can assign a particular chair a capacity & floor where physically it will be placed.



Chair Name	Capacities	State
Chair 1	1	Available
Chair 2	1	Available
Chair 3	1	Available
Chair 4	1	Available
Chair 5	1	Available
Chair 6	1	Available
Chair 7	1	Available
Chair 8	1	Available
Chair 9	1	Available
Chair 10	1	Available

4.0 : [Menu] Products

Products & its variants can be configured from this menu item. Products here are nothing but the services provided by your beautician in your Spa/Salon. Services / Products can be defined with its categories.



Point of Sale

Men [POS]

NEW SESSION

Last Closing Date: 06/08/2021
Cash Balance: ₹ 0.00

Women [POS]

NEW SESSION

Last Closing Date: 06/08/2021
Cash Balance: ₹ 0.00

4.1 : [Products] Product Variants

Product variants should be well configured to use it properly with POSessions.

Spa & Salon						
Dashboard Orders Products Spa/Salon Management Members Reporting Floor Planning Configuration						
Services Services Available in POS Search... CREATE IMPORT Filters Group By Favorites 1-28 / 28						
☐	Internal Reference	Name	Attribute Values	Sales Price	Cost	Quantity On Hand
☐	SERV_FACIAL	Back Facial		340.00	0.00	
☐	SERV_FACIAL	Cleansing Facial		360.00	0.00	
☐	SERV_FACIAL	Gold Facial		500.00	0.00	
☐	SERV_FACIAL	Makeup Touchup		570.00	0.00	
☐	SERV_FACIAL	Special Occasion Makeup		1,200.00	0.00	
☐	SERV_HAIRCOLOR	Men's Highlight/Haircut		250.00	0.00	
☐	SERV_HAIRCOLOR	Partial Highlight		320.00	0.00	
☐	SERV_HAIRCOLOR	Permanent Color		500.00	0.00	
☐	SERV_HAIRCUT	Beard Trim		150.00	0.00	
☐	SERV_HAIRCUT	Kids Haircut		200.00	0.00	
☐	SERV_HAIRCUT	Men's Haircut		180.00	0.00	
☐	SERV_HAIRCUT	Womens Haircut		250.00	0.00	
☐	SERV_MASSAGE	Massage-30minutes		700.00	0.00	
☐	SERV_NAILS	Basic Manicure		280.00	0.00	
☐	SERV_NAILS	Basic Pedicure		320.00	0.00	
☐	SERV_NAILS	Spa Manicure		430.00	0.00	
☐	SERV_NAILS	Spa Pedicure		380.00	0.00	

4.2 : [Products] Pricing Lists

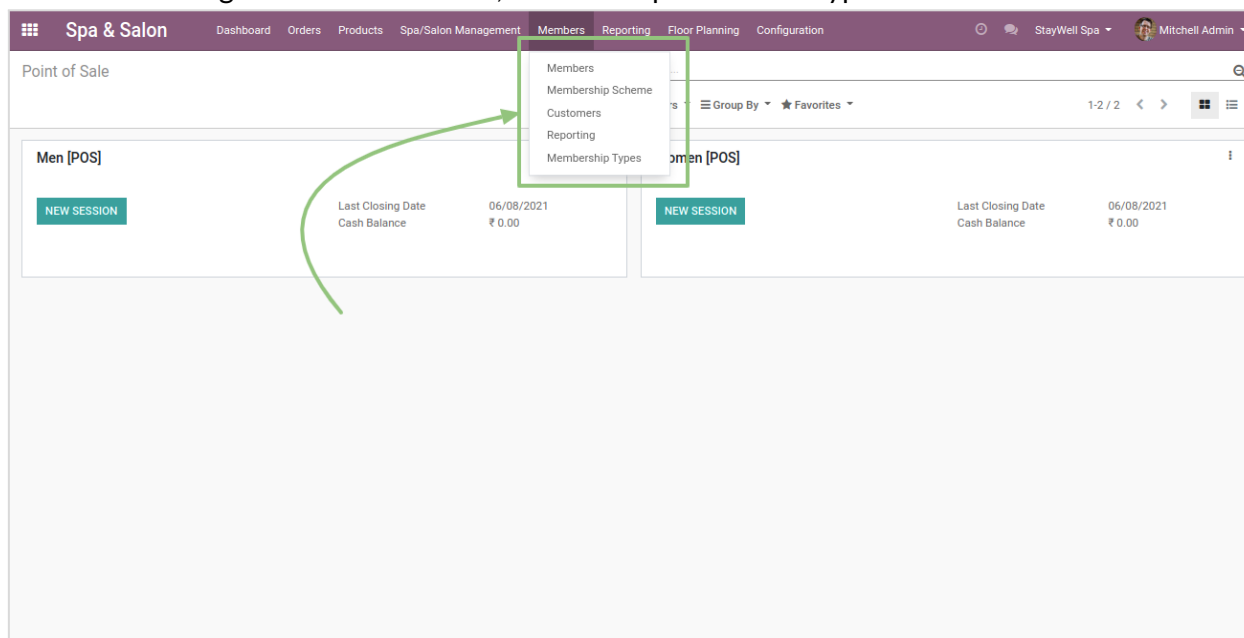
We have an option to define different pricing lists. It can be based on a particular time-frame, product or billing amount.

