Appointment User Guide

*Image from: https://www.pexels.com/photo/click-pen-on-journal-with-a-date-of-2-162583/

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User Guide

Note: This may be included as a separate document if you desire.

Introduction

This guide will aide you in the use of the appointment application. This guide will walk you through the steps to accomplish the tasks that can be accomplished using the appointment application.

Installation and Using the Application

To install this application, you will need to copy the executable JAR that houses the application.

To run this application, you will need to double click the JAR file and it will run. Please note that this may not occur if you do not have the appropriate Java Runtime Environment installed. If this is the case, please contact your IT support team or the appropriate computing systems administrator for more assistance.

Login (An example)

- To begin the login in process. Please click on the JAR file. This will bring up the following screen.

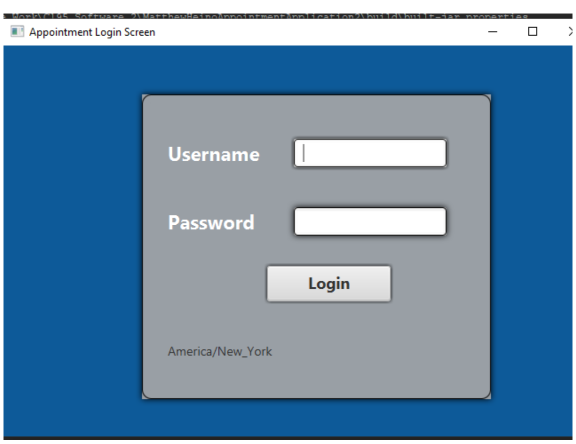

Figure 1 Login Screen

On this screen you will need to enter your personal credentials. If you enter your credentials incorrectly you will be greeted with the following screen.

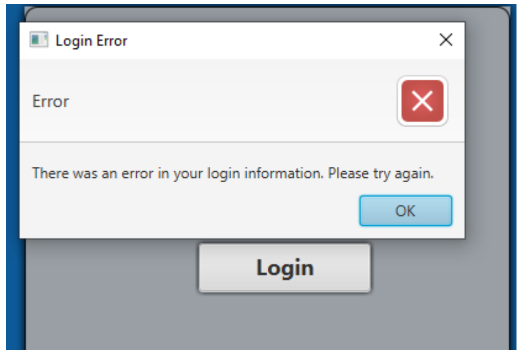

Figure 2 Login Error Screen

Upon successful login you may be greeted with one of two screens. The first screen will show if you have any appointment pending within the next fifteen minutes the other will display a message that confirms that you do not have any appointments pending at this time. Please refer to the images below for the samples of what these screens will look like.

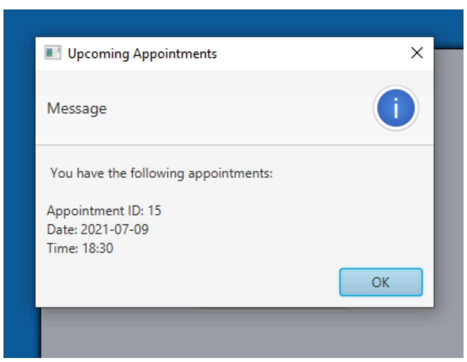

Figure 3 Appointment Pending Notification

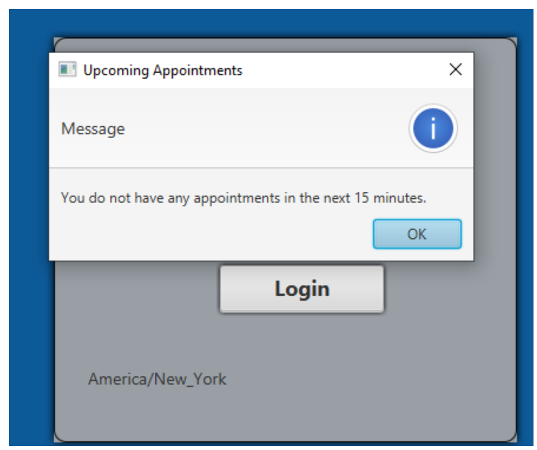

Figure 4 No Appointment Pending

- Note accounts will be assigned to you by your administrator along with other information like passwords.

