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Candela for Salons

INTRODUCTION

Candela for Salons helps you effectively manage every aspect of your Salon. You can tailor its various operations according to the kind of services and products you are offering. Candela streamlines the entire business cycle of a salon from management of different types of service options and booking of orders to inventory management of the products being used.

Candela for Salons also handles account and employee management needs of a typical salon.

Generally speaking, a Salon's management will involve the following decisions and activities:

Creation of service Areas

Salons offer various types of services like facials, manicure, pedicure, spa treatment, hair treatments, etc. A salon owner needs to decide the kind of service areas s/he wants to create.

Products to be used for Various Services

Every salon has a preference for products of certain brands that will be used for various services like facials, hair treatments, etc.

All these products not just need to be purchased but inventory of all products also needs to be maintained to get a clear idea about costs involved and accruing profits.

Decision about the types of services to be offered

Once the departments are created you need to figure out what services your salon can offer in each department. For example, in the hair care department you may decide to offer hair cutting, hair styling, protein treatment, hair dyeing, etc.

Some services will involve use of other products. Depending upon the products being used you will work out what each service will cost for you and what you need to charge the customers to make it profitable.

Advance Booking of Customer Orders

If you decide to provide the option of advance booking for certain treatments or for bridal makeup and hairdo, you will have to maintain records of bookings and keep track of all customer orders.

Keeping Track of Services Provided by Each Service Provider

Keeping track of how many customers are catered to by each service provider is important to make decisions about commissions and promotions.

Accounts Management and Closing


Handling accounts and daily cash and store closings are handled on the relevant screens. Click CTRL+H on the relevant screen for detailed help.

Let's now learn how each Salon function is handled in Candela RMS.

DEFINING SALON & CREATING DEPARTMENTS

Creating a Salon in Candela

You can personalize Candela by defining your Salon. This how:

- Go to **Configuration>Store Definition**
- Click Cancel button  to bring the screen in update mode.
- Enter your salon name in **Name** field.
- Enter other information and **Update**



| Definition | Employees | Accounts | Franchise Discoun |
|------------------|-----------------------|----------|-------------------|
| Store Definition | | | |
| Name | Beauty Salon | | Code |
| Address | Saim Road, Mehr Towns | | |

Defining Salon Employees

After you have defined your salon in Candela and updated the record, again click the cancel button. Your salon will load on the screen.

- Click **Employees** tab.
- In **Name** field, enter name of the employee.
- Give it a **Code** (it could be same as the name or any other alpha numeric code).
- From **Employee Type** drop down, select employee type

Note: Three employee types are defined in the system. You can edit them and also define new types according to your requirements.

Employee types are defined on **Configuration>Misc>Employee Type**

- For your record, enter employee's salary in **Salary** field.
- Select **Start Date** (from this date onwards the system will maintain the employee's record).
- Mark the checkbox '**Set as Sales Person**' for the employees whose sales and services record you want to manage.

Note: if the checkbox 'Set as Sales person' is checked for a certain employee, her name can be attached to a particular sale. And C-12 report will show employee wise sales.

- **Save**
- All defined employees will appear in the grid

Definition **Employees** Accounts Franchise Discount Credit Cards Area All S

Beauty Salon (POS) (Company Owned)

Name: Sara
 Code: Sara
 Employee Type: Ministring angel
 Salary: 30000.0000
 Start Date: 26/Sep/2017
 End Date: 26/Sep/2017
 Set As Sales Person:
 Attach User: ---Select---

| Shop Employee Name | Shop Employee Code | Type | Salary | Start Date |
|--------------------|--------------------|------------------|-----------|-------------|
| Search here... | | | | |
| Fareeha | Fareeha | Salon Manager | 50,000.00 | 26/Sep/2017 |
| Kiran | Kiran | Ministring angel | 25,000.00 | 26/Sep/2017 |
| Sara | Sara | Ministring angel | 30,000.00 | 26/Sep/2017 |

Creating Salon Service Areas

In Candela, Service areas are called line items. To create service areas for your salon follow the steps below:

- Go to: **Configuration>Misc>Line Item Based Attributes>Line Items.**
- In the **Name** field, enter name of the service area.
- Enter a **Code** for it.
- If you want to you, enter **Comments** about the area being defined.
- Click **Save** button
- All defined areas will appear in the grid.
- You also need to define a separate line item for all your products that will be used in various service areas.
- Once you have defined the service areas, define another line item for the products that will be used for defining products while providing various services.
- If you have retail section in your salon where you sell products of various brands or your own products, you will also need to create a line item for it.

