

C868 – Software Capstone Project Summary

Task 2 – Section C



Capstone Proposal Project Name: Widget Sales Unlimited, LLC -- Appointment Organizer Plus+

Student Name: Gregory Farrell

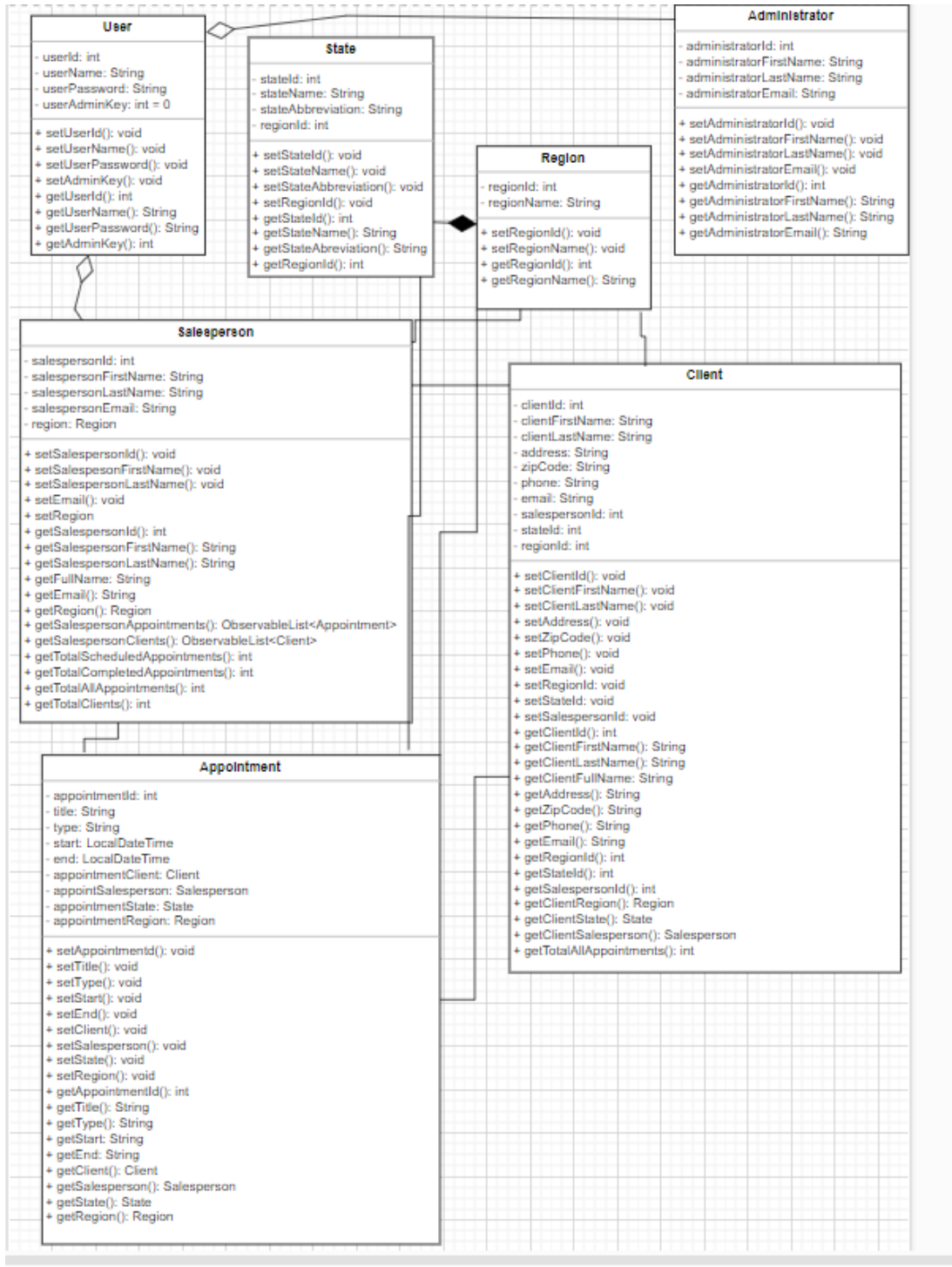
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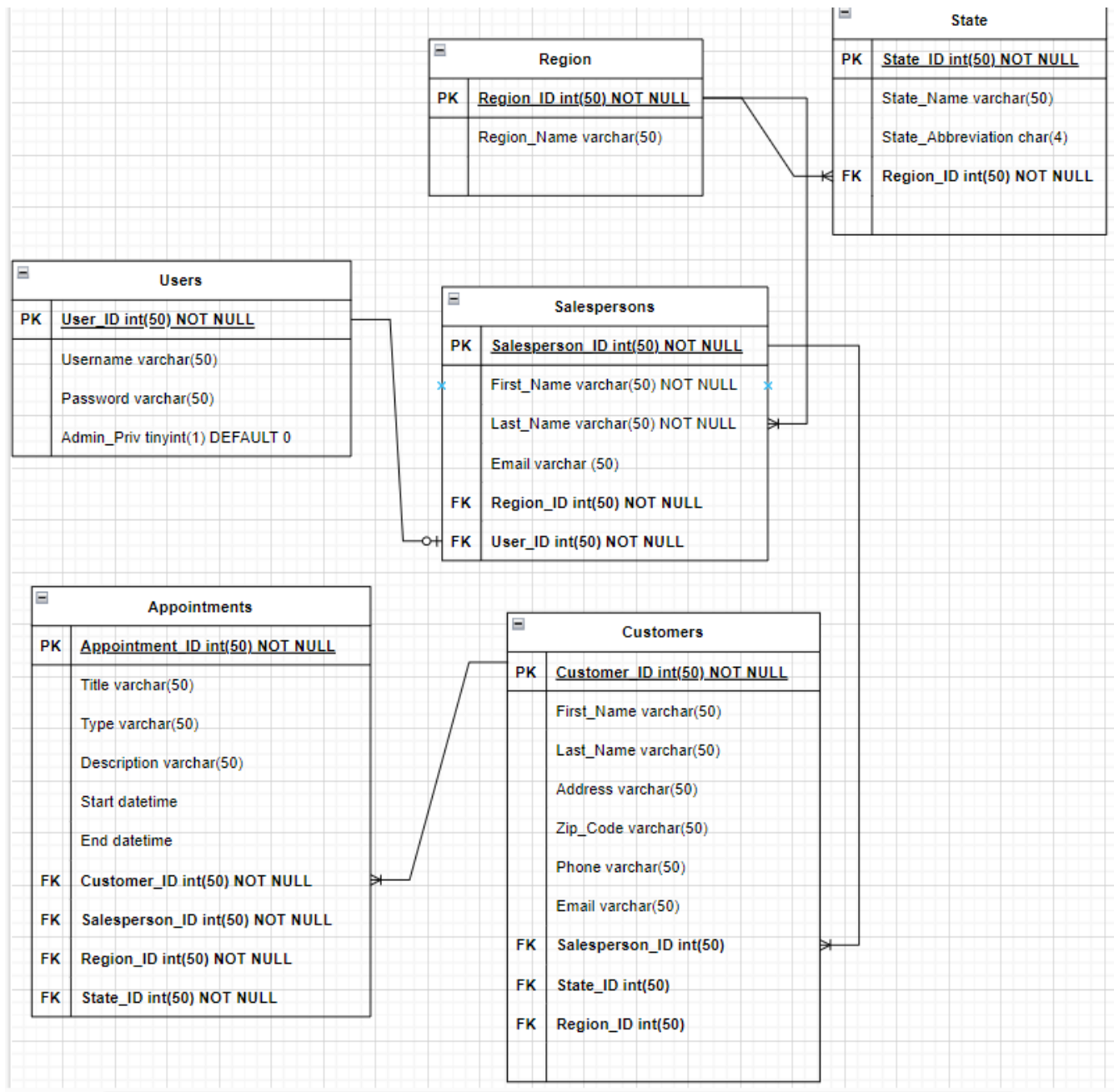
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Application Design and Testing