Buy Now

Spa & Salon						
Dashboard Orders Products Spa/Salon Management Members Reporting Floor Planning Configuration						
Pricelists Search... CREATE IMPORT Filters Group By Favorites 1-2 / 2						
☐	Pricelist Name		Company			
☐	+ Public Pricelist					
☐	+ Default USD pricelist					

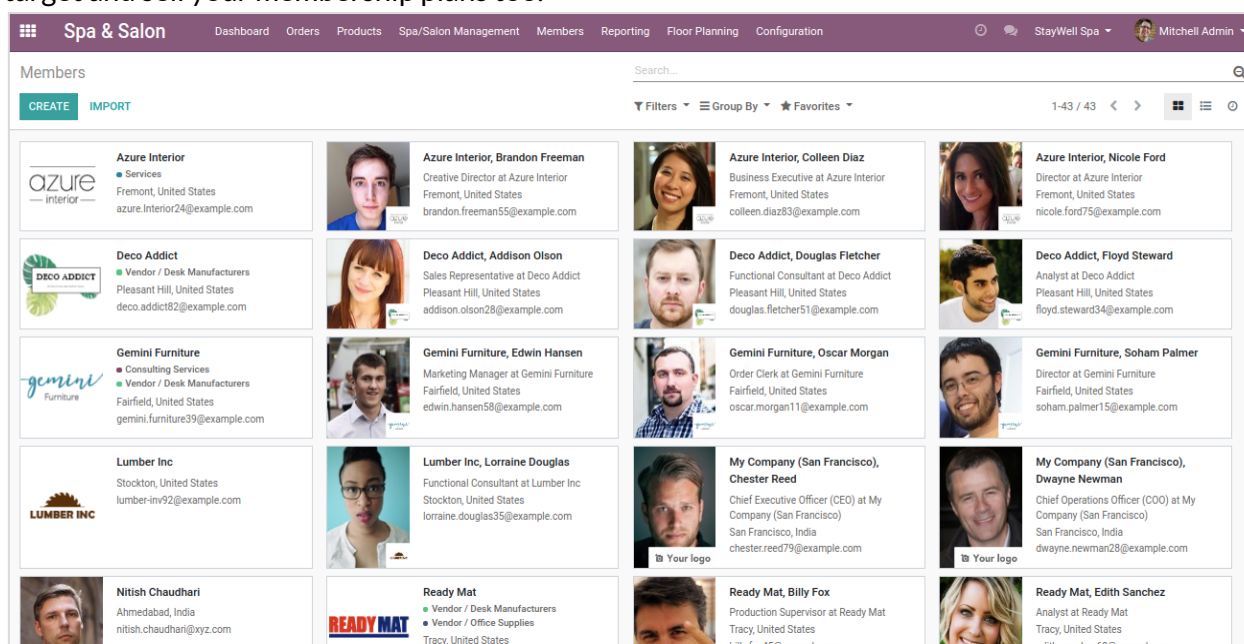
5.0 : [Menu] Members

There can be some types of membership schemes & plans you are offering to your customers. Customers can have some extra benefits by becoming your members. Members-related options are here to manage members' contacts, membership schemes & types & customers.



5.1 : [Members] Members

Every customer is not a member. Those who have taken some kind of a membership plan that you have defined will be listed here like this in this section. It helps us in considering other customers to target and sell your membership plans too.



5.2 : [Members] Membership Scheme

Different types of membership schemes can be created here. These schemes will get available while we are offering any customer with any of these kinds of membership. We can click on the “Create” button to add new or modify it by clicking on any of the records.

Spa & Salon			
Dashboard Orders Products Spa/Salon Management Members Reporting Floor Planning Configuration			
Membership Scheme			
CREATE IMPORT Filters Group By Favorites 1-3 / 3			
☐ Scheme Name	Scheme Type	Subscription Start	Subscription End
☐ Gold Scheme	Take X Service From Category Get X Percentage Discount	07/01/2021	07/31/2021
☐ Silver Scheme	Take X Service From Category Get X Percentage Discount	07/01/2021	07/31/2021
☐ Pink Scheme	Take X Service From Category Get X Percentage Discount	07/01/2021	07/31/2021

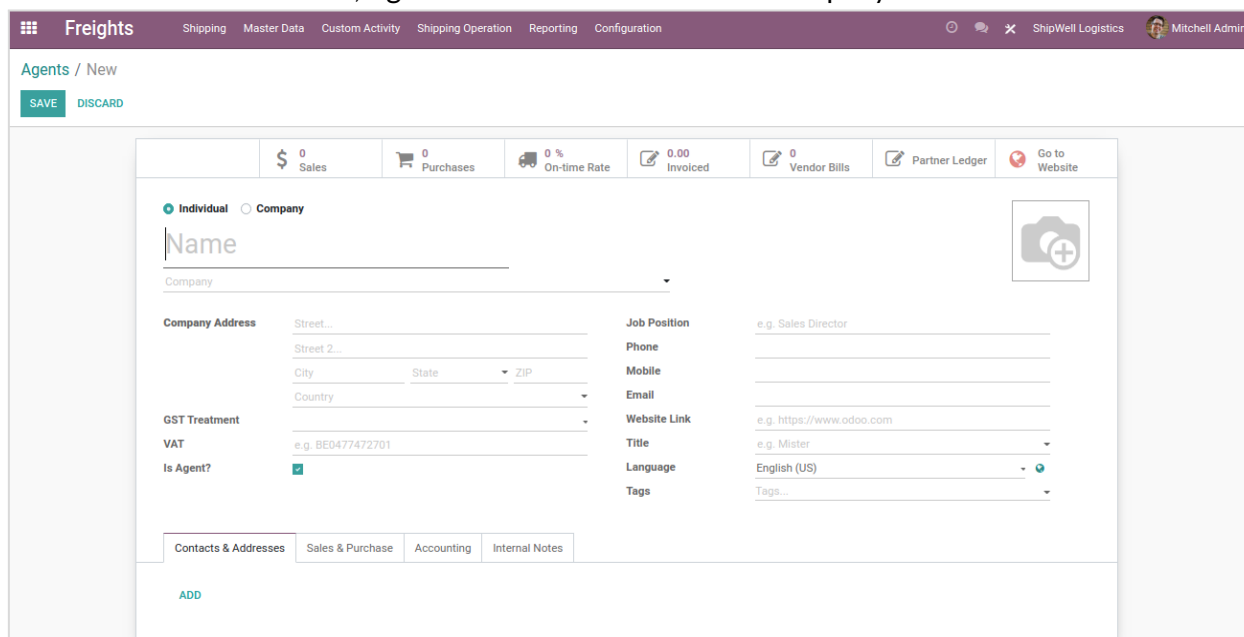
5.3 : [Members] Customers

This page lists out all customers you have once served to. Creating a new customer will ask us for more details like contact information & some other. We can have these records listed both in a Kanban & in List view. Members & Non-Members both types of customers will be here.