Line Item

Name: serenity lounge With Size and Color:

Code: SL Allow Decimal:

Sort Order: 0

Comments: manicure, pedicure, body massage, foot massage.

F Exp Title: _____

| Line Item Name | Line Item Code | Comments |
|------------------|----------------|--|
| Search here.... | | |
| Beauty Shop | BB | products of different brands for sale |
| Color Palette | CP | Make up and nail salon |
| Hair Flair | HF | Hair Salon for all types of cuts, hair treatments and hair styling. |
| serenity lounge | SL | manicure, pedicure, body massage, foot massage. |
| service products | SP | products to be used for various services |
| Snow White | SW | for threading, facials, skins treatments, facials, brightening treatme |

Annotations in image:
 - Red arrow pointing to 'serenity lounge' row: line item for retail
 - Red arrow pointing to 'service products' row: line item for service products

PRODUCTS TO BE USED FOR VARIOUS SERVICES

After Defining Service areas you can create a list of products that you will need to purchase for providing services in various service areas.

If you want to have a clear idea of what exactly your service costs and want to maintain costs and profits of the products that are used during various services, you need to define per ml quantity of each product in Candela.

Let's learn how to do it.

- Go to **Configuration>Product Definition**.
- From **Line Item** drop down menu select the Line Item that you have created for service products. (Arrow in the pic below is misleading)

Product Definition Product Price Barcode Lab

Line Item: service products Refresh

Product Code: SP00004 Refresh

Product Name: Beauty One HandSoak 250 ML

Annotations in image:
 - Red arrow pointing to 'service products' dropdown: misleading
 - Red arrow pointing to 'Refresh' button next to Product Code

- Click F2 in Product Code field to generate **Product Code**

Note: Product code is generated if you have created a product Template. To create a product template, click the plus sign in front of Product code field. In the Pop-up screen enter Template Name and code. For more help click **CTRL+H** on the screen to access integrated help.

- Enter **Product Name**
- If you want to attach brands with products select brand for the product being defined.

Note: Click the plus sign to define all the brands that you use. All defined brands will appear in the drop down menu
For more details click **CTRL+H** on Product Definition screen.

- Select supplier
- Add Purchase conversion Factor

| | |
|-----------------------|-----|
| Purchase Conv. Unit | Jar |
| Purchase Conv. Factor | 250 |

Note: Purchase Conversion Factor: This field is used to enter purchase conversion factor of the inventory. For example, if you purchase a Jar of cream having 250 ML, you will enter 250 in the conversion factor. *For more details click CTRL+H on Product Definition screen.*

- For all service products you can enter cost price and tax on the GRN screen when you enter stock.
- For all service products, select the **Product Type 'Basic'**
- Set inventory levels in ML (it is the amount of stock you want at your salon)

Product Type Basic Assembly

Inventory Level

| Minimum | Optimal | Maximum |
|---------|---------|---------|
| 1,250 | 2,500 | 3,750 |

- Save.
- Now click the ‘New’ button (green plus sign at the bottom of the screen) or press CTRL+N and define the next product. And so.

Checking list of the Defined Products

To check complete list of the products, select the line item whose products you want to see and click **All Product List** tab

| Product Definition | Product Price | Barcode Labels | Product Assembly | Opening Stock | All Product List | |
|---|----------------------------------|----------------|------------------|---------------|------------------|--------------|
| Product Code = [SP00013] Product Name = [Silky Protein Treatment 500 ML] | | | | | | |
| F <input checked="" type="checkbox"/> Exp Title <input type="text"/> | | | | | | |
| Product Code | Product Name | Brand | Average Cost | Supplier Name | Purchase Unit | Purchase Con |
| Search here... | | | | | | |
| SP00013 | Silky Protein Treatment 500 ML | | 0.00 | | Jar | 500.0000 |
| SP00012 | colors Liquid Base 40 ML | colors | 0.00 | Bio Amla | Bottle | 40.0000 |
| SP00011 | Natures way herbal mask 500 ML | Natures Way | 0.00 | | Jar | 500.0000 |
| SP00010 | Silky Hair Conditioner 300 ML | Silky | 0.00 | | Bottle | 300.0000 |
| SP00009 | Beauty One whitening Mask 300 ML | Beatuy One | 0.00 | | Jar | 300.0000 |
| SP00008 | Beauty One Hand Soak 250 ML | Beatuy One | 0.00 | Bio Amla | Jar | 250.0000 |

CREATING PRICING AND SERVICES UNDER EACH SERVICE AREA

- On **Product Definition** scree, select the service area under which you want to define services.
- Create a product template for it and click **F2** to generate **Code** for the service you want to define.
- Enter **Name** of the service.

