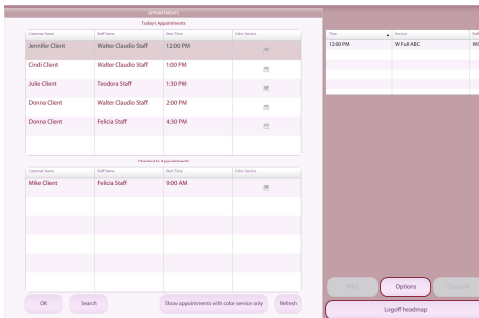


**Use this guide to create access and modify your client's visit.**

*Each visit can include one or more services, and each service may use one or more color bowls.*



## Appointments Screen

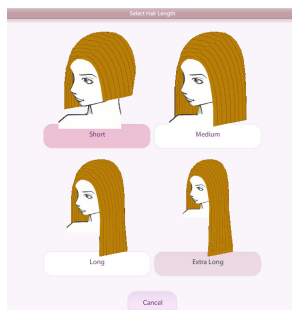
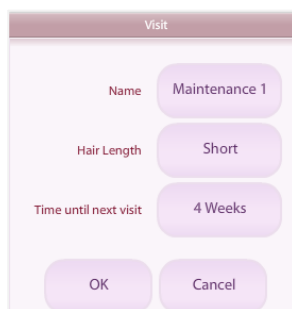
You will use this main screen to:

- View a list of Today's Appointments
- Show appointments with a color service only
- Search for a client's contact information
- Access a client's visit record
  - The Check-In button will always bring you back to the main Appointments Screen from any other screen.

## Client Search

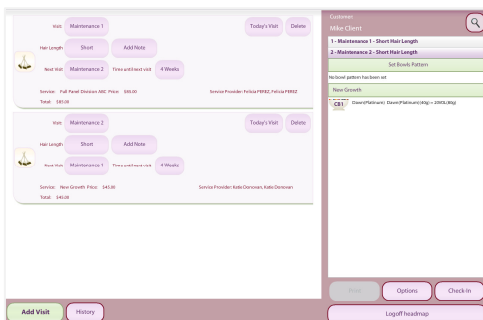
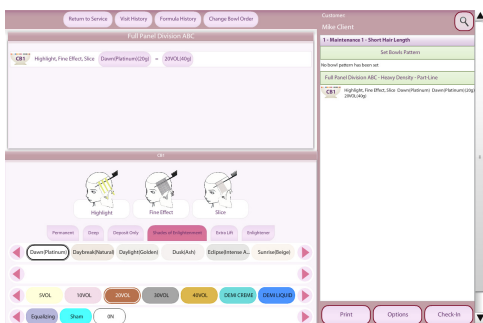
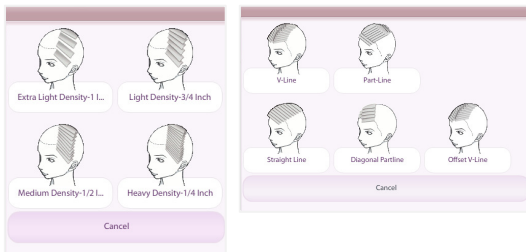
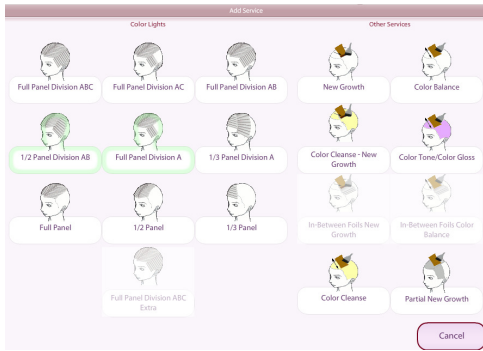
*Since the program is integrated with SalonBiz<sup>®</sup>/SpaBiz<sup>®</sup>, the client telephone numbers will appear based on your default setting selected in Blueprints.*

1. If you do not see your client in the Today's Appointments field, click the Search button to locate your client.
2. Type in the first few letters of your client's first and last name in the corresponding fields, then click on the Search button.
3. Highlight your client's name from the list, and click the OK button to view.



