C868 – Software Capstone Project Summary

Task 2 – Section C

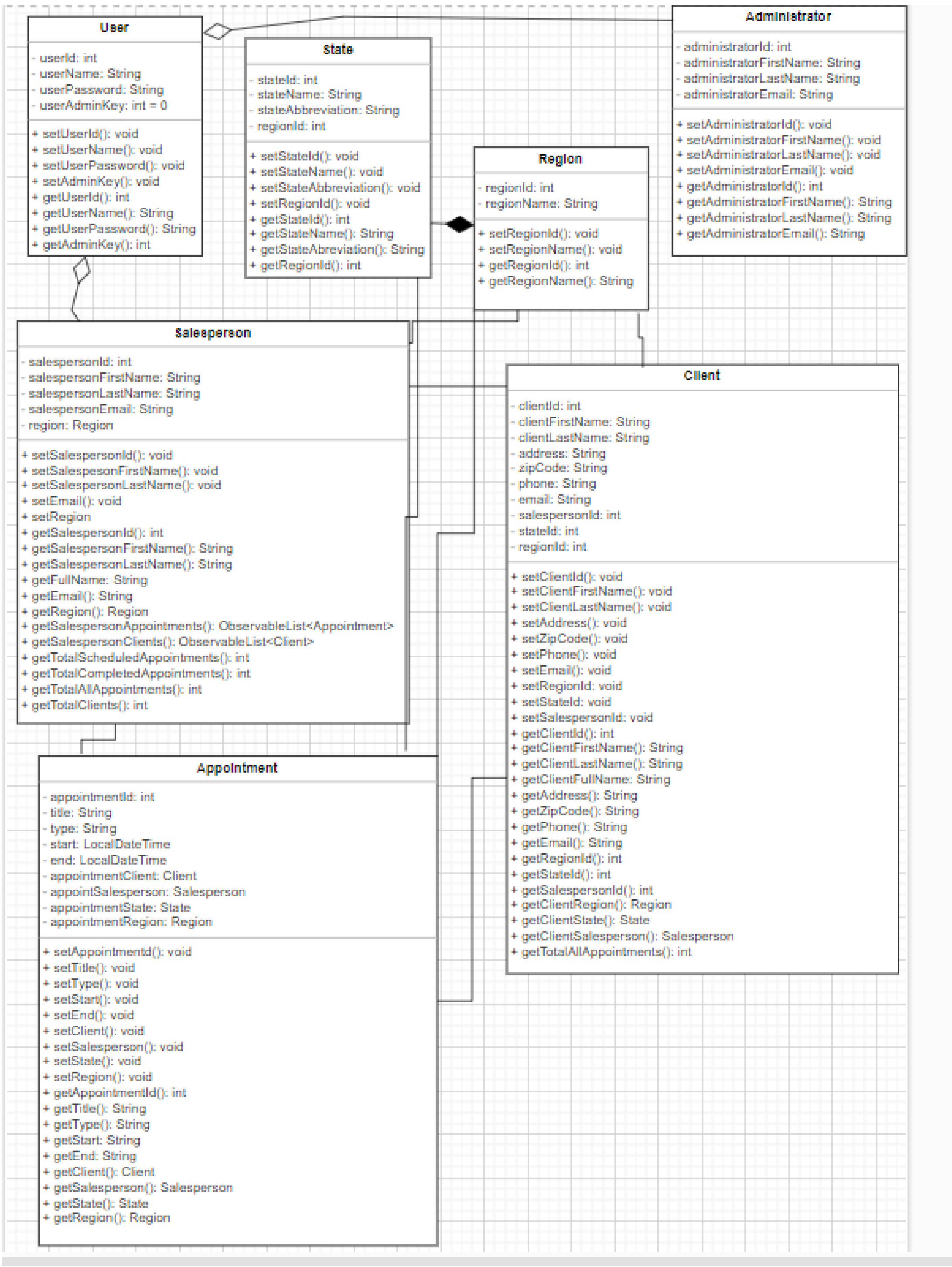
Capstone Proposal Project Name: Widget Sales Unlimited, LLC -- Appointment Organizer Plus+

Student Name: Gregory Farrell

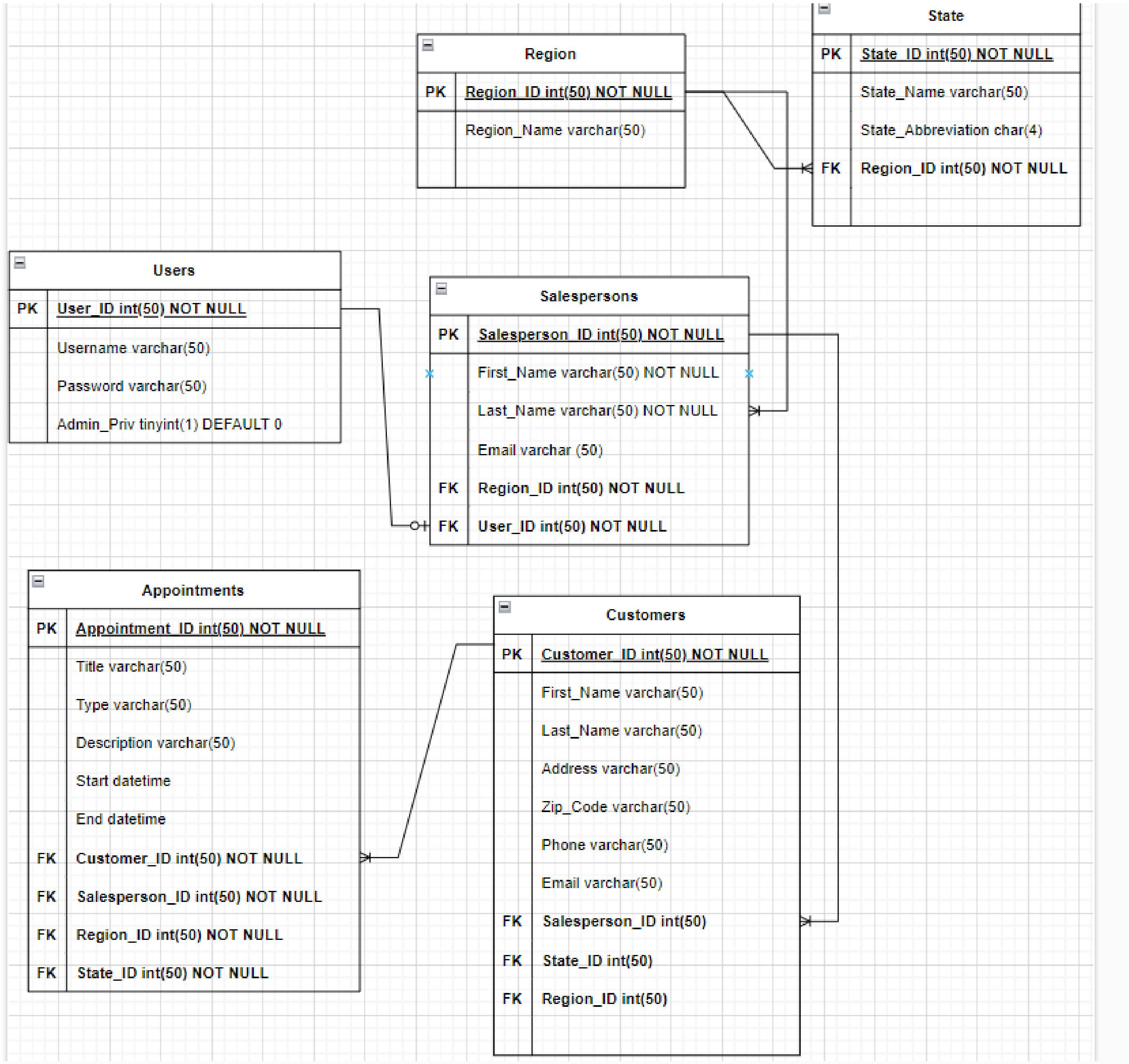
Table of Contents

Application Design and Testing

Java Class Design



Database Entity Relationship Diagram

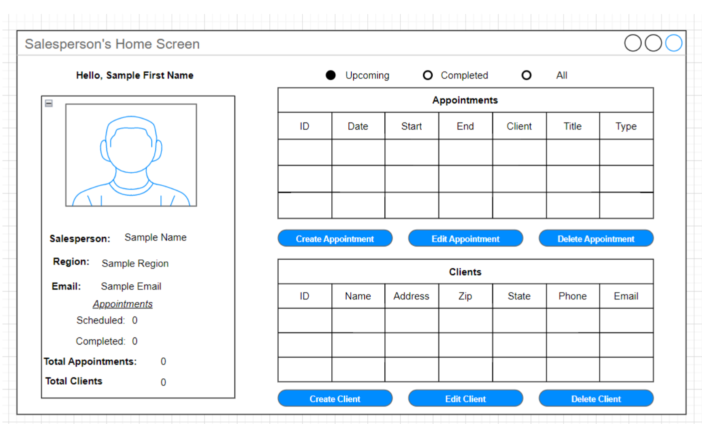


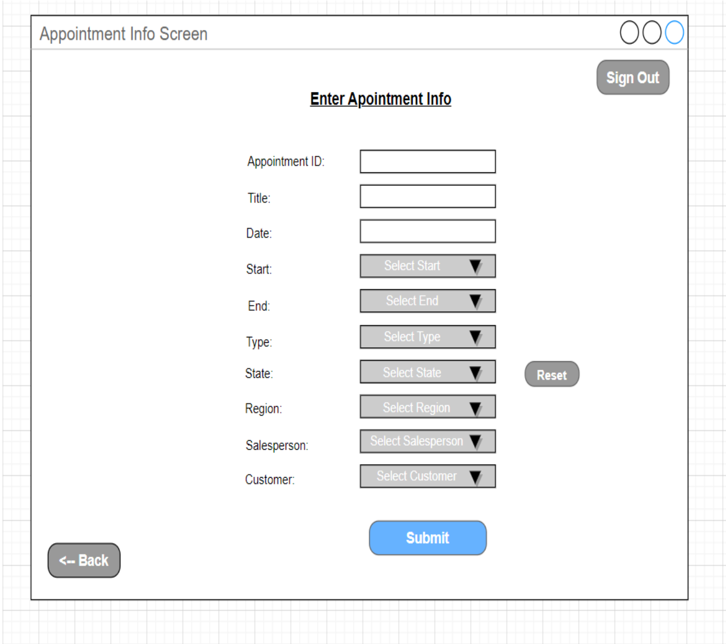
UI Design

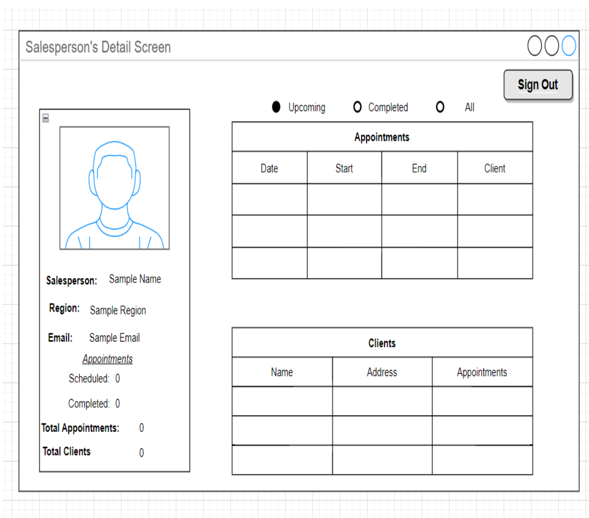
Stack of wireframes presented to the customer displaying the proposed GUI.