Spa & Salon			
Dashboard Orders Products Spa/Salon Management Members Reporting Floor Planning Configuration			
Customers			
CREATE IMPORT Individuals Search... Filters Group By Favorites 1-31 / 31			
 Azure Interior, Brandon Freeman Creative Director at Azure Interior Fremont, United States brandon.freeman55@example.com	 Azure Interior, Colleen Diaz Business Executive at Azure Interior Fremont, United States colleen.diaz83@example.com	 Azure Interior, Nicole Ford Director at Azure Interior Fremont, United States nicole.ford75@example.com	 Deco Addict, Addison Olson Sales Representative at Deco Addict Pleasant Hill, United States addison.olson28@example.com
 Deco Addict, Douglas Fletcher Functional Consultant at Deco Addict Pleasant Hill, United States douglas.fletcher51@example.com	 Deco Addict, Floyd Steward Analyst at Deco Addict Pleasant Hill, United States floyd.steward34@example.com	 Gemini Furniture, Edwin Hansen Marketing Manager at Gemini Furniture Fairfield, United States edwin.hansen58@example.com	 Gemini Furniture, Oscar Morgan Order Clerk at Gemini Furniture Fairfield, United States oscar.morgan11@example.com
 Gemini Furniture, Soham Palmer Director at Gemini Furniture Fairfield, United States soham.palmer15@example.com	 Lumber Inc, Lorraine Douglas Functional Consultant at Lumber Inc Stockton, United States lorraine.douglas35@example.com	 My Company (San Francisco), Chester Reed Chief Executive Officer (CEO) at My Company (San Francisco) San Francisco, India chester.reed79@example.com	 My Company (San Francisco), Dwayne Newman Chief Operations Officer (COO) at My Company (San Francisco) San Francisco, India dwayne.newman28@example.com
 Nitish Chaudhari Ahmedabad, India nitish.chaudhari@xyz.com	 Ready Mat, Billy Fox Production Supervisor at Ready Mat Tracy, United States billy.fox45@example.com	 Ready Mat, Edith Sanchez Analyst at Ready Mat Tracy, United States edith.sanchez68@example.com	 Ready Mat, Julie Richards Financial Manager at Ready Mat Tracy, United States julie.richards84@example.com
 Ready Mat, Kim Snyder Senior Associate at Ready Mat Tracy, United States kim.snyder96@example.com	 Ready Mat, Sandra Neal Sales Manager at Ready Mat Tracy, United States sandra.neal80@example.com	 Ready Mat, Theodore Gardner System Analyst at Ready Mat Tracy, United States theodore.gardner36@example.com	 Ready Mat, Travis Mendoza Knowledge Manager at Ready Mat Tracy, United States travis.mendoza24@example.com

5.4 : [Members] Reporting

Creating a record here will help us directly select an agent while working with Shipping Orders. Same as customer & vendor, Agents can be an individual or a company.



Freights | Shipping | Master Data | Custom Activity | Shipping Operation | Reporting | Configuration

Agents / New

SAVE DISCARD

0 Sales | 0 Purchases | 0 % On-time Rate | 0.00 Invoiced | 0 Vendor Bills | Partner Ledger | Go to Website

☒ Individual ☐ Company

Name

Company

Company Address

Street...
Street 2...
City State ZIP
Country

GST Treatment

VAT e.g. BE0477472701

Is Agent? ☒

Job Position e.g. Sales Director

Phone
Mobile
Email
Website Link e.g. https://www.odoo.com

Title e.g. Mister

Language English (US)

