

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

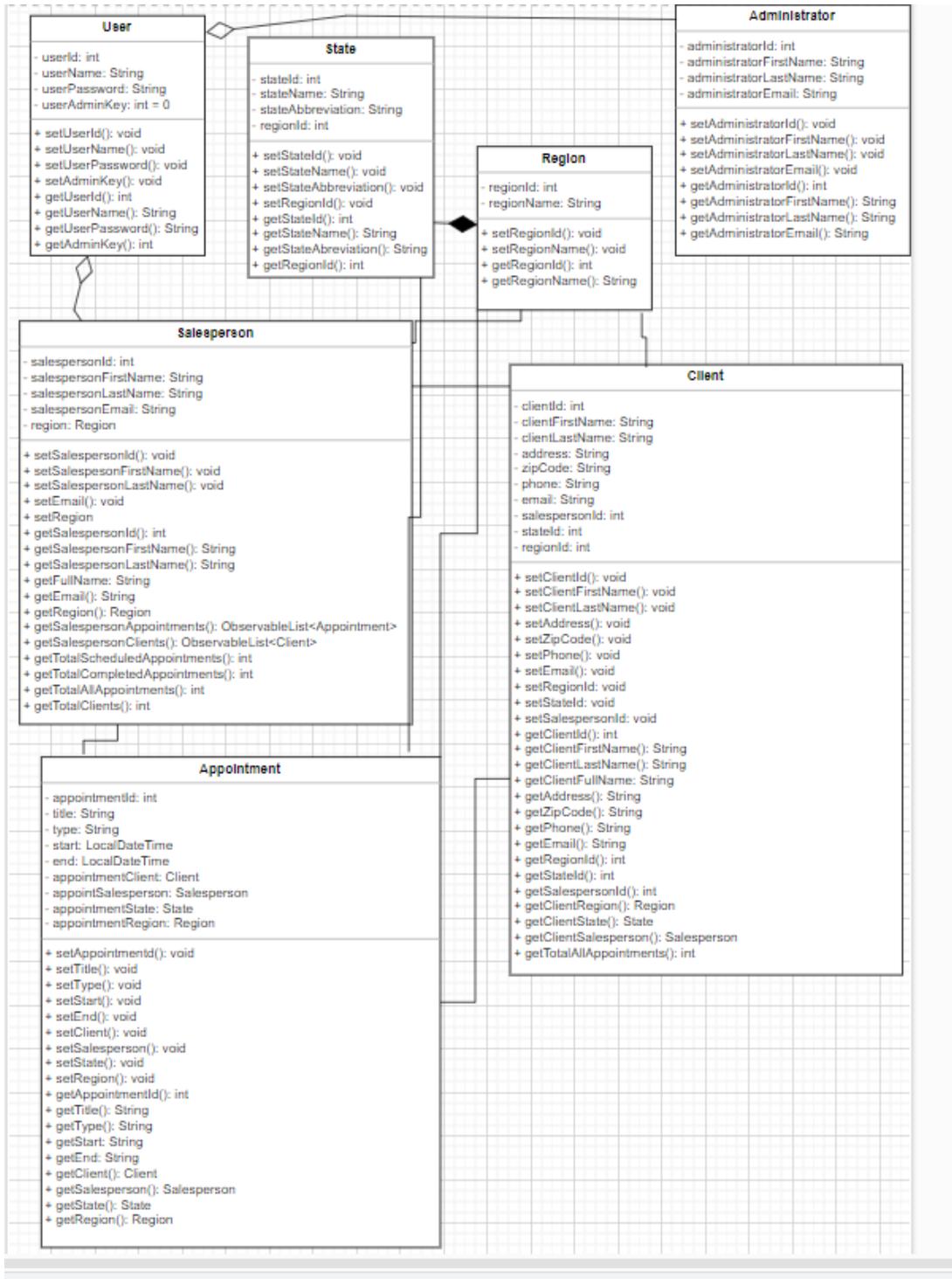
| | |
|---|-----------|
| <i>Application Design and Testing.....</i> | 4 |
| Java Class Design | 4 |
| Database Entity Relationship Diagram..... | 5 |
| UI Design..... | 5 |
| Unit Test Plan..... | 8 |
| Introduction..... | 8 |
| Purpose | 8 |
| Overview..... | 9 |
| Test Plan..... | 9 |
| Items | 9 |
| Features..... | 9 |
| Deliverables | 9 |
| Procedures | 9 |
| Results | 10 |
| <i>User Guide.....</i> | 19 |
| Set Up and Run Application for Maintenance Purposes..... | 19 |
| Introduction..... | 20 |
| Administrator Login..... | 20 |
| <i>Home Screen</i> | 20 |
| <i>View All Clients</i> | 22 |
| <i>View All Appointments</i> | 24 |
| <i>Create New User.....</i> | 28 |