Java Class Design



Database Entity Relationship Diagram



UI Design

Stack of wireframes presented to the customer displaying the proposed GUI.

Appointment Organizer+

Login Screen

WSU Appointment Organizer+

Username:

Password:

Login

Client Info Screen

Enter Client Info

Sign Out

Customer ID:

First Name:

Last Name:

Address:

Zip Code:

State:

Reset

Phone Number:

Email:

Region:

Salesperson:


Save

<-- Back

Salesperson's Home Screen

Hello, Sample First Name

☒ Upcoming ☐ Completed ☐ All



Salesperson: Sample Name
Region: Sample Region
Email: Sample Email
Appointments
Scheduled: 0
Completed: 0
Total Appointments: 0
Total Clients 0

ID	Date	Start	End	Client	Title	Type

Create Appointment Edit Appointment Delete Appointment

ID	Name	Address	Zip	State	Phone	Email

Create Client Edit Client Delete Client

Appointment Organizer+

Appointment Info Screen

Sign Out

Enter Appointment Info

Appointment ID:

Title:

Date:

Start:

Select Start ▼

End:

Select End ▼

Type:

Select Type ▼

State:

Select State ▼

Region:

Select Region ▼

Salesperson:

Select Salesperson ▼

Customer:

Select Customer ▼

Reset

Submit

<-- Back

Salesperson's Detail Screen

Sign Out

Salesperson: Sample Name

Region: Sample Region

Email: Sample Email

Appointments

Scheduled: 0

Completed: 0

Total Appointments: 0

Total Clients: 0

● Upcoming ○ Completed ○ All

Appointments

Date	Start	End	Client

Clients

Name	Address	Appointments

Create New User Screen

Sign Out

Create New User

User Type:

Select User Type ▼

Region:

Select Region ▼

First Name:

Last Name:

Email:

Username:

Password:
(minimum 8 characters)

Re-Enter Password:

Submit

<-- Back

7

All Clients Screen

[WSU Client Roster](#) Sign Out

Sort By Region: Select Region ▼ ☐ All Regions Search.....

Client ID	Client Name	Address	Zip Code	State	Phone	Email	Salesperson	Region

<-- Back Create Client Edit Client Info Delete Client

All Appointments Screen

[All WSU Appointments](#) Sign Out

Select Date Range: Start Date to End Date Submit

or

☐ All Appointments ☒ Upcoming Appointments ☐ Completed Appointments Search.....

Client ID	Client Name	Address	Zip Code	State	Phone	Email	Salesperson	Region

<-- Back Create Appointment Edit Appointment Delete Appointment

Unit Test Plan

Introduction

Purpose

Unit testing was conducted throughout development and any flaws or bugs that were detected were corrected at the time they were discovered.

Overview

As classes were implemented from the design document, the program was periodically compiled and run to ensure that all of the methods functioned as intended. Unit tests were continually conducted to confirm that all features were checked, including populating tables, running reports, filtering data, creating new clients, appointments and users. We will now conduct a use case test that will run all the way from creating a new administrative user that will create, edit and delete both client and appointment data and then create a new Salesperson user that will create, edit and delete both client and appointment data.

Test Plan

Items

Initial administrative user login credentials.

Features

Creating, editing and deleting clients and appointments, as well as creating new users.

Deliverables

The program will function as intended and screen shots will be taken.

Procedures

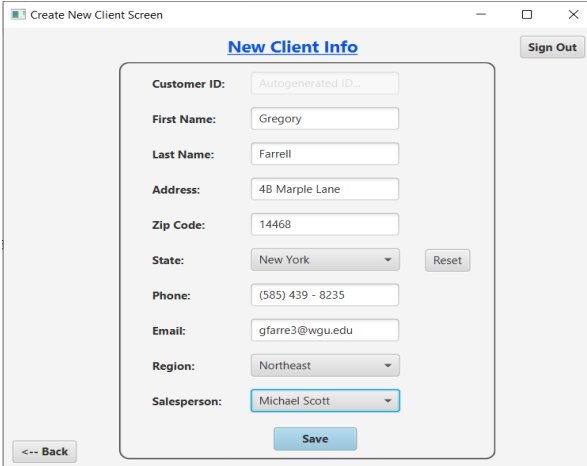
- Username: admin1, Password: passw0rd! will login and then:
 1. Create a new client
 2. Verify that the new client appears in the salesperson table
 3. Create a new appointment for that client.
 4. Search for the appointment by client name and verify that they appear in the all appointments table
 5. Edit the created appointment by changing the title and the date.
 6. Verify that the appointment has been updated in the table.

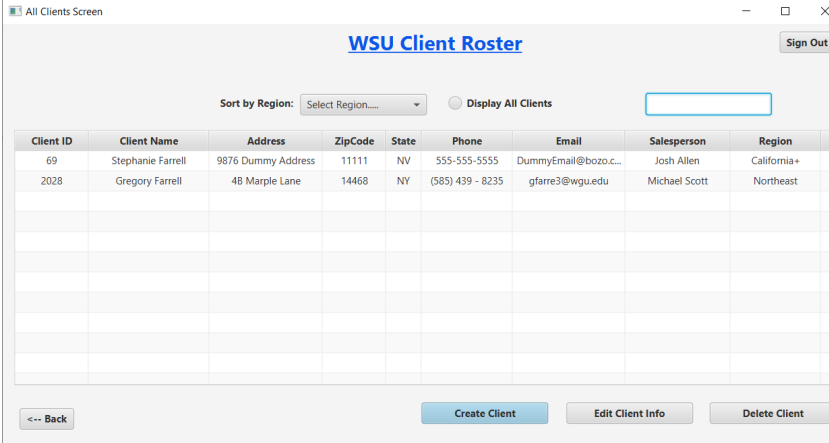
7. Delete the newly created client and confirm that both the client and appointment are now removed from the database.
8. Create a new administrative user.
9. Sign out and log back in with the new admin credentials.
10. Create a new salesperson user.
11. Sign out and log back in with the new salesperson user credentials.
12. Create 3 new clients and confirm that all the information on the Salesperson Home Screen updates properly.
13. Create several appointments for the new clients and confirm that the Salesperson Home Screen updated properly.
14. Edit an appointment and first confirm it will not allow 2 appointments at the same time for the same salesperson/customer.
15. Change the date to an unused date and confirm it updated properly in the Salesperson Home Screen.
16. Delete an appointment and confirm everything updates properly.
17. Delete the client and confirm both the client and appointments are removed from the tables and the salesperson stats update properly.

