SOFTWARE USERS GUIDE
V/1.0-0126

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Protective Styling Software

This guide walks you through using the Protective Styling Services form and the Protective Styling Library inside your Protective Styling Software.

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1. Getting started

1.1 Launch the software and log in

1. Open the software:• Action: Double-click the Protective Styling Software icon (or open from your company's approved launch method).

2. Login screen:• Action: Enter your assigned Username and Password.

3. Sign in:• Action: Select Login.
• Result: You are taken to the Home / Main Dashboard.

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2. Navigating the main dashboard

On the main screen you'll see navigation buttons/menus similar to:

• Home
• Client Intake
• HSPSS CMS (Client Management System)
• Appointment Scheduling System
• Protective Styling Services Form
• Protective Styling Library
• Reports & Analytics
• Close

2.1 Open Protective Styling Services form

1. From the Home/dashboard:• Action: Select Protective Styling Services Form.

2. Result:• The Protective Styling Services screen opens, showing client-related styling details and record navigation at the bottom.

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3. Creating or viewing a Protective Styling Service

The Protective Styling Services screen connects the client, their hair profile, the chosen style, and the related appointment/payment status.

3.1 Create a new service record

1. New record:• Action: Use the navigation controls at the bottom (for example: Record: 1 of 1 plus buttons for New or a blank record).
• Choose the option that moves you to a blank record.

2. Confirm you're on a new record:• Check: Record navigation shows either new or an empty form with no prior client data.

3.2 Identify the Protective Styling Service

At the top of the form you'll see a section similar to:

• # Protective Styling Services #Name?
• Payment / Appt
• Status

1. Service name:• Action: In # Protective Styling Services #Name?, enter a descriptive name, such as:• "Knotless Braids – Mid Back"
• "Custom Wig Install – Closure"

2. Appointment or payment link:• Action: In Payment ⊠ Appt, choose or indicate whether this record is tied to:• An Appointment (scheduled visit) and/or
• A Payment (paid, deposit, etc.).

3. Service status:• Action: In Status ⊠, set the current state of the service, for example:• "Inquiry," "Booked," "In Progress," "Completed," or "Cancelled" (based on your internal status list).

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4. Styling options and hair options

On the left side you'll see Styling Options and Hair Options. These define the exact look and align it with the client's hair characteristics.

4.1 Define the style type

The main styling block may look similar to:

• Style Type
• Wig Install Method
• Cap Size
• Cap Type
• Baby Hair
• Extensions

1. Style Type:• Action: Choose or type the style category (e.g., "Wig Install," "Sew-In," "Knotless Braids," "Twists," etc.).

2. Wig Install Method:• Action: Specify the method (e.g., "Glue-less," "Adhesive," "Sew-Down," "Quick Weave").

3. Cap Size:• Action: Set the cap size (e.g., "Small," "Medium," "Large," or numeric if used in your system).

4. Cap Type:• Action: Indicate the cap type (e.g., "Closure," "Frontal," "360," "U-Part," "Full Cap").

5. Baby Hair:• Action: Mark whether Baby Hair is included (Yes/No or via checkbox).

6. Extensions:• Action: Note if Extensions are required and any specific details (bundles, type, etc., if not captured separately).

4.2 Capture hair pattern, type, texture, and length

Under Hair Options, you'll see fields similar to:

• Hair Pattern
• Hair Type

• Hair Texture
• Length

1. Hair Pattern:• Action: Record the curl pattern (e.g., “2C,” “3B,” “4C,” “Mixed”).

2. Hair Type:• Action: Record the hair category (e.g., “Fine,” “Medium,” “Coarse,” “Chemically Treated,” “Natural”).

3. Hair Texture:• Action: Note the texture (e.g., “Silky,” “Kinky,” “Coily,” “Straight,” “Wavy”).

4. Length:• Action: Record current length (e.g., “Neck,” “Shoulder,” “Bra-strap,” “Waist,” or inches).

4.3 Color, highlights, and enhancements

You’ll see a row for Color Highlights and related controls.