- Enter **Price** (it is the price you will charge customers).
- If this service requires use of additional products (service products), from **Product Type** radio button select **Assembly**.

The screenshot shows the 'Product Definition' tab with the following details:

- Line Item: serenity lounge
- Product Code: SL00001
- Product Name: Manicure Simple
- Product Type: Assembly (selected)
- Price: 1,500.00
- Creation Date: 28/Sep/2017

Note: For learning how to create assemblies of the services you can refer to the section ‘Attaching Products to Services’

- Click **New** button to define the next service until you have defined all services that will be provided under the selected service area.
- Now select the next service area and define its services.

The screenshot shows the 'Product Definition' tab with the following details:

- Line Item: Hair Flair
- Product Code: HF00001
- Product Name: French Braid

PURCHASING PRODUCTS FOR SERVICE AREAS

You will need various products for each service area. Services like manicure, pedicure, facial, hairdo, etc. will require products like massage creams, scrubs, soaks, hair sprays, etc. You need to purchase these products and manage how stock is consumed for each service.

Note: Before purchasing these products you need to define them in the system. Service products definition is explained in the section '**Products to be used for various services.**'

Let's have a look at the steps involved:

- Go to **Purchase>GRN**
- Select **Supplier** (supplier can be defined from plus button or by pressing F2 in supplier field)
- Select Products you want to enter in Stock
- All selected products will load in the grid
- Enter cost price in **Rate** column
- In the **Pack Qty** enter number of jars or bottle of particular product you want to enter in stock.
- **Unit Qty** column will show total quantity of the product in MI
- **Save**

Product Code: Hold Product Help Keep Focus Show Pr
Purchase Order: Show PC

Print Retail Price Print

F Exp Title: Goods Receipt Notes

| Product | Product Name | Unit | R Price | Rate | Pack Qty | Total Amt | Unit Qty |
|---------|------------------------------------|--------|---------|----------|----------|-----------|----------|
| SP00003 | Beauty One Cleanser 1000 ML | Jar | 0.00 | 1,000.00 | 5 | 5,000.00 | 5,000 |
| SP00005 | Siren Nail file set | Pcs | 0.00 | 300.00 | 5 | 1,500.00 | 5 |
| SP00006 | Silky Cuticle Massage Cream 100 ML | Tube | 0.00 | 300.00 | 5 | 1,500.00 | 500 |
| SP00007 | Loreal Hair Dye 180 ML | Tube | 0.00 | 1,000.00 | 5 | 5,000.00 | 900 |
| SP00008 | Beauty One Hand Soak 250 ML | Jar | 0.00 | 1,000.00 | 5 | 5,000.00 | 1,250 |
| SP00009 | Beauty One whitening Mask 300 ML | Jar | 0.00 | 1,500.00 | 5 | 7,500.00 | 1,500 |
| SP00010 | Silky Hair Conditioner 300 ML | Bottle | 0.00 | 1,000.00 | 5 | 5,000.00 | 1,500 |
| SP00011 | Natures way herbal mask 500 ML | Jar | 0.00 | 1,200.00 | 5 | 6,000.00 | 2,500 |

Note: If you have not entered retail price, the system will warn you that cost price is greater than retail. Ignore it and proceed further.

GRN POSTING

Since you need service products for using them in various services and not for retail purpose, you don't need to enter retail price. However, it is very important to manage cost of service products. To manage cost accurately you need carry out the following steps:

- After entering products along with their cost on the GRN screen, go to Purchase>GRN Posting.
- In the **Posting Date** field select the date current date (date when you are doing the posting).
- Click Save.
- Once the GRN posting is done, cost will update in the system and profit margins will be reflected accordingly all reports.