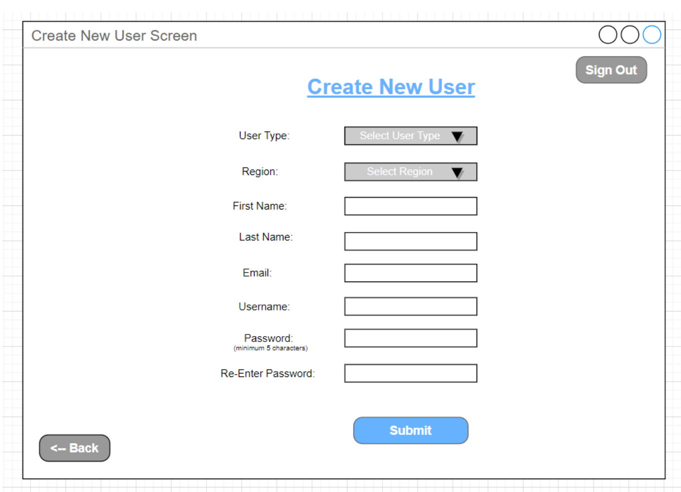

Login Screen
WSU Appointment Organizer+
Username:
Enter Username......
Password:
Enter Password......
Login

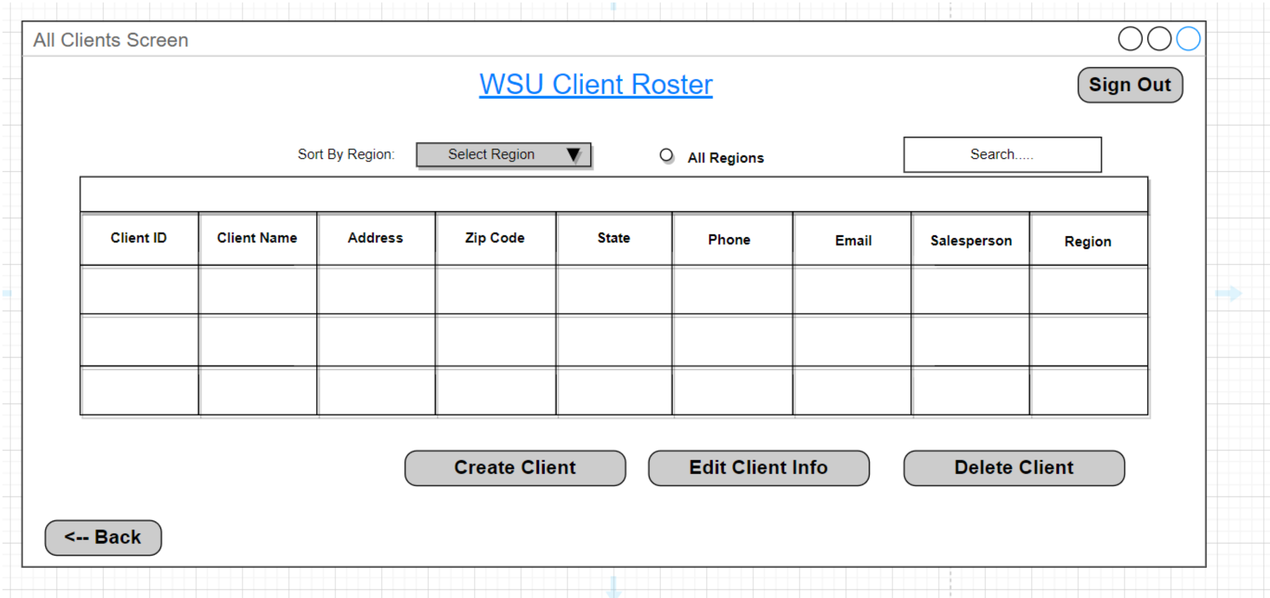

Client Info Screen
Sign Out
Enter Client Info
Customer ID:
First Name:
Last Name:
Address:
Zip Code:
State:
Select State
Reset
Phone Number:
Email:
Region:
Select Region
Salesperson:
Select Salesperson
Save
<-- Back

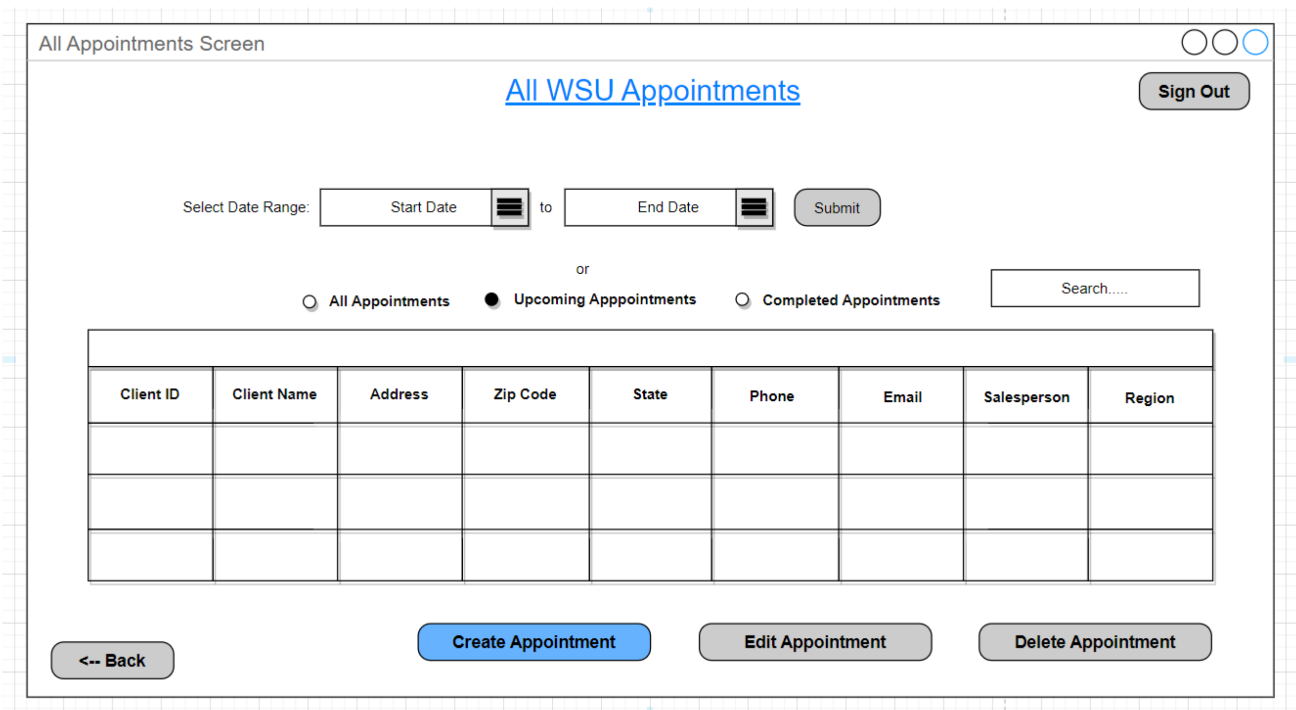

Salesperson's Home Screen
Hello, Sample First Name
Upcoming
Completed
All
Appointments
ID
Date
Start
End
Client
Title
Type
Create Appointment
Edit Appointment
Delete Appointment
Clients
ID
Name
Address
Zip
State
Phone
Email
Create Client
Edit Client
Delete Client
Salesperson: Sample Name
Region: Sample Region
Email: Sample Email
Appointments
Scheduled: 0
Completed: 0
Total Appointments: 0
Total Clients 0


Appointment Info Screen
Sign Out
Enter Apointment Info
Appointment ID:
Title:
Date:
Start:
Select Start
End:
Select End
Type:
Select Type
State:
Select State
Reset
Region:
Select Region
Salesperson:
Select Salesperson
Customer:
Select Customer
Submit
<-- Back


Salesperson's Detail Screen
Sign Out
Upcoming
Completed
All
Appointments
Date
Start
End
Client
Salesperson: Sample Name
Region: Sample Region
Email: Sample Email
Appointments
Scheduled: 0
Completed: 0
Total Appointments: 0
Total Clients 0
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 5 characters)
Re-Enter Password:
Submit
<-- Back





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

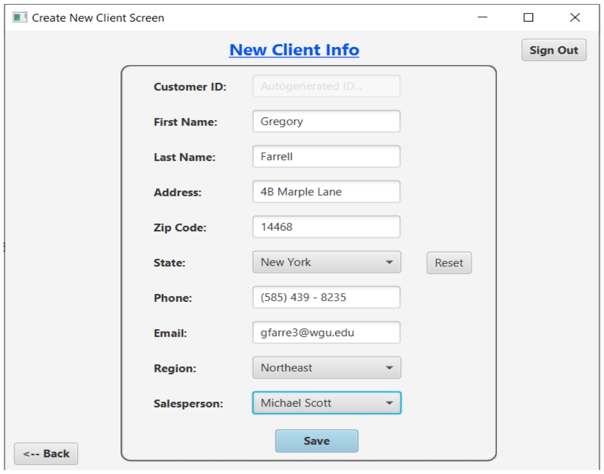
- Username: admin1, Password: passw0rd! will login and then:

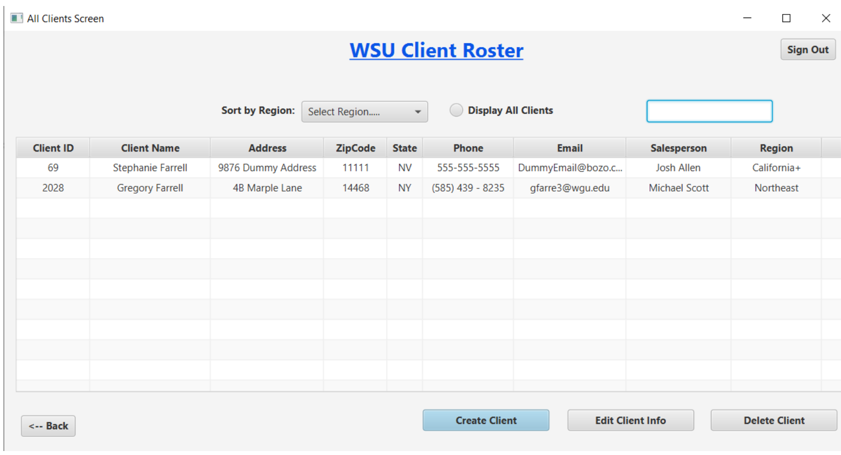
  1. Create a new client
  2. Verify that the new client appears in the salesperson table
  3. Create a new appointment for that client.
  4. Search for the appointment by client name and verify that they appear in the all appointments table
  5. Edit the created appointment by changing the title and the date.
  6. Verify that the appointment has been updated in the table.

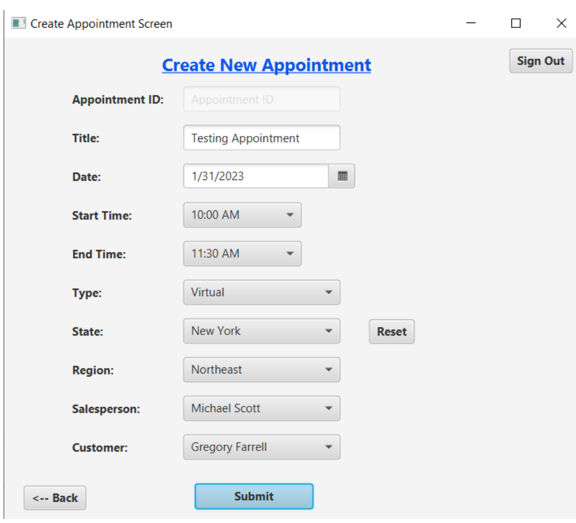
7. Delete the newly created client and confirm that both the client and appointment are now removed from the database.
8. Create a new administrative user.
9. Sign out and log back in with the new admin credentials.
10. Create a new salesperson user.
11. Sign out and log back in with the new salesperson 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.