1. Color / Highlights:• Action: Indicate whether the style involves color or highlights, and briefly describe:• Base color (e.g., “1B,” “4,” “613”)
• Highlights or ombre details.

2. Administrative notes (if shown):• Action: Use Administrative to capture internal details such as:• Special pricing approvals
• Stylist assignments
• Internal notes not meant for client view.

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5. Extensions, bundles, and style status

Lower on the form you may see fields such as:

• Extension Type
• Due Date
• # of Bundles
• Style Status

1. Extension Type:• Action: Specify the type of extensions (e.g., “Body Wave,” “Straight,” “Kinky Curly,” “Tape-In,” “Microlinks”).

2. Due Date:• Action: Enter the Due Date for the style:• For installs: the appointment date
• For custom units: completion or pickup date.

3. # of Bundles:• Action: Record the planned number of bundles or packs.

4. Style Status:• Action: Update Style Status to reflect where this specific style request sits in your workflow, such as:• “Not Started,” “In Production,” “Ready for Install,” “Completed.”

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6. Library links, attachments, and images

This section connects the service record to the Protective Styling Library, images, and external resources.

You’ll see:
• Links
• Attachments
• Selected Images

6.1 Add library or reference links

1. Links:• Action: Use the Links area to store relevant URLs or internal references, such as:• Style inspiration boards
• Product pages for hair or caps
• Company knowledge base articles.

6.2 Attach files

1. Attachments:• Action: Attach supporting documents or files, for example:• Client photos before/after
• Signed consent forms
• PDF care instructions (if not handled elsewhere).

6.3 Select images

1. Selected Images:• Action: Mark or open this section to associate key images with the service:• Front, side, back reference images
• Approved inspiration photos.

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7. Client care package and starter kit

You'll see:
• Client Care Package
• Starter Kit Care Instructions

7.1 Configure the client care package

1. Client Care Package:• Action: Indicate if a Client Care Package is included and what it contains:• Shampoos, conditioners, oils
• Satin bonnet, scarf, wig stand, etc.

7.2 Set starter kit and care instructions

1. Starter Kit Care Instructions:• Action: Check or select Starter Kit Care Instructions when the client receives written or digital aftercare guidance.
• Tip: Use this as a tracking point to confirm the client has been educated on:• How to maintain the style
• How often to return for maintenance
• What products to avoid.

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8. Notes, appointment linkage, and follow-up

Near the bottom/right of the form you'll see areas like:

• Notes Install Appointment
• Notes

8.1 Record install appointment notes

1. Notes Install Appointment:• Action: Use this field to document:• Specific instructions for day-of install

• Timing considerations
• Any special client requests (e.g., part placement, density preferences).

8.2 General notes

1. Notes:• Action: Capture additional details that don't fit elsewhere:• Scalp sensitivities
• Past issues (e.g., tension, product allergies)
• Recommendations for future appointments.

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9. Working with records and search

At the bottom of the screen, you'll see controls similar to:

• Record: 1 of 1
• No Filter Search
• Navigation buttons (First, Previous, Next, Last, New, Delete, etc.)

9.1 Navigate records

1. Move between records:• Action: Use navigation arrows/buttons to move to:• First record
• Previous
• Next
• Last.

2. View record count:• Check: Record: X of Y tells you which record is currently displayed.

9.2 Search and filter

1. No Filter Search:• Action: If available, click/search from this area to:• Enter search criteria (like client name, style type, or date).
• Apply filters to limit the list of services.

2. Clear filters:• Action: Reset or clear search filters to return to full list when needed.

9.3 Save changes

1. Saving:• Action: After entering or editing data, use:• A Save button (if present), or
• Navigate off the record if your system auto-saves.

• Best practice: Explicitly save before closing to ensure no data