Appointment Organizer+

| | |
|---------------------------------------|-----------|
| <i>Salesperson Login</i> | 29 |
| Salesperson Home Screen..... | 29 |

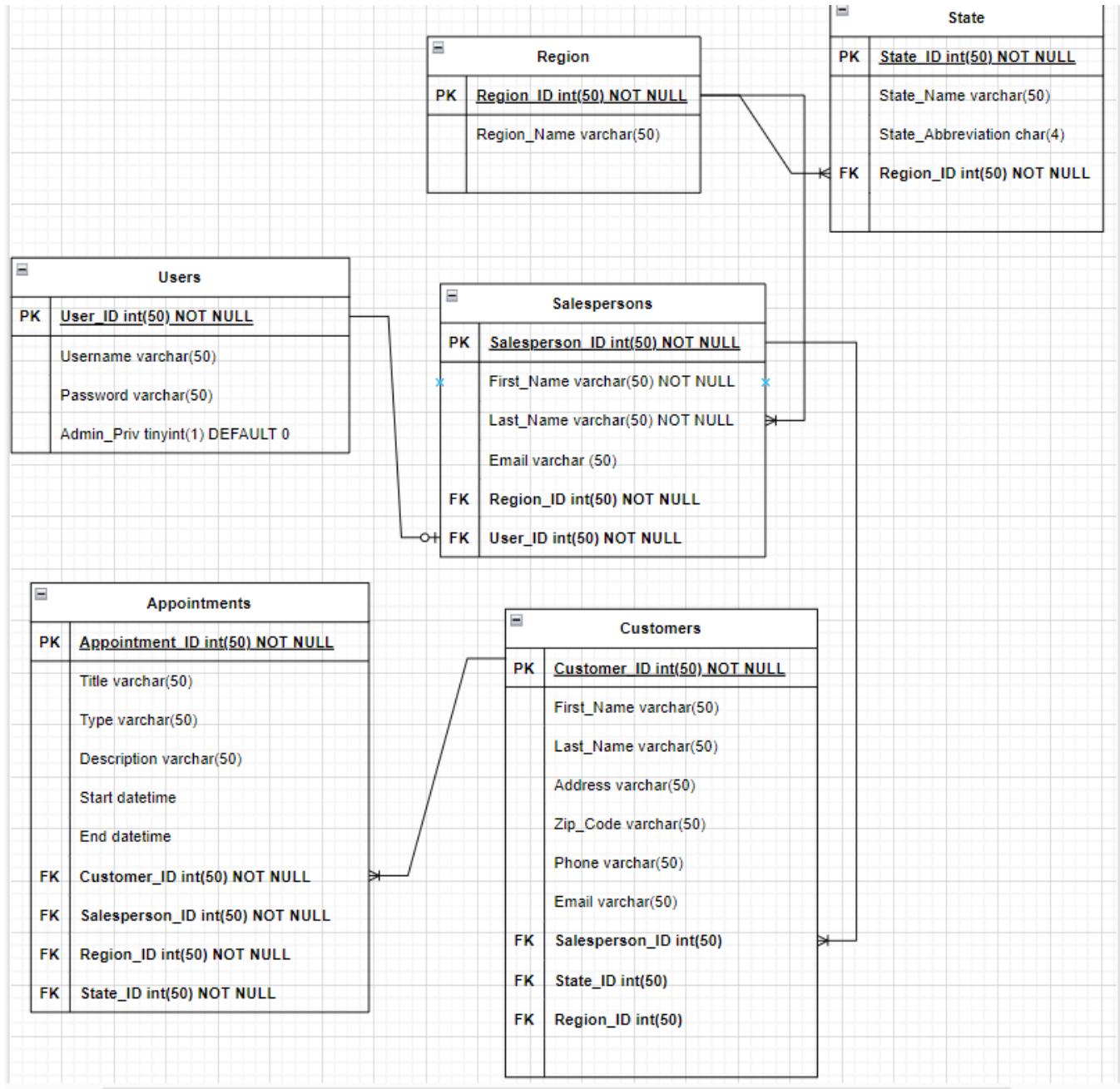
Application Design and Testing

Java Class Design



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Database Entity Relationship Diagram