Main Screen

Main Screen Options

- On the screen shown below you will be able to do the following operations:

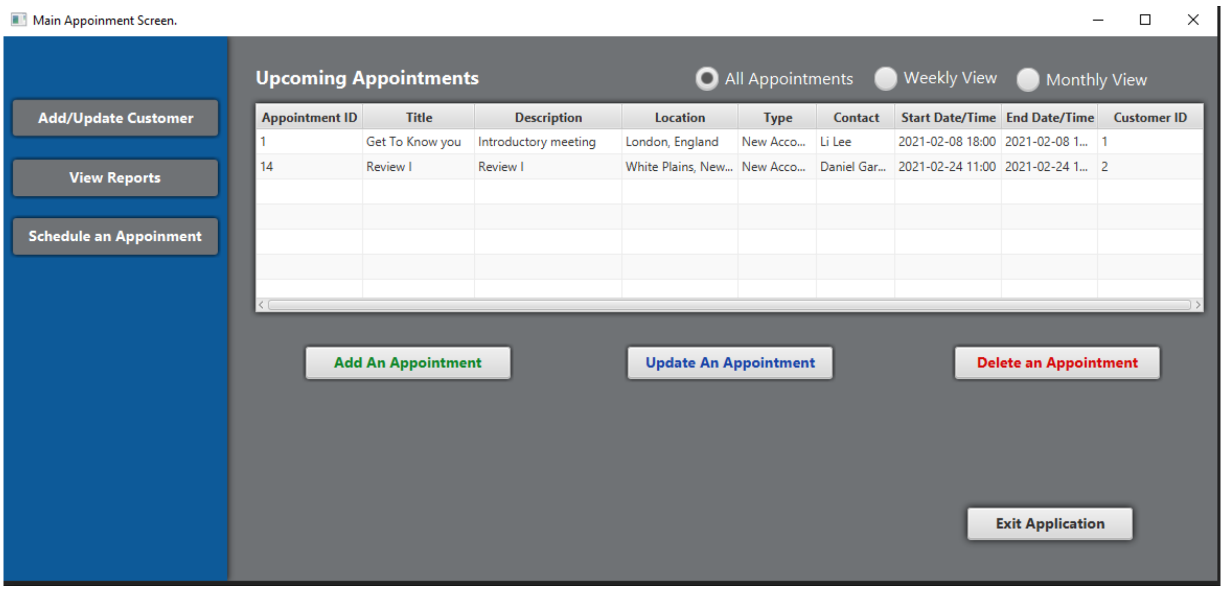

Figure 5 Main Screen

1. View your appointments. You can see all your appointments, your appointments for the week, and your appointments for the month. You will also be given the option to add an appointment, delete the appointment, update an appointment. This screen will allow you exit the application by clicking the button on this screen.
2. You will be able to view reports for the application. This is accomplished by clicking button on the left of the screen. This will be discussed in the following section.
3. You will be able to schedule an appointment. This is accomplished by clicking the **Schedule Appointment** button on the left panel.

Reports

- To access the reports section of the application please click on the button located in the left pane on this screen. Clicking on this will take you to the following screen.

