

Auréa

Beauty institute, SPA & care center management software

User Manual

Version 2.1.0

EN

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1. Welcome to Auréa

Auréa is a complete management software for beauty institutes, SPAs and care centers. It brings together in a single application appointment booking, patient records, treatments and services, product and medication sales, the cash register, purchasing, multi-site inventory, accounting and payroll.

Who this manual is for

This manual is intended for all institute staff: reception, beauticians, masseurs, dermatologists, doctors, physiotherapists, hairdressers, accountants and management. Each role accesses the functions relevant to it through a system of roles and permissions.

The screenshots in this manual show the application's actual screens. Depending on your role, some menus may not appear — this is normal, as the display adapts to your access rights.

Key concepts

Auréa is based on a few simple concepts:

- Patient: anyone received at the institute. Their record holds their identity, medical details (skin type, allergies, contraindications) and treatment history.
- Treatment / Product: the catalog groups cabin treatments, services, medications and cosmetic products for sale.
- Appointment: each service planned with a practitioner and, if needed, a cabin.
- Site / Cabin: an institute may have several sites; inventory and cash are tracked per site.
- Role: determines what each staff member can see and do.

First login

On startup, enter your username and password. If you are logging in for the first time, your administrator provides your credentials. After login, the Dashboard appears.

Tip: change your password at first login through the Settings menu, to keep your data secure.

Overview of the modules

Auréa is organized into modules accessible from the sidebar. The Dashboard gives the overview; the Schedule plans appointments; Patients and Treatments & Records handle medical follow-up; Sales, Cash and Payment documents cover collection; Purchasing and Suppliers manage supply; Inventory and Transfers track products; Prospecting grows the clientele.

Each module has a dedicated chapter in this manual. You can read it from end to end or go directly to the chapter relevant to you using the table of contents.

2. Installation & getting started

This chapter explains how to launch Auréa for the first time, understand the general layout of the screen and carry out the first essential settings.

Launching the application

Auréa is installed on a Windows computer. Once installation is complete, a shortcut is available on the desktop. Double-click it to start.

On the very first launch, Auréa automatically prepares its database and applies the necessary internal updates. This is transparent and happens only once; subsequent launches are immediate.

Back up your data regularly. Auréa creates automatic backups, but an external copy (USB stick, disk, cloud) protects against hardware loss.

Understanding the main screen

The Auréa screen is divided into three areas. On the left, the navigation sidebar groups all modules. In the center, the work area shows the selected module. At the bottom left, your username, role and active company are shown.

At the top of the sidebar, a selector lets you switch company if your installation manages several. At the very bottom, the "Switch company" and "Log out" buttons are always accessible.

Essential settings

Before using Auréa day to day, a few settings are recommended: enter the institute's details (name, address, phone, logo) that will appear on invoices; create staff accounts with their roles; define sites and cabins; and populate the catalog of treatments, services, medications and products.

These settings are found in the Settings menu and in the corresponding modules (Sites & Cabins, Inventory, HR & Payroll). Once in place, the institute is ready to receive its first patients.