Results

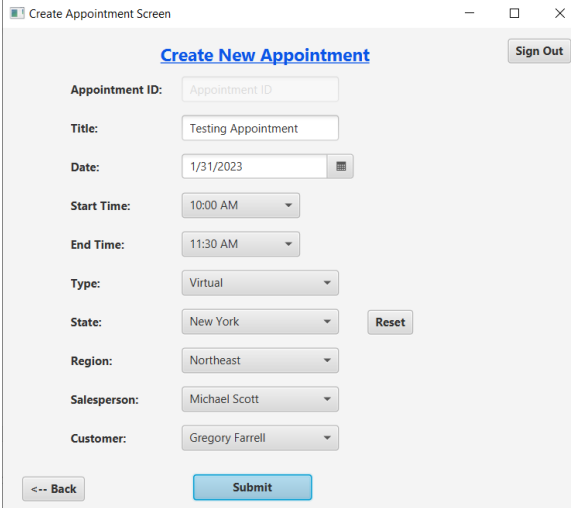
All of the tests were passed as evidenced below:

Appointment Organizer+

1. 

2. 

Client ID	Client Name	Address	ZipCode	State	Phone	Email	Salesperson	Region
69	Stephanie Farrell	9876 Dummy Address	11111	NV	555-555-5555	DummyEmail@bozo.c...	Josh Allen	California+
2028	Gregory Farrell	4B Marple Lane	14468	NY	(585) 439 - 8235	gfarre3@wgu.edu	Michael Scott	Northeast

3. 

Appointment Organizer+

[illegible]

4.

Edit Appointment Screen

Create New Appointment

Sign Out

Appointment ID:

4214

Title:

Changed Title

Date:

2/1/2023

Start Time:

10:00 AM

End Time:

11:30 AM

Type:

Virtual

State:

New York

Region:

Northeast

Salesperson:

Michael Scott

Customer:

Gregory Farrell

<-- Back

Submit

5.

[illegible]

6.

Appointment Organizer+

All Clients Screen

WSU Client Roster

Sign Out

Sort by Region: ☐ Display All Clients

Client ID	Client Name	Address	ZipCode	State	Phone	Email	Salesperson	Region
69	Stephanie Farrell	9876 Dummy Address	11111	NV	555-555-5555	DummyEmail@bozo.c...	Josh Allen	California+
2028	Gregory Farrell	48 Marple Lane	14468	NY	(585) 439 - 8235	gfarre3@wgu.edu	Michael Scott	Northeast

Confirmation

Confirmation

Permanently delete selected client and all associated appointments?

OK Cancel

<-- Back Create Client Edit Client Info Delete Client

7.

All Clients Screen

WSU Client Roster

Sign Out

Sort by Region: ☐ Display All Clients

Client ID	Client Name	Address	ZipCode	State	Phone	Email	Salesperson	Region
69	Stephanie Farrell	9876 Dummy Address	11111	NV	555-555-5555	DummyEmail@bozo.c...	Josh Allen	California+

<-- Back Create Client Edit Client Info Delete Client

All Appointments Screen

All WSU Appointments

Sign Out

No Results Found

Message

There are no Appointments matching that search criteria.

OK

Submit

☐ Clients ☐ Completed Appointments

Appt ID	Date	Client ID	Client Name	Title	Type	Region	State
4002	12-14-2022	2	Tammy Duckworth	Dummy Title	In-Person	Northeast	NY
4002	12-14-2022	2	Tammy Duckworth	Dummy Title	In-Person	Northeast	NY
4002	12-14-2022	2	Tammy Duckworth	Dummy Title	In-Person	Northeast	NY
4003	12-14-2022	3	Johnathan Kumi...	Dummy Title	In-Person	Northeast	NY
4003	12-14-2022	3	Johnathan Kumi...	Dummy Title	In-Person	Northeast	NY
4003	12-14-2022	3	Johnathan Kumi...	Dummy Title	In-Person	Northeast	NY
4004	12-14-2022	4	Steve Smith II	Dummy Title	In-Person	Northeast	NJ
4004	12-14-2022	4	Steve Smith II	Dummy Title	In-Person	Northeast	NJ
4004	12-14-2022	4	Steve Smith II	Dummy Title	In-Person	Northeast	NJ

<-- Back Create Appointment Edit Appointment Delete Appointment

Create New User Screen

Create New User

Sign Out

User Type: Administrator

Region: Select Region

First Name: Greg

Last Name: Farrell

Email: gfarrell

Username: gfarre3@wgu.edu

Password: (minimum 5 characters)

Re-Enter Password:

Submit

<-- Back

8.

Administrator Home Screen

WSU Salesforce Roster

Hello, Greg Farrell

Sign Out

Sort by Region: Select Region....

Display All Salespersons

Search by Name or ID...

ID	Salesperson	Region	Scheduled Appts.	Completed Appts.	Total Appts.	Total Clients
1	Reddy, Morgan	Northeast	1	2	3	2
2	Marshall, Sarah	California+	4	4	8	4
3	Vance, Bob	Northeast	1	3	4	4
4	Scott, Michael	Northeast	2	2	4	3
5	Schrutte, Dwight	California+	1	3	4	4
6	Raferty, Bill	Northeast	3	2	5	3
7	Stall, Leslie	Northeast	3	3	6	3
8	Diller, Phyllis	Northeast	2	2	4	2
9	Brown, John	Northeast	3	3	6	3
10	Allen, Josh	California+	4	3	7	5

Create New User

Salesperson Detail

View All Clients

View All Appointments

9.

Create New User Screen

Create New User

Sign Out

User Type: Salesperson

Region: California+

First Name: Biggie

Last Name: Smalls

Email: BSmalls@gmail.com

Username: BSmalls

Password: (minimum 5 characters)

Re-Enter Password:

Submit

<-- Back

10.

Login Screen

Appointment Organizer Plus+

Username : BSmalls

Password :

Login

User Locale : America/New_York

11.

