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How to choose business management software for a beauty salon

Appointment scheduling, no-shows, financial information and an evaluation method based on real tasks

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English

Abstract

Selecting software for a salon requires assessing the relationship between appointments, professionals, resources, communication and financial information. An extensive list of features may conceal difficulties in the daily process, while a simple interface may fail to handle important exceptions. This article presents a documentary review and a proposal for task-based evaluation, bringing together principles of digital adoption, evidence on reminders, risk management and data processing requirements. It explicitly distinguishes research on healthcare appointments from its possible application to salons, avoiding the transfer of effectiveness percentages between sectors. A capacity model, examples of contribution margin per unit of service time and a weighted matrix for comparing candidates are developed. A gradual implementation plan is also proposed, with indicators of no-shows, utilisation and administrative work. The conclusion is that the choice should prioritise process consistency and quality demonstrated in normal and exceptional situations, ensuring that costs are understood, data can be accessed and the service can be ended.

Keywords: beauty salons; business management software; online appointment booking; capacity; no-shows; systems evaluation.

1. Introduction

In a salon, an appointment connects a customer, a professional, a service, a duration and, sometimes, a shared resource. The operation also includes breaks, days off, changes, cancellations and payments. When this information is spread across messages, paper and spreadsheets, the team has to reconstruct the context repeatedly.

The software should reduce this reconstruction and support consistent decisions. A good demonstration allows the complete journey to be observed: request, availability, confirmation, service delivery, payment and possible rescheduling. Seeing only a filled appointment

calendar does not demonstrate that the system prevents conflicts or correctly maintains appointment statuses.

The OECD highlights the importance of skills and organisation in digital adoption. Applied to a salon, this means that the team needs to agree on what statuses mean, who can change the appointment calendar and how to handle a no-show. The tool does not replace these operating decisions. (OCDE, 2021)

2. Method and limits of the evidence

A narrative and documentary review was conducted, with sources consulted on 20 November 2026. Searches covered work on “appointment reminders”, “SME digital transformation” and original references on security, privacy and invoicing. The reminders literature was consulted in the Cochrane records and the text by McLean and colleagues. Technical and regulatory conditions were framed using documentation from NIST, CNPD, CEPD and the Autoridade Tributária.

No controlled trial of a specific Lyntev system in salons was identified in this targeted search. No experimental comparison of providers was conducted. The formulas, matrix and implementation plan are original proposals to support selection. The numerical examples are fictional and do not represent customer results.

3. Start with appointment scheduling as a process

3.1. Availability and resources

Availability needs to take account of working hours, actual duration, breaks, days off and skills. A service may require more than one resource. For example, a shared room or piece of equipment should not be reserved for two incompatible services, even if professionals are free. The evaluation should explicitly ask which resources the system controls.

Product processing times and the time during which the professional works on the customer should also be distinguished when this organisation forms part of the operation. It should not be assumed that any waiting period allows another appointment: the decision depends on the service and the capacity to supervise it. The model should reflect safe practice and the standard of customer service defined by the salon.

An important test is an attempt to book the last available slot simultaneously on two devices. The expected result is a single valid confirmation or an explicit conflict rule. If the interface only checks availability before saving, two people may receive an impression of success without a consistent booking existing. The provider should demonstrate the final behaviour, rather than simply claim that it “prevents overlaps”.

3.2. Statuses and changes

Requested, confirmed, arrived, completed, cancelled and no-show are not equivalent statuses. Each transition should have a meaning and, where necessary, a person responsible. Changing an appointment should update the communications and resources involved. An old message showing the previous time may cause a failure even when the calendar has been corrected.

Table 1. Tests of the appointment calendar and resources

Test situation	Result to observe
Professional on a day off	No availability and a consistent explanation
Last slot requested simultaneously	One valid booking; conflict handled clearly
Service with a shared resource	Compatibility between professional and resource
Customer changes the time	Calendar and communications updated without duplication
Service cancelled	Slot released and necessary history retained
Team member leaves	Access revoked and appointments reassigned

Table 1 note. Proposed test protocol. Not all salons need every resource; requirements should be agreed before the comparison.

4. No-shows and communication: what can be learnt from research

A Cochrane review brought together eight randomised trials involving 6,615 participants on message reminders for healthcare appointments. It found low- to moderate-quality evidence favouring attendance compared with no reminders. The population and operations were in healthcare, and the search coverage extended up to 2012. It is not methodologically correct to turn these results into a promised percentage reduction in no-shows at a salon. (Gurol-Urganci et al., 2013)

McLean and colleagues show the relevance of the processes surrounding a reminder: the ability to cancel, reschedule and assign the slot to someone else. For a salon, the implication to test is the quality of the change journey, rather than simply the number of messages sent. The review examines healthcare services; adaptation to the beauty sector still requires local observation. (McLean et al., 2016)

The system should allow confirmation, operational reminders and promotional communication to be distinguished. It is useful to check the channel, costs, delivery failures and the customer's ability to update their contact details. A sent message does not prove it has been read. An early cancellation may be a useful outcome if it allows the slot to be filled; always treating it as a loss may distort the evaluation.

The content should avoid unnecessary information. On a shared mobile phone, a notification may be seen by third parties. Data protection by design guides the choice of data, access and initial settings. Its practical application is to use only the information necessary for the purpose and review options that expose details without an operational benefit. (CEPD, 2020a)

5. Indicators that help with management

5.1. Capacity and utilisation

Consider a fictional salon with three professionals, seven available hours per day and 22 working days: 462 hours of monthly capacity. If services occupying 310 of those hours are delivered, utilisation under this criterion is 67.1%. Capacity should exclude previously defined periods of unavailability and use the same unit in the numerator and denominator.