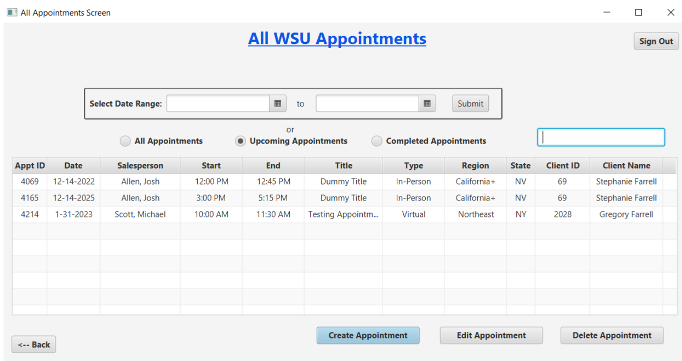
Results

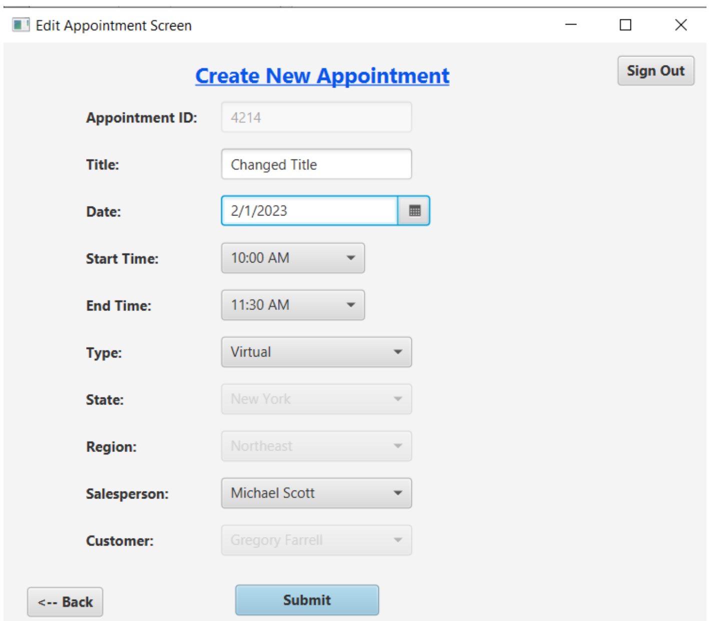
All of the tests were passed as evidenced below:

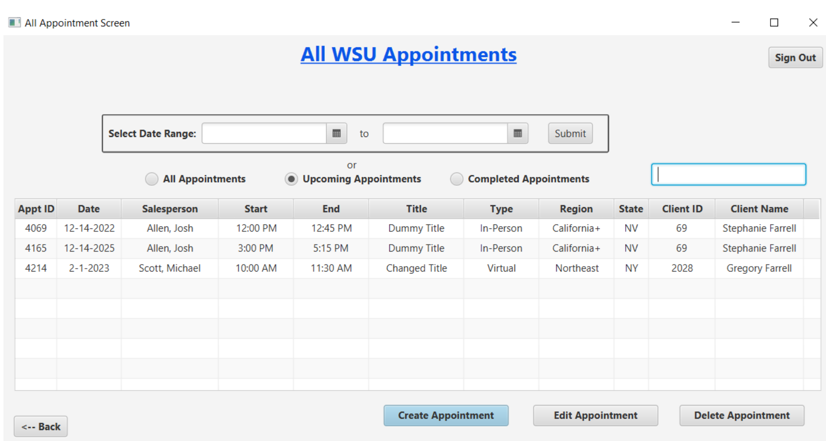
1. 
Create New Client Screen
New Client Info
Sign Out
Customer ID:
Autogenerated ID...
First Name:
Gregory
Last Name:
Farrell
Address:
48 Marple Lane
Zip Code:
14468
State:
New York
Reset
Phone:
(585) 439 - 8235
Email:
gfarre3@wgu.edu
Region:
Northeast
Salesperson:
Michael Scott
Save
<-- Back

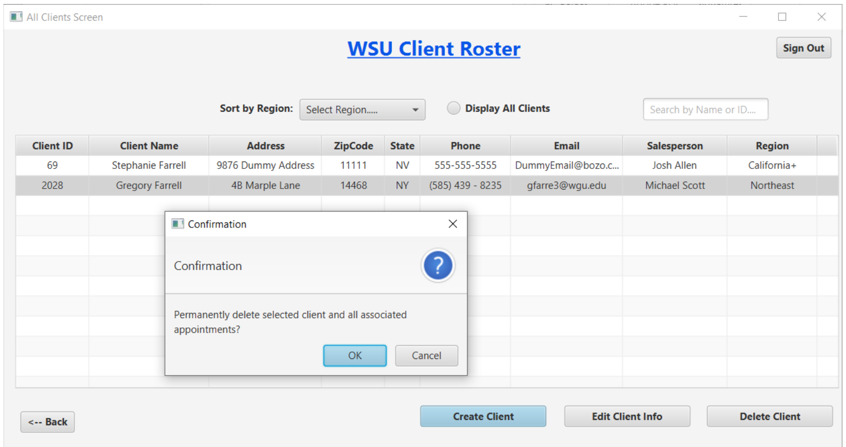
2. 
All Clients Screen
WSU Client Roster
Sign Out
Sort by Region:
Select Region.....
Display All Clients
Client ID | Client Name | Address | ZipCode | State | Phone | Email | Salesperson | Region
69 | Stephanie Farrell | 9876 Dummy Address | 11111 | NV | 555-555-5555 | DummyEmail@bozo.c... | Josh Allen | California+
2028 | Gregory Farrell | 48 Marple Lane | 14468 | NY | (585) 439 - 8235 | gfarre3@wgu.edu | Michael Scott | Northeast
<-- Back
Create Client
Edit Client Info
Delete Client

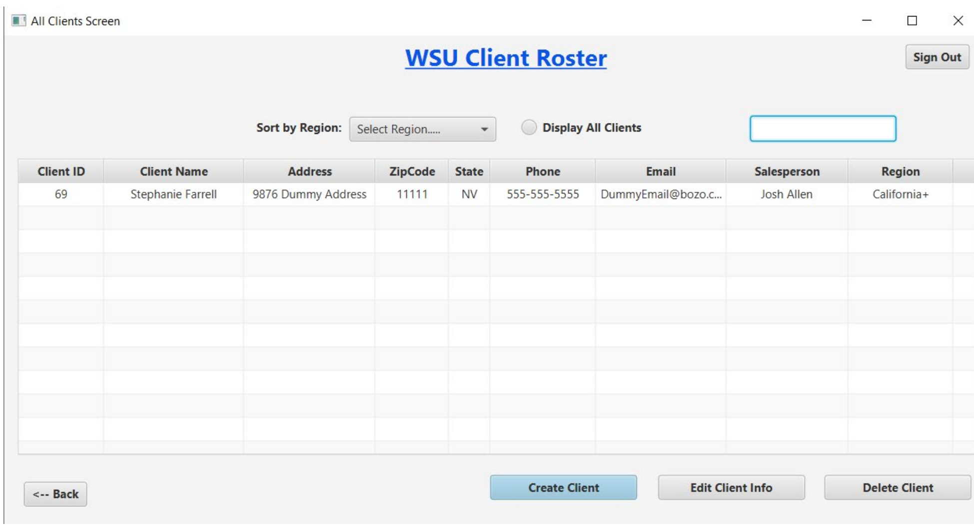
3. 
Create Appointment Screen
Create New Appointment
Sign Out
Appointment ID:
Appointment ID
Title:
Testing Appointment
Date:
1/31/2023
Start Time:
10:00 AM
End Time:
11:30 AM
Type:
Virtual
State:
New York
Reset
Region:
Northeast
Salesperson:
Michael Scott
Customer:
Gregory Farrell
<-- Back
Submit

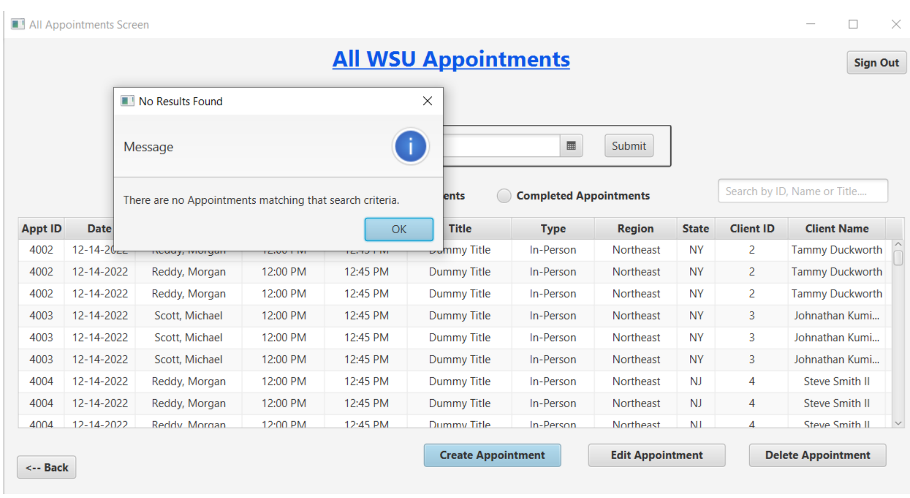
4. 
All Appointments Screen
All WSU Appointments
Sign Out
Select Date Range:
to
Submit
or
All Appointments
Upcoming Appointments
Completed Appointments
Appt ID Date Salesperson Start End Title Type Region State Client ID Client Name
4069 12-14-2022 Allen, Josh 12:00 PM 12:45 PM Dummy Title In-Person California+ NV 69 Stephanie Farrell
4165 12-14-2025 Allen, Josh 3:00 PM 5:15 PM Dummy Title In-Person California+ NV 69 Stephanie Farrell
4214 1-31-2023 Scott, Michael 10:00 AM 11:30 AM Testing Appointm... Virtual Northeast NY 2028 Gregory Farrell
<-- Back
Create Appointment
Edit Appointment
Delete Appointment

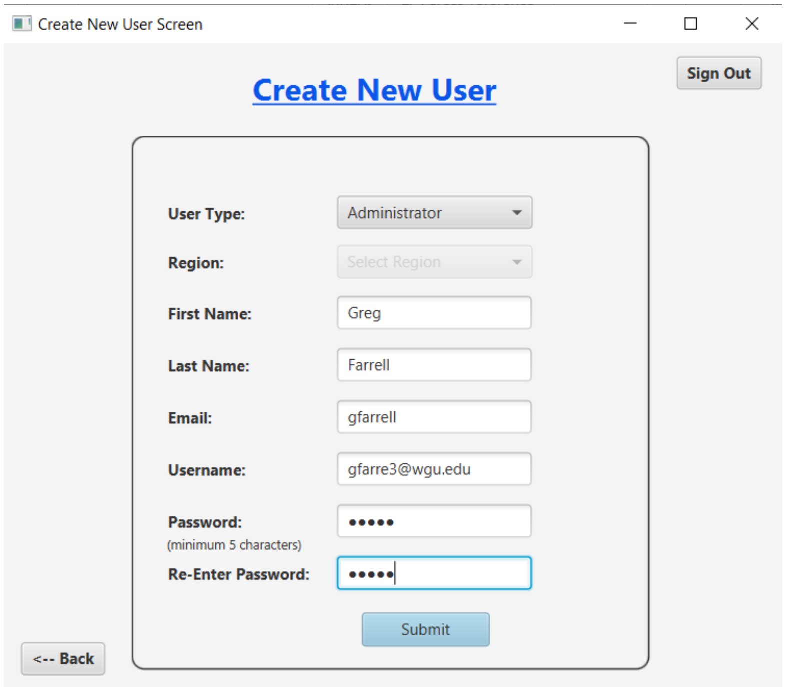
5. 
Edit Appointment Screen
Create New Appointment
Sign Out
Appointment ID: 4214
Title: Changed Title
Date: 2/1/2023
Start Time: 10:00 AM
End Time: 11:30 AM
Type: Virtual
State: New York
Region: Northeast
Salesperson: Michael Scott
Customer: Gregory Farrell
<-- Back
Submit

6. 
All Appointment Screen
All WSU Appointments
Sign Out
Select Date Range:
to
Submit
or
All Appointments
Upcoming Appointments
Completed Appointments
Appt ID Date Salesperson Start End Title Type Region State Client ID Client Name
4069 12-14-2022 Allen, Josh 12:00 PM 12:45 PM Dummy Title In-Person California+ NV 69 Stephanie Farrell
4165 12-14-2025 Allen, Josh 3:00 PM 5:15 PM Dummy Title In-Person California+ NV 69 Stephanie Farrell
4214 2-1-2023 Scott, Michael 10:00 AM 11:30 AM Changed Title Virtual Northeast NY 2028 Gregory Farrell
<-- Back
Create Appointment
Edit Appointment
Delete Appointment

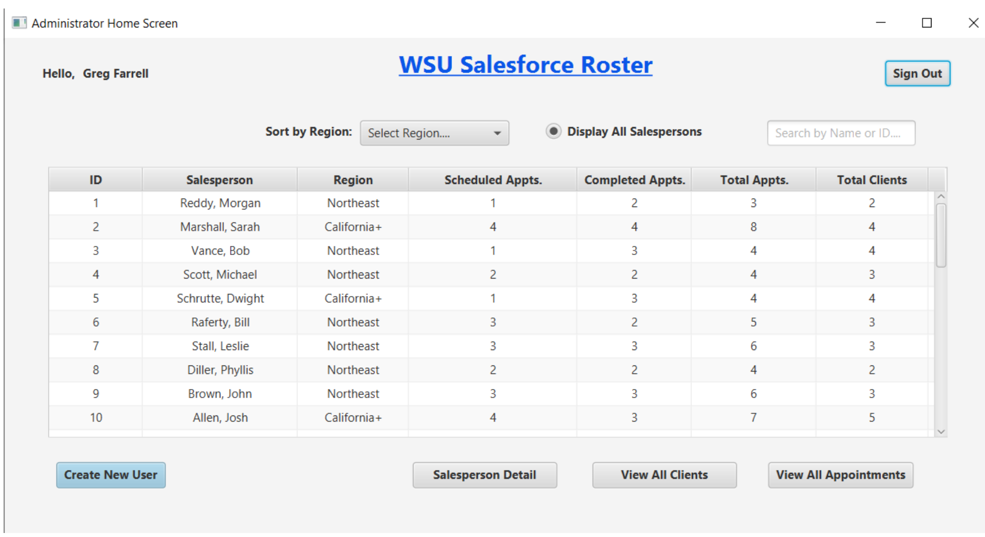
7. 
All Clients Screen
WSU Client Roster
Sign Out
Sort by Region:
Select Region.....
Display All Clients
Search by Name or ID...
Client ID
Client Name
Address
ZipCode
State
Phone
Email
Salesperson
Region
69 Stephanie Farrell 9876 Dummy Address 11111 NV 555-555-5555 DummyEmail@bozo.c... Josh Allen California+
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