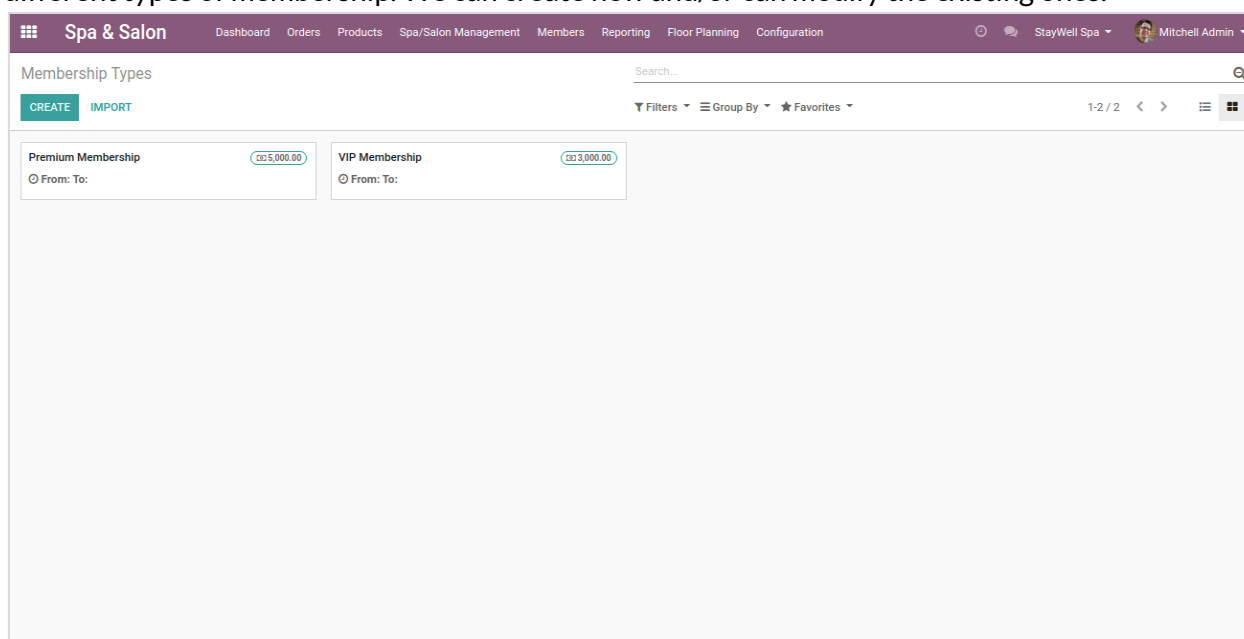
Tags

Contacts & Addresses | Sales & Purchase | Accounting | Internal Notes

ADD

5.5 : [Members] Membership Types

Membership types can be defined from here. Image here shows us the Kanban view of the two different types of membership. We can create new and/or can modify the existing ones.



Spa & Salon | Dashboard | Orders | Products | Spa/Salon Management | Members | Reporting | Floor Planning | Configuration

Membership Types

CREATE IMPORT

Search...

Filters Group By Favorites

1-2 / 2

Premium Membership 5,000.00

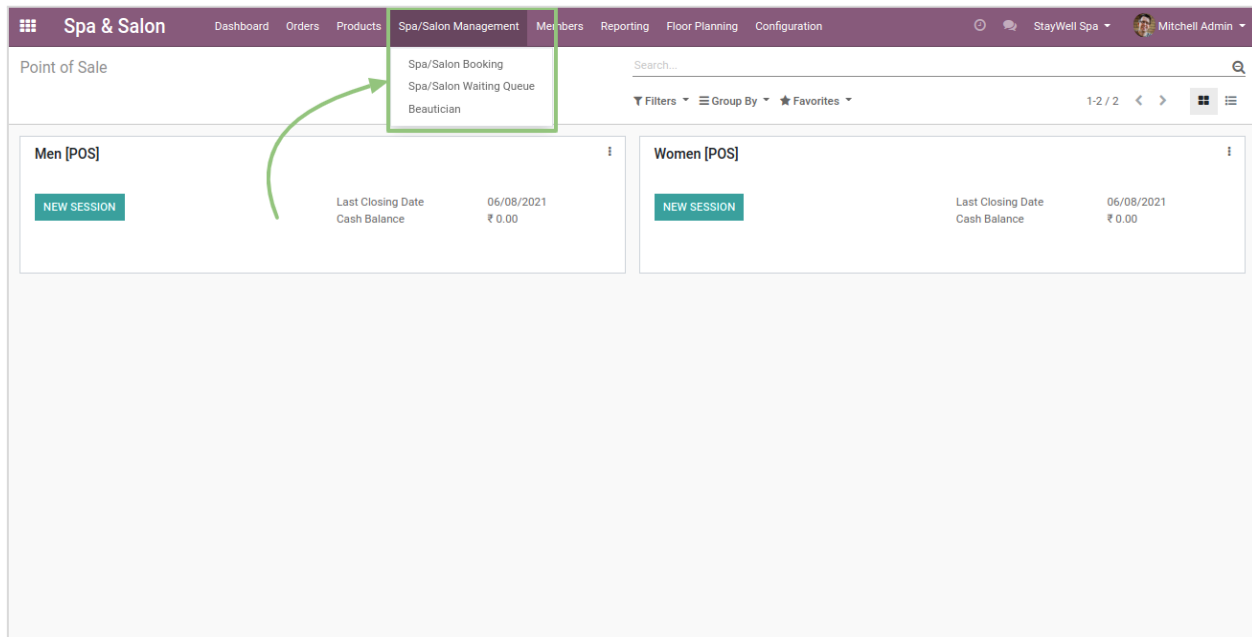
From: To:

VIP Membership 3,000.00

From: To:

6.0 [Menu] Spa/Salon Management

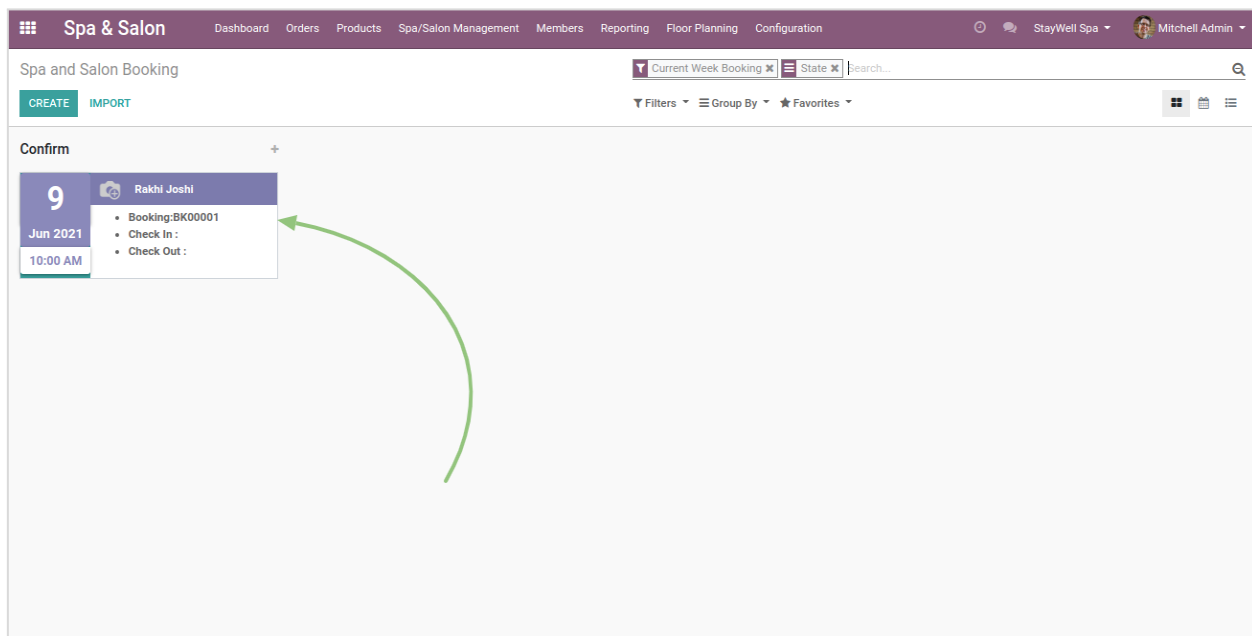
This major menu opens up with a couple of more options to manage your bookings, waiting queue & beauticians. Offers complete operational settings to take care of our Spa/Salon specific things.



6.1 [Spa/Salon Management] Bookings

Customers may ask us to book a specific service / slot for them. It's like a doctor's appointment. We can create it & have it listed as shown in an image. Available both in Kanban & Listed view.

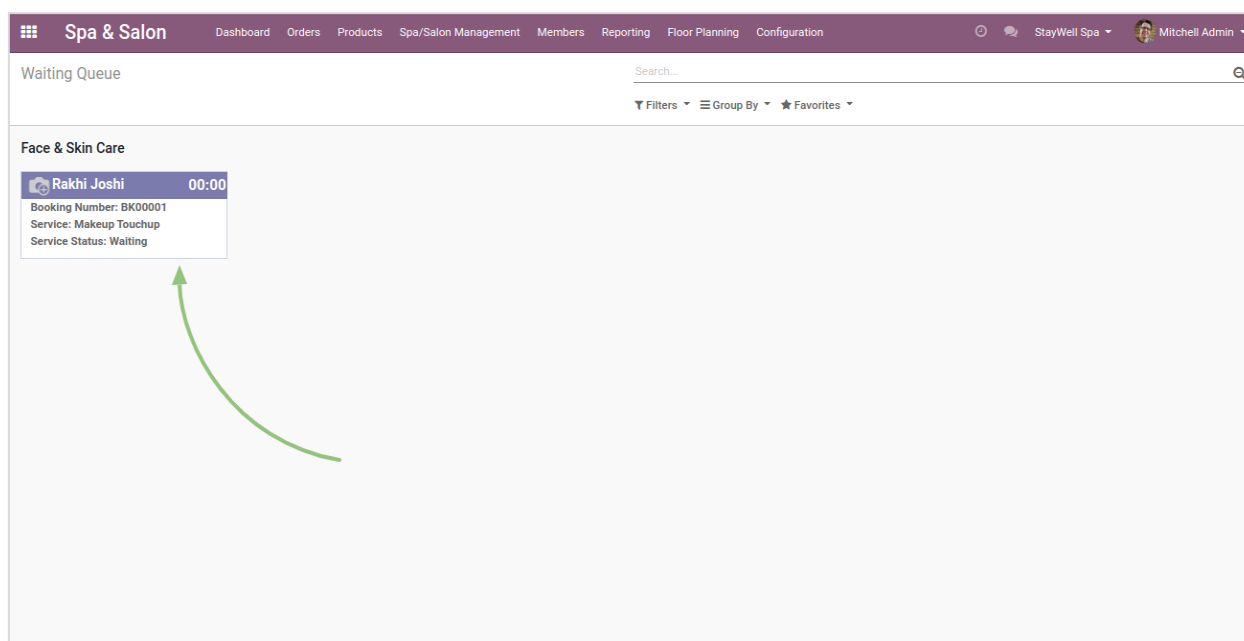
Buy Now



6.2 [Spa/Salon Management] Waiting Queue

Waiting Queues is a second thing to manage if we have bookings done in a larger volume. Customers may come some minutes prior they have booked for any of our services. Customers arrived and reported that their presence can be managed with a waiting queue screen here.