UI Design

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

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Login Screen

WSU Appointment Organizer+

Username:

Password:

Client Info Screen

Enter Client Info

Customer ID:

First Name:

Last Name:

Address:

Zip Code:

State:

Phone Number:

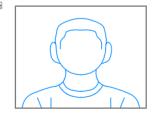
Email:

Region:

Salesperson:

Salesperson's Home Screen

Hello, Sample First Name



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

Upcoming Completed All

Appointments

| ID | Date | Start | End | Client | Title | Type |
|----|------|-------|-----|--------|-------|------|
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

Clients

| ID | Name | Address | Zip | State | Phone | Email |
|----|------|---------|-----|-------|-------|-------|
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

Appointment Organizer+

Appointment Info Screen

Enter Appointment Info

Sign Out

| | |
|-----------------|----------------------|
| Appointment ID: | <input type="text"/> |
| Title: | <input type="text"/> |
| Date: | <input type="text"/> |
| 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

Upcoming Completed All

Sign Out

| | |
|---------------------|----------------------|
| | <input type="text"/> |
| Salesperson: | Sample Name |
| Region: | Sample Region |
| Email: | Sample Email |
| Appointments | |
| Scheduled: | 0 |
| Completed: | 0 |
| Total Appointments: | 0 |
| Total Clients | 0 |

| Appointments | | |
|----------------------|----------------------|----------------------|
| Date | Start | End |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

| Clients | | |
|----------------------|----------------------|----------------------|
| Name | Address | Appointments |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

Create New User Screen

Create New User

Sign Out

| | |
|--|----------------------|
| User Type: | Select User Type ▼ |
| Region: | Select Region ▼ |
| First Name: | <input type="text"/> |
| Last Name: | <input type="text"/> |
| Email: | <input type="text"/> |
| Username: | <input type="text"/> |
| Password: <small>(minimum 5 characters)</small> | <input type="text"/> |
| Re-Enter Password: | <input type="text"/> |

Submit

<- Back

Appointment Organizer+

The image displays two wireframe diagrams of appointment management screens, likely from a user interface design tool like Balsamiq.

All Clients Screen: This screen shows a table for managing client information. The columns are Client ID, Client Name, Address, Zip Code, State, Phone, Email, Salesperson, and Region. At the top, there are buttons for "Select Region" (with a dropdown arrow), "All Regions" (radio button), and "Search....". Below the table are buttons for "Create Client", "Edit Client Info", and "Delete Client". A "Sign Out" button is in the top right corner. A "Back" button is at the bottom left.

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

All Appointments Screen: This screen shows a table for managing appointment details. The columns are Client ID, Client Name, Address, Zip Code, State, Phone, Email, Salesperson, and Region. At the top, there is a date range selector ("Select Date Range: Start Date [calendar icon] to End Date [calendar icon] Submit") and a search bar ("Search...."). Below the table are buttons for "Create Appointment", "Edit Appointment", and "Delete Appointment". A "Sign Out" button is in the top right corner. A "Back" button is at the bottom left.

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

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.

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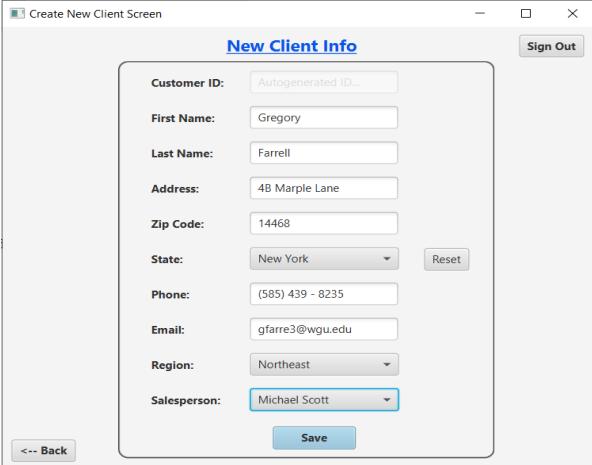
7. Delete the newly created client and confirm that both the client and appointment are now removed from the database.
8. Create a new administrative user.
9. Sign out and log back in with the new admin credentials.
10. Create a new salesperson user.
11. Sign out and log back in with the new salesperson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