Note: for detailed help on GRN posting, click CTRL+H on GRN Posting screen

ATTACHING PRODUCTS TO SERVICES

Many services involve use of various products. For example, manicure would require you to use scrub, creams, soaks, masks, nail file set, etc. While you will charge a certain price for each service, you need to know about the costs involved in giving the service. You need to take into account the various products and their quantities used for each service. Only then you will have a clear idea about your total costs and exact profit margins.

Attaching products to services is very interesting and easy.

Let's learn!

- Go to **Product Definition** screen.
- From **Line Item** drop down, select the service area.
- Go to **All Product List** and select the service to which you want to attach products.
- Now click **Product Assembly** tab.



- On the **Product Assembly** screen, the selected service will appear.
- Click **New** button.
- Click product help button to select product for the service.
- Enter **Qty** in ml that you might need for the service.
- Click **Add** button.
- The selected product will appear in the grid with cost and Qty details.
- Now select the next product, add **Qty** and click **Add**.

- Enter quantity in Qty column
- In **Receipt Cash** field enter received amount
- Click **Save**

Sale And Return Grid Settings Change View

select service provider
Beauty Salon select service

Sale Person: Kiran | Customer/Member: | Receivable: 0.00

City/Product (SKU): 1 | Hold Show Picture Return Receipt #: | Date/Time: 02/Oct/2017 12:22:39 PM

| Sr. # | Product Code | Product Name | Rate | Qty | U. Dist | Discount | Total | |
|-------|--------------|-----------------|----------|-----|---------|----------|----------|--------|
| 1 | SL00001 | Manicure Simple | 1,500.00 | 1 | 0.00 | 0.00 | 1,500.00 | Delete |

Record: 1 Of 1

Receipt Holding: 0 / 0 | Payment Mode: Cash Credit Cash/Credit Card Credit Card | Comments: | Print Receipt No. of Copies: 1 | Search Receipt

Gross Total: 1,500.00
Customer Discount: 0.00
Receipt Disc: 0.00
Net Gross Total: 1,500.00
Adjustment: 0.00
VAT: 0.00

Net Total
1,500.00

Receipt Cash: | Balance: **500.00**

Activate Windows | Gift Receipt | Go to Settings | Summary Receipt

Let us make you feel like a Queen

Beauty Salon
Saim Road, Mehr Towns

Pos: 001 Mop : Cash Sales

Receipt #: 1
Date: 02-Oct-2017 12:37:07 PM

| Sr. | Product | Amount |
|---------------------|----------------------------|----------------|
| 1 | SL00001 Manicure Simple | 1500.00 |
| Gross Total: | | 1500.00 |
| Net Total: | | 1500.00 |
| Items Total: | | 1 |
| Cash: | | 2000.00 |
| Balance: | | 500.00 |

Sales Person: Kiran
Women Uphold Half the Sky
Candela Retail Solution <www.lumensoft.biz>

CHECKING SALES OF SERVICES

- To check your sales, go to: **C-11 Shop Sales Report**
- From Line Item grid select the service area
- Click **Generate Report**
- The report will show details of services sold along with the cost incurred, profit margins, and other details.

C-11 Shop Sales Report

Criteria **Result** Report Templates --Select--

Mkt Dis Dis Show Comments Batch No. Group Discounted Products
 Adj Dis Cust Dis Product Detail

F Exp Title: Shop Sales Report Dated (02/17)

Drag a column header here to group by that column.

