The purpose of this project is to create a secure, fast and easy to use cloud platform for service based businesses. The project will be split in two parts, one for businesses and one for retail customers. The first one, which will be called Business Platform, is for business client which are Salons (hair, nails, beauty, spa) to manage their bookings, clients, finance, inventory and marketing. The second platform, which will be called Retail Platform, is for retail customers that will be able to book their services by browsing through available salons. A more detailed description of the features and functionality of both will follow below

Basic foundations

- Web based app using standard browsers (Chrome, Firefox, Safari)
- Modern, secure and fast UI. Mobile responsive (mostly for big tablets)
- Encrypted database and client server communication (SSL)
- Multilanguage – multi currency, multi tax (products & services) support (Greek should be the main but you will get help for that)
- Multi-level access for different types of users. Check Structure screenshot at the end of the file.
- Long term support we be needed
- System availability should be highest possible and support response should be fast
- Android & iOS apps

Business Platform

The main purpose of the Business Platform is to create a secure, fast and easy to use web based platform for service based businesses. This new system should combine characteristics from ERP/CRM systems adjusted on this particular market combined with clever tweaks like set and forget marketing, online booking etc. A detailed description of the current system is available as also a video showing it live to give you a good sense of the concept. A detail description of the requirements and feature of the new system will follow.

There is already available a mockup of the basic UI (HTML5/CSS3) that can used as a base for development or give an insight of what I need. (Screenshot are available at the end of the description)

Packages

Business Platform should come in 3 packages with different levels of functionality

1) Free package for small Salons that only need basic functionality
2) Standard package for small to medium Salons
3) Premium package for larger and more advanced salons

Multi-level access

Based on the role every account should have various levels of access. Admin should have full access while reception should have full access apart customers to avoid extracting the full list, maintaining access to customer's info but only one by one. A low level employee should only have access to the timetable etc. A live example can be found on the old system using the accounts below

157.245.215.162/beautifyme/index.php/mis

Username: demo	Username: demor	Username: demoJE
Password: demo123	Password: demo123	Password: demo123

Scheduler

One of the most important part of the system is Schedule. This is where booking of services is done, so it has to be clean and fast. The basic structure is to have one column for every available employee and combining them with time bar to create a timetable. Booking appointment should be done from a salon's employees or online by retail customers in which case only a basic form of the timetable should be displayed showing blocked and available tiles.

- The functionality needed here is of standard calendar (ex google calendar) combined with columns for every employee. Proper dynamic resizing should be implement in cases of numerous employees and multiple columns. Screens of 20+ inches should be able to display 15+ names. Overlay of each service box on timetable should be used to make readable when many employees are displayed and everything is getting too small to read.
- There should be a moving horizontal time line showing current time. A refresh of the calendar displaying any changes (add/remove appointments done by another user or online) can be combined with the moving of the time line.
- Every appointment booked should start by selecting an existing client from the search bar, by entering info of a new one or by checking the box Guess for clients that don't want to give a name or other info. A shortcut (an "I" next to the name) for a quick view of client's info should be implement. Also, an alert sign should be implemented for missing basic contact info.
- An appointment may consist of one or more services that can be performed by one or more employees. When all services are added on timetable the appointment should be finalized by pressing a button and the system will combine the selected services and form an appointment.
- The tiles created on timetable can be moved or resized by drag & drop, adjusting duration of a service or the employee that will perform the service. An X button should be added on every service tile in order to delete it and remove the service from the appointment. When no more services are left the whole appointment should be deleted.
- An overlay of the appointment's info should be displayed when the cursor is on top of blocked tile, containing info about status, client's name, existing/new client, phone, start/end time, employee's name and service cost. Available statuses are pending, check-in, completed, no show.
- A switch for hiding completed appointments should be implemented in order to give a clear view of the work that has to be done.
- A drop down menu for selecting one or more employee to filter the timetable displaying only their columns.
- By clicking on a blocked tile (service) a check-out page should be loaded containing client's info services provided, employees, prices, products sales and ways of payment. After completing the appointment it should be locked for changes and be displayed on calendar as completed.
- A crucial function of the check-out form is having the choice to hide one or more of the services or products. The system will calculate everything as they were displayed
- Services done during previous appointments
- Reschedule/transfer appointment
- Recurring appointments after X days/weeks

Online booking should be done by 3 ways. A direct link from our website using a different subdomain for every salon, Facebook & Instagram booking.

Remember that the whole process should be completed as fast as possible and with the less use of keyboard possible.

A general idea of the calendar's functionality can be viewed at the attached videos that are based on the old system.

Check-out

- By clicking on a blocked tile (service) a check-out page should be loaded containing client's info services provided, employees, prices, products sales and ways of payment. After completing the appointment it should be locked for changes and be displayed on calendar as completed. Appointments that are completed and locked can only be unlocked by Admin level accounts.
- Services can be added or removed
- Automatic calculation in payment fields. Multiple ways of payments are allowed (eg. Half amount cash and half card)
- A crucial function of the check-out form is having the choice to hide one or more of the services or products. The system will calculate everything as if they were displayed but it will only show the full details when the user is using a PIN code. All economic reports without using PIN code should be displayed calculated correctly for the services displayed.
- All economic data should have two decimal places
- Functionality for add/subtract loyalty points and due amounts manually when needed.
- Cancellation/Rescheduling/ recurring appointment should be implemented by changing date.

Rating of appointment

By the completion of an appointment the customer should have the option to rate the given services. This can be done by two ways. First, a special account connected to a tablet on the reception desk displaying appointment's info and giving 1 to 5 stars for various attributes of the appointment like quality of services, stuff's performance, salon's environment etc. The second way can be used in cases that there is no tablet to rate or in cases the customer misses rating services. A few minutes/hours after the appointment the customer will get a message (SMS, Viber, email) asking to rate the appointment leading to the same screen as in the first case.

Quick Sale – Check-out

In some case customers want to buy only a product without having any services so there is no appointment. To accommodate these cases a shortcut to check-out form should be placed on Scheduler.

Sales

Sales report will present financial result for the selected period (default setting is current day). It should display all transactions at a given period containing date, client, service, products, totals. Also, ways of payment should be displayed separately (cash, cards, voucher, due amount). Note that without the PIN code should display only a part from the total sales. When the PIN code is entered total results should be displayed. Every transaction should have a shortcut that leads to the actual appointment.

A report of the due payments done by customers is also needed.

Services

Here we have all the services offered by the salon and are available to customers. Each service should have attributes like gender, category, duration, wait time, cost of materials, price and VAT %. Categories are really important elements as they help get correct data from statistical reports.

Apart from the usual services there should be implemented group services with the usage of a voucher. An example is that you pay once and get 5 times of the same service. After each visit that you've enjoyed a free service, the system removes one of the five uses until it's zero.

Customers

Clients info like first and last name, gender, address info, telephone numbers, emails and social media, date of birthday and name day, reference from another client, last visit date, custom groups that the client belongs like family, teams etc, notes and switches that allow or block communication towards the client for name day and birthday, reminders and loyalty points and marketing campaigns. A "Right to be forgotten" button will be necessary, that deletes all personal info of the client and replaces customers name by anonymous/retail customer but keeps financial transaction to avoid meshing with reports.

A report of the customer references each client has done will also be needed.

Products/Inventory

Product name, barcode, Supplier, Brand, Category (eg for hair salons Styling, Care, technical etc), gender, cost, VAT (Tax) %, selling price with & without tax, stock and low stock, custom groups and notes. Sales reports filtered by supplier, brand, category for stock on hand, sales performance and internal stock consumption

Products that are sold through the Check-out form should be remove from stock automatically. However, products that are used for providing service like hair dye should be removed manually.