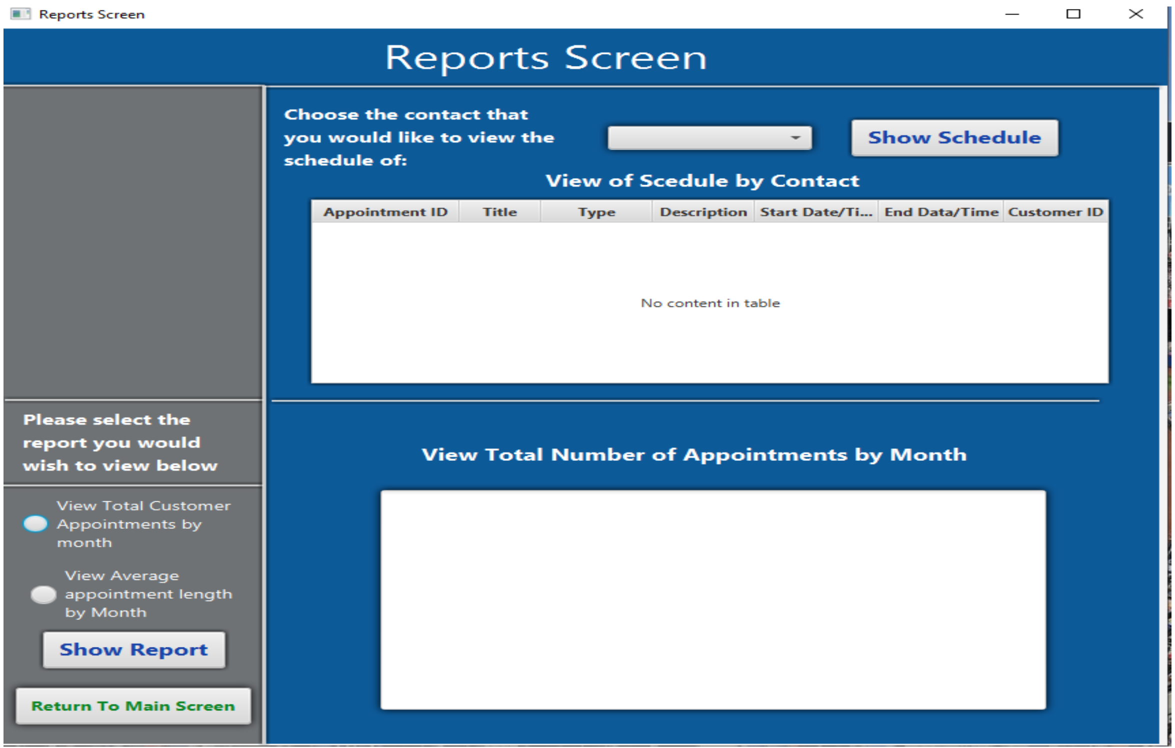

Figure 6 Reports Screen

- The top panel will allow you to look for appointments for each contact in the list. You can choose a company contact by choosing from the dropdown. The appointments will be displayed for the contact in the table below.

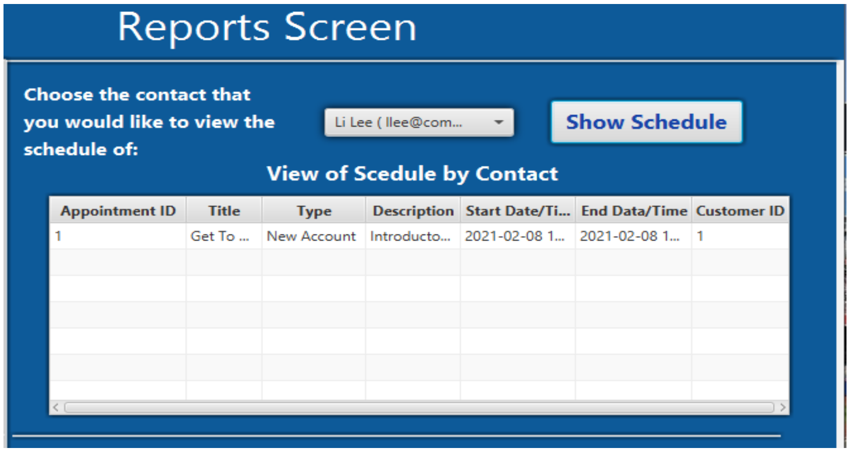

Figure 7 Show Appointments Screen.

- The bottom panel will all you to perform two different types of reports. The first report will display the total number of appointments by month the second is the average appointment length by month. To enable click on the appropriate radio button and then click on the **Show Report** button to display this report in the text area to the right. A screen is shown below.