Appointment Organizer+

Salesperson Home Screen

Hello, Biggie!

Appointments

☒ Upcoming ☐ Completed ☐ All

Sign Out

ID	Date	Start	End	Client	Title	Type
No content in table						

Create New Appointment Edit Appointment Delete Appointment

Clients

Client ID	Name	Address	Zip Code	State	Phone	Email
No content in table						

Create New Client Edit Client Info Delete Client

Salesperson: Smalls, Biggie
 Region: California+
 Email: BSmalls@gmail.com
 Appointments
 Upcoming Appts: 0
 Completed Appts: 0
 Total Appointments: 0
 Total Clients: 0

12.

Salesperson Home Screen

Hello, Biggie!

Appointments

☒ Upcoming ☐ Completed ☐ All

Sign Out

ID	Date	Start	End	Client	Title	Type
No content in table						

Create New Appointment Edit Appointment Delete Appointment

Clients

Client ID	Name	Address	Zip Code	State	Phone	Email
2029	BigTime Client	123 Rosecrans Ave	90210	CA	555 321 2134	theemail@hotmail.com
2031	Test Client 3	423 Almost Done Ave	12314	AZ	123 123 1234	stophate@gmail.com
2030	Willy Wonka	954 Hershey Way	80743	NV	453 324 9900	sweetness@taffy.net

Create New Client Edit Client Info Delete Client

Salesperson: Smalls, Biggie
 Region: California+
 Email: BSmalls@gmail.com
 Appointments
 Upcoming Appts: 0
 Completed Appts: 0
 Total Appointments: 0
 Total Clients: 3

13.

Salesperson Home Screen

Hello, Biggie!

Appointments

☒ Upcoming ☐ Completed ☐ All

Sign Out

ID	Date	Start	End	Client	Title	Type
4215	1-31-2023	9:00 AM	11:30 AM	Willy Wonka	First Appointment	Group Session
4216	2-9-2023	8:30 AM	9:15 AM	Willy Wonka	Second Appointm...	In-Person
4217	2-11-2023	10:15 AM	11:45 AM	Willy Wonka	Third Appointment	Virtual
4218	1-26-2024	3:30 PM	7:30 PM	BigTime Client	It's Huge	In-Person
4219	2-4-2023	10:00 AM	11:30 AM	Test Client 3	Last Call	In-Person

Create New Appointment Edit Appointment Delete Appointment

Clients

Client ID	Name	Address	Zip Code	State	Phone	Email
2029	BigTime Client	123 Rosecrans Ave	90210	CA	555 321 2134	theemail@hotmail.com
2031	Test Client 3	423 Almost Done Ave	12314	AZ	123 123 1234	stophate@gmail.com
2030	Willy Wonka	954 Hershey Way	80743	NV	453 324 9900	sweetness@taffy.net

Create New Client Edit Client Info Delete Client

Salesperson: Smalls, Biggie
 Region: California+
 Email: BSmalls@gmail.com
 Appointments
 Upcoming Appts: 5
 Completed Appts: 0
 Total Appointments: 5
 Total Clients: 3

Appointment Organizer+

14.

The screenshot shows the 'Create New Appointment' form in the 'Edit Appointment Screen'. The form fields are: Appointment ID (4216), Title (Second Appointment), Date (1/31/2023), Start Time (9:00 AM), End Time (10:00 AM), Type (Virtual), State (Utah), Region (California), Salesperson (Biggie S), and Customer (Willy W). A modal error message titled 'Conflicting Appointment' is displayed, stating 'Salesperson already scheduled 9:00 AM to 11:30 AM'. The form has a 'Sign Out' button in the top right, a '<-- Back' button at the bottom left, and a 'Submit' button at the bottom right.

Create New Appointment [Sign Out](#)

Appointment ID: 4216

Title: Second Appointment

Date: 1/31/2023

Start Time: 9:00 AM

End Time: 10:00 AM

Type: Virtual

State: Utah

Region: California

Salesperson: Biggie S

Customer: Willy W

Conflicting Appointment

Error

Salesperson already scheduled 9:00 AM to 11:30 AM

[OK](#)

[<-- Back](#) [Submit](#)

15.

The screenshot shows the 'Create New Appointment' form in the 'Edit Appointment Screen'. The form fields are: Appointment ID (4216), Title (Second Appointment), Date (3/23/2023), Start Time (9:00 AM), End Time (10:00 AM), Type (Virtual), State (Utah), Region (California+), Salesperson (Biggie Smalls), and Customer (Willy Wonka). The form has a 'Sign Out' button in the top right, a '<-- Back' button at the bottom left, and a 'Submit' button at the bottom right.

Create New Appointment [Sign Out](#)

Appointment ID: 4216

Title: Second Appointment

Date: 3/23/2023

Start Time: 9:00 AM

End Time: 10:00 AM

Type: Virtual

State: Utah

Region: California+

Salesperson: Biggie Smalls

Customer: Willy Wonka

[<-- Back](#) [Submit](#)

Appointment Organizer+

Salesperson Home Screen

Hello, Biggie!

Appointments

Upcoming Completed All

ID	Date	Start	End	Client	Title	Type
4215	1-31-2023	9:00 AM	11:30 AM	Willy Wonka	First Appointment	Group Session
4216	3-23-2023	9:00 AM	10:00 AM	Willy Wonka	Second Appointm...	Virtual
4217	2-11-2023	10:15 AM	11:45 AM	Willy Wonka	Third Appointment	Virtual
4218	1-26-2024	3:30 PM	7:30 PM	BigTime Client	It's Huge	In-Person
4219	2-4-2023	10:00 AM	11:30 AM	Test Client 3	Last Call	In-Person

Create New Appointment Edit Appointment Delete Appointment

Clients

Client ID	Name	Address	Zip Code	State	Phone	Email
2029	BigTime Client	123 Rosecrans Ave	90210	CA	555 321 2134	theemail@hotmail.com
2031	Test Client 3	423 Almost Done Ave	12314	AZ	123 123 1234	stophate@gmail.com
2030	Willy Wonka	954 Hershey Way	80743	NV	453 324 9900	sweetness@taffy.net

Create New Client Edit Client Info Delete Client

Salesperson: Smalls, Biggie
Region: California+
Email: BSmalls@gmail.com
Appointments
Upcoming Appts: 5
Completed Appts: 0
Total Appointments: 5
Total Clients: 3

Sign Out

Salesperson Home Screen

Hello, Biggie!