It is important to distinguish booked time, services delivered and direct work. A period occupied in the calendar may include technical waiting time; a paid appointment may require work outside the recorded time. High utilisation is not, in itself, an absolute objective: the team needs capacity for unforeseen events, cleaning, preparation and customer service.

Equation 1. Utilisation = service time actually occupied / capacity time defined for the period.

5.2. Contribution margin per unit of time

Revenue per service is not the same as profit. In a fictional example, a service priced at 30 €, with 10 € in variable costs and a duration of 40 minutes, generates a contribution of 20 €, or 30 € per hour. Another service priced at 50 €, with 15 € in variable costs and a duration of 90 minutes, generates 35 €, or approximately 23.33 € per hour.

This comparison does not determine which service should be removed: demand, customer retention, quality and relevant combinations may matter. It only shows that a higher selling price may correspond to a lower contribution per unit of time. The contribution still has to cover fixed costs and should not be described as net profit. Staff costs should be classified consistently with the model used.

5.3. Minimum set of metrics

Table 2. Salon management indicators

Indicator	Recommended definition	Check required
No-shows	Appointments not attended without valid cancellation / eligible appointments	Separate cancellations by the salon
Early cancellation	Cancellations before the defined cut-off / eligible appointments	Keep the same time limit
Recovered slots	Cancelled slots that are filled / available cancelled slots	Consider duration and professional
Administrative work	Team minutes spent on defined tasks	Include corrections and duplications
Contribution	Revenue minus defined variable costs	Do not confuse with a balance or profit

Table 2 note. Original work. The meaning of statuses should be agreed before using the reports.

6. Compare software using an evidence matrix

A matrix with six dimensions and adjustable weights is proposed. The weights in the example are: scheduling and operations, 30%; customer data, 15%; financial information, 15%; permissions and continuity, 15%; export and ending the service, 15%; ease of learning, 10%. They add up to 100%. These values are a working proposal, not scientifically validated weights.

Each dimension receives a rating from zero to four: zero, absent; one, incomplete; two, depends on substantial manual intervention; three, supports the normal journey; four, supports the normal journey and the exceptions tested. The final score is the sum of each weight multiplied by its rating and divided by four.

It is necessary to define disqualifying requirements before calculating the average. For example, if an essential scheduling control function fails, a good visual rating does not compensate for that problem. The same applies to an inability to export the necessary data or revoke the access of someone who has left. The decision should retain a note or evidence for each criterion, rather than a general impression of the demonstration.

7. Data, finances and continuity

A customer record may contain personal observations and photographs. If the salon records health information, such as allergies, it should assess the framework and conditions applicable to those data; simply adding a free-text field is not enough. Information that the service does not need should not be collected. Access needs to match each person's work and the purpose of processing. (Parlamento Europeu & Conselho da União Europeia, 2016)

The CNPD recommends organisational and technical measures appropriate to the risk, including protection of access and secure, tested backups. For selection, it is useful to request a recovery demonstration and a procedure for when a team member leaves. An export performed by the user and a provider's recovery backup meet different needs. (CNPD, 2023)

It is also essential to distinguish financial record-keeping from invoicing. A screen showing income and expenses does not demonstrate that the software issues valid tax documents. The Autoridade Tributária provides information and a list of certified invoicing software. When this function is necessary, the applicable solution and version and the workflow used by the salon should be confirmed, with accounting support where appropriate. (AT, s.d.)

8. Gradual implementation

During preparation, standardise service names, durations, working hours and professionals. Before importing customers, remove duplicates in a controlled way and define the fields needed. A small fictional batch allows the results to be checked without exposing real data. The final import should retain a copy and a way to restore it.

At launch, choose a period and a pilot team. If there is temporary coexistence with the previous appointment calendar, define a single main source to avoid competing bookings. Document changes and incidents. Training should cover cancellation, correction, connection failure and escalation to the person responsible, as well as normal appointment creation.

In the following weeks, review questions, working time and data quality. Comparing metrics with the previous period requires consideration of holidays, promotions, seasonality and the mix of services. A fall in no-shows in a quieter month may not have been caused by the software. With low volume, the main initial result may be the ability to operate without duplication and with reliable information.

9. Discussion and conclusion

The choice of software for a salon should be led by tasks, operating rules and observable evidence. A consistent appointment calendar, clear communication, appropriate permissions and usable data have consequences throughout the operation. AI features should be assessed for the usefulness of their suggestions and the team's ability to validate them, without assuming that an automatic report changes results on its own.

The matrix presented is an adaptable starting point. The evidence on reminders is mainly from healthcare and does not support specific promises for salons. The financial examples are educational. Rigorous selection combines these limitations with local trials, transparent costs and an implementation plan the team can carry out.

Appendix A. Script for a 45-minute demonstration

1. Create a service, a day off and a resource needed by the salon.
2. Book, change, cancel and attempt an overlap on two devices.
3. Confirm the message the customer receives with each change.
4. Compare revenue, payment, contribution and the tax document.
5. Restrict a team member's access and then revoke it.
6. Export a sample with the necessary relationships and attachments.
7. Record costs, limitations, manual tasks and questions to clarify.

Editorial disclosure

Institutional authorship and editing: Lyntev. A narrative review and applied analysis, prepared with artificial intelligence support and not submitted for peer review. Frameworks and scenarios identified as our own do not constitute empirical research results.

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