



maintenance plan

Use this guide to create access and modify your client's maintenance plan.

ColorBiz understands that every client represents a unique situation. A maintenance plan is simply, a pattern of visits. For some clients, this will be a set of regularly scheduled services that can easily predict the resources needed the cost of services, and the duration of each visit. For others, it may require more flexibility to accommodate the client's requests and circumstances.

There is no obligation to completely fill out an extensive maintenance plan for every client. You may work on a client's maintenance plan without them being present, however most plans are created over time. A maintenance plan is best described in a few common situations:

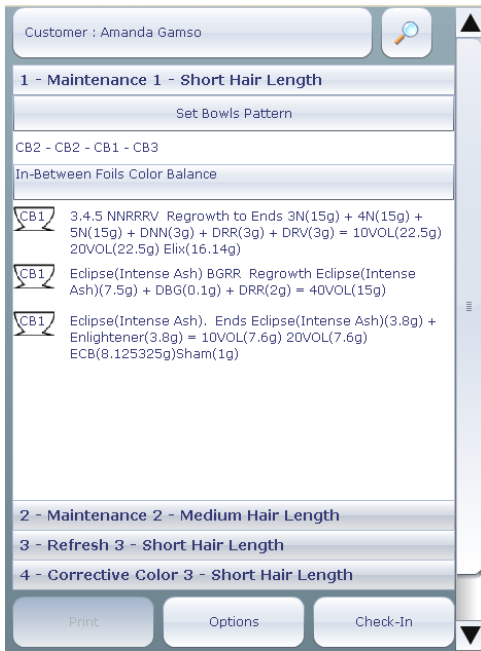
- They have highlights and alternate every five weeks with highlights on one visit and a re-growth touch up on the next visit.
- They rotate between a partial highlight and a full highlight every four weeks.
- They used a box of color at home and would like to return to their natural color. The stylist will create a plan to safely get the client back to their natural color.

Maintenance Plan

1. From the Appointments screen, access your client's visit record by searching for your client, or accessing their visit information from the check in screen.
2. To add a visit, click the Add Visit button.
3. In the Select Visit Name field, click the name of the visit that will be performed.
4. Determine hair length and service interval, then click the OK button.
5. Now that a visit has been established, you may continue to add services to this visit, modify this visit, or add a new visit for this client.

- You may notice that a pattern or maintenance plan has already been established. Continue to build on this visit(s) by adding visits, thus creating a plan to keep your client's hair maintained.





Summary Bar

Use the Maintenance Plan Summary bar to quickly navigate to any part of your client's plan.

1. From the Appointments screen, access your client's visit record by searching for your client.
2. In the Maintenance Plan summary bar, click any established Visit to see the services and color bowls within that visit.
3. To access any color bowl within the service, click the Formula Bar or on the color bowl number.



Maintaining the Plan

Once you have established a visit, you may use the visit screen to maintain each visit.

- Click the Visit button to modify the Visit Name.
- Click the Hair Length button to modify your client's hair length.
- Click the Next Visit button to modify the next visit name for your client.
- Click the Time Until Next Visit to alter the duration between visits.
- Click the Today's Visit button to make this visit today's visit.
 - ❖ Clicking this button will also automatically establish a date for your next visit. This makes pre-booking appointments easier for both the client and the front desk. 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.
- Click the Remove button if you would like to remove this visit along with the services and color bowls associated with the visit.
- Click the Note button to add, edit or delete any note.