All Clients Screen
WSU Client Roster
Sign Out
Sort by Region:
Select 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
Completed Appointments
Search by ID, Name or Title...
Appt ID
Date
Title
Type
Region
State
Client ID
Client Name
4002 12-14-2022 Reddy, Morgan 12:00 PM 12:45 PM Dummy Title In-Person Northeast NY 2 Tammy Duckworth
4003 12-14-2022 Scott, Michael 12:00 PM 12:45 PM Dummy Title In-Person Northeast NY 3 Johnathan Kumi...
4004 12-14-2022 Reddy, Morgan 12:00 PM 12:45 PM Dummy Title In-Person Northeast NJ 4 Steve Smith II
<-- Back
Create Appointment
Edit Appointment
Delete Appointment

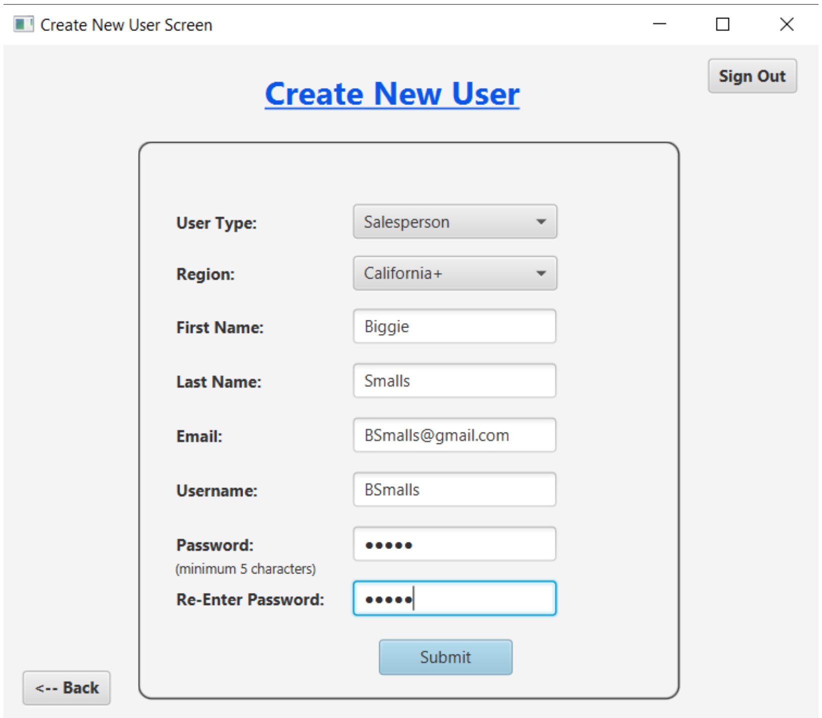


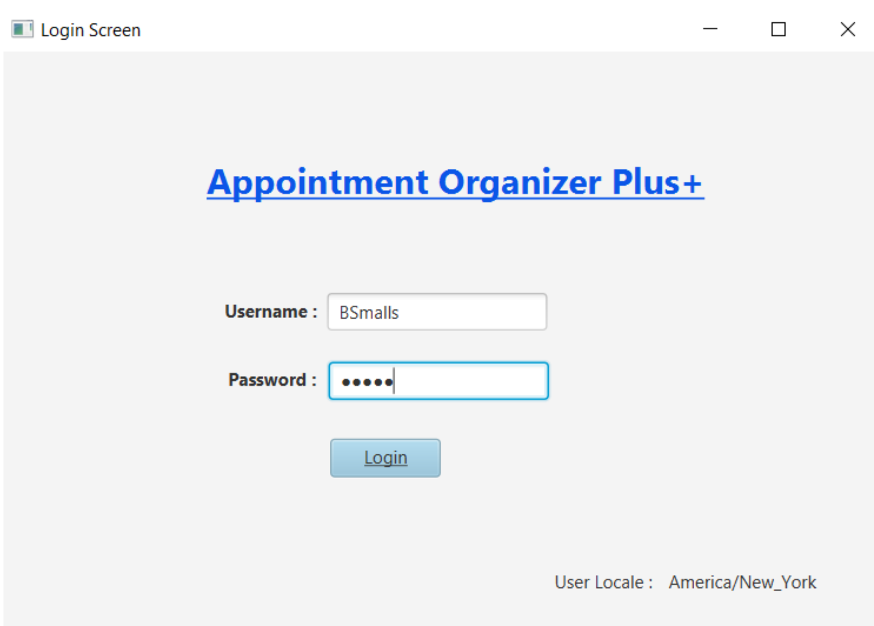
8.

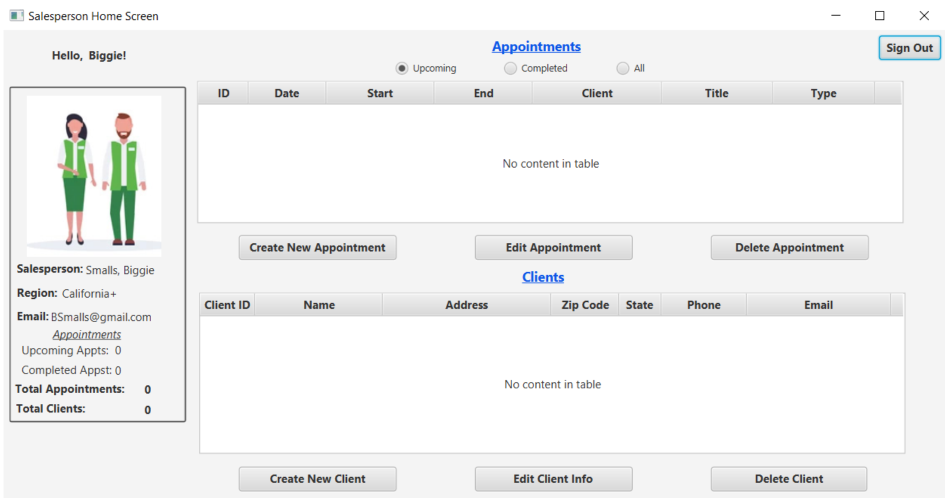


ID	Salesperson	Region	Scheduled Appts.	Completed Appts.	Total Appts.	Total Clients
1	Reddy, Morgan	Northeast	1	2	3	2
2	Marshall, Sarah	California+	4	4	8	4
3	Vance, Bob	Northeast	1	3	4	4
4	Scott, Michael	Northeast	2	2	4	3
5	Schrutte, Dwight	California+	1	3	4	4
6	Raferty, Bill	Northeast	3	2	5	3
7	Stall, 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

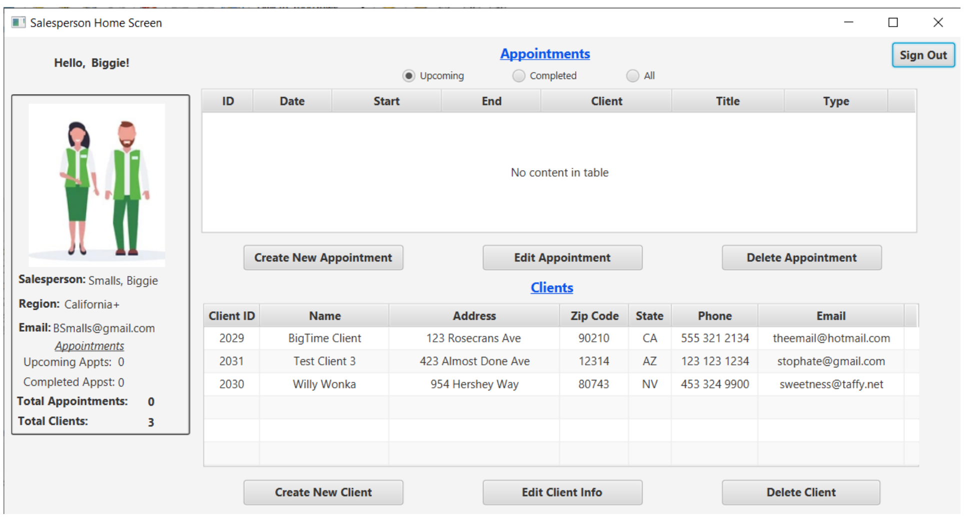
9.

10. 
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

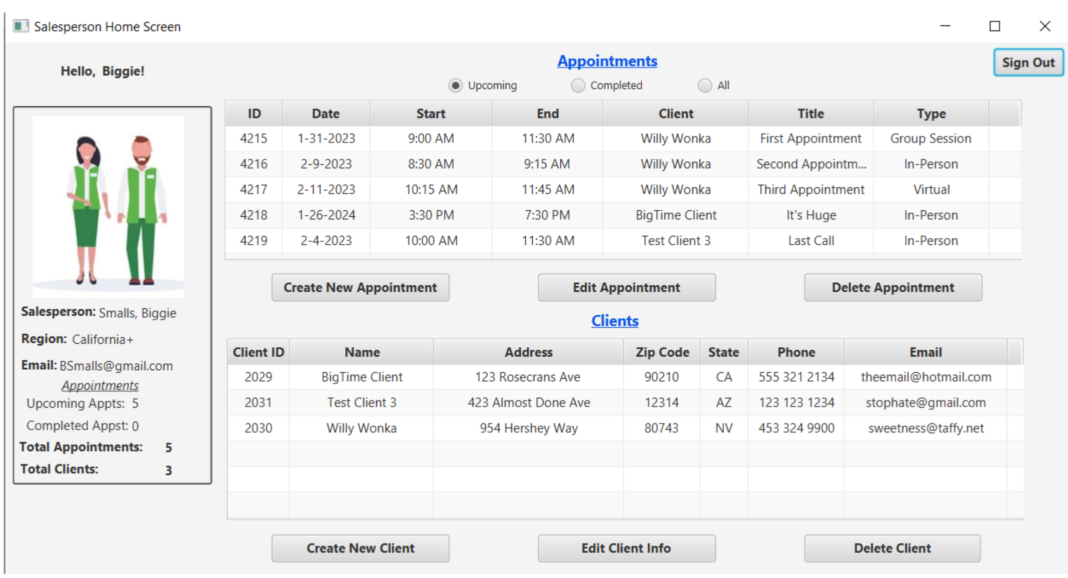
11. 
Login Screen
Appointment Organizer Plus+
Username :
BSmalls
Password :
Login
User Locale :
America/New_York