Partners

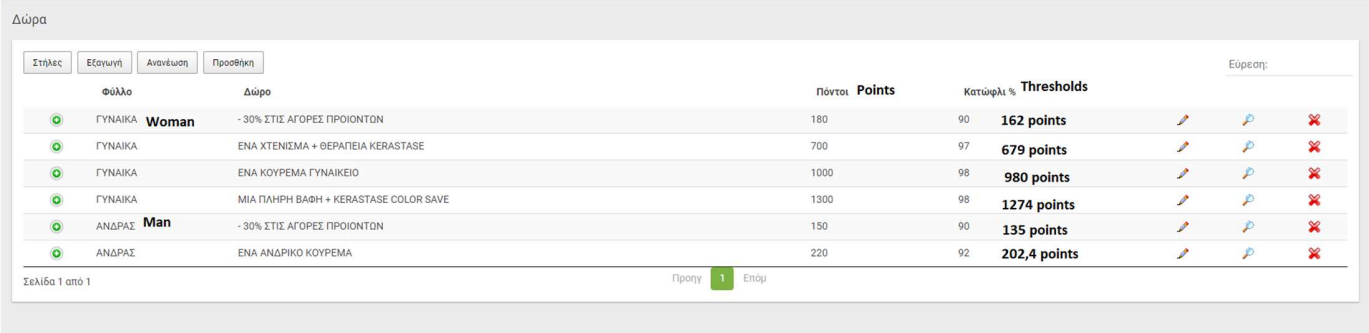
Basic info about the employee like name, address, contact details and the display order. Stuff availability setup should be implemented here. Revenue targets can also be set here for each employee. Wages and tips from appointments.

Staff	Sun 23 Feb	Mon 24 Feb	Tue 25 Feb	Wed 26 Feb	Thu 27 Feb	Fri 28 Feb	Sat 29 Feb
Guess Who Not working							
Dimitris Evangelou 48h		09:00 - 17:00	09:00 - 17:00	09:00 - 17:00	09:00 - 17:00	09:00 - 17:00	09:00 - 17:00
Wendy Smith 48h		09:00 - 17:00	09:00 - 17:00	09:00 - 17:00	09:00 - 17:00	09:00 - 17:00	09:00 - 17:00

Also, access level setup should be done from here (example can be found at the screenshots at the end)

Loyalty Points

A loyalty points system that is based on various criteria chosen by each salon. An easy example is to give 3 loyalty points for every euro spent on a specific category of services/products or having more than 5 visits in one month or even because they invite their friends. The criteria mixture is free for the salon to decide what fits best its needs. After setting the criteria for collecting points you set the gifts and their the thresholds



Regarding the customers, they only have access to their loyalty points using their mobile number. You can check it using the link below and by entering 6944619901 as a mobile number.

http://loyaltypoints.gr/letif

By entering the phone number you can see your loyalty points, the available presents, you can accept GDPR terms if you haven't done it and lastly make a reference to another person and get more points or presents when he completes the first visit to the salon.

Expenses

All salon's expenses should be registered here based on given categories (wages, rent, raw materials and products cost, utility bills, advertisement, accountant etc).

Campaigns

This is a marketing tool that helps the salons target precisely a chosen target group among their client base. Using criteria like give me woman that use Highlight service and don't buy any products can reach a particular group inside their client base and contact them by SMS or email offering discounts, points etc to attract them and increase spending.

Dynamic Groups – This is a client base analysis tool giving information based on the number of visits, unique customers, total revenue, and average revenue per visit. There is also an analysis based on the category of services. An example is to ask unique customers that have 3 visits per year showing their average spending per visit, total revenue of that group and a name list of these clients that can be used at communication center.

Notifications/Messages – Notifications are used for various reasons like name days and birthdays, no show bookings etc. Messages are mostly used by the Admin to inform salons about updates and changes to the app.

Communication Center

The concept here is to create a gateway to communicate with the clients through SMS, Viber or email. On the current system we are using AMD Telecoms API (https://www.amdtelecom.net/) which great to use and has the all the functionality we need. All communication with clients will be conducted from here so the gateway. Every salon business should buy credits. In the current system I'm buying bulk credits and then add those needed to the Salons that need them.

Set and forget (Setup once)

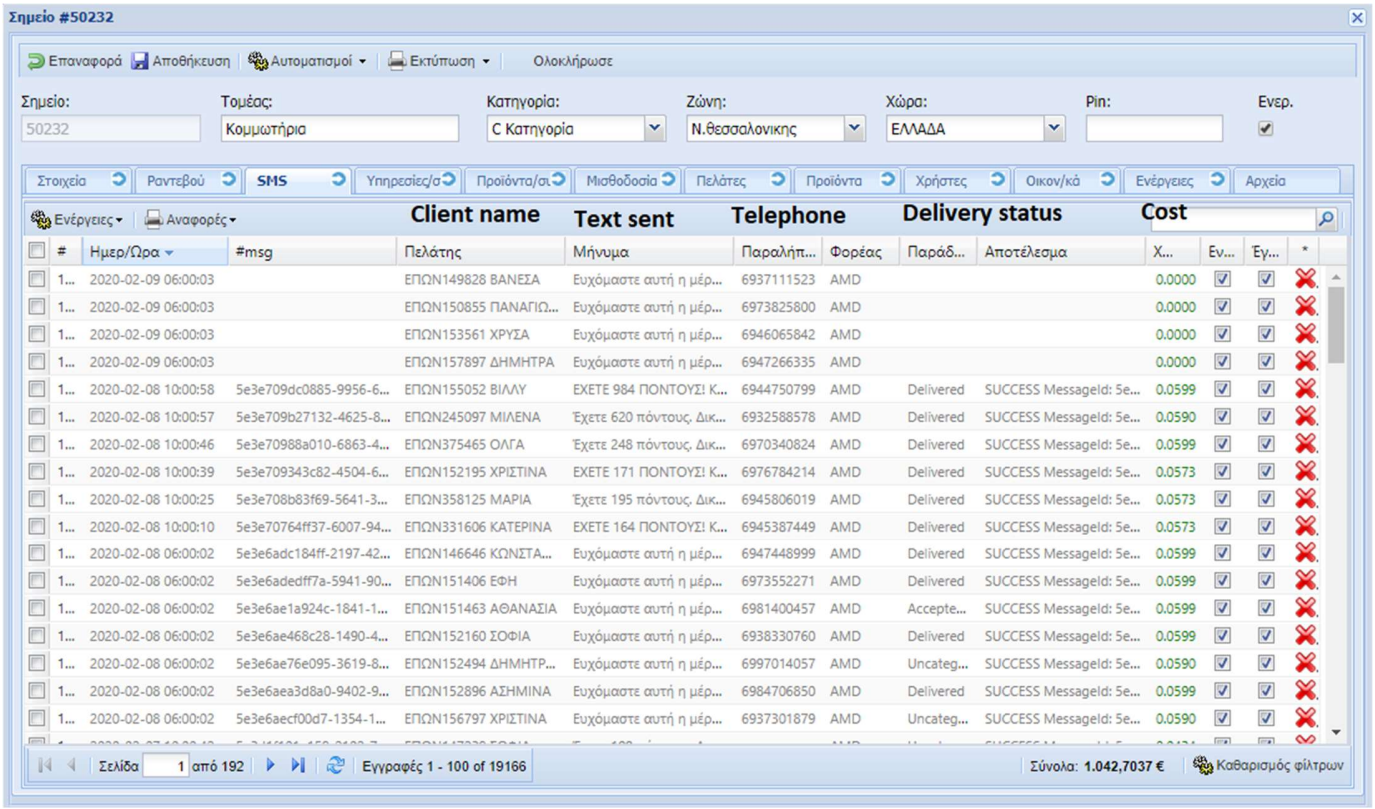
- This is an automatic function for sending messages for birthdays and name days
- New appointments/rescheduling/cancellation after an appointment is booked/changed/canceled.
- Reminders for appointments at X hours/days before.
- Reminders for scheduling next appointment after X days since last visit.
- Informative messages about the loyalty points total after X days from last visit
- Welcome message to new customers
- Thank you for visiting X hours after the appointment.