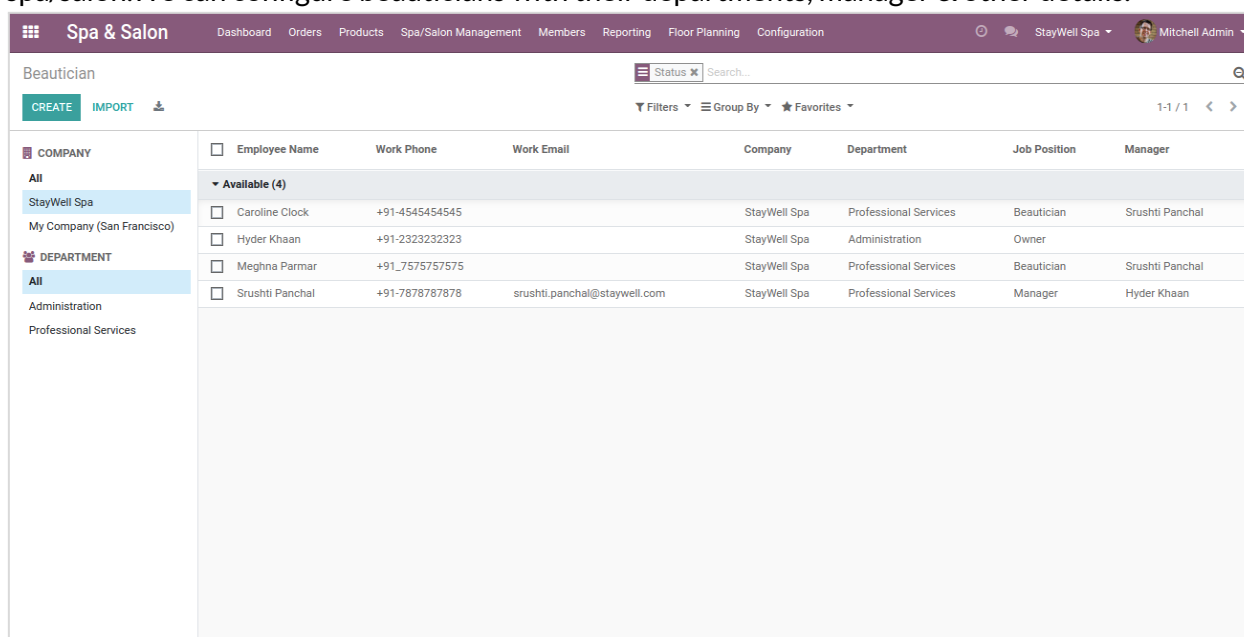
Buy Now



The screenshot displays the 'Waiting Queue' section of the 'Spa & Salon' management application. The top navigation bar includes 'Dashboard', 'Orders', 'Products', 'Spa/Salon Management', 'Members', 'Reporting', 'Floor Planning', and 'Configuration'. The user is logged in as 'Mitchell Admin'. The 'Waiting Queue' page shows a search bar and filters. Under the 'Face & Skin Care' category, a card for 'Rakhi Joshi' is visible, showing a booking number of 'BK00001', service 'Makeup Touchup', and status 'Waiting'. A green arrow points to the 'Waiting' status.

6.3 [Spa/Salon Management] Beauticians

We have an integrated way of managing our staff members including our Beauticians. Just like configuring employees, we can manage beauticians as they would be working employees of your spa/salon. We can configure beauticians with their departments, manager & other details.

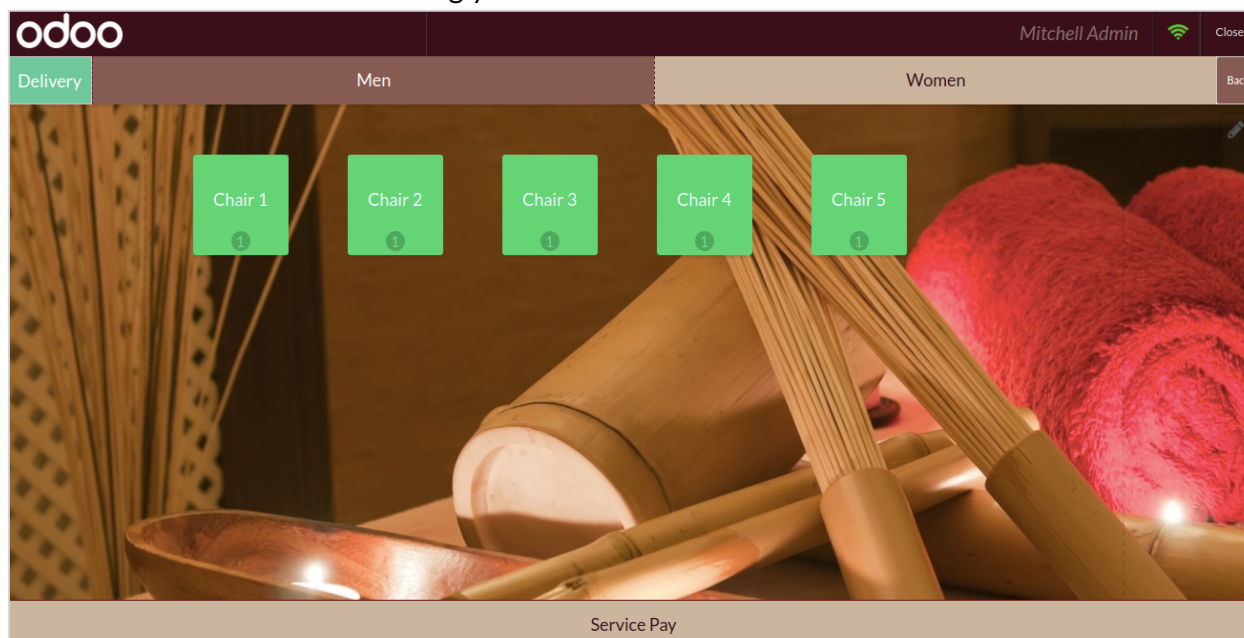


The screenshot displays the 'Beautician' management section of the 'Spa & Salon' application. The top navigation bar is the same as in the previous screenshot. The 'Beautician' page includes a 'CREATE' button, an 'IMPORT' button, and a search bar. Below the search bar, there are filters and a table of beauticians. The table has columns for 'Employee Name', 'Work Phone', 'Work Email', 'Company', 'Department', 'Job Position', and 'Manager'. The table lists four beauticians: Caroline Clock, Hyder Khaan, Meghna Parmar, and Srushti Panchal. The 'Available (4)' filter is selected.