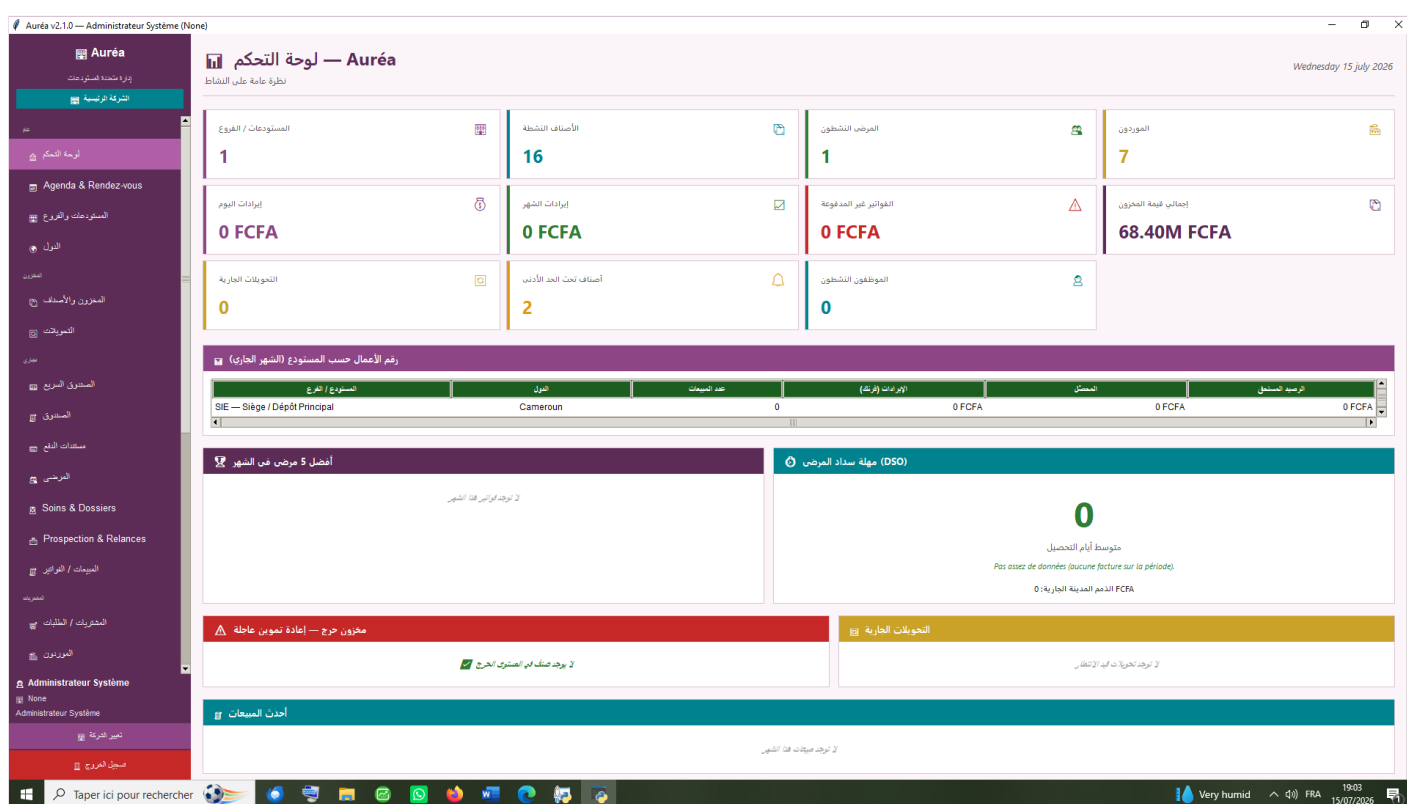
3. The Dashboard

The Dashboard is the home page. It offers an overview of the institute's activity at a glance.

Overview

Right after login, the dashboard shows the essential indicators: number of active patients, revenue for the day and the month, unpaid invoices, inventory value, items below the alert threshold and transfers in progress.

The colored cards at the top are quick to read: each figure reflects one aspect of the activity. The tables below list revenue by site, the top patients of the month and the latest sales.



The Auréa Dashboard with its key indicators.

The navigation sidebar

On the left, the sidebar gives access to all modules, grouped by theme: General (dashboard, schedule, sites, countries), Inventory, Commercial (cash, patients, treatments, sales), Purchasing, Finance and Analytics.

A colored badge may appear on some menus: for example, the number of today's appointments on "Schedule", or the number of unpaid invoices on "Sales".

Reading the financial indicators

The dashboard cards gather the institute's key figures. "Revenue for the day" and "for the

month" track your activity; "Unpaid invoices" draws attention to amounts still to be collected; "Inventory value" shows the capital tied up in products.

The average collection time (DSO) measures the average number of days between an invoice and its payment. The lower it is, the healthier your cash flow.

The summary tables

Below the cards, several tables detail the activity: revenue by site, the top patients of the month, the latest sales and the low-stock products needing replenishment.

These tables update automatically. They offer a management view without opening each module.