Every rule created should have a customized text and send time. A universal time limit should be used across the system stopping communication gateway from sending SMS/Viber messages during the night annoying customers. A report should display all communication filtered by type.

Import & manage client's lists

- Manage ready list that will be imported to the system and communicate through the gateway.
- Manage lists created by reporting and marketing tool of the platform and communicate through the gateway.

A report for all communication done by the gateway

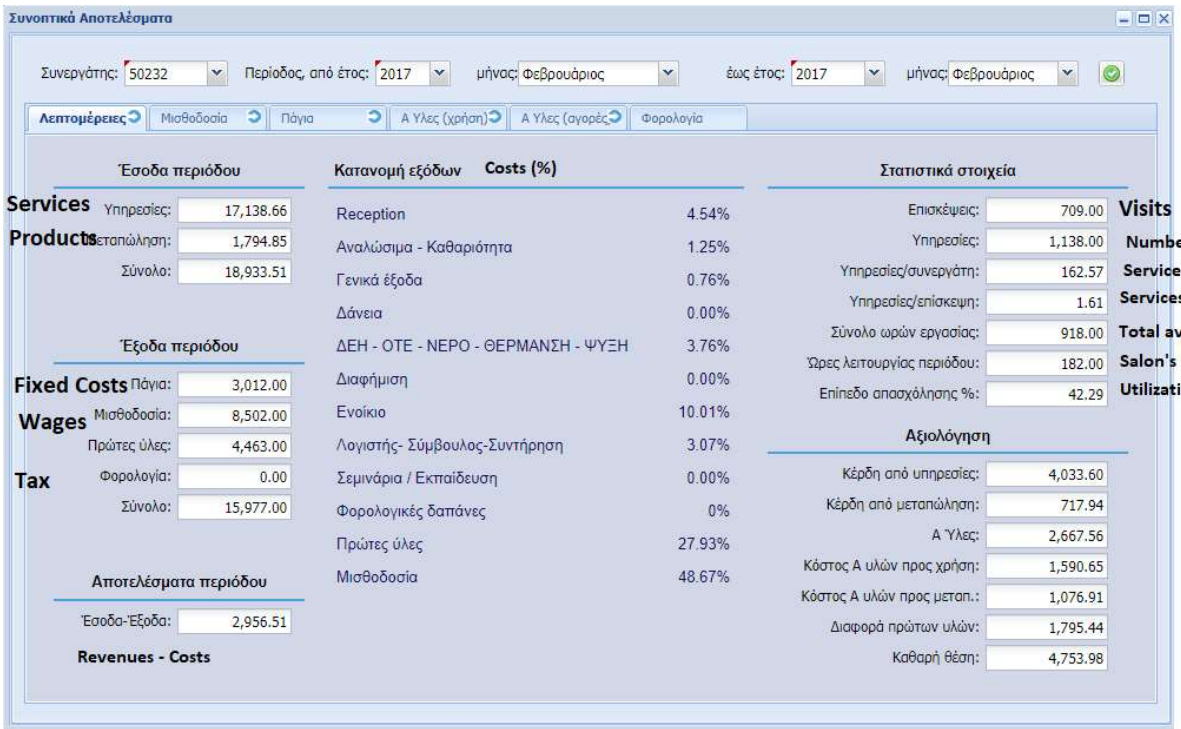


Reporting tool

All salons should be divided in various categories based on the number of stuff members. For example Category A is for Salons with 1-3 stuff members, Category B for 4-7 stuff members etc.

