SOFTWARE USERS GUIDE
V/1.0-0126

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Maintenance Software

This guide walks through how a stylist or admin should use the Maintenance Services screen inside the Maintenance Software/CMS.

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1. Open the maintenance services form

1. From Home dashboard:• Click Maintenance Software or the equivalent module tile.
• Open the Client Management System (CMS) if prompted.

2. Navigate to Maintenance Services:• In the CMS menu, select Maintenance Services.
• The Maintenance Services form will open, showing:• Maintenance Services on the left
• Maintenance Library on the right
• Navigation controls at the bottom (Record, Filter, Search).

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2. Start a new maintenance record

1. Create new record:• Use the Record navigation bar at the bottom.
• Click the New Record button (typically the blank star/blank record icon or a labeled button, depending on your final build).
• Confirm the form fields clear, showing a new, empty record.

2. Verify record position:• Look at the bottom status line:• It should show something like Record: 1 of 1 (or updated position if multiple records exist).

• Ensure no filter is applied (it may read No Filter next to the record status).

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3. Enter basic appointment and due date details

On the upper-left section of the form:

1. Client name / maintenance name:• In the Name field(s), type the client name or unit identifier as used in your system.

2. Appointment date:• In Appt Date, enter the scheduled date of the maintenance appointment.

3. Due date:• In Due Date, enter the target completion date for the maintenance service (especially important for mailed-in or drop-off units).

4. Appointment time & maintenance request:• In Appt Time, enter the client's appointment time (if an in-person visit).
• In Maintenance Request, type a short summary of what the client is requesting (e.g., "Closure refresh, tighten band, wash & style").

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4. Set return option and status

1. Return option:• In Return Option, select how the unit will be returned:• Examples: In-salon pickup, Mail return, Courier, etc.

• This may be a dropdown or selection field.

2. Status:• In Status, choose the current job status:• Examples: New, In Progress, Completed, Ready for Pickup, Shipped (depending on your configuration).

3. Status date:• In the Date field next to Status/Return Option, enter the date that status was last updated.

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5. Add service request details, images, and notes

In the middle-left section labeled Product Type ~ Services Requested ~ Request Images ~ Notes:

1. Product type:• In Product Type, specify the unit type:
• Examples: 5x5 Closure wig", "Frontal unit", "U-part wig," etc.

2. Services requested:
In Services Requested, list each service the client needs:
• Example: "Deep cleanse, tightening, lace tint, curls added".

3. Request images:
• Use the Request Images area to:
• Attach photos the client provided as inspiration or problem areas.
• Or document current condition photos before work begins.

4. Notes 1:• In Notes 1 (or the primary notes field), capture any special instructions or cautions:
• Example: "Client prefers low heat only; do not cut lace further."

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6. Categorize, link resources, and attach files

To the right of the request section:

1. Category:• In Category, assign a classification for reporting and filtering:• Examples: “Wash & Repair”, “Customizing”, “Color Correction”.

2. Subject:
• In Subject, enter a concise title:• Example: “Unit refresh after 6 weeks of wear”.

3. Links:
In Links, paste URLs relevant to the job:
• Client mood boards, Pinterest inspiration, product references, order link from the vendor, etc.

4. Attachments:
In Attachments, add files connected to the maintenance job:
• Intake forms, signed policies, color formulas, or additional client reference photos.

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7. Record maintenance results and care instructions

In the lower-left section labeled Maintenance Results: Services Provided ~ Results Images ~ Care Package ~ Instructions:

1. Services provided:
• In Services Provided, document what was actually done (which may differ slightly from requested):
• Example: “Clarifying shampoo, deep conditioner, elastic band replaced, bleached knots retouched.”

2. Results images:
• In Results Images, upload or link photos showing the finished unit from multiple angles.

3. Care package:
• In Care Package, list items included when returning the unit:
• Example: “Edge brush, travel-size foam, care card”.

4. Instructions:
• In Instructions, write the client’s home-care guidance:
• Example: “Apply foam only to edges, avoid heavy oils, only cool to medium heat, store in satin bag.”

5. Results notes:
- In Notes under the Results section, capture anything you want on record for future visits:
• Fit issues, client feedback, or internal stylist notes.

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8. Save the record

1. Save changes:
• Use the Save button or the built-in save icon (commonly the disk icon or a labeled control).
• Wait for any confirmation message or visual cue that the record has been saved.

2. Confirm record count:
• Check the bottom bar to verify the record is now part of the set (e.g., Record: 1 of 3).

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9. Navigate between records

Use the bottom Record navigation controls:

1. Move between records:
• First record: Go to the earliest maintenance record.
• Previous record: Step backward one record.
• Next record: Step forward one record.
• Last record: Jump to the most recent record.

2. Jump to a specific record:
• In the record number area (for example “1 of 5”), type a record number (if enabled) and press Enter to jump directly.

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10. Use filter and search

At the bottom, you’ll see indicators like No Filter and Search:

1. Click the Filter option to narrow records by a field such as:
• Category (e.g., “Wash & Repair”)
• Status (e.g., “Completed”)
• Date ranges (e.g., this month’s appointments).

• Once a filter is applied, the indicator will change from No Filter to show that a filter is active.

2. Clear filters:
• Select Remove Filter (or similar option) to return to viewing all records.
• Confirm that the display reads No Filter again.

3. Search:
• Click Search to locate records based on specific values such as:
• Client name, Subject, Category, or Notes text.
• Run the search, then use the navigation controls to move through search matches.

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11. Using the maintenance library panel

On the right side of the screen (Maintenance Library):

1. Reference standards:
• Use the Maintenance Library area to view saved reference items such as
• Standard service bundles, pricing references, or care templates.

2. Align your entries:
• When filling out Services Requested, Services Provided, and Instructions, refer to the Library so:
• Language is consistent.
• Services align with the established packages.
• Instructions match brand standards.

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12. Recommended workflow summary

1. Before appointment:
• Create the maintenance record → fill in Appt Date/Time, Due Date, Request details, and attach client images.

2. During service:
• Update Status → refine Services Requested if needed → add internal Notes.

3. After service completion:
• Fill in Maintenance Results (Services Provided, Results Images, Care Package, Instructions) → update Status to Completed/Ready → Save.