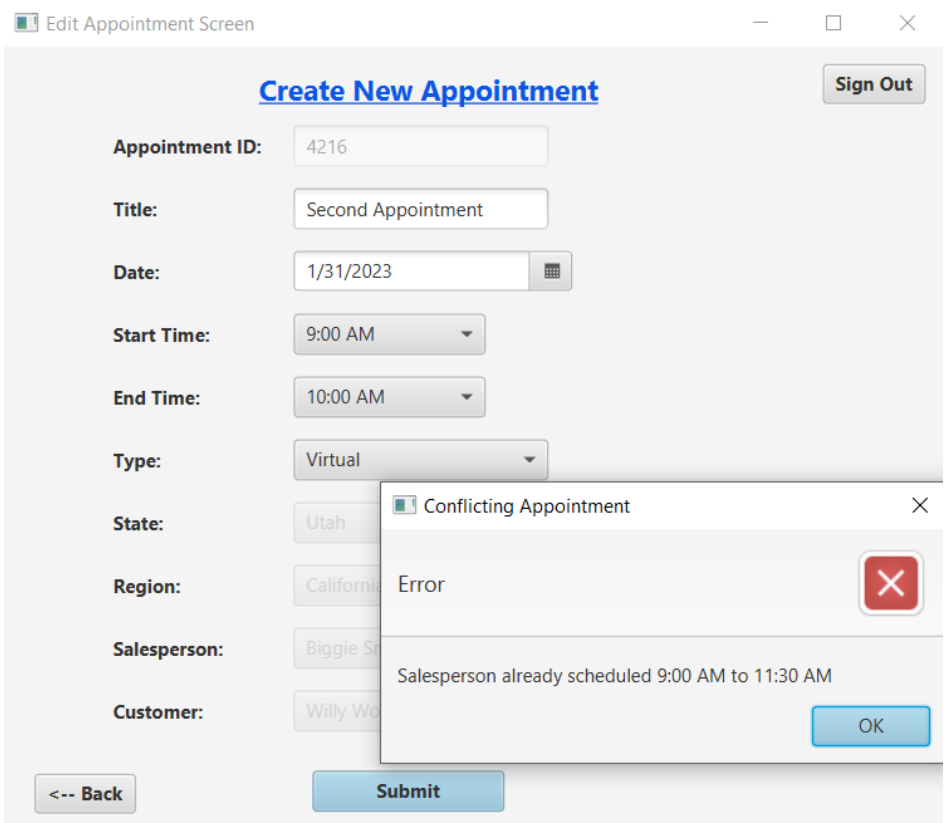

Salesperson Home Screen
Hello, Biggie!
Appointments
Upcoming
Completed
All
Sign Out
ID Date Start End Client Title Type
No content in table
Create New Appointment
Edit Appointment
Delete Appointment
Clients
Client ID Name Address Zip Code State Phone Email
No content in table
Create New Client
Edit Client Info
Delete Client
Salesperson: Smalls, Biggie
Region: California+
Email: BSmalls@gmail.com
Appointments
Upcoming Appts: 0
Completed Appst: 0
Total Appointments: 0
Total Clients: 0

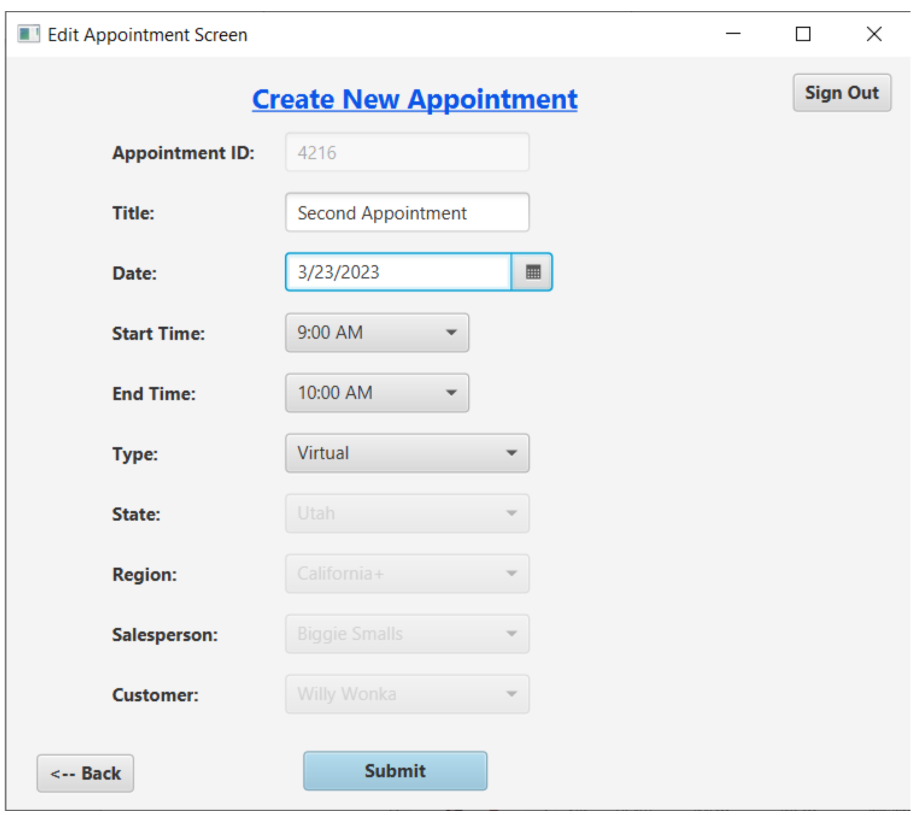
12.

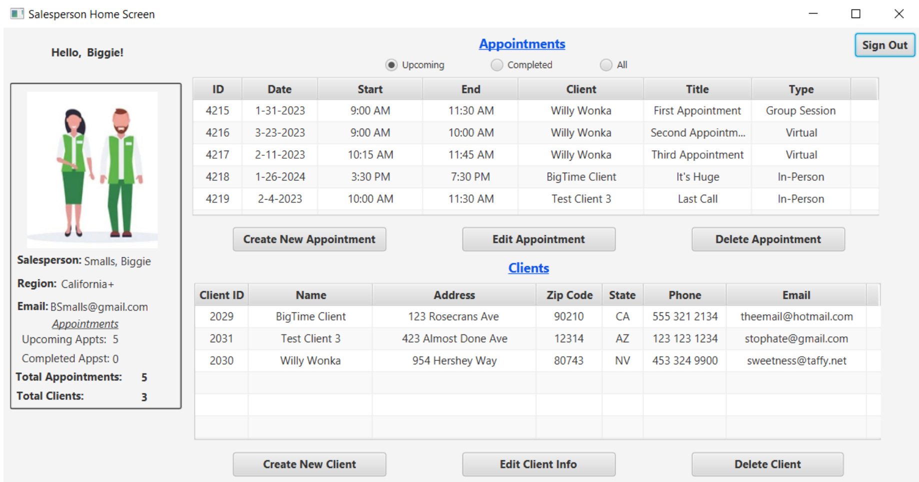

Salesperson Home Screen
Hello, Biggie!
Appointments
Upcoming
Completed
All
Sign Out
ID Date Start End Client Title Type
No content in table
Create New Appointment
Edit Appointment
Delete Appointment
Clients
Client ID Name Address Zip Code State Phone Email
2029 BigTime Client 123 Rosecrans Ave 90210 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 Appst: 0
Total Appointments: 0
Total Clients: 3

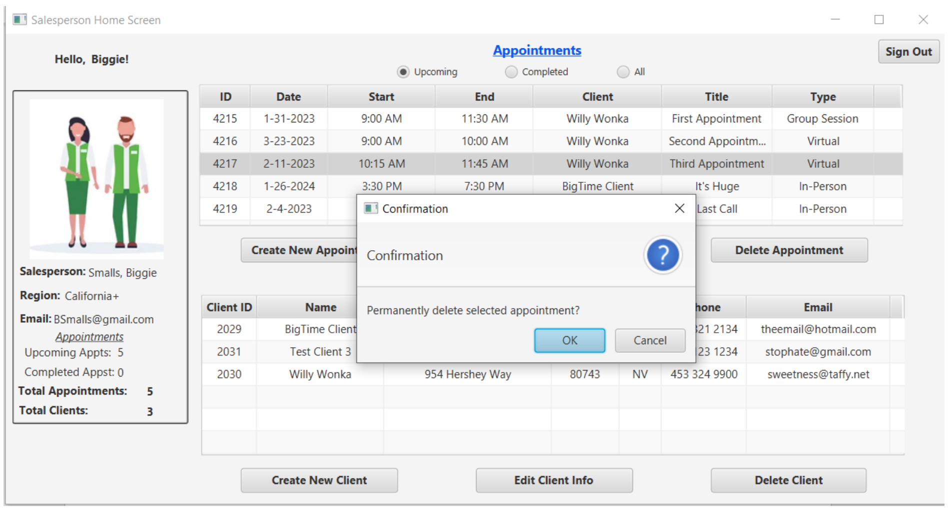
13.

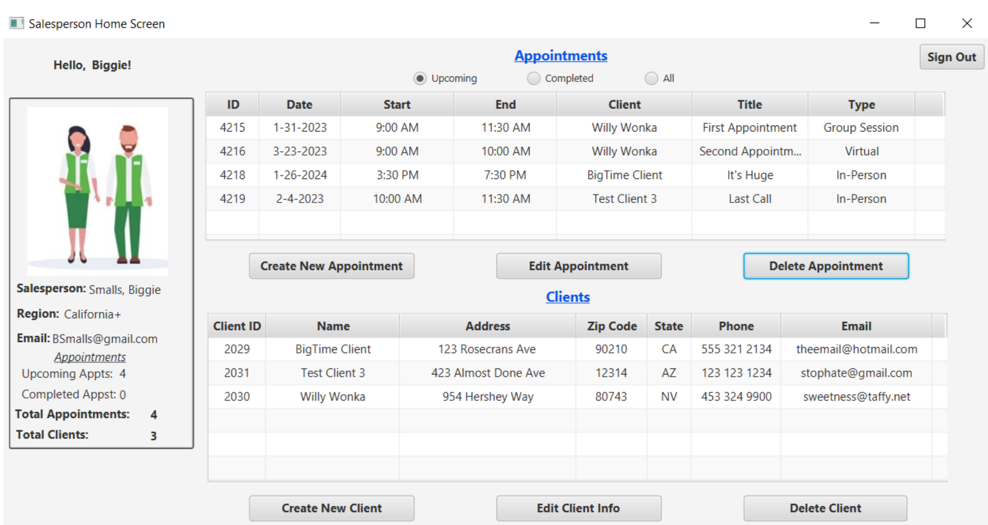

Salesperson Home Screen
Hello, Biggie!
Appointments
Upcoming
Completed
All
Sign Out
ID Date Start End Client Title Type
4215 1-31-2023 9:00 AM 11:30 AM Willy Wonka First Appointment Group Session
4216 2-9-2023 8:30 AM 9:15 AM Willy Wonka Second Appointm... In-Person
4217 2-11-2023 10:15 AM 11:45 AM Willy 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 Appst: 0
Total Appointments: 5
Total Clients: 3

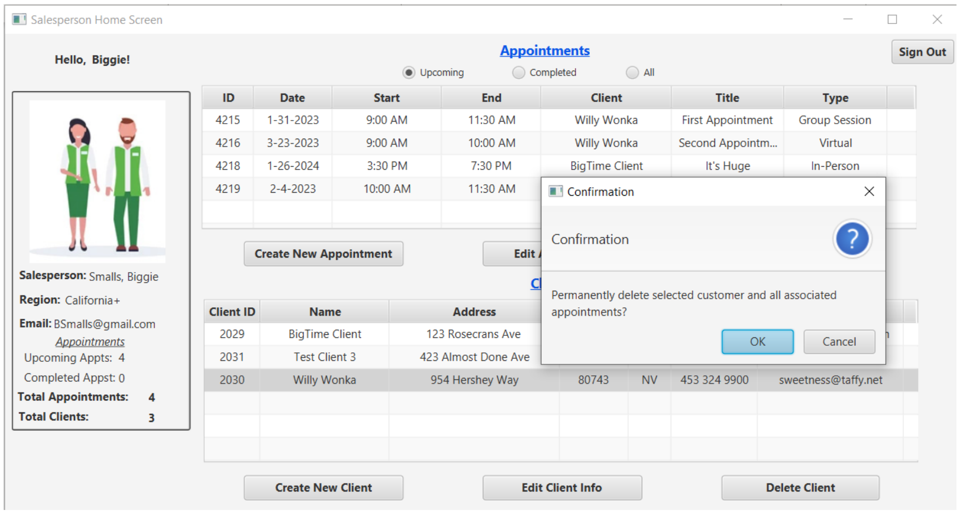
14. 
Edit Appointment Screen
Create New Appointment
Sign Out
Appointment ID:
4216
Title:
Second Appointment
Date:
1/31/2023
Start Time:
9:00 AM
End Time:
10:00 AM
Type:
Virtual
State:
Utah
Region:
Salesperson:
Customer:
Conflicting Appointment
Error
Salesperson already scheduled 9:00 AM to 11:30 AM
OK
<-- Back
Submit