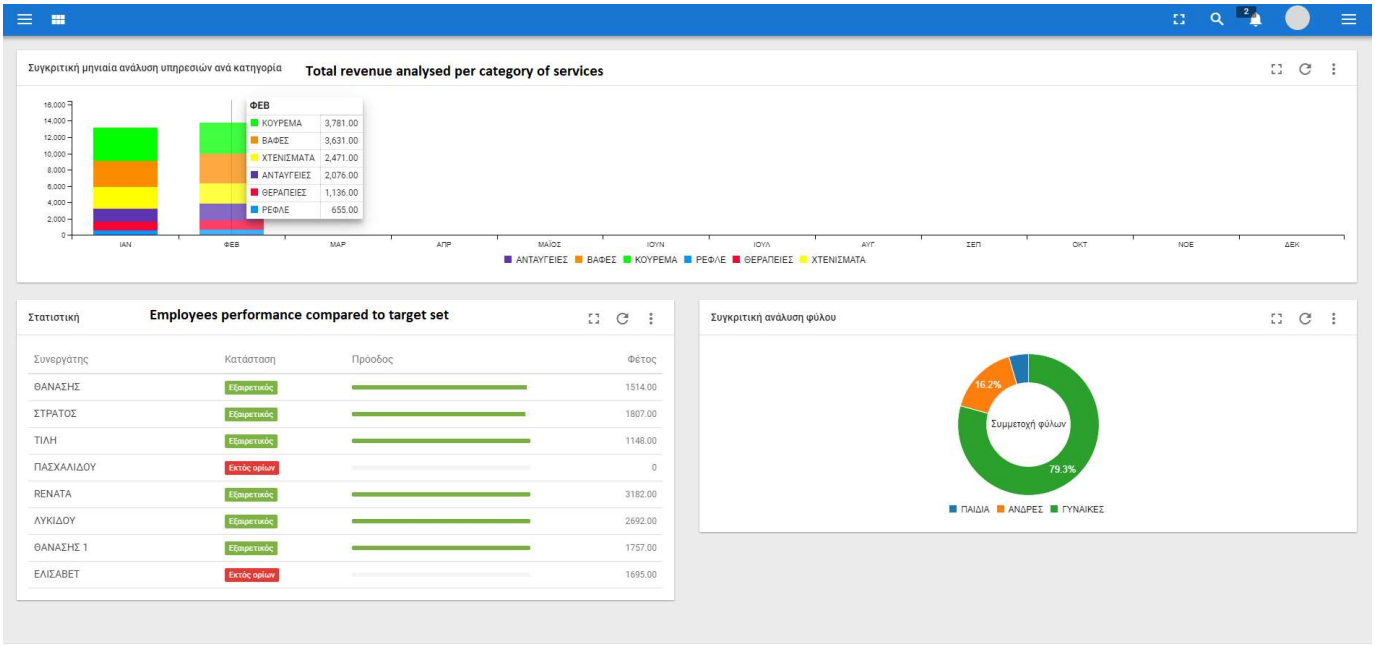
Average time between visits woman/man

Average spending per visit woman/man

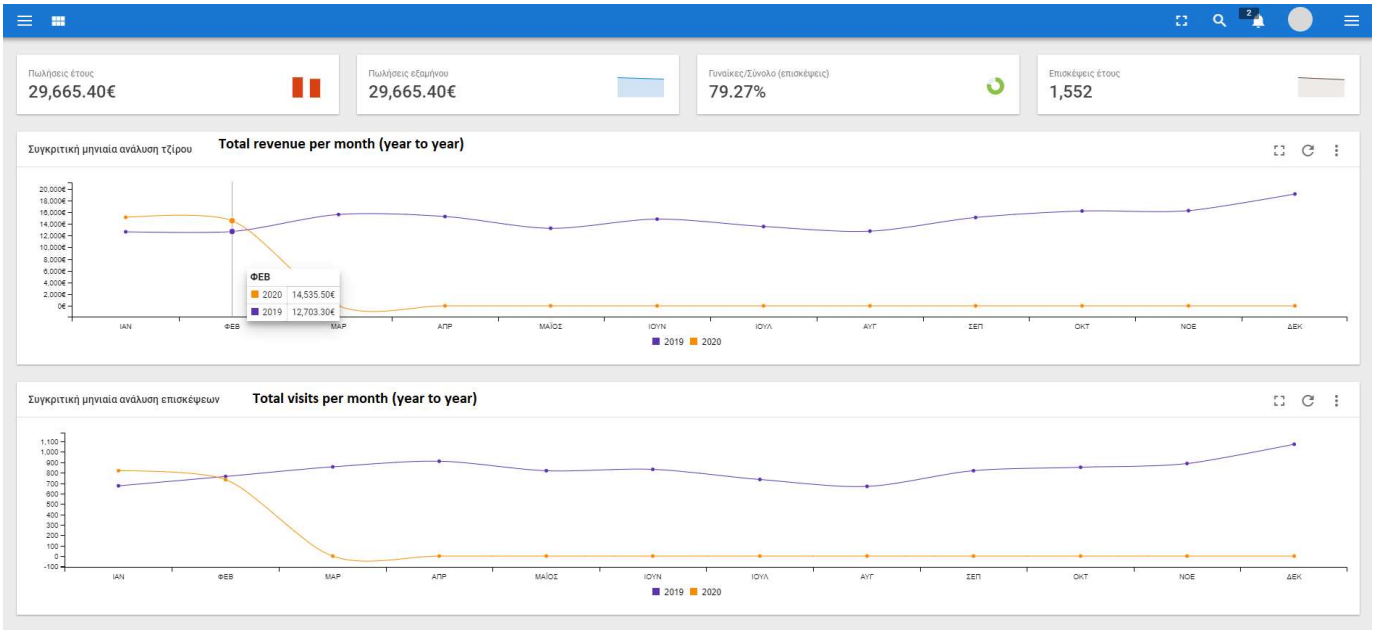


Dashboard

Total Appointments (Online Appointments) per month compared to previous year e.g. 25 (5)