Employee Name	Work Phone	Work Email	Company	Department	Job Position	Manager
Caroline Clock	+91-4545454545		StayWell Spa	Professional Services	Beautician	Srushti Panchal
Hyder Khaan	+91-2323232323		StayWell Spa	Administration	Owner	
Meghna Parmar	+91_7575757575		StayWell Spa	Professional Services	Beautician	Srushti Panchal
Srushti Panchal	+91-7878787878	srushti.panchal@staywell.com	StayWell Spa	Professional Services	Manager	Hyder Khaan

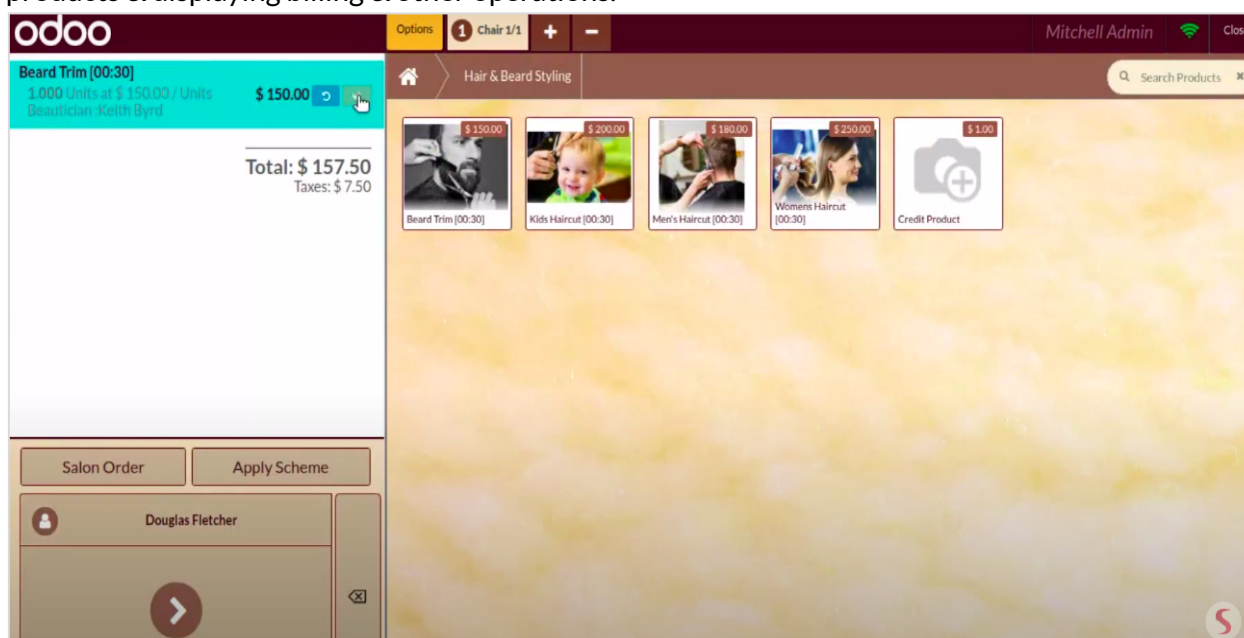
7.0 [POS] Floor Plan

Welcome to our POS ! We can enter / resume any of our sessions from our dashboard. Configured floors & chairs will be visible like this. We can work on multiple chairs simultaneously as we can bill our services to customers accordingly.



7.1 [POS] Billing Sessions

This is how the actual live POS session looks like. Top row has options to switch between floors & chairs. Also one can select to go for a specific product / category to work with. Rest, major sections are listing products & displaying billing & other operations.



7.2 [POS] Payments

This is how a user can process & accept payments. This screen comes when someone is done with the service(s) & wants to check-out & pay. We configured payment methods which will be available to us (Cash, Bank) as shown in an image.

Buy Now

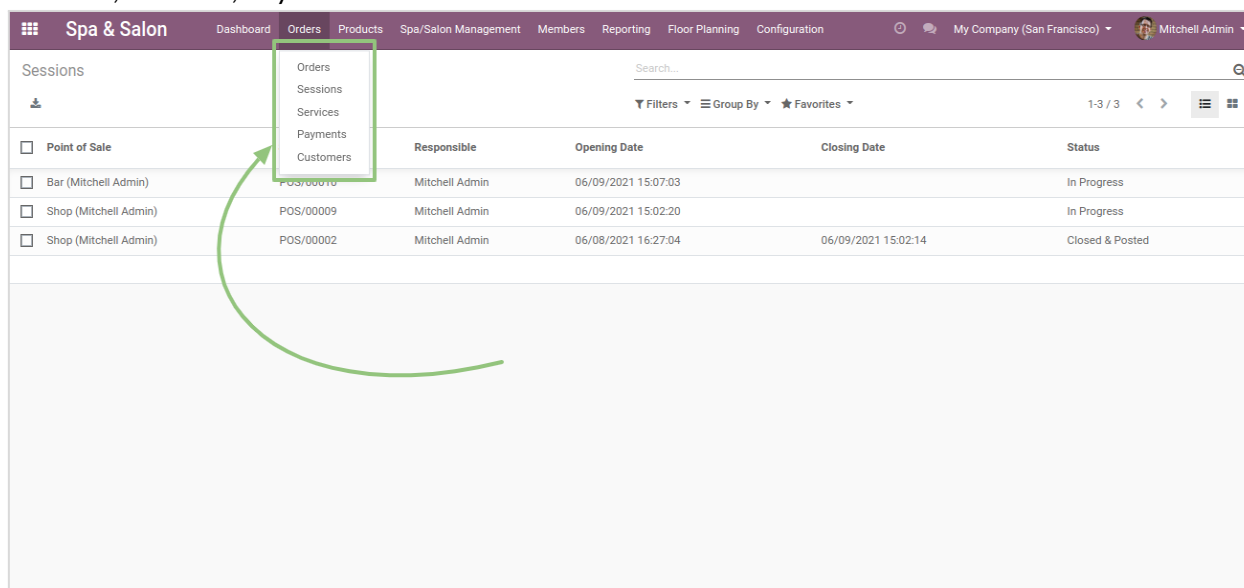
7.3 [POS] Payment Receipt

And this is how the payment receipt will get printed. We can see that the configured Header & Footer also gets visible along with the amount to be paid by the customer.