| Date | Time | Day | Receipt | Product Code | Product Name | Retail Price | Quantity | Sales | Gross Sale | Tax | Net Sales | Cost | Gross Margin | MOP |
|-----------|-------------|--------|---------|--------------|-----------------|--------------|----------|----------|------------|------|-----------|--------|--------------|------------|
| /Oct/2017 | 12:37:07 PM | Monday | 1 | SL00001 | Manicure Simple | 1,500.00 | 1 | 1,500.00 | 1,500.00 | 0.00 | 1,500.00 | 353.33 | 1,146.67 | Cash Sales |
| /Oct/2017 | 12:46:14 PM | Monday | 2 | SL00001 | Manicure Simple | 1,500.00 | 2 | 3,000.00 | 3,000.00 | 0.00 | 3,000.00 | 706.67 | 2,293.33 | Cash Sales |
| /Oct/2017 | 12:46:32 PM | Monday | 3 | SL00001 | Manicure Simple | 1,500.00 | 1 | 1,500.00 | 1,500.00 | 0.00 | 1,500.00 | 353.33 | 1,146.67 | Cash Sales |
| /Oct/2017 | 12:46:50 PM | Monday | 4 | SL00001 | Manicure Simple | 1,500.00 | 1 | 1,500.00 | 1,500.00 | 0.00 | 1,500.00 | 353.33 | 1,146.67 | Cash Sales |
| /Oct/2017 | 03:19:25 PM | Monday | 5 | SL00003 | Manicure deluxe | 2,000.00 | 2 | 4,000.00 | 4,000.00 | 0.00 | 4,000.00 | 886.67 | 3,113.33 | Cash Sales |
| /Oct/2017 | 03:19:50 PM | Monday | 6 | SL00003 | Manicure deluxe | 2,000.00 | 1 | 2,000.00 | 2,000.00 | 0.00 | 2,000.00 | 443.33 | 1,556.67 | Cash Sales |
| /Oct/2017 | 03:20:06 PM | Monday | 7 | SL00003 | Manicure deluxe | 2,000.00 | 1 | 2,000.00 | 2,000.00 | 0.00 | 2,000.00 | 443.33 | 1,556.67 | Cash Sales |

CHECKING SERVICE-PROVIDER WISE SALES REPORT

In Candela you can easily check the detail of customers handled by each service provider:

- Go to: **Reports>C-12 Sales Person Wise Sale Report**
- From **Line Item** grid select service area
- Select service provider

- Click **Generate Report**

C-12 Sales Person Wise Sale Report

Criteria **Result**

Date Range: 02/Sep/2017 - 02/Oct/2017 Find Dis

Customer No.

Sales Type: Cash Credit Card Cust. Credit Cash & Card

Product Range: -

Basic **Advance** **Selected Products**

Line Items

- (BB) Beauty Shop
- (CP) Color Palette
- (HF) Hair Flair
- (SL) serenity lounge
- (SP) service products
- (SW) Snow White

Category

[0/0]

Product Group

[0/0]

Sales Person Info

- Kiran
- Sara

[1/2]

Sales & Return Sales Only Returns Only

View Opt: Detail Report Summary Report Summary w/

Generate Report >>>>

C-12 Sales Person Wise Sale Report

Criteria **Result** Report Ter

Options To View: Mkt Dis Adj Dis Dis Cust Dis Exp Title: Sales Person Performance Report

Drag a column header here to group by that column.

| Shop | Sales Person | Date | Time | Receipt | Product Code | Product Name | Quantity | Sales | Gross Sales | MOP |
|--------------|--------------|-------------|-------------|---------|--------------|-----------------|----------|----------|-------------|------------|
| Beauty Salon | Kiran | 02/Oct/2017 | 12:37:07 PM | 1 | SL00001 | Manicure Simple | 1 | 1,500.00 | 1,500.00 | Cash Sales |
| Beauty Salon | Kiran | 02/Oct/2017 | 12:46:14 PM | 2 | SL00001 | Manicure Simple | 2 | 3,000.00 | 3,000.00 | Cash Sales |
| Beauty Salon | Kiran | 02/Oct/2017 | 12:46:50 PM | 4 | SL00001 | Manicure Simple | 1 | 1,500.00 | 1,500.00 | Cash Sales |
| Beauty Salon | Kiran | 02/Oct/2017 | 03:20:06 PM | 7 | SL00003 | Manicure deluxe | 1 | 2,000.00 | 2,000.00 | Cash Sales |

CHECKING DETAILS OF CONSUMED SERVICE PRODUCTS

It is very easy to get complete details of the products consumed and in which service. Let's check it!

- Go to **Reports>C-17 Assembly Products Sales Report**.
- Select **Criteria** (date; line item).
- Click **Generate Report**

C-17 Assembly Products Sales Report

Criteria **Result**

Date With Time
02/Sep/2017 - 02/Oct/2017 *select to check product consumption within a certain date range*

Time Range
02:38:10 PM - 03:38:10 PM

Product Range [] - []

Basic **Advance** **Selected Products**

| Line Items | Brand | Product Gender |
|-----------------------|-------------|----------------|
| (BB) Beauty Shop | Beatuy One | Female |
| (CP) Color Palette | colors | Common |
| (HF) Hair Flair | Demalogica | Male |
| (SL) serenity lounge | Kenue | |
| (SP) service products | Lancome | |
| (SW) Snow White | Loreal | |
| | Mabeline | |
| | Natures Way | |
| | Silky | |
| | Siren | |