Total Revenue (Online Appointments) per month compared to previous year

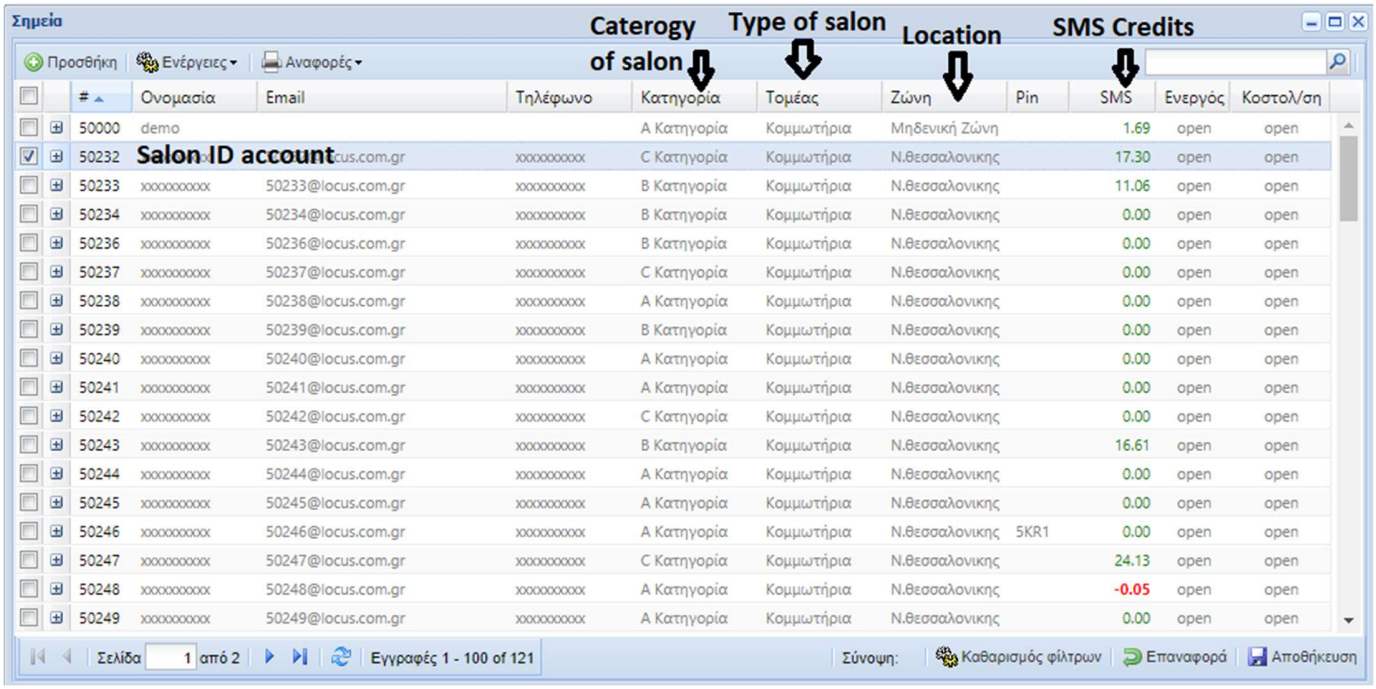


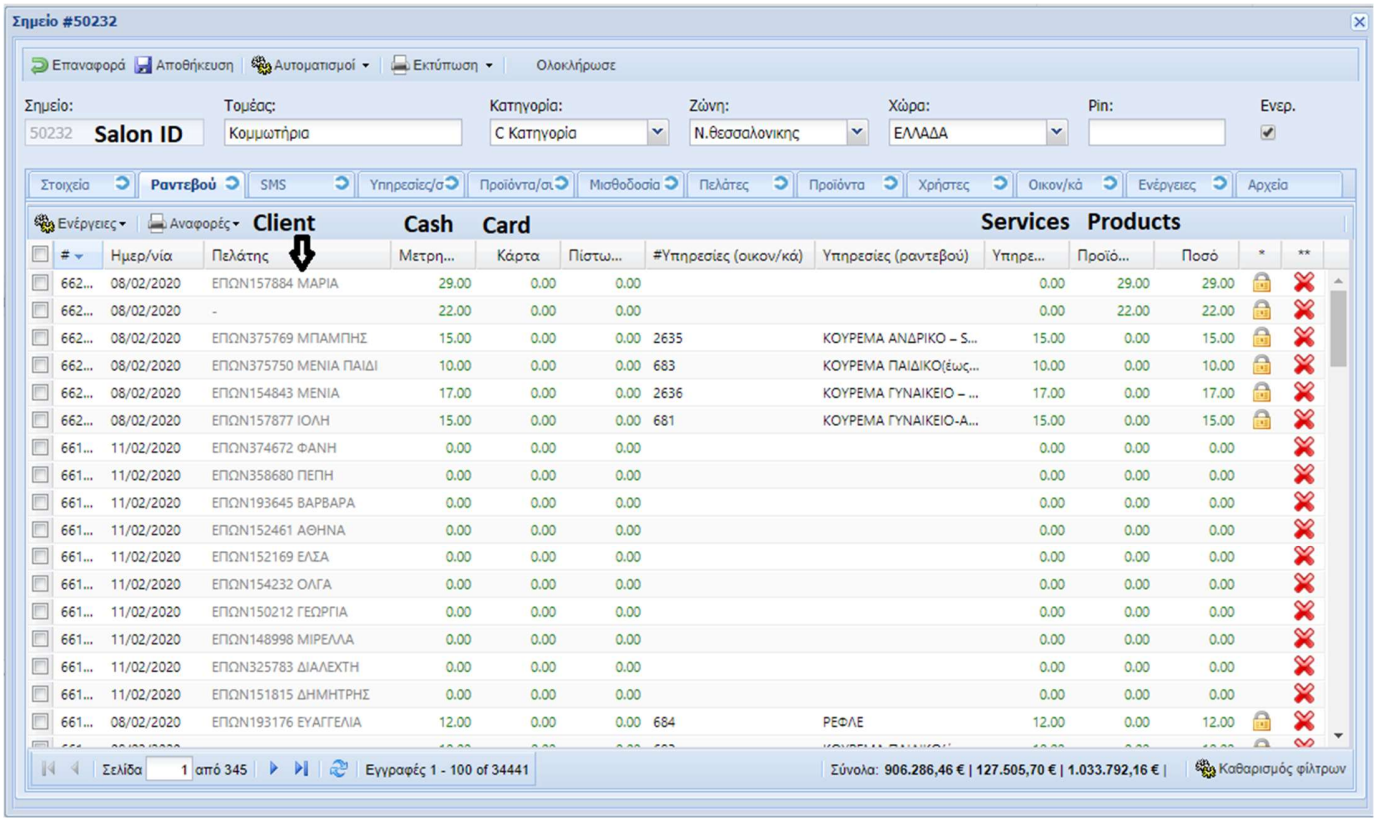
Setup Panel

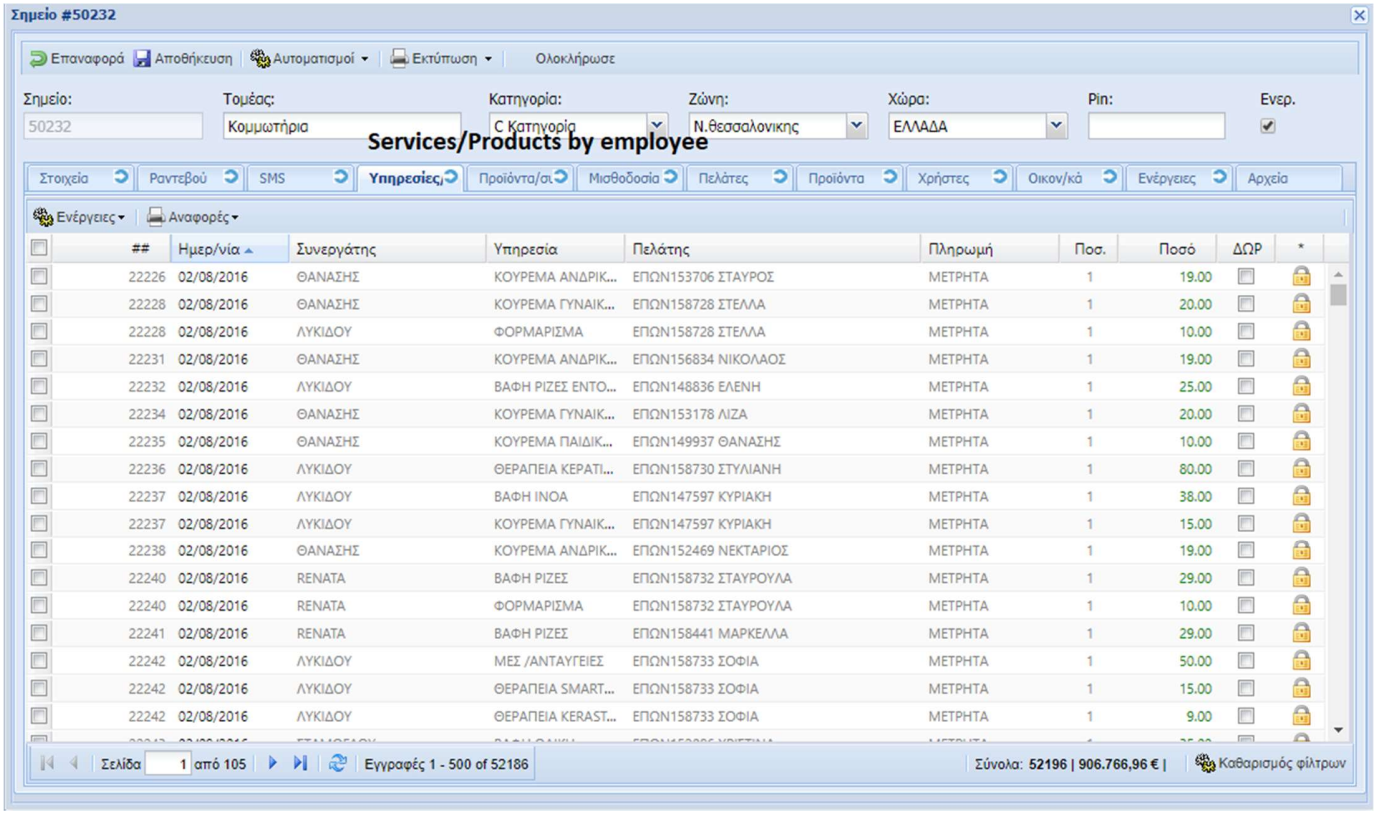
- Setup basic parameter like salon name, logo, contact info, website and social media, address, working hours and language.
- Setting Tax rates (separate for services and products) and how the prices will be displayed, including or not the tax.
- Loyalty points, coupon. Vouchers expiration period. The time period after that a client with no visits will be considered as inactive.