Appointments

Upcoming Completed All

ID	Date	Start	End	Client	Title	Type
4215	1-31-2023	9:00 AM	11:30 AM	Willy Wonka	First Appointment	Group Session
4216	3-23-2023	9:00 AM	10:00 AM	Willy Wonka	Second Appointm...	Virtual
4217	2-11-2023	10:15 AM	11:45 AM	Willy Wonka	Third Appointment	Virtual
4218	1-26-2024	3:30 PM	7:30 PM	BigTime Client	It's Huge	In-Person
4219	2-4-2023				Last Call	In-Person

Create New Appointment Edit Appointment Delete Appointment

Clients

Client ID	Name	Address	Zip Code	State	Phone	Email
2029	BigTime Client				555 321 2134	theemail@hotmail.com
2031	Test Client 3				123 123 1234	stophate@gmail.com
2030	Willy Wonka	954 Hershey Way	80743	NV	453 324 9900	sweetness@taffy.net

Create New Client Edit Client Info Delete Client

Salesperson: Smalls, Biggie
Region: California+
Email: BSmalls@gmail.com
Appointments
Upcoming Appts: 5
Completed Appts: 0
Total Appointments: 5
Total Clients: 3

Sign Out

Confirmation

Confirmation

Permanently delete selected appointment?

OK Cancel

16.

Salesperson Home Screen

Hello, Biggie!

Appointments

Upcoming Completed All

ID	Date	Start	End	Client	Title	Type
4215	1-31-2023	9:00 AM	11:30 AM	Willy Wonka	First Appointment	Group Session
4216	3-23-2023	9:00 AM	10:00 AM	Willy Wonka	Second Appointm...	Virtual
4218	1-26-2024	3:30 PM	7:30 PM	BigTime Client	It's Huge	In-Person
4219	2-4-2023	10:00 AM	11:30 AM	Test Client 3	Last Call	In-Person

Create New Appointment Edit Appointment Delete Appointment

Clients

Client ID	Name	Address	Zip Code	State	Phone	Email
2029	BigTime Client	123 Rosecrans Ave	90210	CA	555 321 2134	theemail@hotmail.com
2031	Test Client 3	423 Almost Done Ave	12314	AZ	123 123 1234	stophate@gmail.com
2030	Willy Wonka	954 Hershey Way	80743	NV	453 324 9900	sweetness@taffy.net

Create New Client Edit Client Info Delete Client

Salesperson: Smalls, Biggie
Region: California+
Email: BSmalls@gmail.com
Appointments
Upcoming Appts: 4
Completed Appts: 0
Total Appointments: 4
Total Clients: 3

Sign Out

17.

Salesperson Home Screen

Hello, Biggie!

Appointments

☒ Upcoming ☐ Completed ☐ All

Confirmation

Confirmation

Permanently delete selected customer and all associated appointments?

OK Cancel

Salesperson: Smalls, Biggie
Region: California+
Email: BSmalls@gmail.com
Appointments
 Upcoming Appts: 4
 Completed Appst: 0
Total Appointments: 4
Total Clients: 3

ID	Date	Start	End	Client	Title	Type
4215	1-31-2023	9:00 AM	11:30 AM	Willy Wonka	First Appointment	Group Session
4216	3-23-2023	9:00 AM	10:00 AM	Willy Wonka	Second Appointm...	Virtual
4218	1-26-2024	3:30 PM	7:30 PM	BigTime Client	It's Huge	In-Person
4219	2-4-2023	10:00 AM	11:30 AM			

Create New Appointment Edit

Client ID	Name	Address
2029	BigTime Client	123 Rosecrans Ave
2031	Test Client 3	423 Almost Done Ave
2030	Willy Wonka	954 Hershey Way

Create New Client Edit Client Info Delete Client

Salesperson Home Screen

Hello, Biggie!

Appointments

☒ Upcoming ☐ Completed ☐ All

Sign Out

Salesperson: Smalls, Biggie
Region: California+
Email: BSmalls@gmail.com
Appointments
 Upcoming Appts: 2
 Completed Appst: 0
Total Appointments: 2
Total Clients: 2

ID	Date	Start	End	Client	Title	Type
4218	1-26-2024	3:30 PM	7:30 PM	BigTime Client	It's Huge	In-Person
4219	2-4-2023	10:00 AM	11:30 AM	Test Client 3	Last Call	In-Person

Create New Appointment Edit Appointment Delete Appointment

Clients

Client ID	Name	Address	Zip Code	State	Phone	Email
2029	BigTime Client	123 Rosecrans Ave	90210	CA	555 321 2134	theemail@hotmail.com
2031	Test Client 3	423 Almost Done Ave	12314	AZ	123 123 1234	stopphate@gmail.com

Create New Client Edit Client Info Delete Client

User Guide

Set Up and Run Application for Maintenance Purposes

There is very little that needs to be done to run for maintenance purposes.

- The user must have Java installed on their machine. If they don't already have it, it can be downloaded at: <https://www.java.com/en/download/manual.jsp>

Introduction

There are 2 types of users for this application, Salespersons and Administrators, and each one will have a different GUI presented to them. This User Guide will provide instructions for logging in and accessing the program as each one.

Administrator Login

1. *Once the application is launched, the user will be presented with this login screen:*



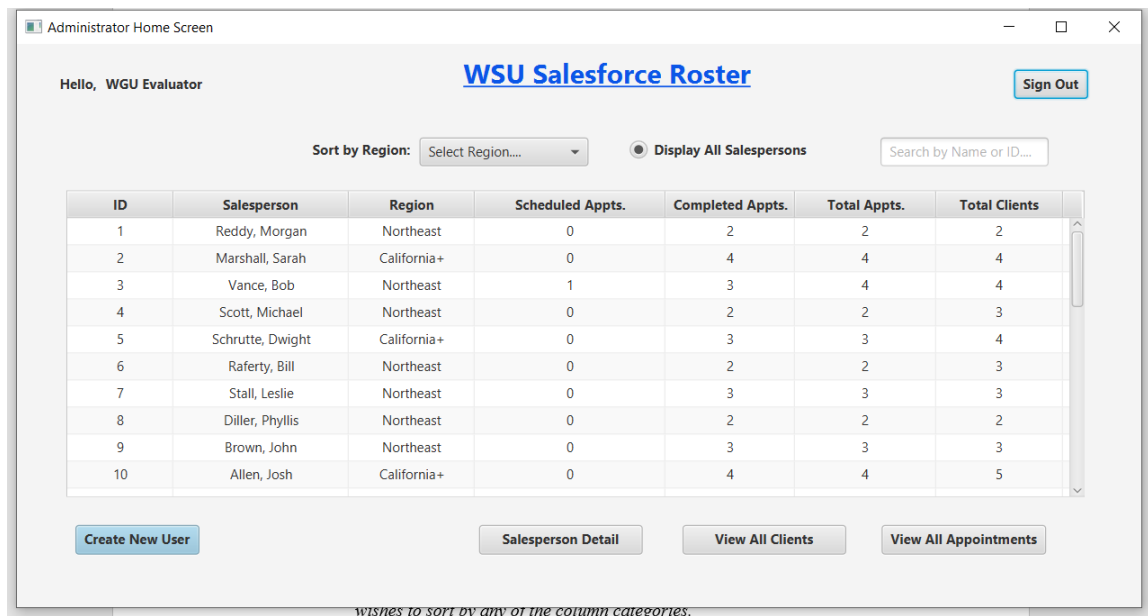
2. *The evaluator should initially login as an Administrator. The credentials are:*

Username: admin

Password: Passw0rd!