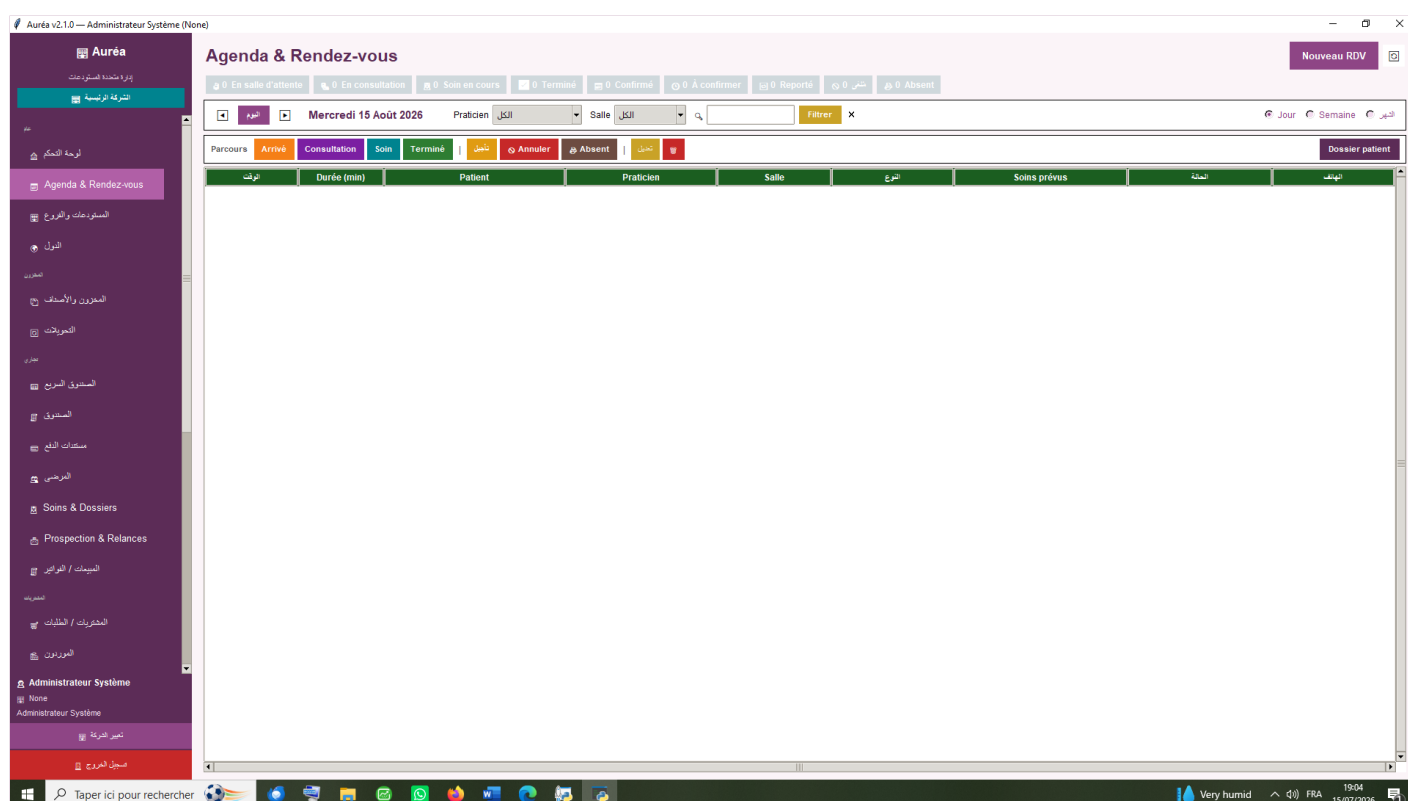
4. Schedule & Appointments

The Schedule module is the heart of daily operations. It lets you plan appointments, follow each patient's journey and view the workload of every practitioner and cabin.

Day, week and month views

At the top right of the screen, choose the Day, Week or Month view. The arrows move through time, and the "Today" button returns to the current date.

You can filter the list by practitioner, by cabin, or search for a patient by name or record number.



The Schedule & Appointments screen with patient journey tracking.

Creating an appointment

Click "New appointment". Enter the patient (or create one on the fly), the practitioner, the cabin, the date, time and duration. You can also add the reason and the planned treatments, chosen from your catalog.

Auréa automatically checks for conflicts: if the practitioner, the cabin or the patient is already busy in that slot, the entry is rejected and free slots are suggested.

- 1 Click the "New appointment" button at the top right of the screen.
- 2 In the Patient field, search for the patient by name; if they do not yet exist, create them on the fly without leaving the window.

- 3 Choose the practitioner who will perform the service, then the cabin if needed.
- 4 Enter the date and time of the appointment, along with its duration in minutes.
- 5 Select the appointment type and, if you wish, tick the planned treatments from your catalog.
- 6 Optionally add a reason or notes, then click "Save". Auréa checks for conflicts and confirms the creation.

Auréa prevents creating an appointment in the past: only future slots are accepted.

Following the patient journey

The "Pathway" bar advances each appointment through the visit: Arrived (waiting room) → Consultation → Treatment in progress → Completed. Each step is time-stamped.

The colored counters at the top of the screen show, in real time, the number of patients at each stage: waiting, in consultation, in treatment, completed, confirmed, to confirm, postponed, cancelled and no-show.

- Postpone: moves the appointment to a new date, keeping the postponement history.
- Cancel: frees the slot and marks the appointment as cancelled.
- No-show: records that the patient did not attend.
- Patient record: opens the full record of the selected patient.

Detecting and resolving conflicts

Auréa monitors three types of conflict: the same practitioner in two simultaneous appointments, the same cabin double-booked, or the same patient expected in two places. As soon as a conflict is detected, the entry is blocked.

The free-slot search then offers the next availabilities of the practitioner and the cabin, to reschedule in one click without searching manually.