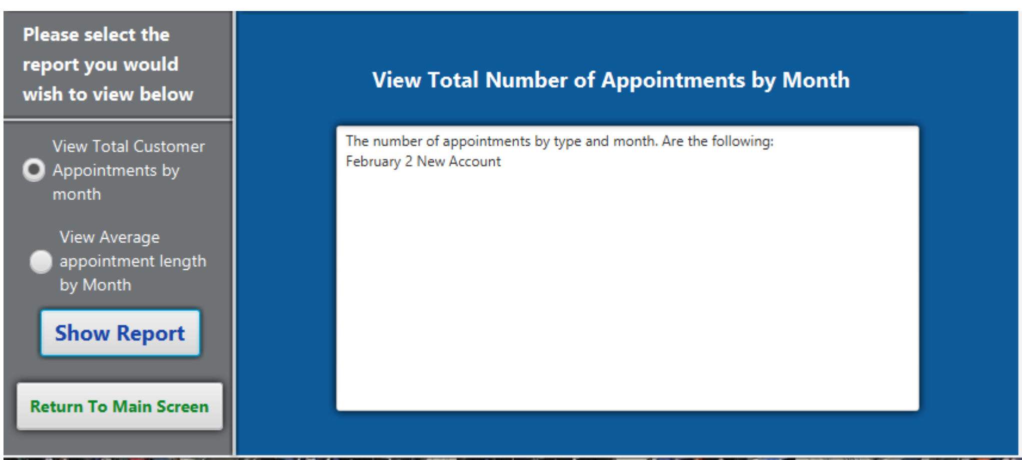

Figure 8 Show Reports Screen

- To return to the main screen click the Return to Main Screen button.

Add or Update a Customer

- From the main screen (**Figure 5**) choose the option from the left panel titled Add/Update Customer. From this screen you will be able update and create a new customer for the system. It will take you to the screen that is displayed below.

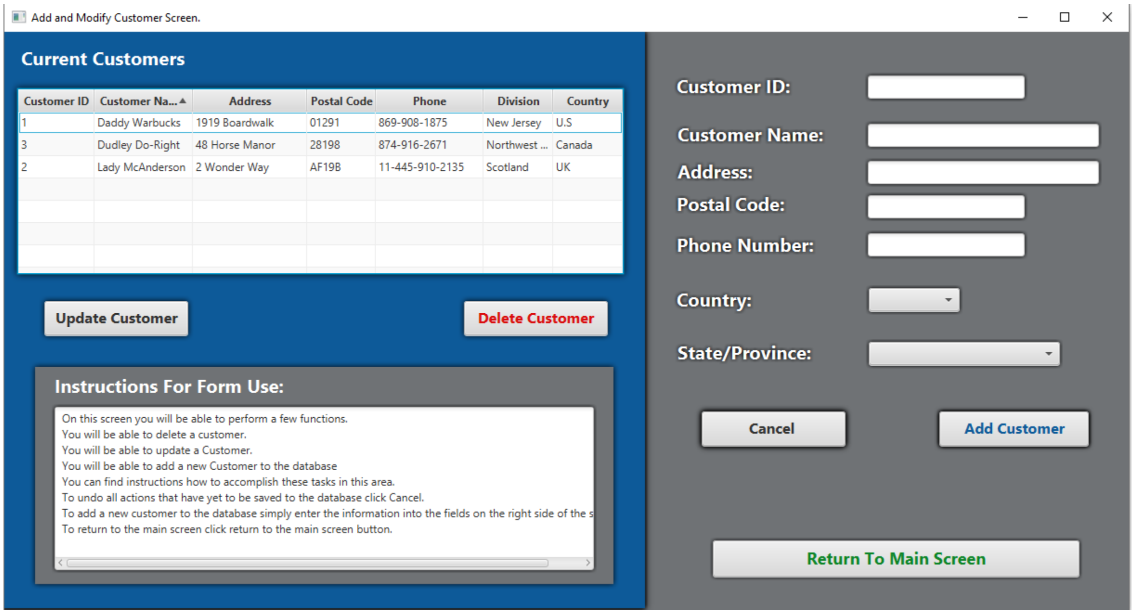

Figure 9 Add or Modify Customer

- On this screen you will be able to view all the customers that are currently in the database. You will be able to perform the following actions:
    1. Delete a customer from the database.
    2. Update a customer's information.
    3. Create a new customer.

To delete a customer:

Select the customer from the table located at the top of the left panel. This will highlight the customer. Please note that there must be a customer selected to perform this action. When customer is selected click on the delete customer button. This will delete the customer from the database along with any appointments that may be associated with them. A screen for this action is shown below.