Home Screen

1. *The Administrator Home Screen provides a table showing all the Salespersons for the entire company and the appointment activity for each one.*



2. The user can filter the table in several ways:

- a. The table columns themselves can be clicked to resort the table if the user wishes to see who has the most or least appointments, clients, etc.
- b. The combo box provides a drop-down menu where the user can filter the table by region, thereby displaying only the salespersons belonging to each region.
 - i. The radio button resets the table back to displaying all salespersons as there is no option in the drop-down menu to accomplish this.
- c. The search box allows the user to search for name or salesperson ID and returns all results containing any part of the ID or string that was entered.
 - i. If an empty search is entered the table will also repopulate with all salespersons.

3. By clicking the “Salesperson Detail” button, the user can look at a more detailed screen of the selected Salesperson’s activity.

- a. Clicking the “Back” button will return the user to the Administrator Home Screen.

Salesperson Detail Sign Out

Salesperson: Diller, Phyllis

Region: Northeast
Email: PDiller@wsu.com

Appointments
 Scheduled: 0
 Completed: 2
Total Appointments: 2
Total Clients: 2

Appointments
☐ Upcoming ☐ Completed ☒ All

Date	Start	End	Client
12-14-2022	12:00 PM	12:45 PM	Micah Hyde
12-14-2022	12:00 PM	12:45 PM	Jordan Poyer
12-14-2025	12:00 PM	12:45 PM	Micah Hyde
12-14-2025	12:00 PM	12:45 PM	Jordan Poyer

Clients

Name	Address	Total Appointments
Micah Hyde	9876 Dummy Address	2
Jordan Poyer	9876 Dummy Address	2

[<-- Back](#)

View All Clients

1. Clicking on the “View All Clients” button takes the user to All Clients Screen, which displays a table of all of the Clients across the entire company.

WSU Client Roster Sign Out

Sort by Region: Select Region..... ☒ Display All Clients Search by Name or ID....

Client ID	Client Name	Address	ZipCode	State	Phone	Email	Salesperson	Region
2	Tammy Duckworth	9876 Dummy Address	11111	NY	555-555-5555	DummyEmail@bozo.c...	Morgan Reddy	Northeast
3	Johnathan Kuminga	9876 Dummy Address	11111	NY	555-555-5555	DummyEmail@bozo.c...	Michael Scott	Northeast
4	Steve Smith II	9876 Dummy Address	22222	NJ	555-555-5555	DummyEmail@bozo.c...	Bob Vance	Northeast
5	Tony Montoya	9876 Dummy Address	11111	NJ	555-555-5555	DummyEmail@bozo.c...	Michael Scott	Northeast
8	Tammy Davis	9876 Dummy Address	11111	AZ	555-555-5555	DummyEmail@bozo.c...	Dwight Schrutte	California+
9	Tim Davis II	9876 Dummy Address	11111	MA	555-555-5555	DummyEmail@bozo.c...	Bill Raferty	Northeast
10	Kelly Bonsignore	9876 Dummy Address	11111	IL	555-555-5555	DummyEmail@bozo.c...	Jessie Pinkman	Mid-West
11	Vic Carucci	9876 Dummy Address	11111	MA	555-555-5555	DummyEmail@bozo.c...	Leslie Stall	Northeast
12	Michelle Caracci	9876 Dummy Address	98877	NY	555-555-5555	DummyEmail@bozo.c...	Bob Vance	Northeast
13	Tom Michaels	9888 Dummy Address	11111	CT	555-555-5555	DummyEmail@bozo.c...	Leslie Stall	Northeast
14	Micah Hyde	9876 Dummy Address	11111	NY	555-555-5555	DummyEmail@bozo.c...	Phyllis Diller	Northeast
15	Jordan Poyer	9876 Dummy Address	11111	RI	555-555-5555	DummyEmail@bozo.c...	Phyllis Diller	Northeast

[<-- Back](#) Create Client Edit Client Info Delete Client

2. The user can filter the table in several ways:
 - a. The table columns themselves can be clicked to reorder the table if the user wishes to sort by any of the column categories.

- b. *The combo box provides a drop-down menu where the user can filter the table by region, thereby displaying only the clients belonging to each region.*
 - i. *The radio button resets the table back to displaying all clients as there is no option in the drop-down menu to accomplish this.*
 - c. *The search box allows the user to search for a client's name or ID and returns all results containing any part of the ID or string that was entered.*
 - d. *If an empty search is entered the table will also repopulate with all salespersons*
3. *Clicking the "Delete Client" button will allow the user to delete the selected client from the database. This should be used very sparingly as deleting a client will also delete all of the appointments, both scheduled and completed, that are associated with the client. A pop-up warning will confirm that the user does in fact intend to execute this action.*
4. *Clicking the "Create Client" button will take the user to the Create New Client Screen where a new client can be entered and assigned to a salesperson.*

Create New Client Screen

New Client Info

Sign Out

Customer ID:

Autogenerated ID...

First Name:

Last Name:

Enter Last Name

Address:

Enter Address

Zip Code:

Enter Zip Code

State:

Select State

Phone:

Enter Phone Number

Email:

Enter Email

Region:

Select Region

Salesperson:

Select Salesperson

Save

<-- Back

Reset

- a. *To create a new client, the user needs to enter information into the text fields for the first name, last name address, zip code, email and phone number.*
 - b. *User then selects a state. Each salesperson belongs to 1 and only 1 region, so once the user selects a state then the corresponding drop-down box for salespersons will be populated with the salespersons for that region.*
 - i. *States is used as the first selection because the user will not naturally know which region a state belongs to. However, once a state is chosen the corresponding region of the region drop-down box is set and the states are filtered so that only states in that region are displayed. The user can change the state drop-down box by either changing the region or by clicking the reset button to set all fields back to their original state.*
 - c. *Once the user has entered all of the data, click save to insert the new client into the database and return the program to the All Clients Screen. There you will see the new client added.*
 - i. *There is also a back button if the user no longer wishes to create a new client.*
5. *The “Edit Client Info” button allows the user to edit the info for the selected client from the table.*
- a. *The user will be directed to a screen similar to the Create Client Screen. See Section 5 for details.*

View All Appointments

1. *Clicking on the “View All Appointments” button takes the user to All Appointments Screen, which displays a table of all of the Appointments across the entire company.*

All Appointments Screen

All WSU Appointments

[Sign Out](#)

Select Date Range: to

or

☐ All Appointments
 ☒ Upcoming Appointments
 ☐ Completed Appointments

Search by ID, Name or Title...