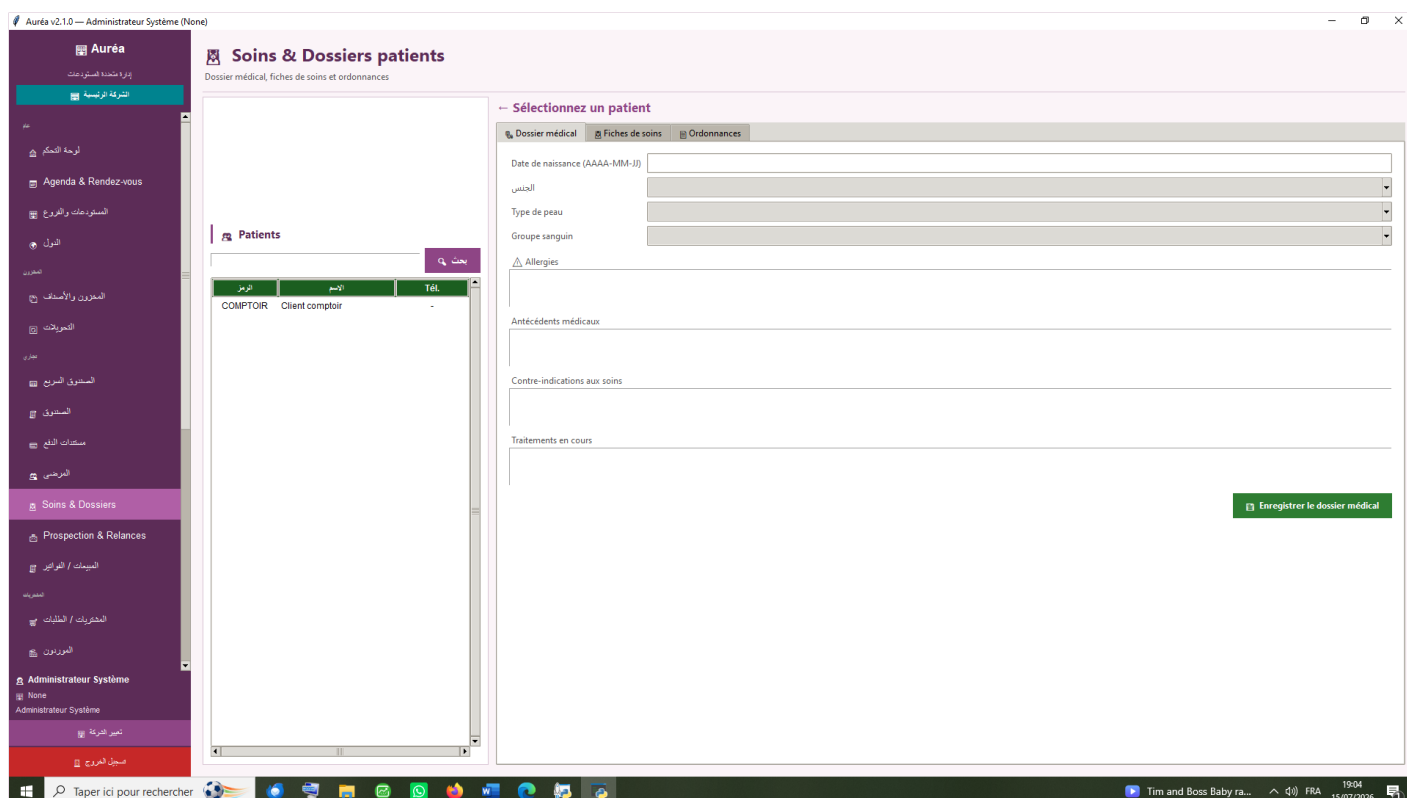
5. Patients & Treatment Records

Auréa treats each client as a patient, with a full record bringing together identity, medical details and the history of treatments and prescriptions.

The Treatments & Records screen

Select a patient from the list on the left (a search is available). The right side shows three tabs: Medical record, Treatment sheets and Prescriptions.

Visual alerts immediately flag allergies and contraindications in the record, for treatment safety.



The Treatments & Patient Records screen and its Medical record tab.

The medical record

The Medical record tab gathers date of birth, sex, skin type, blood group, allergies, medical history, treatment contraindications and current treatments.

Editing this record is reserved for authorized practitioners (doctors, dermatologists, physiotherapists). Other staff can view it according to their rights.

Fill in allergies and contraindications carefully: they appear as alerts when creating a treatment sheet.

Treatment sheets and prescriptions

The Treatment sheets tab records each treatment performed: practitioner, duration,

treated area, products used, observations and recommendations. This is the patient's follow-up history.

The Prescriptions tab lets doctors and dermatologists issue numbered prescriptions, with diagnosis, medications, dosage and treatment duration.

- 1 Select the relevant patient from the list on the left.
- 2 Open the "Treatment sheets" tab, then click "New treatment sheet".
- 3 Choose the treatment performed, the practitioner and the duration; fill in the treated area and the products used.
- 4 Write your observations and recommendations to the patient, then save: the sheet is added to the record's history.
- 5 For a prescription, open the "Prescriptions" tab, click "New prescription", enter the diagnosis, add the medications with dosage and duration, then save.

6. Sites & Cabins

An institute may have several sites (branches) and several cabins. Auréa tracks inventory and activity per site.

Managing your sites

The Sites & Cabins screen lists your sites with their code, type, country, city and associated inventory value. The "New site / branch" button lets you add more.

When you have only one active site, Auréa automatically preselects it in forms (invoice, quote, purchase order): you no longer have to choose it every time.

The screenshot shows the 'Sites & Cabins' screen in the Auréa software. The top bar indicates 'Beauté & SPA Pro v2.0.0 — Administrateur Système (None)'. The sidebar menu on the left lists various modules: GÉNÉRAL (Tableau de bord, Sites & Cabins), STOCK (Stock & Soins & Produits, Transferts), COMMERCIAL (Caisse rapide, Caisse, Pièces de paiement, Patients, Soins & Dossiers, Rendez-vous & Agenda, Ventes / Factures), ACHATS (Achats / Commandes, Fournisseurs), and FINANCES (Administrateur Système, Change de société, Déconnexion). The main content area is titled 'Sites & Cabins' with the subtitle 'Réseau multi-sites et valorisation du stock'. It features a summary card showing '1' site and a total stock value of '68.40M FCFA'. Below this is a table with columns: Code, Nom, Type, Pays, Ville, Responsable, Téléphone, Valeur stock, and Actif. The table contains one entry for 'SIE - Siège / Dépôt Principal' located in 'Cameroun' with a stock value of '68.40M FCFA'. At the bottom right, a status bar shows 'Valeur stock réseau : 68.40M FCFA' and the date '15/07/2025'.

Code	Nom	Type	Pays	Ville	Responsable	Téléphone	Valeur stock	Actif
SIE	Siège / Dépôt Principal	Siège	Cameroun	Douala	None	None	68.40M FCFA	✓

The Sites & Cabins screen and inventory value per site.

Organizing cabins

Within each site, you define the treatment cabins. They are used to schedule appointments without double booking: a cabin busy in a slot cannot be assigned to another patient at the same time.

Name your cabins clearly (for example "Cabin 1 — Facials", "Cabin 2 — Massage") so the team can find their way around the schedule easily.