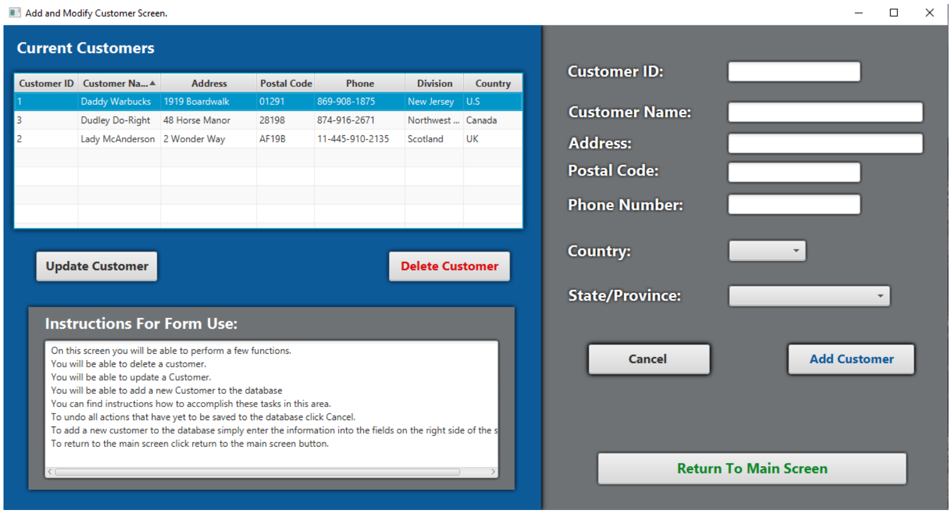

Figure 10 Delete a Customer Screen

To update a customer:

Select the customer from the table located at the top of the left panel. This will highlight the customer. Please note that there must be a customer selected to perform this action. When customer is selected click on the update customer button. The customer's information will appear in the righthand panel. Edit the information that is needed and then click on the **Update Customer** button in the righthand panel. This action will add the user to the database.

To create a new customer:

To create a new customer, click in the righthand panel and add the appropriate information for the new customer. To save the customer click on the **Add Customer** button. This will add the new user to the database. ***Note: The Customer ID will be created by the database system and is not editable.*** The screen is shown below.

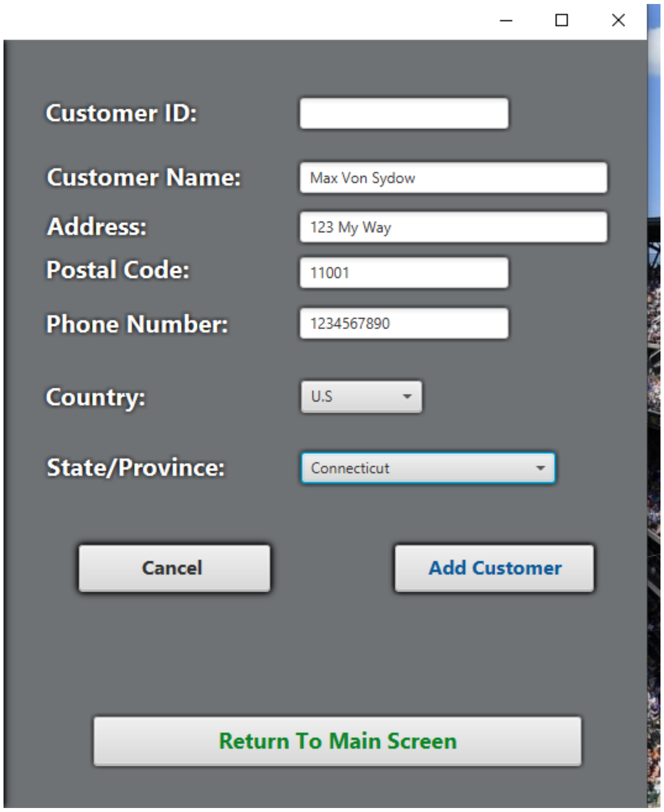

Figure 11 Adding a New Customer Screen

After a successful addition of customer, you will be presented with the screen like to the following:

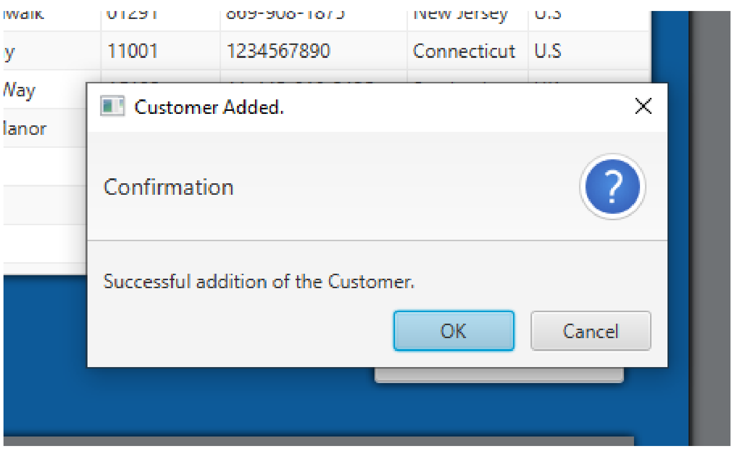

Figure 12 Customer Added Success Screen

- To return to the main screen click on the **Return to Main Screen** button.