## New Visit

1. Once you have entered your client's visit record, click the Add Visit button located at the bottom of the screen.
  - ❖ If you're entering a client's record that does not yet have any visits, the Add Visit form will pop up automatically for you.
2. Select a name for this visit from the Select Visit Name screen.
3. A default hair length will automatically appear in the Hair Length field. To change the length to one appropriate for your client's hair, simply click the Hair Length button and select from the four options available.
4. Determine an ideal return time for your client's next appointment by clicking the Time Until Next Visit button. The Select Interval screen will appear. Using the +/- buttons you can alter the time between visits. Then select days, weeks or months by clicking the appropriate button.
5. Click the OK button.
6. You may enter a note by clicking the Note button. Click the OK button when finished.
7. You may delete this visit by clicking the Remove button. Answer Yes to the confirmation screen to delete the visit and all of the color bowls.

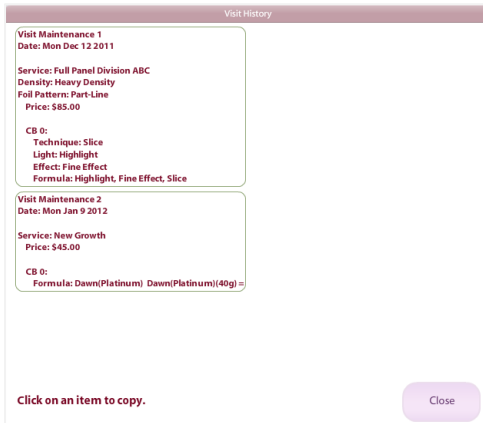


## Adding the Service

- From the client visit screen, click the HeadMapping<sup>®</sup> icon located on the left hand side of the visit field.
- Click the Add Service button to select from the service options available, and then click on your desired service.
  - If the visit does not yet have a service in it, the Add Service form will pop up automatically for you.
- If you have selected a highlight service:
  - From the Service Screen, click the Density box. Select a density from the four available.
  - From the Service Screen, click the Foil Pattern button. Select a foil pattern from the five available. This will complete adding the highlight service to the visit.
- To add an additional service to the visit, click the Add Service button located at the bottom of your screen for a list of additional service options.
- Click the desired service to add to the visit from the Other Services field.
- Verify the Application and Support staff that will be performing the selected services. If you need to change the service staff, click the staff box and select the appropriate staff from the Select Staff screen.
- To delete a service from a visit, simply click the Remove button in the corresponding service field. Answer the confirmation question appropriately.
- To add, edit or delete a note from any particular service, click the Note button to make any necessary adjustments.
- Now that you have added a service to a visit, you are ready to begin building your color bowl.
  - For information on building your color bowl, go to the Color Bowl Quick Reference Guide.

## Established Visit

- Follow the steps above to access your client's visit record.
- Once you enter your client's visit record, you may notice that a pattern or maintenance plan has already been established.
- At this point you can access an existing visit or create a new visit.
  - Click the Today's Visit button to save the visit as today's visit.
  - To access the details of an existing visit, click on the HeadMapping<sup>®</sup> icon, verify service details, color formula and service staff. Click the Today's Visit button to save this visit as today's visit.
    - Clicking the Today's Visit button will automatically send the pertinent appointment information directly to SalonBiz/SpaBiz.
  - To create a new visit, click the Add Visit button and follow the steps above in New Visit.



## Client History

*Client history begins to accumulate immediately after you identify a visit as Today's Visit. Any visit in a client's history can be copied into a new visit.*

1. From the client's visit screen, click the History button located in the bottom center of your screen.
2. You can view all visit history including service date, type, price and formula. Click the Close button when you are finished reviewing the history.
3. To copy a visit, click once on the visit you wish to copy.
4. Select the visit name from the options available.
5. Modify the visit as necessary by updating the service interval and adding any necessary notes.