Tracking inventory value per site

Each site has its own stock. The "Inventory value" column of the Sites & Cabins screen shows, at a glance, the capital tied up at each site.

This information is valuable for balancing supplies between your establishments and avoiding overstock.

7. Sales & Invoicing

The Sales module handles quotes, invoices, payments and unpaid tracking. A single invoice can combine treatments and products.

Creating an invoice

Click "New invoice". Select the patient, the site (preselected if there is only one), the date, the payment method and, if needed, a global discount.

Then add the lines: each treatment or product is chosen from the catalog, with its quantity and price. The total and VAT are calculated automatically.

- 1 From the Sales module, click "New invoice".
- 2 Select the patient; the site is already filled if there is only one.
- 3 Check the date, choose the payment method and, if needed, enter a global discount.
- 4 Add each line: choose the treatment or product, the quantity and the price; the subtotal is calculated automatically.
- 5 Check the total and VAT shown at the bottom, then click "Create and validate" (or "Create (draft)" to finalize later).

Creating a new invoice, with the site preselected.

Quotes, payments and unpaid invoices

You can create a quote and then convert it into an invoice. At payment, record the settlement (cash, Mobile Money, card). The outstanding balance is tracked automatically and appears in the unpaid indicators.

The cards at the top of the Sales screen summarize the number of invoices for the month, the invoiced revenue and the amount still due.

Tracking revenue

The Sales module is not limited to issuing invoices: it feeds the institute's statistics. Revenue by site, by period and by patient is found in the dashboard and the analytics.

By reconciling sales with payments, Auréa highlights partially settled invoices and the outstanding balance, for cash tracking without surprises.

8. Cash register & payments

The Cash module handles counter payments, opening and closing the register and tracking settlements by payment method.

Quick cash

Quick cash is designed for counter payments in just a few steps. Select the treatments or products, enter the patient if needed, choose the payment method and confirm. The receipt can be printed immediately.

This mode is ideal for the quick sale of cosmetic products or collecting payment for a treatment without detailed invoicing.

Opening and closing the register

At the start of the day, the register is opened with a starting float. Throughout the day, each payment is recorded in it. At the end of the day, closing compares the expected theoretical amount with the actually counted amount and flags any discrepancy.

Accepted payment methods include cash, Mobile Money and card. Each settlement is broken down by method, which makes cash control and accounting easier.

Close the register every evening: it is the best way to quickly detect an error or discrepancy.

Payment documents

The Payment documents screen summarizes all settlements received over a period. You can filter by date, payment method or patient, and track the total collected.

This information feeds directly into accounting and financial reports, without double entry.

Checking discrepancies

At closing, a discrepancy between the theoretical amount and the counted amount may appear. A small gap is often explained by change given; a large gap deserves a review of the day's operations.

Recording discrepancies, even small ones, helps identify habits to correct and secure the register over time.

9. Purchasing & Suppliers

The Purchasing module handles supplier orders, receipts and payments, directly linked to inventory.

Placing a supplier order

Click "New order". Choose the supplier and the receiving site (preselected if there is only one). Enter the date, reference and any transport or customs fees.

Add the treatments and products ordered with their quantity and purchase price. On receipt, the site's inventory is updated automatically.

Creating a supplier purchase order.

Managing suppliers

The Suppliers screen lists your partners: contact details, payment terms and order history. A well-documented supplier speeds up order creation.

For each supplier, you can track the total ordered and the amounts still to be paid, to stay in control of your commitments.

Receiving and updating stock

On receipt of an order, confirm the quantities actually delivered. Auréa then automatically increases the relevant site's stock and records the movement.

If the delivery is partial, you can receive only some of the lines; the rest remains expected.

10. Inventory & stock

The Inventory module tracks quantities of products, medications and consumables at each site, with automatic replenishment alerts.

The Treatments & Products catalog

The catalog brings together everything the institute offers: cabin treatments (with duration and required practitioner), services, medications (with optional mandatory prescription) and cosmetic products. Each item has a code, a purchase price and a sale price.

For physical products, Auréa tracks the quantity in stock, the alert threshold and the critical threshold. Treatments and services do not consume stock but may use consumables.

Alerts and replenishment

When a product falls below its alert threshold, it appears in the dashboard indicators and in the "Low stock — urgent replenishment" box. This makes it possible to order in time and avoid shortages.

Stock movements (inflows on receipt of an order, outflows on sale) are recorded automatically, ensuring an always up-to-date inventory.

Transfers between sites

If your institute has several sites, the Transfers module lets you move products from one to another. The source site's stock decreases, the destination's increases, and the operation remains traced.

Transfers in progress are visible on the dashboard, to track goods in circulation.

Physical inventory

Periodically, it is healthy to compare Auréa's theoretical stock with the stock actually present on the shelves. This physical inventory corrects discrepancies due to breakage, loss or entry errors.

Reliable stock is the basis of accurate replenishment: neither a shortage that drives the patient away, nor overstock that ties up cash.