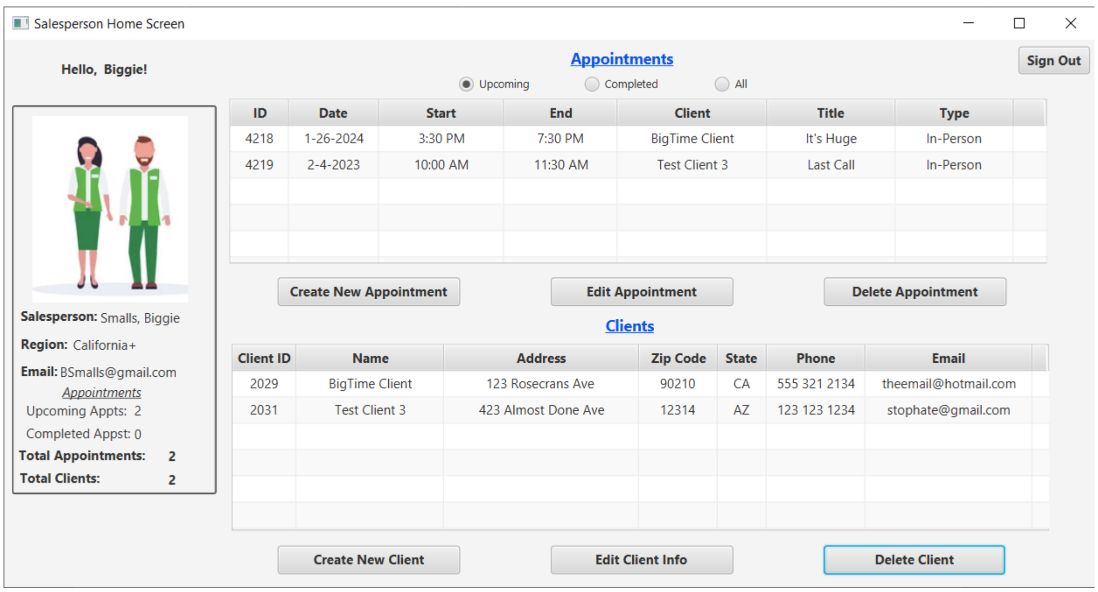
15. 
Edit Appointment Screen
Create New Appointment
Sign Out
Appointment ID:
4216
Title:
Second Appointment
Date:
3/23/2023
Start Time:
9:00 AM
End Time:
10:00 AM
Type:
Virtual
State:
Utah
Region:
California+
Salesperson:
Biggie Smalls
Customer:
Willy Wonka
<-- Back
Submit


Salesperson Home Screen
Hello, Biggie!
Appointments
Sign Out
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
Salesperson: Smalls, Biggie
Region: California+
Email: BSmalls@gmail.com
Appointments
Upcoming Appts: 5
Completed Appst: 0
Total Appointments: 5
Total Clients: 3
Create New Client
Edit Client Info
Delete Client

16. 
Salesperson Home Screen
Hello, Biggie!
Appointments
Sign Out
Confirmation
Confirmation
Permanently delete selected appointment?
OK
Cancel
Create New Appointment
Delete Appointment
Create New Client
Edit Client Info
Delete Client


Salesperson Home Screen
Hello, Biggie!
Appointments
Sign Out
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
Salesperson: Smalls, Biggie
Region: California+
Email: BSmalls@gmail.com
Appointments
Upcoming Appts: 4
Completed Appst: 0
Total Appointments: 4
Total Clients: 3
Create New Client
Edit Client Info
Delete Client

17. 



User Guide

Set Up and Run Application for Maintenance Purposes

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

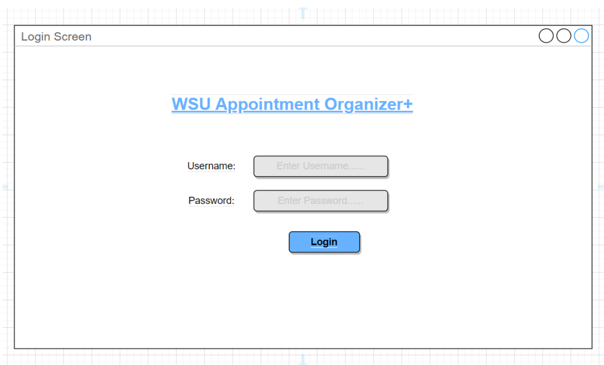
- The user must have Java installed on their machine. If they don't already have it, it can be downloaded at: https://www.java.com/en/download/manual.jsp

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:*



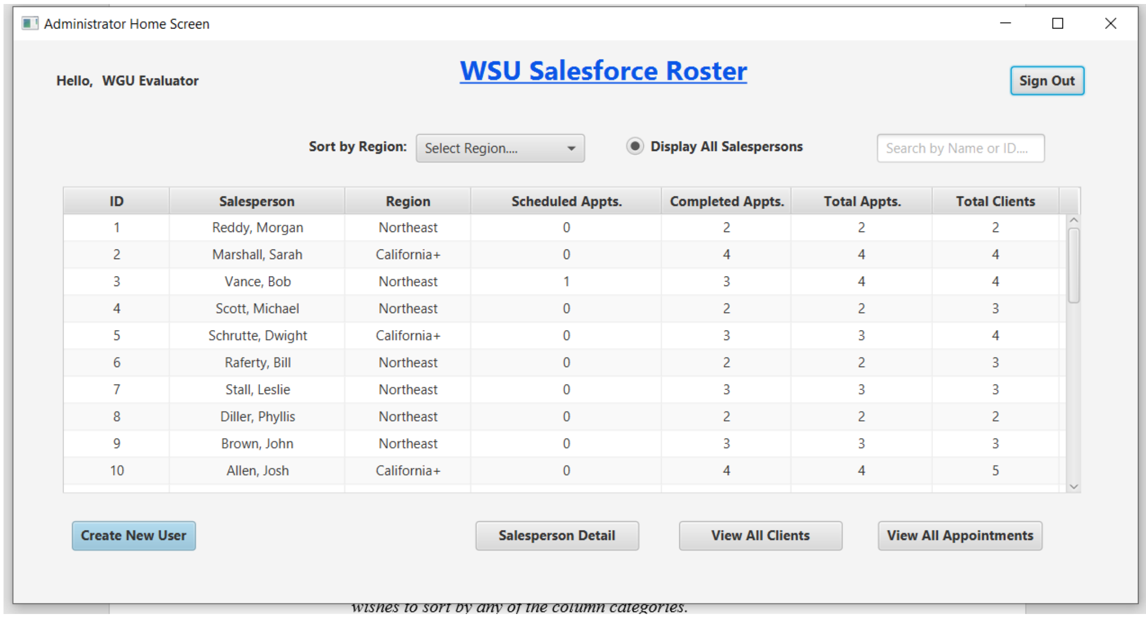
2. *The evaluator should initially login as an Administrator. The credentials are:*

   Username: admin

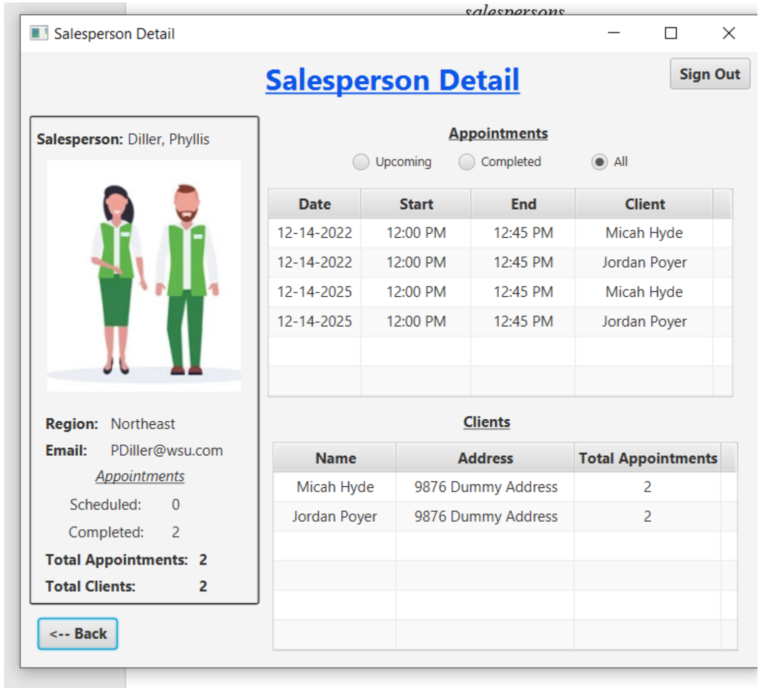
   Password: Passw0rd!

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.*

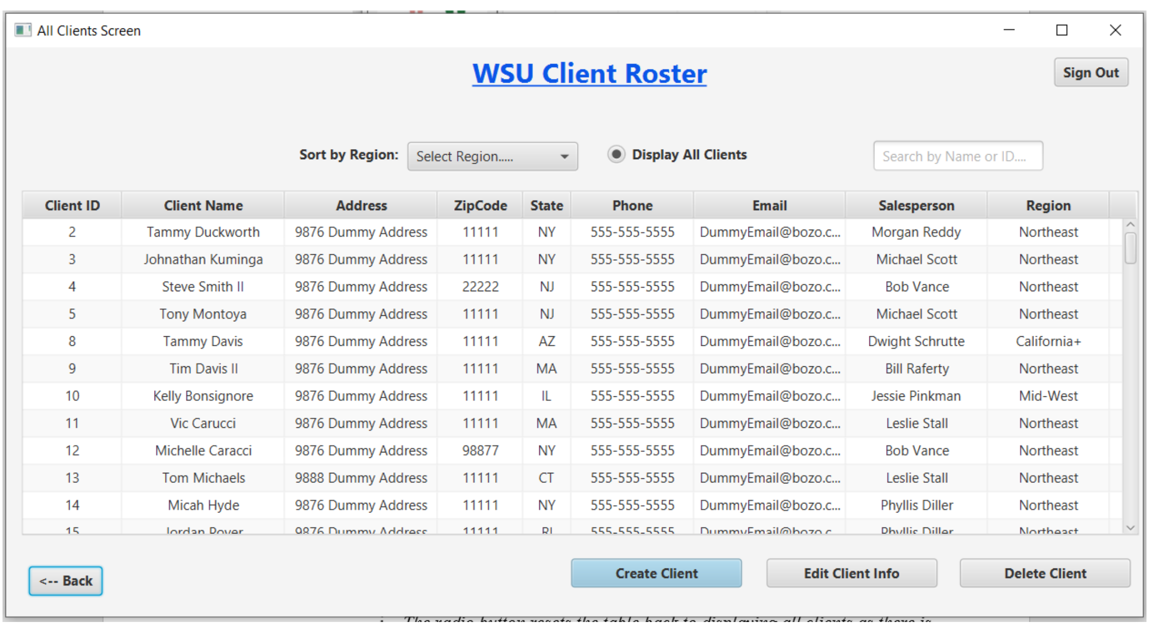


2. *The user can filter the table in several ways:*
    a. *The table columns themselves can be clicked to resort the table if the user wishes to see who has the most or least appointments, clients, etc.*
    b. *The combo box provides a drop-down menu where the user can filter the table by region, thereby 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.*



View All Clients

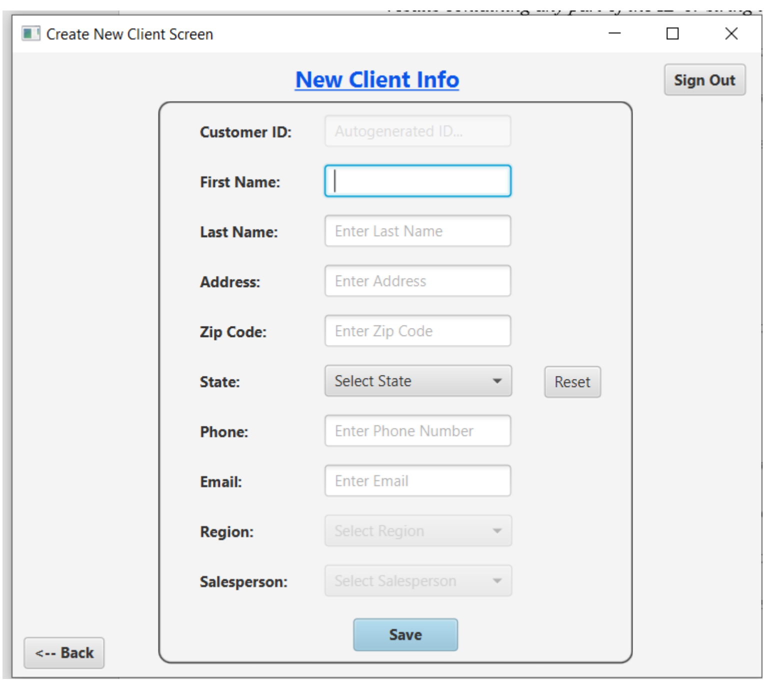
1. *Clicking on the "View All Clients" button takes the user to All Clients Screen, which displays a table of all of the Clients across the entire company.*