Admin Panel

This panel is for give me full access and view the data of all salons in order provide support and mine data.
Some screenshots from the old system







Retail Platform

The concept here is to create an online platform for retail customers and let them book their services online through a website or a mobile app. Retail customers should create an account and surf around all available salons, checking their profiles and reviews in order to choose what fits best to their needs.

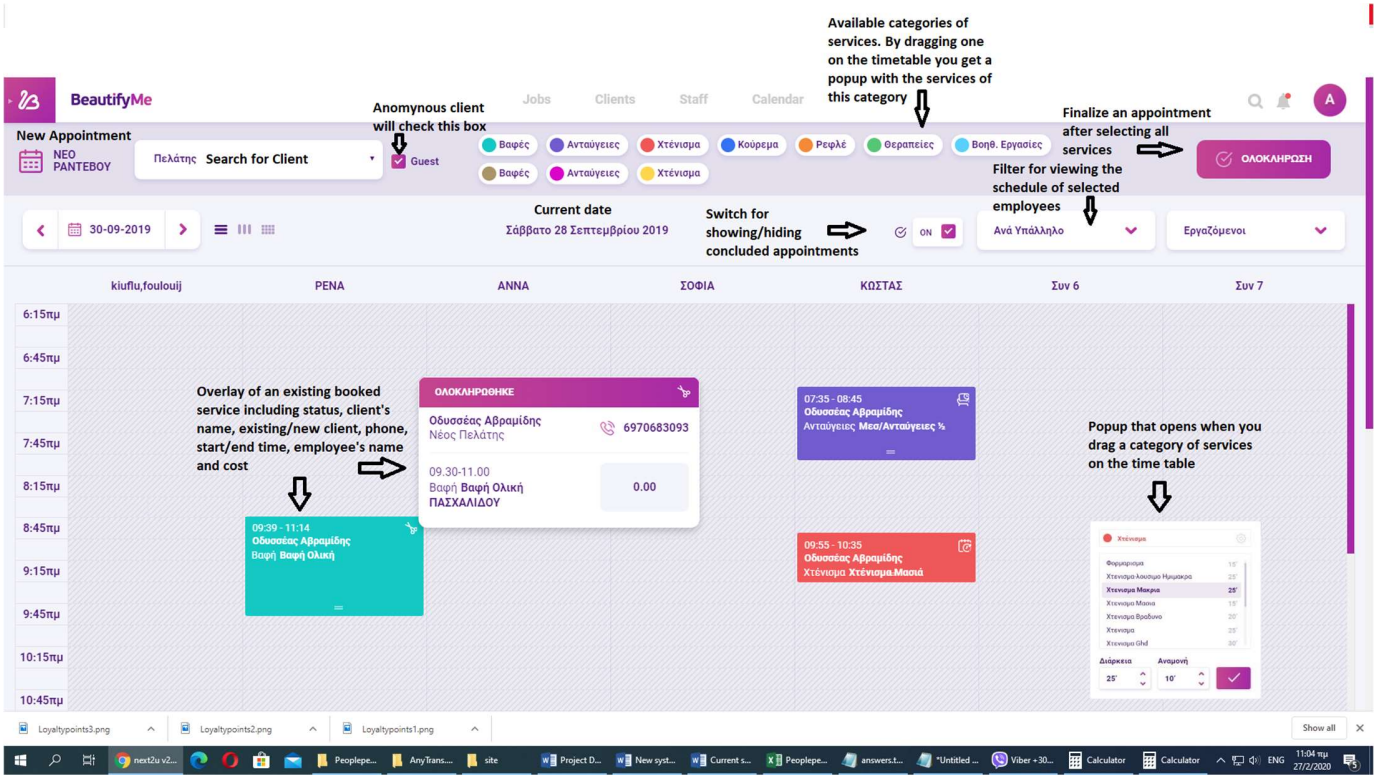
Reservation done here should be displayed on salons calendars.