[1/6] [0/10] [0/3]

Generate Report >>>>>

- The report will show the total amount of service products consumed against each service

C-17 Assembly Products Sales Report

Criteria Result

F Exp Title C-17 Assembly Products Sales Report

| Sold In | Qty |
|---|-----|
| Search here... | |
| Product Consumed: Beauty One Cleanser 1000 ML | 40 |
| Product Consumed: Beauty One Hand Soak 250 ML | 90 |
| Manicure Simple | 50 |
| Manicure deluxe | 40 |
| Product Consumed: Beauty One whitening Mask 30... | 40 |
| Product Consumed: Silky Cuticle Massage Cream 10... | 40 |
| Product Consumed: Silky Exfoliating scrub 500 ML | 90 |
| Product Consumed: Siren Nail file set | 9 |
| Total consumed 90 ml | |
| consumed in Manicure simple: 50 | |
| consumed in manicure deluxe: 40 | |

CHECKING DETAILS OF EACH SERVICE

Candela also keeps a record of products used in each service. The record is a checklist of all products included in a particular service.

- Go to **Reports>G-10 Assembly Products with (BOM) details**
- From Line Items grid select service and click **Generate Report**

G-10 Assembly Product with BOM Detail

Criteria Result

Product Range [?] - [?]

Basic Advance Selected Products

Line Items

| | |
|-----------------------|---|
| (BB) Beauty Shop | A |
| (CP) Color Palette | I |
| (HF) Hair Flair | S |
| (SL) serenity lounge | A |
| (SP) service products | I |
| (SW) Snow White | S |

[1/6]

Brand

Product Gender

| | |
|--|---|
| | A |
| | I |
| | S |


[0/0]

| | |
|--------|---|
| Female | A |
| Common | I |
| Male | S |

[0/3]

Generate Report >>>>>

G-10 Assembly Product with BOM Detail

| Criteria | Result |
|-----------------|--|
| Manicure Simple | <p>Product Code SL00001 Product Price 1,500.00 Consumption Level 2</p>  |
| Pedicure Simple | |
| Manicure deluxe | |
| Facial simple | |
| Facial Herbal | |

| Product Code | Product Name | Quantity |
|--------------|------------------------|----------|
| SP00008 | Beauty One Han... | 10 |
| SP00002 | Silky Exfoliating s... | 10 |
| SP00005 | Siren Nail file set | 1 |

You can click each service to check detail of products being used

CREATING AN APPOINTMENT BOOK

In candela, you can easily book appointments for your customers. Advance booking of appointments feature in Candela helps you do the following:

- ✓ Keep track of customers' bookings
- ✓ Book orders for preferred dates
- ✓ Book appointments according to customer's preference for specific service providers
- ✓ Receive advance payments for bookings
- ✓ Send them text message reminders to customers regarding their bookings.

Booking an Appointment

- Go to **Shop Activities>Sales and Return**
- If the customer wants a specific service provider, select her name from Sale Person help button.

- Enter client name
- Click product help button to select the service for which appointment is being made
- Click **Appointments** button (To enable Appointment go to System Configuration>sale tab and mark the check box 'Enable Advance Orders on Sale screen')

Sale And Return Appointments

Beauty Salon

Sale Person: Customer/Member:

Qty/ Product (SKU): Hold Show Picture Receipt #: Date/Time: 10/Oct/2017 05:53:36 PM

| Sr. # | Product Code | Product Name | Rate |
|-------|--------------|-----------------|----------|
| 1 | SL00003 | Manicure deluxe | 2,000.00 |
| 2 | SL00005 | Facial Herbal | 1,500.00 |

select services

- Appointment (customer order) screen will open up.
- Enter customer cell number. (If you select a registered customer, system will pick his/her mobile no. automatically. You don't need to mention manually)
- Select due date from **Delivery Date** calendar
- Enter advance amount if any.