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.*



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.*

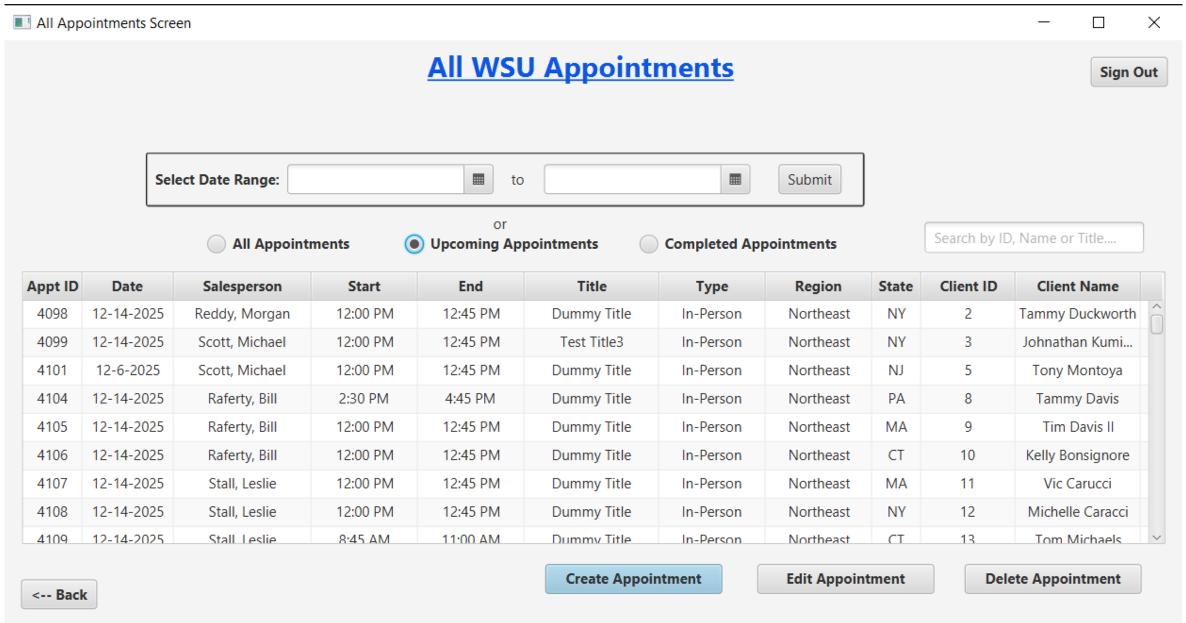
   i. *There is also a back button if the user no longer wishes to create a new client.*

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.*

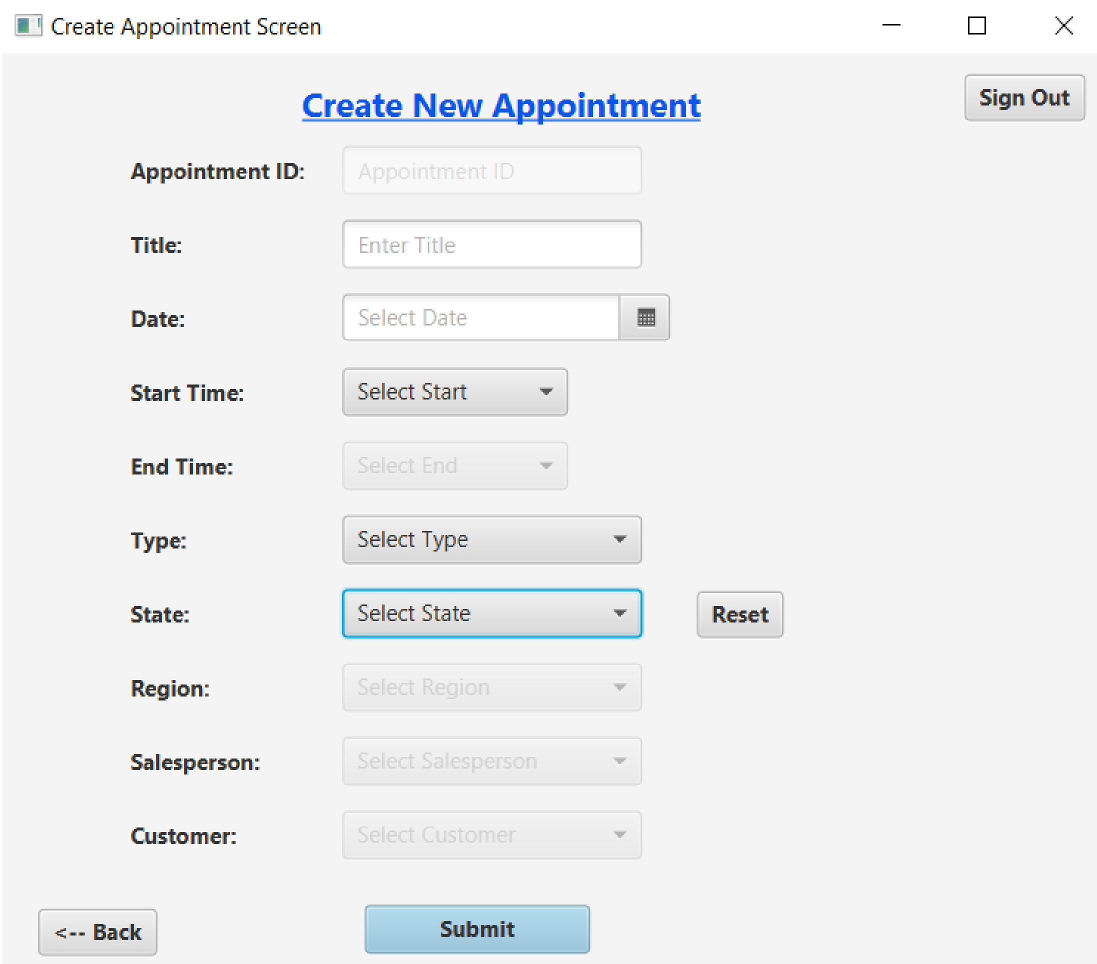
View All Appointments

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.*



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.*



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.*
   i. *User selects a start date.*
   ii. *After user selects a start time, the available end times are populated.*
   iii. *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.*

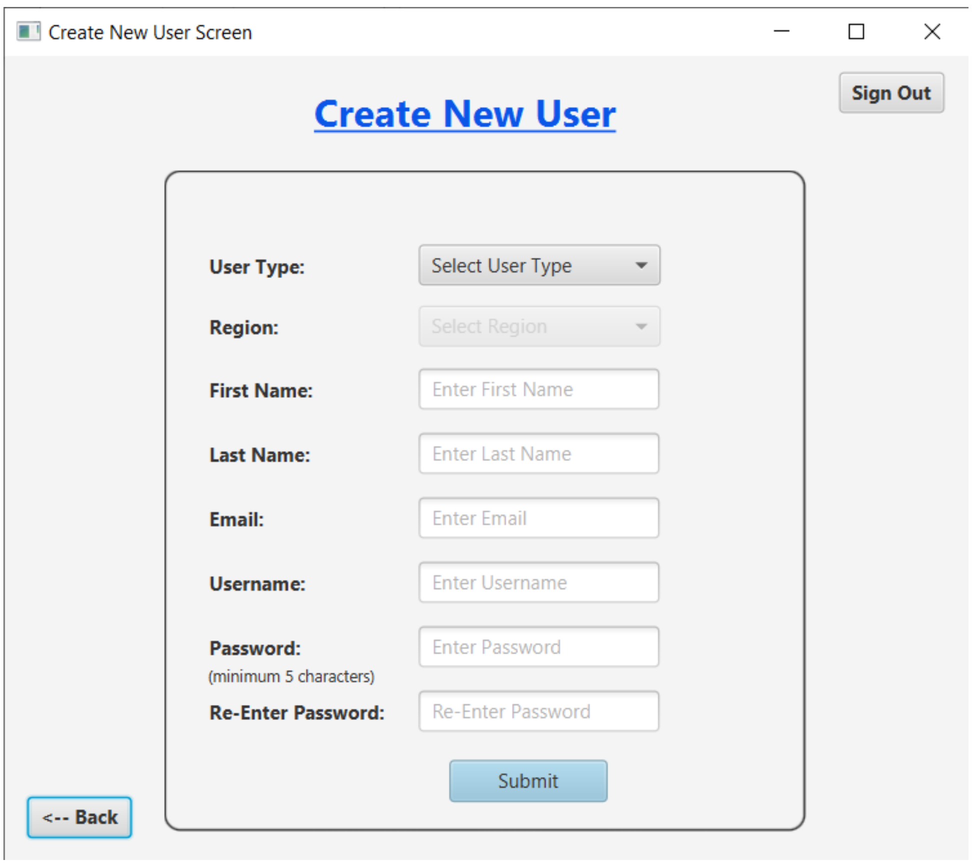
c. *Once the user has selected all of the data, click submit to update the appointment in the database and return the program to the All Appointments Screen.*

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.*



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.*

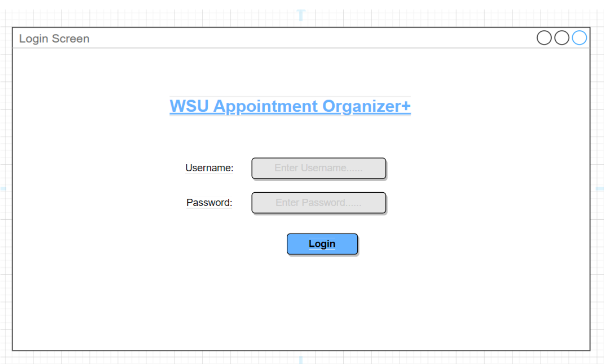
b. *A salesperson user is the primary user of the application and is not able to create new users. They can only enter, edit and delete their own client and appointment data.*

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

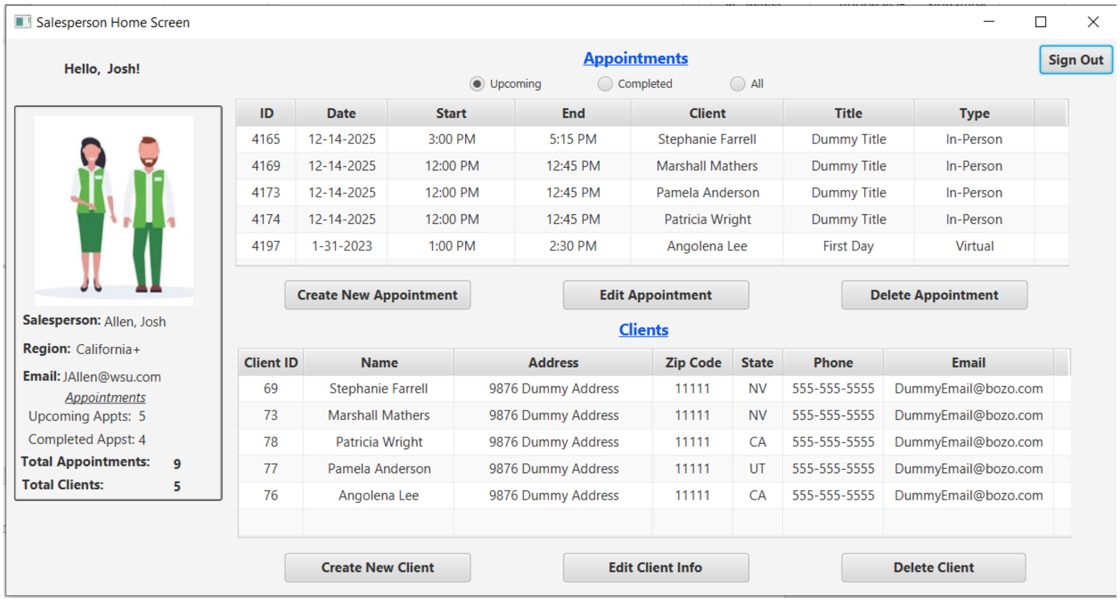
1. *Once the application is launched, the user will be presented with this login screen:*



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.



a. 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.

b. The Appointments Table is initially populated with all the upcoming appointments the salesperson has scheduled.

   i. 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.

   ii. The table can also be sorted by any of the column types by clicking on the column name.

c. The Clients table displays all of the clients that have had an appointment scheduled with that salesperson.

   i. 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.