As I don’t have these part in my old system I can only help you by checking the idea at the website below

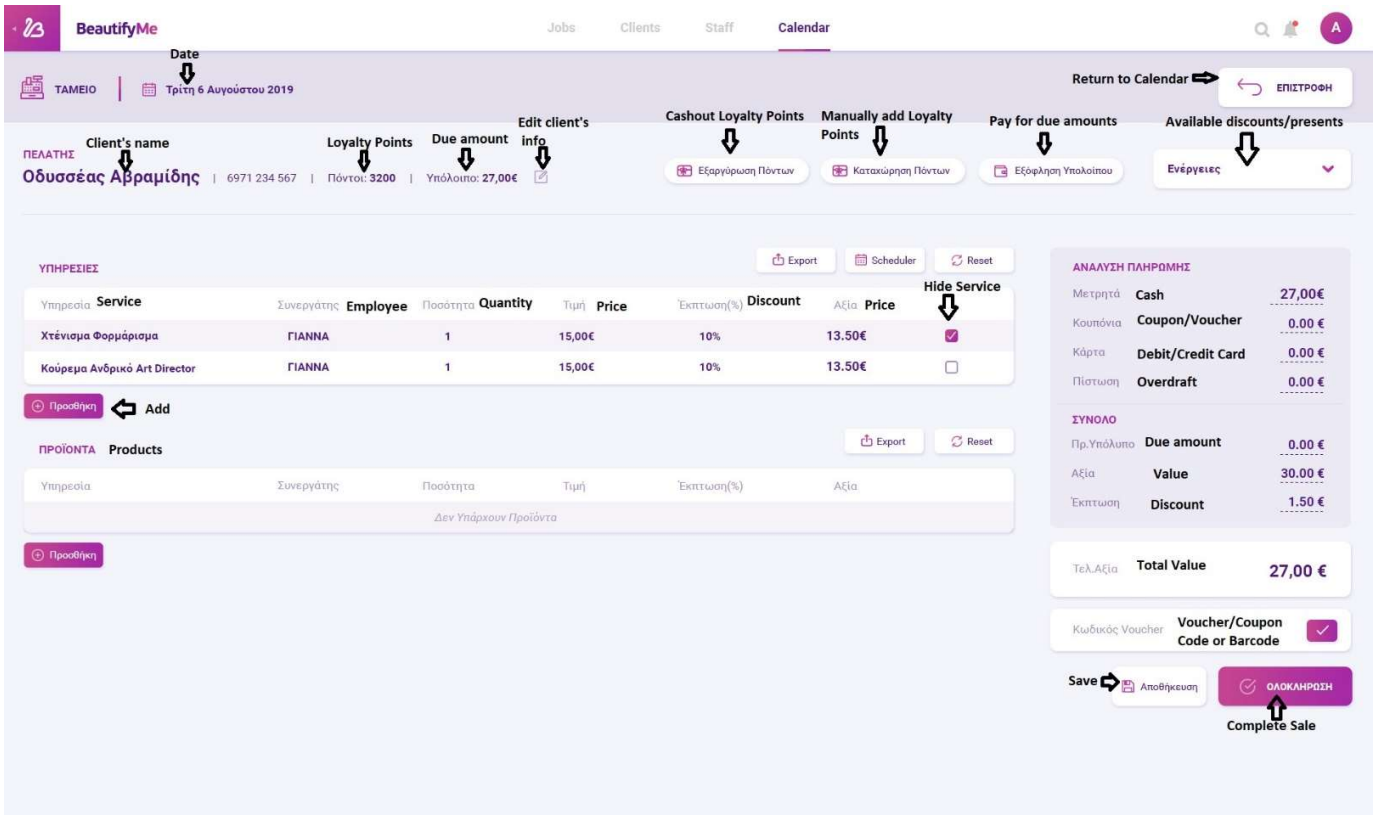
https://www.funkmartini.gr/

Screenshots follow…

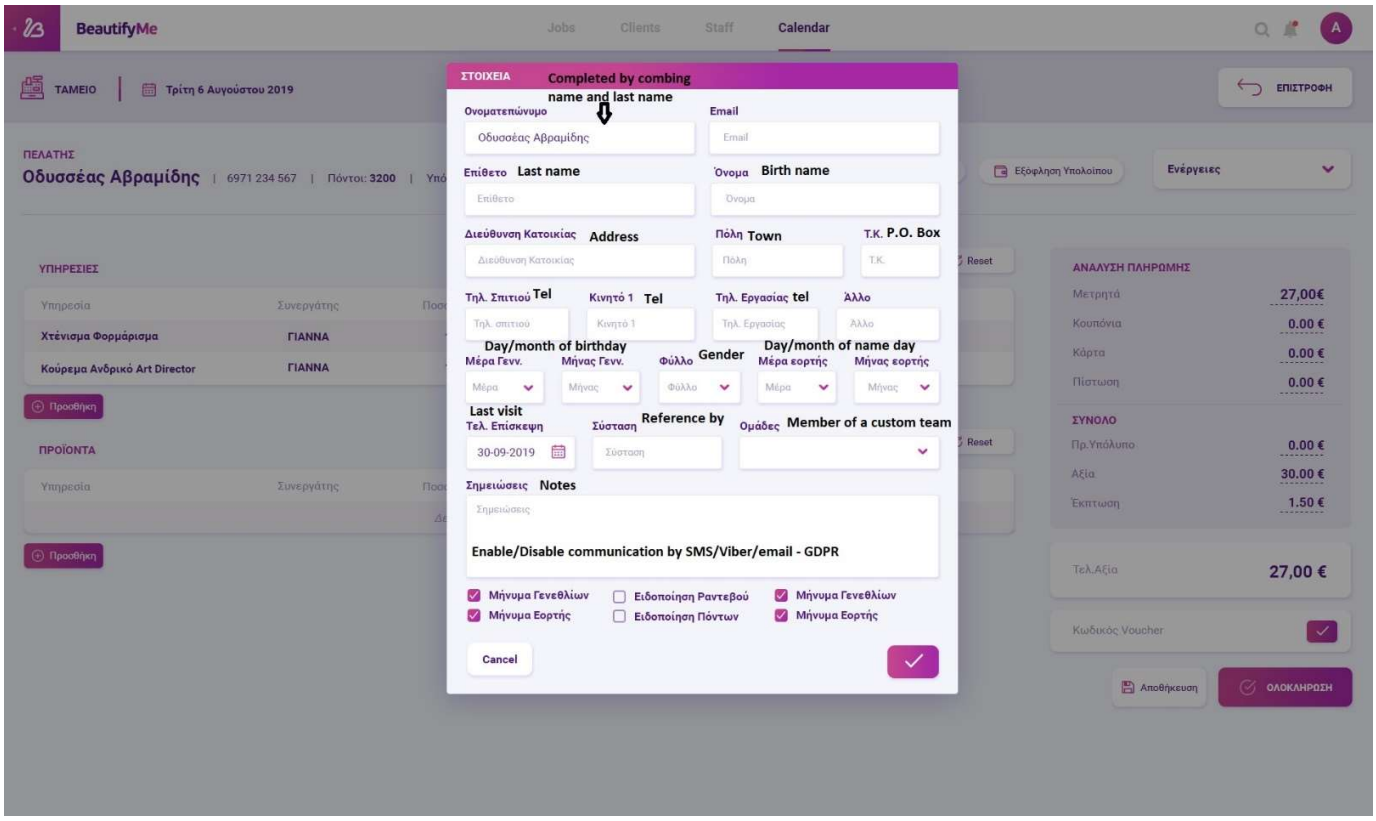
Calendar



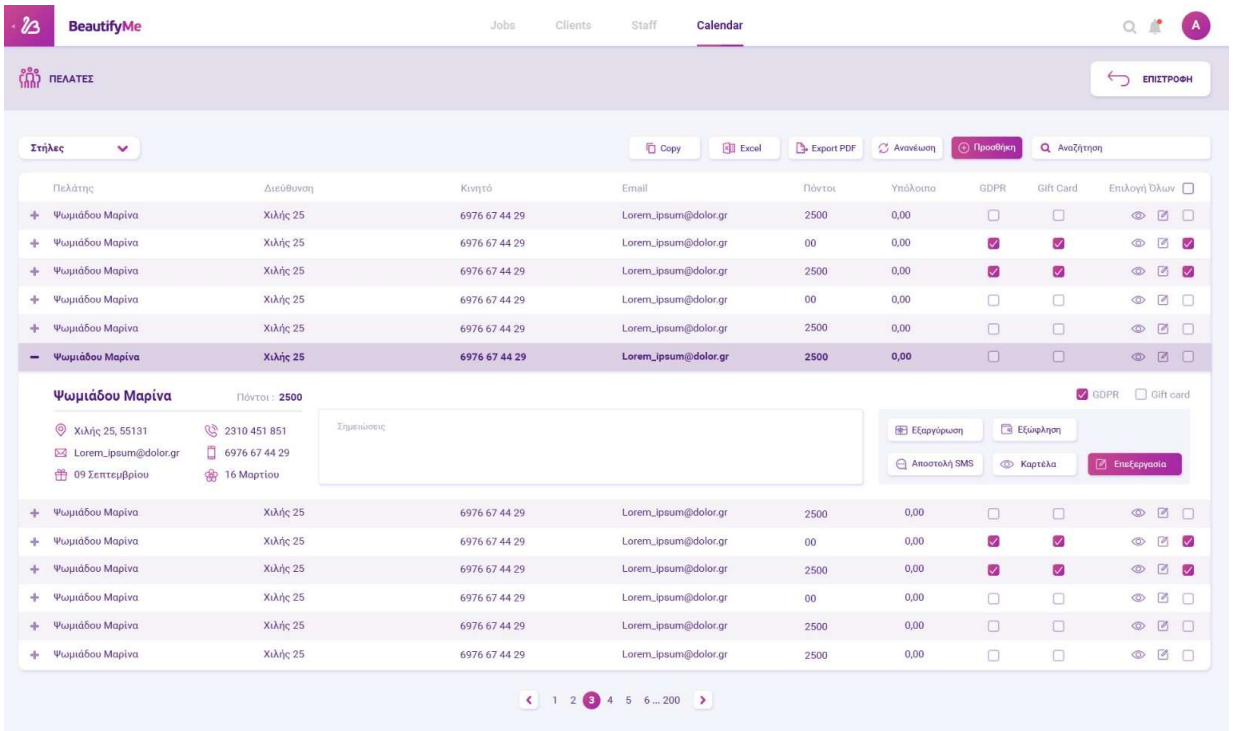
Check-out



Client's info (through check-out shortcut)



Clients



Partner's Multi-level access setup example

BOOKINGS & CLIENTS	BASIC	LOW	MEDIUM	HIGH	OWNER
Access Own Calendar	☑	☑	☑	☑	☑
Access Other Staff Calendars	☑	☑	☑	☑	☑
Can Book Appointments	☐	☑	☑	☑	☑
Home	☐	☐	☐	☑	☑
Clients	☐	☑	☑	☑	☑
Can see client contact info	☑	☑	☑	☑	☑
Can download clients	☐	☐	☐	☑	☑
Messages	☐	☑	☑	☑	☑
Services	☐	☐	☑	☑	☑

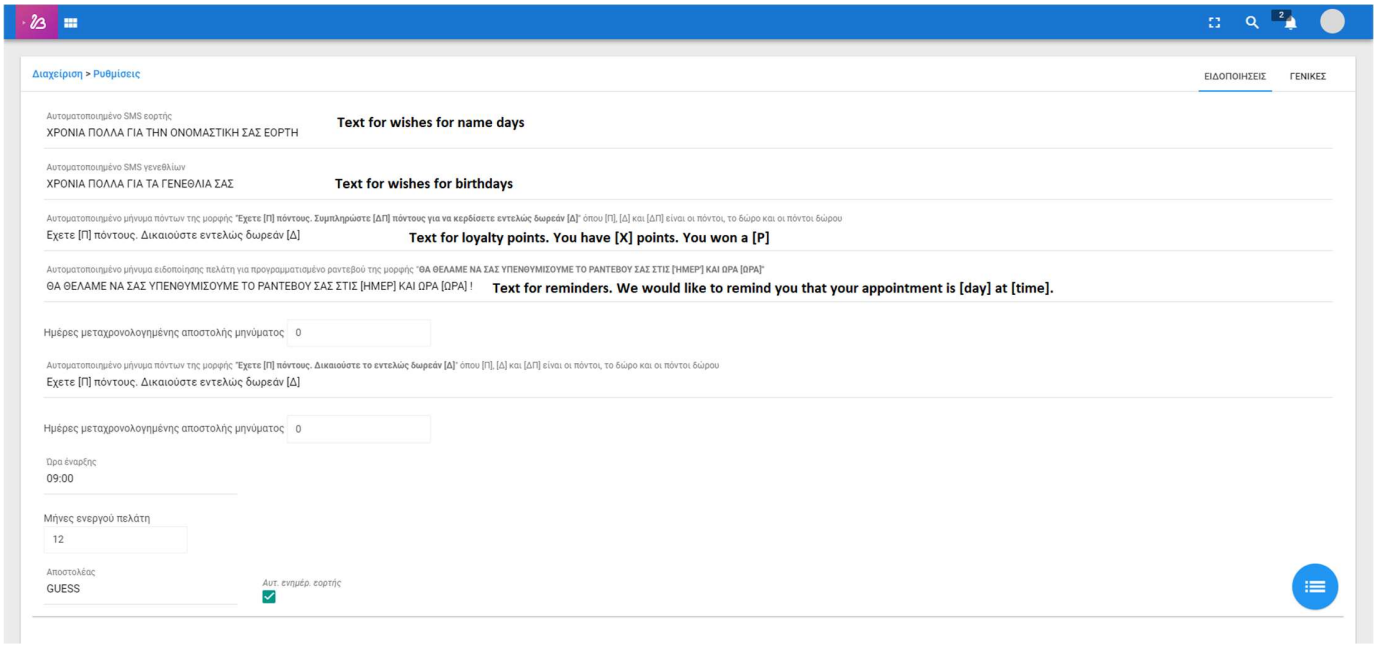
SALES	BASIC	LOW	MEDIUM	HIGH	OWNER
Can check out sales	☐	☑	☑	☑	☑
Can edit prices at checkout	☐	☑	☑	☑	☑
Can void invoices	☐	☐	☑	☑	☑
Daily Sales	☐	☐	☑	☑	☑
Appointments	☐	☐	☑	☑	☑
Invoices	☐	☐	☑	☑	☑
Vouchers	☐	☐	☑	☑	☑