My Company (San Francisco)	
Tel: +1 (415) 691-3277	
GSTIN: 24B8BFF3679L6Z8	
info@yourcompany.example.com	
http://www.example.com	
Taking care of your looks is WORSHIP	
Served by Mitchell Admin	
at table Chair 1	
Guests: 1	
Beard Trim [00:30]	150.00
Subtotal	\$ 150.00
SGST Sale 2.5%	3.75
CGST Sale 2.5%	3.75
TOTAL	\$ 157.50
Bank	157.50
CHANGE	\$ 0.00

8.0 [Menu] Orders

Once we actively started working with POS Sessions, we are having more options to have a look at our orders related to auto-generated data. So, order-specific data can be viewed here. Includes Orders, Sessions, Services, Payments & Customers.



The screenshot shows the 'Spa & Salon' application interface. The top navigation bar includes 'Dashboard', 'Orders', 'Products', 'Spa/Salon Management', 'Members', 'Reporting', 'Floor Planning', and 'Configuration'. The 'Orders' menu is highlighted, showing a dropdown with 'Orders', 'Sessions', 'Services', 'Payments', and 'Customers'. Below the menu, a table lists sessions with columns: 'Point of Sale', 'Responsible', 'Opening Date', 'Closing Date', and 'Status'.

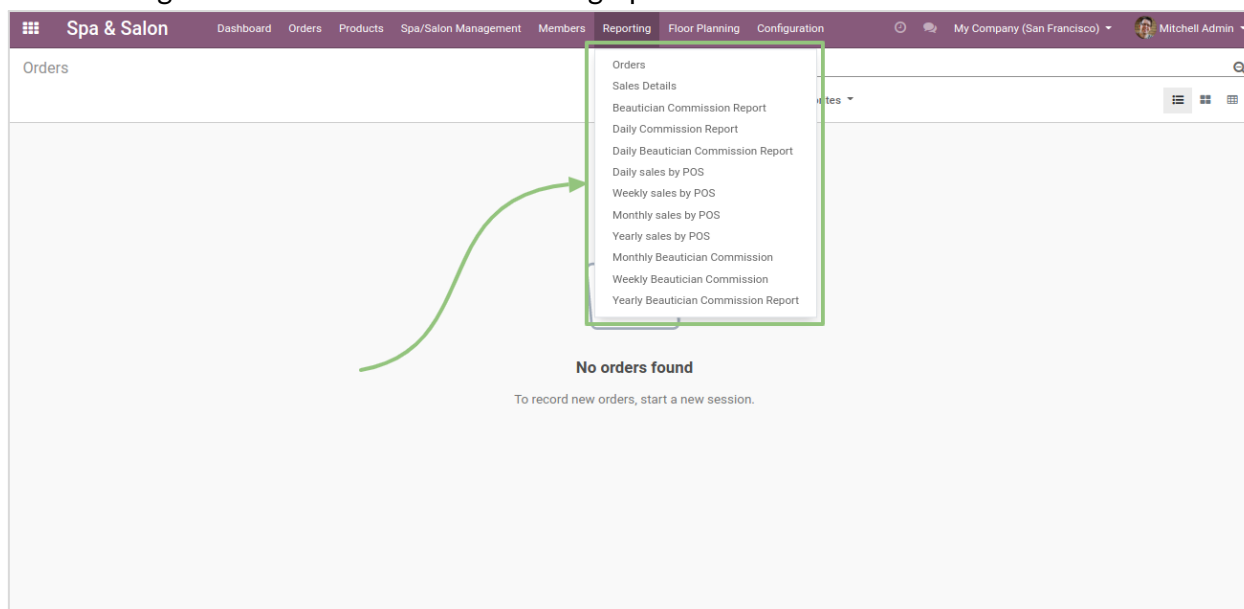
Point of Sale	Responsible	Opening Date	Closing Date	Status
Bar (Mitchell Admin)	Mitchell Admin	06/09/2021 15:07:03		In Progress
Shop (Mitchell Admin)	Mitchell Admin	06/09/2021 15:02:20		In Progress
Shop (Mitchell Admin)	Mitchell Admin	06/08/2021 16:27:04	06/09/2021 15:02:14	Closed & Posted

8.1 [Orders] Sessions

We can have our POSessions listed here that we have worked with so far. It gives us an idea of each session with its Responsible Person, Session ID, Opening-Closing Date & current status. Running sessions will be listed as In-Progress & the rest will be as Closed & Posted.

9.0 [Menu] Reporting

Reporting helps business owners & managers in strategic decision making. We have 10+ parameters to check when it comes to viewing the reporting & other analytical data. We have options to check through these data both in numerical & graphical view.



The screenshot shows the 'Spa & Salon' application interface. The top navigation bar includes 'Dashboard', 'Orders', 'Products', 'Spa/Salon Management', 'Members', 'Reporting', 'Floor Planning', and 'Configuration'. The 'Reporting' menu is highlighted, showing a dropdown with various reports including 'Orders', 'Sales Details', 'Beautician Commission Report', 'Daily Commission Report', 'Daily Beautician Commission Report', 'Daily sales by POS', 'Weekly sales by POS', 'Monthly sales by POS', 'Yearly sales by POS', 'Monthly Beautician Commission', 'Weekly Beautician Commission', and 'Yearly Beautician Commission Report'.

No orders found
To record new orders, start a new session.

Get in touch

We'd love to hear from you!

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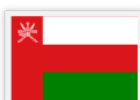
USA



UAE



Australia



Oman



Mauritius



Sudan



UK



Nigeria