Customer Orders Search Result

Ref # Advance Order Layaway Mode of Payment

Customer Name: Phone #: Cash Credit Card

Address:

Order Date: 10/Oct/2017 Try Date: 10/Oct/20 Delivery Date: 12/Oct/2017

Payment: Total Amount:
 Adjustment: Amount Paid:
 Balance Due:

Technical Detail [Custom Details](#)

- Click **Save**
- Advance order screen will close.
- Now click **save** on the main screen.
- Advance order receipt will be printed

| Beauty Salon | | | |
|-----------------------|--------------|---------------|---------------|
| Saim Road, Mehr Towns | | | |
| Ref # | 5 | Ord Date | 10-Oct-17 |
| Try Date | | Delivery Date | 10-Oct-17 |
| Customer Name Zeenia | | | |
| Contact No | 032144455567 | | |
| Invoice Detail | | | |
| Item Name | Qty | Rate | Disc Total |
| Manicure deluxe | | 12,000.00 | 0.00 2,000.00 |
| Facial Herbal | | 11,500.00 | 0.00 1,500.00 |
| Gross Total | | | 3,500.00 |
| Net Total | | | 3,500.00 |
| Advance: | | | 2,000.00 |
| Balance: | | | 1,500.00 |
| Ref # | 5 | Ord Date | 10-Oct-17 |
| Try Date | | Delivery Date | 10-Oct-17 |
| Customer Name Zeenia | | | |

Checking Status of All Appointments

Go to **Sales and Return** screen

Click **Search Receipt** button

On the next screen, click **Search Client Appointments**

You can search appointments according to various criteria

Search Search Client Appointments

Phone #/Customer Name

Show All Open Orders With Zero Balance

Date Range

Order No Range -

Order Status

Order Status

Product Code

All Order Try Delivery

Order Delivery Delivered UnDelivered All

All POS

F Exp Title

| Receipt # | Customer's Name | Sale Date | Net Total | Qty | Order Date | Delivery Date | Contact No. | Status | Balance |
|-----------|-----------------|-------------------------|-----------|-----|-------------|---------------|--------------|--------|---------|
| 8 | Zeenia | 10/Oct/2017 05:59:03 PM | 3,500.00 | 2 | 10/Oct/2017 | 12/Oct/2017 | 033344455567 | Open | 1500.00 |
| 7 | bina | 10/Oct/2017 05:39:12 PM | 1,500.00 | 1 | 10/Oct/2017 | 10/Oct/2017 | 0333444556 | Open | 750.00 |
| 6 | Zeenia | 10/Oct/2017 05:32:13 PM | 3,500.00 | 2 | 10/Oct/2017 | 10/Oct/2017 | 032144455567 | Open | 1500.00 |

Sending Appointment Reminder SMS

On the due date of appointment or a day before it you can send a reminder to the client. Follow the step below to send reminders:

- Go to sales and return screen.
- Click Search Receipt button.
- On the next screen click **Search Client Appointments** tab.
- Select search criteria and click Search Order button
- All appointments (according to the selected criteria) will load in the grid.
- In the grid double click the appointment for which you want to send a reminder

| Customer's Name | Sale Date | Net Total | Qty | Order Date | Delivery Date | Contact No. | Ref Type | Status |
|-----------------|-------------------------|-----------|-----|-------------|---------------|--------------|--------------|--------|
| Zeena | 10/Oct/2017 05:22:19 PM | 3,500.00 | 2 | 10/Oct/2017 | 10/Oct/2017 | 032144459367 | AdvanceOrder | Open |
| Farseda | 10/Oct/2017 10:13:53 AM | 4,500.00 | 3 | 10/Oct/2017 | 12/Oct/2017 | 03215556677 | AdvanceOrder | Open |
| Flavia | 10/Oct/2017 10:11:05 AM | 1,500.00 | 1 | 10/Oct/2017 | 12/Oct/2017 | 0321667788 | AdvanceOrder | Open |

- Appointment details will load on the sales and return screen
- Click **Appointment** tab

Sale And Return

Appointments

Beauty Salon

Sale Person: Kiran | Customer/Member: Fareeda

Qty/ Product (SKU): 1 | Hold: | Show Picture: | Return: | Receipt #: 4 | Date/Time: 10/Oct /2017

| Sr. # | Product Code | Product Name |
|-------|--------------|-----------------|
| 1 | SL00003 | Manicure deluxe |
| 2 | SL00004 | Facial simple |
| 3 | SL00002 | Pedicure Simple |

- Client appointment details will open on the customer order screen
- Select the radio button **Completed** and click **Update**
- The Client will get the SMS reminder

Note: SMS for client appointments are configured on SMS Configuration screen. Please refer to help document <http://lumensoft.biz/configuration/sms-configuration-in-candela/>