Appt ID	Date	Salesperson	Start	End	Title	Type	Region	State	Client ID	Client Name
4098	12-14-2025	Reddy, Morgan	12:00 PM	12:45 PM	Dummy Title	In-Person	Northeast	NY	2	Tammy Duckworth
4099	12-14-2025	Scott, Michael	12:00 PM	12:45 PM	Test Title3	In-Person	Northeast	NY	3	Johnathan Kumi...
4101	12-6-2025	Scott, Michael	12:00 PM	12:45 PM	Dummy Title	In-Person	Northeast	NJ	5	Tony Montoya
4104	12-14-2025	Raferty, Bill	2:30 PM	4:45 PM	Dummy Title	In-Person	Northeast	PA	8	Tammy Davis
4105	12-14-2025	Raferty, Bill	12:00 PM	12:45 PM	Dummy Title	In-Person	Northeast	MA	9	Tim Davis II
4106	12-14-2025	Raferty, Bill	12:00 PM	12:45 PM	Dummy Title	In-Person	Northeast	CT	10	Kelly Bonsignore
4107	12-14-2025	Stall, Leslie	12:00 PM	12:45 PM	Dummy Title	In-Person	Northeast	MA	11	Vic Carucci
4108	12-14-2025	Stall, Leslie	12:00 PM	12:45 PM	Dummy Title	In-Person	Northeast	NY	12	Michelle Caracci
4109	12-14-2025	Stall, Leslie	8:45 AM	11:00 AM	Dummy Title	In-Person	Northeast	CT	13	Tom Michaels

2. The user can filter the table in several ways:

- a. The table columns themselves can be clicked to reorder the table if the user wishes order sort by any of the table column categories.
- b. The radio buttons allow the user to sort by Upcoming, Completed or All appointments.
- c. The search box allows the user to search for a client's name or ID or a salesperson's name or ID and returns all results containing any part of any of those.
- d. If an empty search is entered the table will also repopulate with all appointments.
- e. The custom date range allows the user to search over a specified period of time.
 - i. The end date must come after the start date.

3. The "Delete Appointment" button will allow the user to delete the selected appointment from the database. However, appointments that have already been completed cannot be deleted. They can only be removed by deleting a client (and thereby all associated appointments)

4. The “Create Appointment” button will take the user to the Create Appointment Screen where a new appointment can be created and assigned a client and salesperson.

The screenshot shows a web application window titled "Create Appointment Screen". The main heading is "Create New Appointment" in blue. In the top right corner, there is a "Sign Out" button. The form contains the following fields and controls:

- Appointment ID:** A text input field with the placeholder "Appointment ID".
- Title:** A text input field with the placeholder "Enter Title".
- Date:** A date picker with the placeholder "Select Date" and a calendar icon.
- Start Time:** A dropdown menu with the placeholder "Select Start".
- End Time:** A dropdown menu with the placeholder "Select End".
- Type:** A dropdown menu with the placeholder "Select Type".
- State:** A dropdown menu with the placeholder "Select State". To its right is a "Reset" button.
- Region:** A dropdown menu with the placeholder "Select Region".
- Salesperson:** A dropdown menu with the placeholder "Select Salesperson".
- Customer:** A dropdown menu with the placeholder "Select Customer".

At the bottom left is a "<-- Back" button, and at the bottom center is a blue "Submit" button.

- a. To create a new appointment the user needs to enter a title and then all of the other fields are implemented with drop-down boxes.
- User selects a start date.
 - After user selects a start time, the available end times are populated.
 - User selects an appointment type.
- b. User then selects a state. Each salesperson and client belong to 1 and only 1 region, so once the user selects a state, the region is determined and the

corresponding drop-down boxes for salespersons and clients will be populated for that region.

- i. *State is used as the first selection because the user will not naturally know which region a state belongs to. After the state is selected, the rest of the options are determined.*
 - ii. *The reset button will return the option back to the initial state.*
 - c. *Once the user has selected all of the data, click submit to insert the new appointment into the database and return the program to the All Appointments Screen. There you will see the new appointment added.*
 - i. *There is a verification check to confirm that neither the salesperson nor the client has any other appointments scheduled during the window the user has entered (it is possible for a client to schedule appointments with different salespersons for that region. While it may be in poor taste on the salesperson's part, this requires that the client's schedule be checked as well as the salesperson).*
 - d. *There is also a back button if the user no longer wishes to create a new appointment.*
5. *The "Edit Appointment Info" button allows the user to edit the info for the selected appointment from the table.*
- a. *The user will be directed to a screen similar to the Create Appointment Screen.*
 - b. *The state (and therefore region) and customer cannot be changed. However, the salesperson can be changed.*
 - c. *Once the user has selected all of the data, click submit to update the appointment in the database and return the program to the All Appointments Screen.*

- i. *There is a verification check to confirm that neither the salesperson nor the client has any other appointments scheduled during the window the user has entered.*
- d. *There is also a back button if the user no longer wishes to create a new appointment.*

Create New User

1. *The Create New User button on the Administrator Home Screen takes the user to the Create New User Screen.*

The screenshot shows a web application window titled "Create New User Screen". The window has a light gray background. At the top, there is a blue header with the text "Create New User" in white. To the right of the header is a "Sign Out" button. Below the header is a white rounded rectangle containing the form. The form has the following fields: "User Type:" with a dropdown menu showing "Select User Type"; "Region:" with a dropdown menu showing "Select Region"; "First Name:" with a text input field showing "Enter First Name"; "Last Name:" with a text input field showing "Enter Last Name"; "Email:" with a text input field showing "Enter Email"; "Username:" with a text input field showing "Enter Username"; "Password:" with a text input field showing "Enter Password" and a note "(minimum 5 characters)"; and "Re-Enter Password:" with a text input field showing "Re-Enter Password". At the bottom of the form is a blue "Submit" button. In the bottom left corner of the window is a blue "<-- Back" button.

2. *The user first selects what type of user the new user will be.*
 - a. *An Administrator user is able to access all of the same functions and screens that were previously covered in this guide and can themselves then create more new users.*

- b. A salesperson user is the primary user of the application and is not able to create new users. They can only enter, edit and delete their own client and appointment data.*
- 3. User must enter the first name, last name, email address, username and password for the new user. The password must be at least 5 characters long and must be retyped to verify that it is correct.*
- 4. User then clicks submit and the new user is entered into the database and the program is redirected to the Administrator Home Screen. At this point the evaluator should click the sign out button in the upper right corner and click confirm on the prompt.*
 - i. The evaluator can now login with the new credentials to verify that it works but there will be no client or appointment data with that user, so we will use a dummy user to demonstrate the Salesperson user.*

Salesperson Login

1. Once the application is launched, the user will be presented with this login screen:



2. There are a variety of dummy users entered into the database, enter: Username: user10,
Password: 12345

Salesperson Home Screen

1. The Salesperson home screen displays a variety of information about that salesperson appointment activity.

The screenshot displays the 'Salesperson Home Screen' for a user named Josh Allen. The interface includes a sidebar with user information, a main section for appointments, and a section for clients.