STAFF	BASIC	LOW	MEDIUM	HIGH	OWNER
Working Hours	☐	☐	☐	☑	☑
Closed Dates	☐	☐	☐	☑	☑
Staff Members	☐	☐	☐	☑	☑
Permission Levels	☐	☐	☐	☐	☑

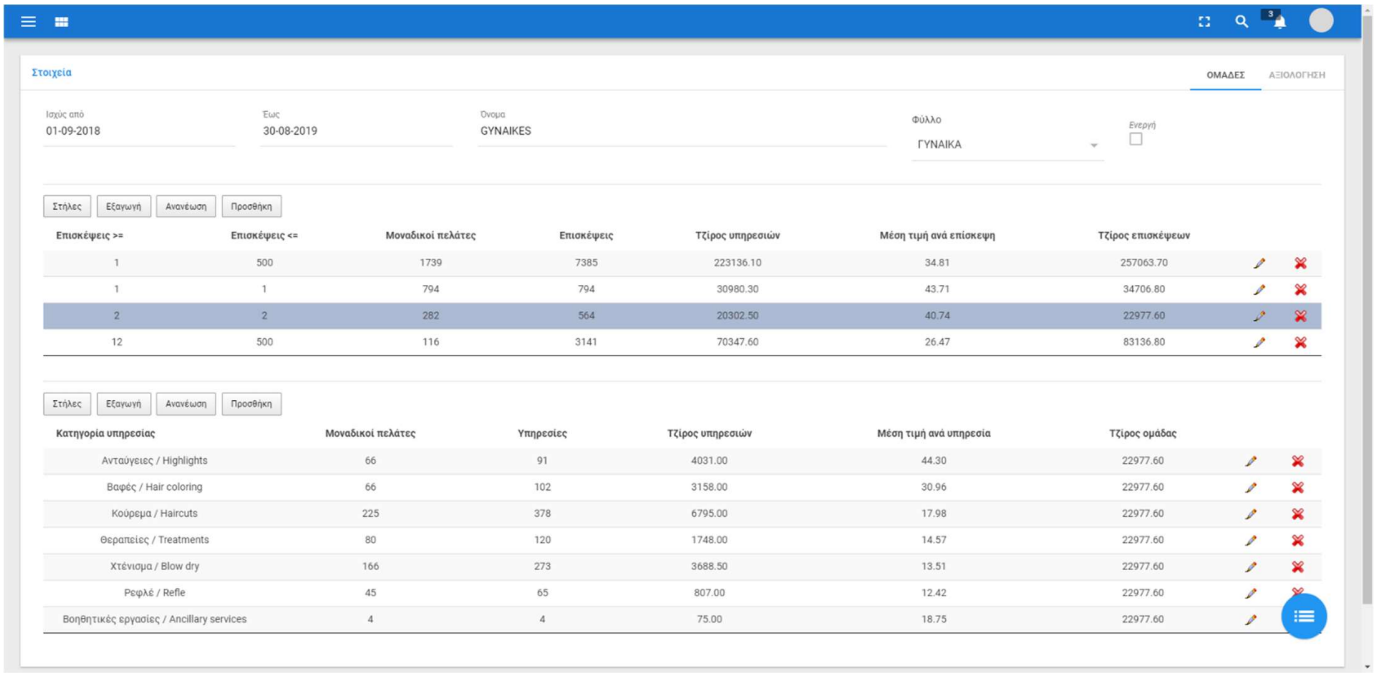
INVENTORY	BASIC	LOW	MEDIUM	HIGH	OWNER
Products	☐	☐	☑	☑	☑

REPORTS	BASIC	LOW	MEDIUM	HIGH	OWNER
All Reports	☐	☐	☐	☑	☑

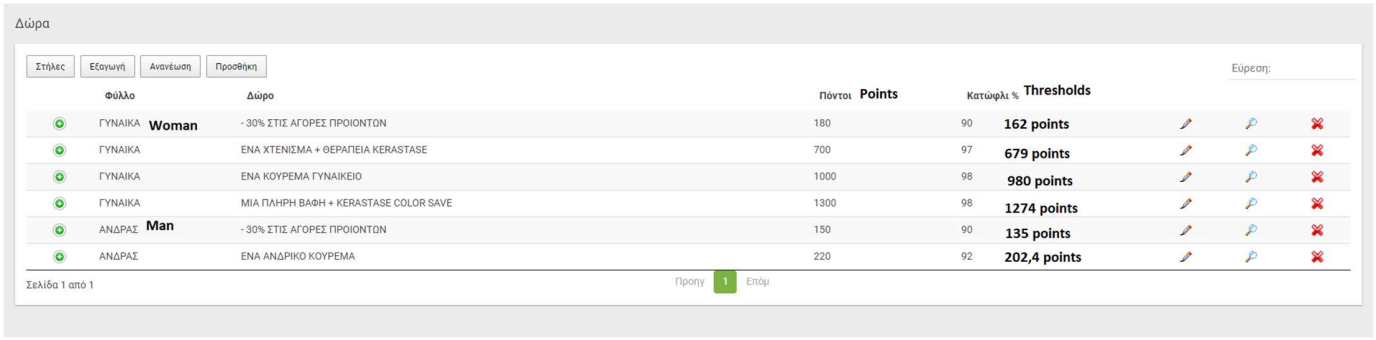
Setup message's text



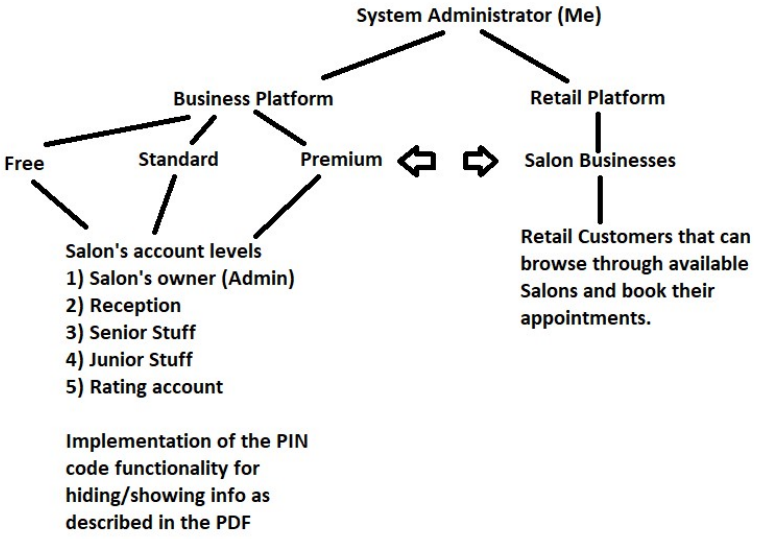
Dynamic groups



Loyalty points – Gifts



System Structure


System Administrator (Me)
Business Platform
Retail Platform
Free
Standard
Premium
Salon Businesses
Salon's account levels
1) Salon's owner (Admin)
2) Reception
3) Senior Stuff
4) Junior Stuff
5) Rating account
Retail Customers that can browse through available Salons and book their appointments.
Implementation of the PIN code functionality for hiding/showing info as described in the PDF