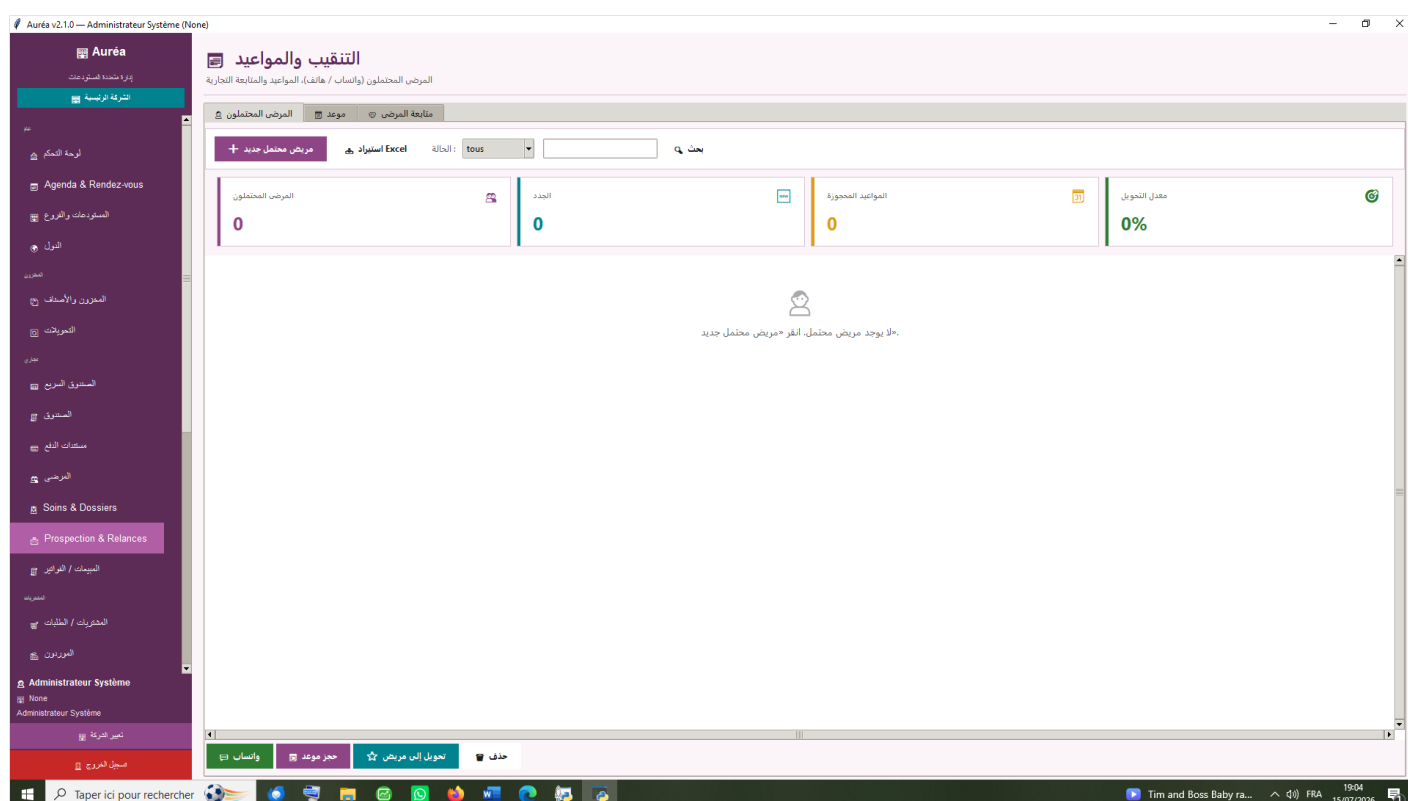
11. Prospecting & Follow-ups

This module helps grow the clientele: tracking potential patients, booking appointments and commercial follow-ups.

Tracking potential patients

The screen shows potential patients, new contacts, booked appointments and the conversion rate. You can import a list from Excel, contact a prospect via WhatsApp, book them an appointment or convert them into a patient.

Follow-up tracking ensures no opportunity is lost and helps retain existing clients.



The Prospecting & Follow-ups screen and its conversion table.

Converting a prospect into a patient

When a potential patient becomes a client, the "Convert to patient" button automatically creates their record in the Patients module, without re-entering their details.

You can also book them an appointment directly or send them a WhatsApp follow-up message, without leaving the screen.

Importing a contact list

The "Import Excel" button lets you add, in one go, a list of potential patients from a spreadsheet file. It is ideal after a trade show, a campaign or a referral operation.

Once imported, these contacts join the prospecting follow-up and the conversion-rate

calculation.

12. Staff, roles and permissions

Auréa protects sensitive data through a system of roles. Each staff member only accesses the functions of their profession.

Available roles

Auréa offers roles tailored to the institute:

- Doctor and Dermatologist: full medical record, treatment sheets, prescriptions, schedule.
- Physiotherapist: medical record, treatment sheets, schedule.
- Beautician, Masseur, Hairdresser: treatment sheets and schedule.
- Reception: appointments, patient creation, invoicing, payment and cash register.
- Accountant: accounting, reports and purchasing, without access to the medical record.
- Administrator and Director: full access to all functions.

Changing the language

Auréa is available in French, English, Spanish and Arabic. Changing the language is done in Settings. The interface, including the treatment screens and the schedule, then displays in the chosen language.

In Arabic, text displays correctly right-to-left in labels and buttons.

Creating and managing accounts

From the HR & Payroll module, add each staff member with their ID, name, position and home site. The position automatically determines the role and therefore the associated permissions.

You can change a position at any time, deactivate an account that leaves the institute or reset a password. Deactivated accounts keep their history but can no longer log in.