Add or Update an Appointment

- To add or update an appointment you can chooses this option from the screen shown in **Figure 5**. This screen will allow you to add an appointment. Please keep in mind that appointments are to be added only during office hours of the home office.

Adding and updating an appointment

To add an appointment

- To add an appointment please enter the appropriate information for the appointment and then click on the **Save New Appointment** button. The new appointment will appear in the table in the top panel. See screenshot below.

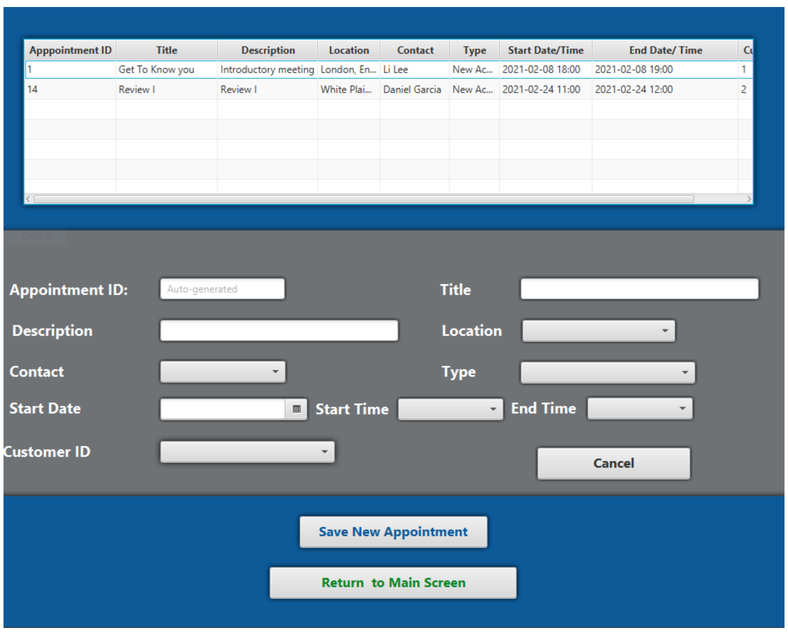

Figure 13 Add Appointment Screen

You will be shown the following screen upon successful addition of the new appointment.

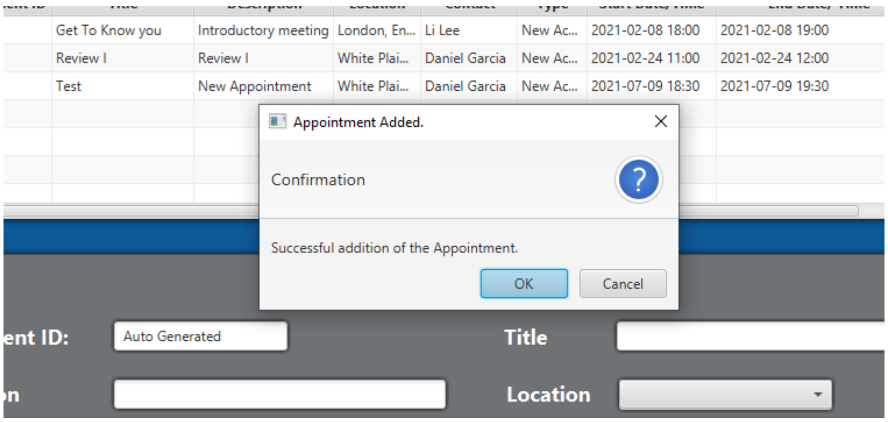

Figure 14 Successful Appointment

- To return to the main screen click the **Return to Main Screen** button.

To update an appointment

To update an appointment please enter the appropriate information for the appointment and then click on the update appointment. The new appointment will appear in the table in the top panel. See screenshot below.