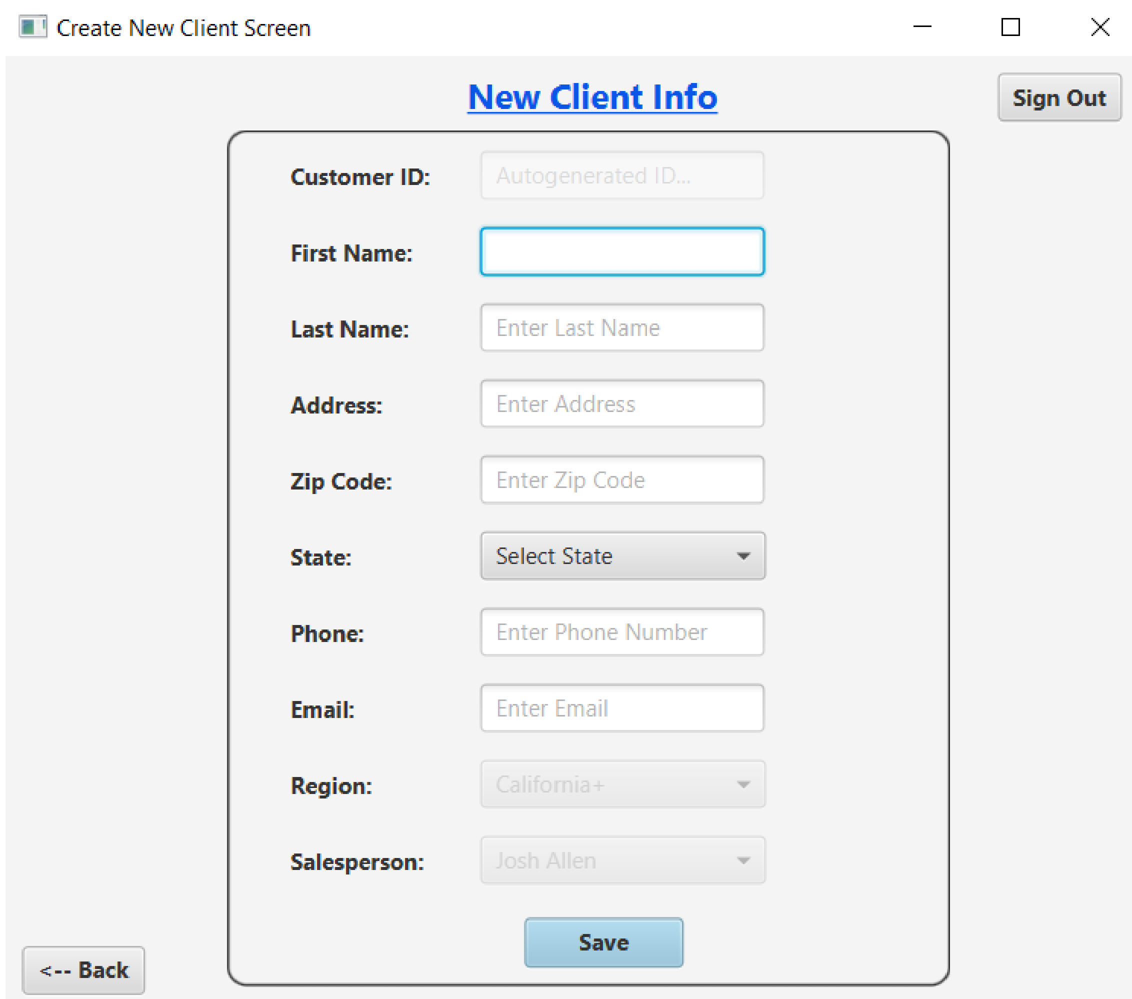
d. The "Delete Appointment" button will delete the appointment selected from the table from the database.

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.

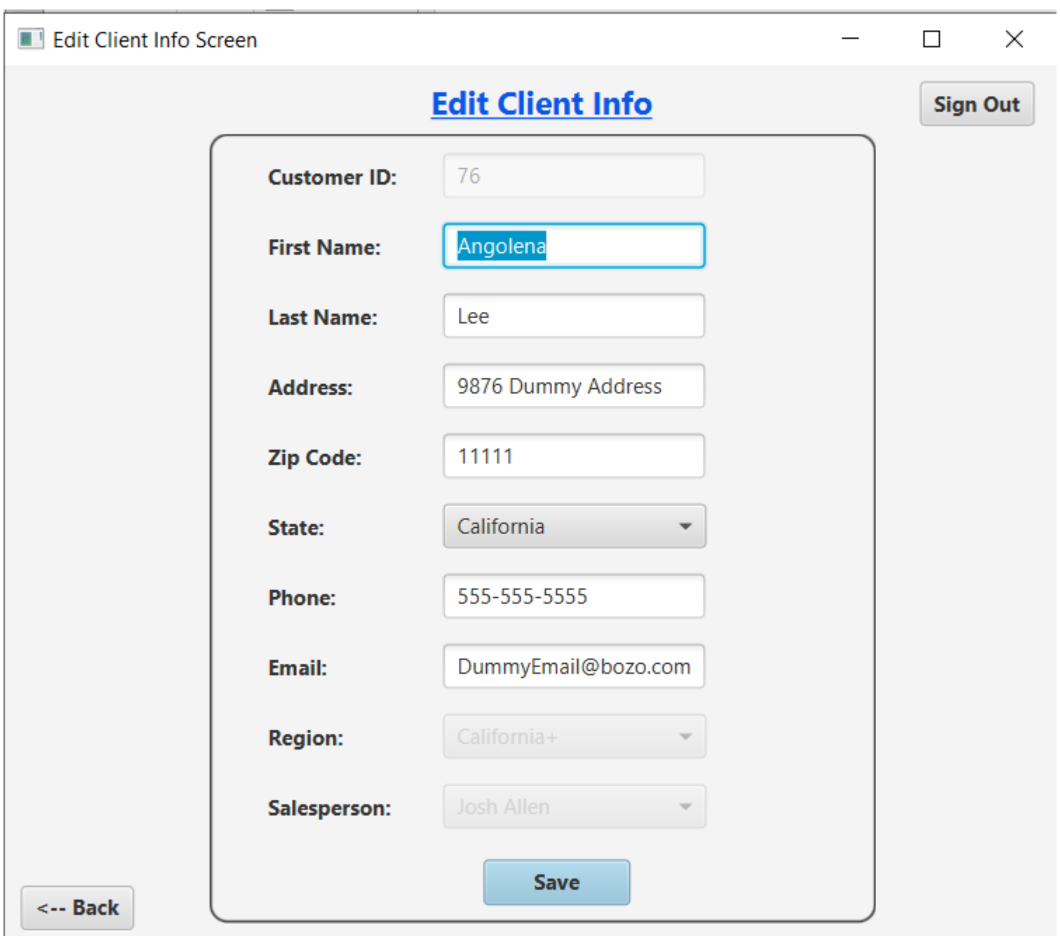


i. User must enter the new client's first name, last name, address, zip code, phone and email. User must also select a state from the drop down menu, which is filtered according to the salesperson's already assigned region.

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.

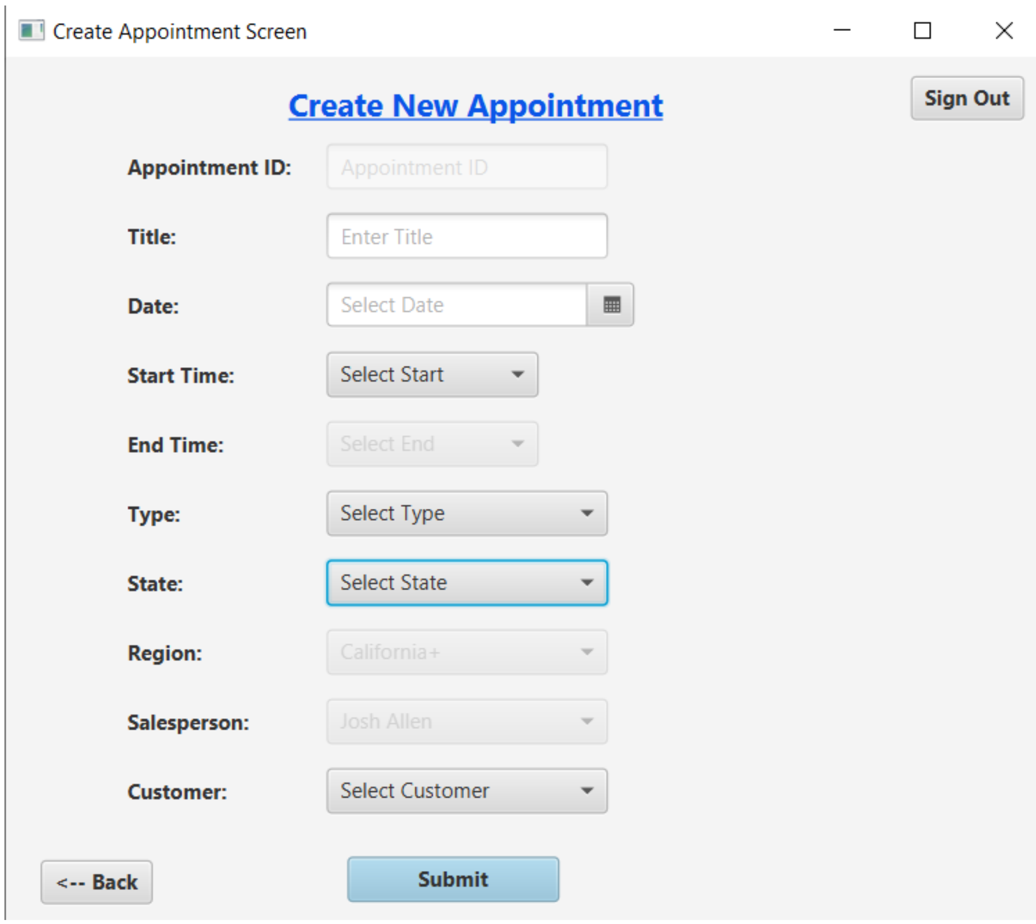
g. Clicking the "Edit Client Info" button will direct the application to the Edit Client Info Screen and pass the information from the client that was selected.



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.



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.

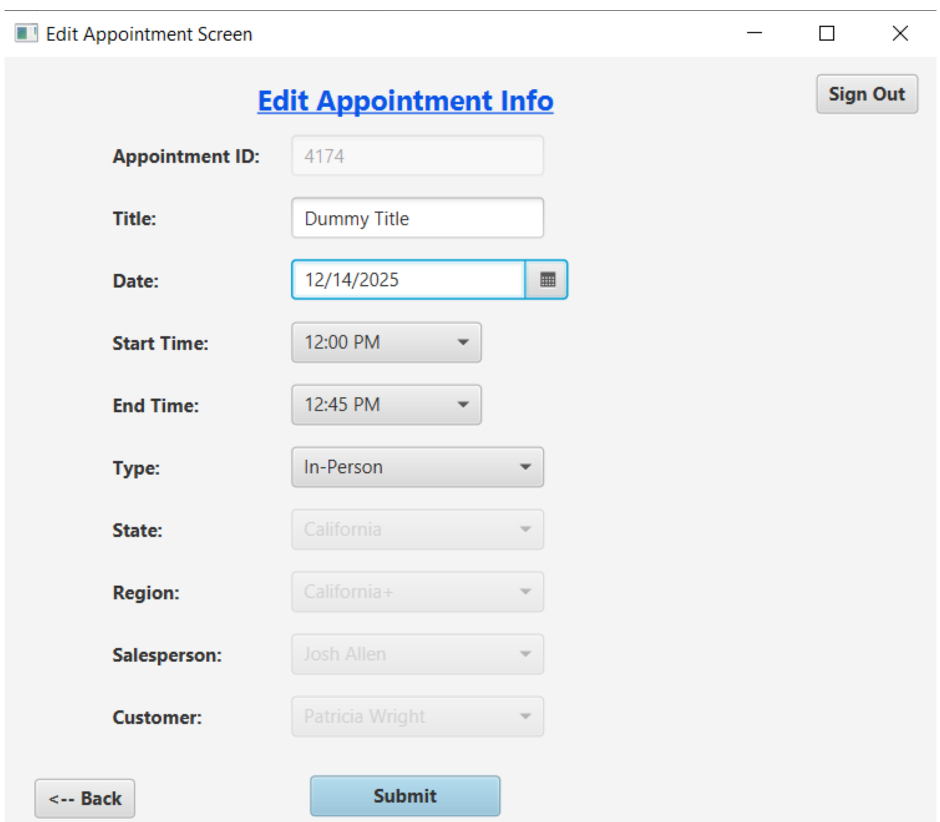
ii. Once a start time is selected, the available end times will populate the end times combo box.

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.



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.