Positions and categories

Auréa offers positions suited to the institute: beautician, masseur, dermatologist, doctor, physiotherapist, hairdresser, reception, accountant, HR manager and management. Each position is attached to a category that structures the schedule and the statistics.

Practitioners (those who perform treatments) automatically appear in the schedule's selection list, avoiding any double entry.

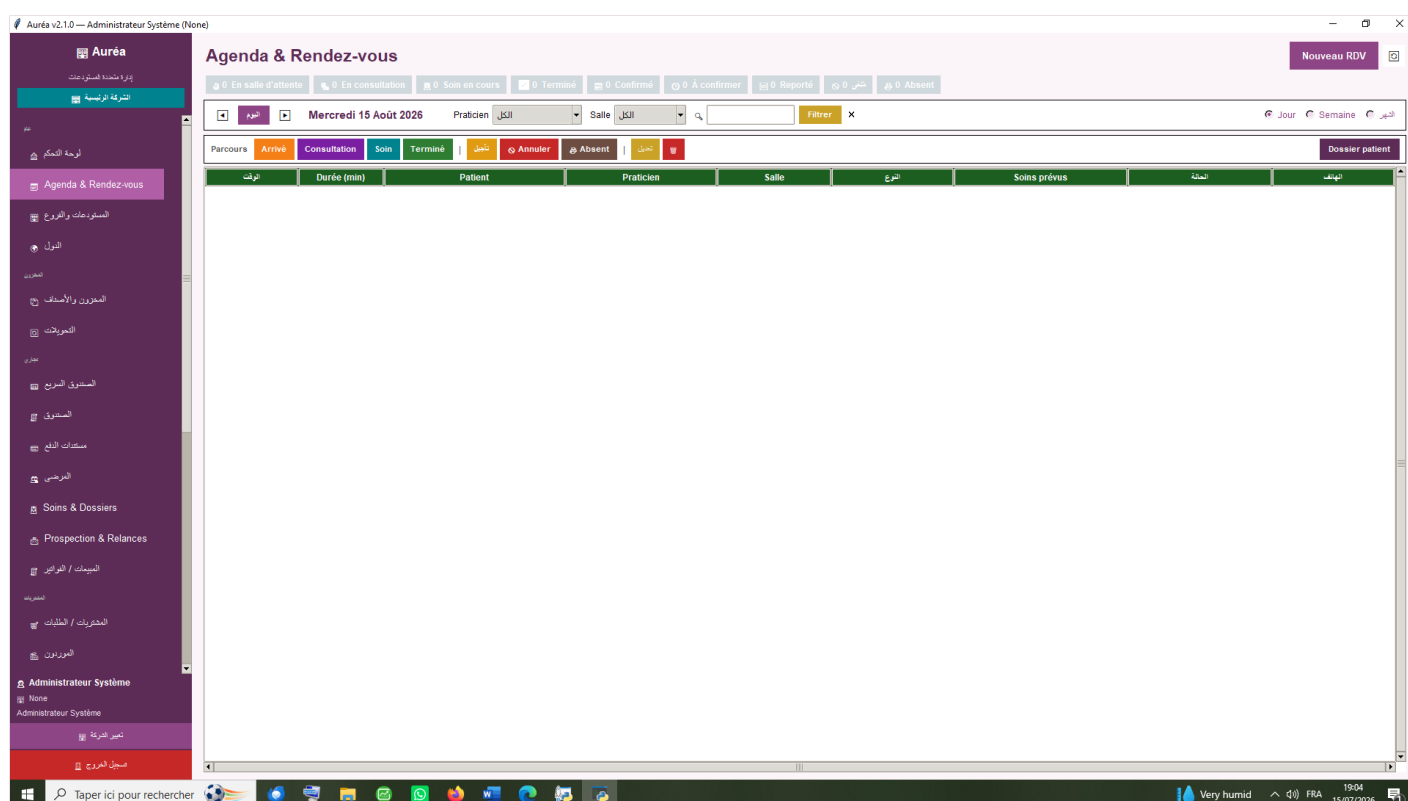
13. Daily best practices

A few simple habits let you get the most out of Auréa and keep reliable data day after day.

Starting and ending the day

On arrival, open the register with its starting float and check the day's schedule: you can see at a glance the appointments, the practitioners involved and the cabins in use.

At the end of the day, advance the last appointments to "Completed", close the register and check that no invoice remains a draft. This routine ensures accurate statistics the next day.



Tracking the patient journey throughout the day.

A schedule kept up to date in real time makes the dashboard reliable: the patient counters then reflect exactly what happens on the ground.

Recording at the right time

Record each treatment performed right away, while the details are fresh: products used, treated area, observations. A complete treatment sheet today saves precious time at the patient's next visit.

Likewise, collect payment for sales as they happen rather than at the end of the day: cash tracking stays accurate and discrepancies are avoided.

Keeping the catalog up to date

A well-kept catalog speeds up every operation. Regularly check sale prices, remove products no longer offered and complete treatment durations so the schedule calculates slots correctly.

Set the required practitioner for each treatment: Auréa can then avoid assigning a service to a staff member without the corresponding qualification.

14. Backup & security

Your patient and financial data is precious. This chapter gathers the essential reflexes to protect it.