Salesperson: Allen, Josh
Region: California+
Email: J.Allen@wsu.com
Appointments
 Upcoming Appsts: 5
 Completed Appst: 4
Total Appointments: 9
Total Clients: 5

Appointments

Radio buttons: ☒ Upcoming, ☐ Completed, ☐ All

ID	Date	Start	End	Client	Title	Type
4165	12-14-2025	3:00 PM	5:15 PM	Stephanie Farrell	Dummy Title	In-Person
4169	12-14-2025	12:00 PM	12:45 PM	Marshall Mathers	Dummy Title	In-Person
4173	12-14-2025	12:00 PM	12:45 PM	Pamela Anderson	Dummy Title	In-Person
4174	12-14-2025	12:00 PM	12:45 PM	Patricia Wright	Dummy Title	In-Person
4197	1-31-2023	1:00 PM	2:30 PM	Angolena Lee	First Day	Virtual

Buttons: Create New Appointment, Edit Appointment, Delete Appointment

Clients

Client ID	Name	Address	Zip Code	State	Phone	Email
69	Stephanie Farrell	9876 Dummy Address	11111	NV	555-555-5555	DummyEmail@bozo.com
73	Marshall Mathers	9876 Dummy Address	11111	NV	555-555-5555	DummyEmail@bozo.com
78	Patricia Wright	9876 Dummy Address	11111	CA	555-555-5555	DummyEmail@bozo.com
77	Pamela Anderson	9876 Dummy Address	11111	UT	555-555-5555	DummyEmail@bozo.com
76	Angolena Lee	9876 Dummy Address	11111	CA	555-555-5555	DummyEmail@bozo.com

Buttons: Create New Client, Edit Client Info, Delete Client

- The box on the left will display the total number of appointments and clients that the salesperson has, as well as the salesperson's name, region and email address.
- The Appointments Table is initially populated with all the upcoming appointments the salesperson has scheduled.
 - The 3 radio buttons above the table allow the table to be filtered with completed appointments, all appointments or back to the original upcoming appointments.
 - The table can also be sorted by any of the column types by clicking on the column name.
- The Clients table displays all of the clients that have had an appointment scheduled with that salesperson.
 - Note that this may also include clients that were not originally signed by that salesperson but subsequently had an appointment. Therefore some clients may appear in tables for multiple salespersons.
- The "Delete Appointment" button will delete the appointment selected from the table from the database.

- i. Only future appointments may be deleted in this manner, completed appointments can only be deleted by deleting a client completely from the database.
- e. The “Delete Client” button will delete the client selected from the table from the database.
 - i. Deleting a client from the database will also delete all appointments associated with that client. A confirmation box will pop up to confirm that the user does in fact wish to do this.
- f. The “Create New Client” button will direct the program to the Create New Client Screen.

Create New Client Screen

New Client Info Sign Out

Customer ID: Autogenerated ID...

First Name:

Last Name:

Address:

Zip Code:

State:

Phone:

Email:

Region:

Salesperson:

<-- Back Save

- i. User must enter the new client's first name, last name, address, zip code, phone and email. User must also select a state from the drop down menu, which is filtered according to the salesperson's already assigned region.
 - ii. The region and salesperson drop down boxes are disabled as the user can only create new clients for themselves.
 - iii. After everything is entered properly, the user clicks save and the new client is entered into the database. The user will be directed back to the Salesperson Home Screen and the new client will appear in the table, as well as the information in the box on the left being updated.
- g. Clicking the "Edit Client Info" button will direct the application to the Edit Client Info Screen and pass the information from the client that was selected.

The screenshot shows a web application window titled "Edit Client Info Screen". Inside the window, there is a form titled "Edit Client Info" with a "Sign Out" button in the top right corner. The form contains the following fields:

- Customer ID: 76
- First Name: Angolena
- Last Name: Lee
- Address: 9876 Dummy Address
- Zip Code: 11111
- State: California
- Phone: 555-555-5555
- Email: DummyEmail@bozo.com
- Region: California+
- Salesperson: Josh Allen

At the bottom of the form is a "Save" button. In the bottom left corner of the window, there is a "<-- Back" button.

- i. The user can then alter the information they wish to change, including the state from which they can choose any state in that region.
 - ii. Once the user is satisfied with the changes, click the “Save” button and the application will direct back to the Salesperson Home Screen and the client information will be updated.
- h. To create a new appointment, click the “Create New Appointment” button and the application will be directed to the Create New Appointment Screen.

Create Appointment Screen

Create New Appointment [Sign Out](#)

Appointment ID:

Title:

Date:

Start Time:

End Time:

Type:

State:

Region:

Salesperson:

Customer:

[<-- Back](#) [Submit](#)

- i. Enter the title, select a date and start time.
 1. Appointments can only be scheduled for dates occurring after the current date. This will be checked for when the “Submit” button is clicked.
- ii. Once a start time is selected, the available end times will populate the end times combo box.

- iii. Next the select the state and the customer for the appointment.
 1. Note that the customer combo box will only be populated with customers that are associated with this user.
- iv. If the user is satisfied with all of the data entered, click submit and the appointment will be entered into the database and the application will be directed back to the Salesperson Home Screen, where the appointment will now appear and the salesperson's stats will be updated.
- i. To edit an appointment, select an appointment from the appointments table and click the "Edit Appointment Info" button. This will direct the program to the Edit Appointment Screen and pass the data from the selected appointment.

The screenshot shows a web application window titled "Edit Appointment Screen". At the top, there is a blue link "Edit Appointment Info" and a "Sign Out" button. The form contains the following fields:

- Appointment ID:** 4174
- Title:** Dummy Title
- Date:** 12/14/2025 (with a calendar icon)
- Start Time:** 12:00 PM (dropdown)
- End Time:** 12:45 PM (dropdown)
- Type:** In-Person (dropdown)
- State:** California (dropdown)
- Region:** California+ (dropdown)
- Salesperson:** Josh Allen (dropdown)
- Customer:** Patricia Wright (dropdown)

At the bottom, there are two buttons: "<-- Back" and "Submit".

- i. Change the information that the user wishes to update and click "Submit"
 1. There will be a check performed to ensure that neither the salesperson or the customer have another appointment scheduled in that window.

- ii. The appointment will be updated and the application will be directed back to the Salesperson Home Screen. The updated appointment will now appear in the appointments table.