Software Documentation: Overview

User Manual

Getting Started

Logging In

1. Launch the software.
2. Enter your username and password.
3. Click the 'Log In' button.

Dashboard Overview

The dashboard provides a summary of your practice's activities, including upcoming appointments, recent patient activity, and financial metrics.

Patient Management

Adding New Patients

1. Navigate to the 'Patients' section.
2. Click 'Add New Patient'.
3. Fill in the required information and click 'Save'.

Updating Patient Information

1. Select the patient from the patient list.
2. Click 'Edit' and update the necessary information.
3. Click 'Save' to save the changes.

Deleting Patient Records

1. Select the patient from the patient list.

2. Click 'Delete'.

3. Confirm the deletion when prompted.

Appointment Scheduling

Creating Appointments

1. Navigate to the 'Appointments' section.

2. Click 'New Appointment'.

3. Select the patient and the desired date and time.

4. Click 'Save' to schedule the appointment.

Rescheduling Appointments

1. Select the appointment from the calendar.

2. Click 'Reschedule' and choose the new date and time.

3. Click 'Save' to update the appointment.

Cancelling Appointments

1. Select the appointment from the calendar.

2. Click 'Cancel'.

3. Confirm the cancellation when prompted.

Billing and Invoicing

Creating Invoices

1. Navigate to the 'Billing' section.

2. Click 'New Invoice'.

3. Select the patient and add the services rendered.

4. Click 'Save' to generate the invoice.

Processing Payments

1. Open the invoice.

2. Click 'Record Payment'.

3. Enter the payment details and click 'Save'.

Generating Financial Reports

1. Navigate to the 'Reports' section.

2. Select 'Financial Reports'.

3. Choose the report type and date range.

4. Click 'Generate Report'.

Reporting

Generating Patient Reports

1. Navigate to the 'Reports' section.

2. Select 'Patient Reports'.

3. Choose the report type and patient details.

4. Click 'Generate Report'.

Custom Reports

1. Navigate to the 'Reports' section.

2. Select 'Custom Reports'.

3. Choose the parameters and filters.

4. Click 'Generate Report'.

Settings and Preferences

User Management

1. Navigate to the 'Settings' section.
2. Select 'User Management'.
3. Add or edit user accounts and assign roles.

System Settings

1. Navigate to the 'Settings' section.
2. Select 'System Settings'.
3. Configure system-wide preferences.

Notification Settings

1. Navigate to the 'Settings' section.
2. Select 'Notification Settings'.
3. Set up email and SMS notifications.