Regular backups

Auréa creates automatic backups of its database. It is nevertheless recommended to also keep a regular external copy on a USB stick, a disk or a cloud space.

An external backup protects against hardware failures, theft and incidents. Choose a frequency suited to your activity — ideally daily.

Occasionally test restoring a backup: a backup is only valuable if you know how to read it back.

Accounts and passwords

Each staff member should have their own account, protected by a personal password. Avoid shared accounts: they make it impossible to track who did what.

Give everyone the role strictly needed for their job. Limited access protects sensitive data, particularly medical records, and reduces the risk of error.

Record confidentiality

Medical records contain sensitive information. Only authorized practitioners can modify them, and viewing them depends on each user's role.

Lock your session when you leave the workstation, and make sure the screen is not visible to patients in the waiting room.

15. Frequently asked questions

This section answers the most common questions from Auréa users in daily use.

I can't see some menus. Is this normal?

Yes. Auréa only shows the modules allowed by your role. An accountant will not see the medical record; a beautician will not see accounting. If you need additional access, contact your administrator.

Why is the site already filled in forms?

When your institute has only one active site, Auréa selects it automatically to save you time. If you manage several sites, the choice remains manual.

Auréa prevents me from creating an appointment. Why?

Two reasons are possible. Either the slot conflicts with an existing appointment (same practitioner, same cabin or same patient): Auréa then suggests free slots. Or the chosen date is already in the past: only future dates are accepted.

How do I change the application language?

Go to Settings and choose the desired language from French, English, Spanish and Arabic. The interface updates immediately, including the schedule and the treatment screens.

Is my data safe?

Auréa performs automatic backups of your database. It is nevertheless strongly recommended to also keep a regular external copy. Each user has a personal password and only accesses the functions of their role.

16. Appendix A — Roles & permissions

This table summarizes, for each role, the main access granted in Auréa. The administrator can adjust these rights.

Access by role

Role	Main access
Administrator	All functions, settings and accounts.
Director / Manager	All management functions and reports.
Doctor	Medical record, prescriptions, treatment sheets, schedule.
Dermatologist	Medical record, prescriptions, treatment sheets, schedule.
Physiotherapist	Medical record, treatment sheets, schedule.
Beautician	Treatment sheets, schedule, sales.
Masseur	Treatment sheets, schedule.
Hairdresser	Treatment sheets, schedule.
Reception	Appointments, patients, invoicing, cash.
Accountant	Accounting, reports, purchasing (no medical record).
HR Manager	Staff, payroll.
Intern	Read-only consultation.

Key point

The medical record can only be edited by authorized health practitioners. Commercial and administrative roles have no access to it, which protects patient confidentiality.

If a staff member needs additional access, only the administrator can grant it, on a case-by-case basis.

17. Appendix B — Appointment statuses

Each appointment moves through a series of statuses reflecting the patient's journey. Here is their meaning.

Meaning of statuses

Status	Meaning
To confirm	Appointment booked, awaiting confirmation.
Confirmed	Appointment confirmed by the patient.
Arrived	The patient has arrived, in the waiting room.
In consultation	The patient is with the practitioner.
Treatment in progress	The treatment or service is under way.
Completed	The service is finished.
Postponed	The appointment was moved to another date.
Cancelled	The appointment was cancelled.
No-show	The patient did not attend.

Real-time tracking

The colored counters at the top of the schedule continuously add up the number of appointments in each status. They offer an instant view of attendance and the progress of the day.

Advancing statuses throughout the visit ensures faithful statistics and a reliable dashboard.

Appointment types

Auréa offers predefined appointment types to ease scheduling and statistics:

Type	Use
Medical consultation	Appointment with a doctor.
Dermatological consultation	Appointment with a dermatologist.
Facial treatment	Facial esthetic treatments.
Body treatment	Body esthetic treatments.
Massage / SPA	Massage and wellness sessions.
Physiotherapy session	Rehabilitation and physio care.
Hairdressing	Hairdressing services.
Follow-up / Check	Post-treatment follow-up appointment.
Emergency	Urgent appointment inserted into the schedule.

18. Glossary

Definitions of the main terms used in Auréa.

Business terms

- Patient: person received and followed by the institute; the equivalent of the "customer" in classic commercial software.
- Practitioner: staff member performing treatments (beautician, masseur, dermatologist, doctor, physiotherapist, hairdresser).
- Treatment sheet: report of a performed treatment, kept in the patient's record.
- Prescription: medical prescription issued by a doctor or dermatologist.
- Cabin: treatment space within a site; used to avoid booking conflicts.
- Site: physical establishment (head office or branch) where stock and cash are tracked.

Management terms

- Quote: non-final price proposal, convertible into an invoice.
- Invoice: final sales document, with payment tracking.
- Outstanding balance: unpaid amount of an invoice.
- Alert threshold: stock quantity below which replenishment is flagged.
- Transfer: movement of products from one site to another.
- Role: access profile determining the functions allowed for a user.

Technical terms

- Database: file where Auréa stores all your data in a structured and secure way.
- Migration: automatic update of the data structure with a new version, without loss of information.
- Backup: safety copy of the database, allowing restoration in case of incident.
- Role & permission: mechanism that limits each user's access to only the functions of their job.
- Terminology: adaptation of the interface vocabulary to the institute's business (Clients shown as Patients, etc.).
- RTL: right-to-left writing direction, used for Arabic display.