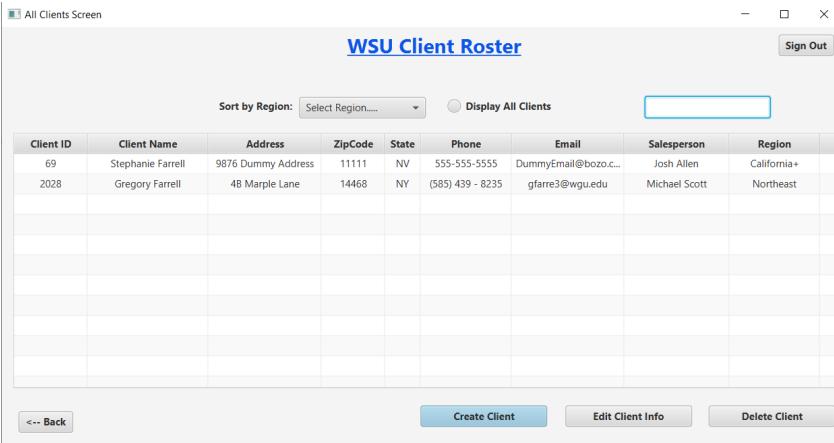
Appointment Organizer+

1.



The 'Create New Client Screen' window titled 'New Client Info'. It contains fields for Customer ID (Autogenerated ID...), First Name (Gregory), Last Name (Farrell), Address (4B Marple Lane), Zip Code (14468), State (New York), Phone ((585) 439 - 8235), Email (gfarre3@wgu.edu), Region (Northeast), and Salesperson (Michael Scott). A 'Save' button is at the bottom.

2.

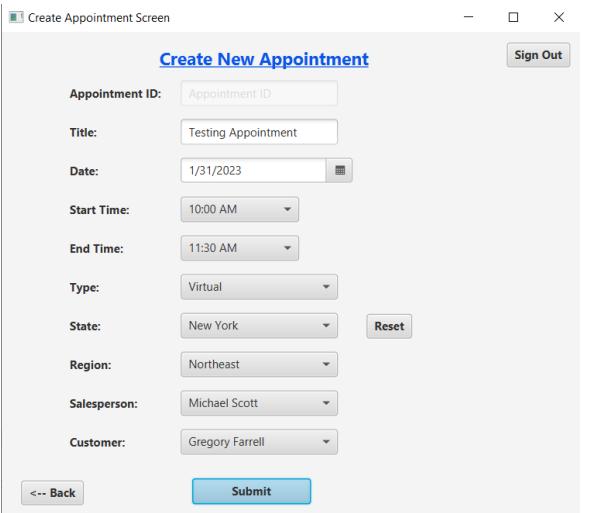


The 'All Clients Screen' window titled 'WSU Client Roster'. It shows a table of clients with columns: Client ID, Client Name, Address, ZipCode, State, Phone, Email, Salesperson, and Region. Two rows are visible:

| 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 |

Buttons at the bottom include '<-- Back', 'Create Client', 'Edit Client Info', and 'Delete Client'.

3.



The 'Create Appointment Screen' window titled 'Create New Appointment'. It contains fields for 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), Region (Northeast), Salesperson (Michael Scott), and Customer (Gregory Farrell). A 'Submit' button is at the bottom.

Appointment Organizer+

4.

| 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.

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

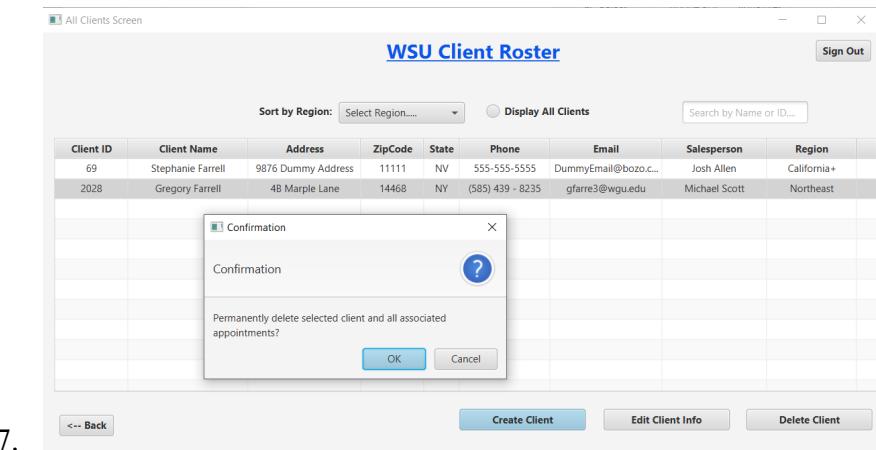
<- Back Submit

6.

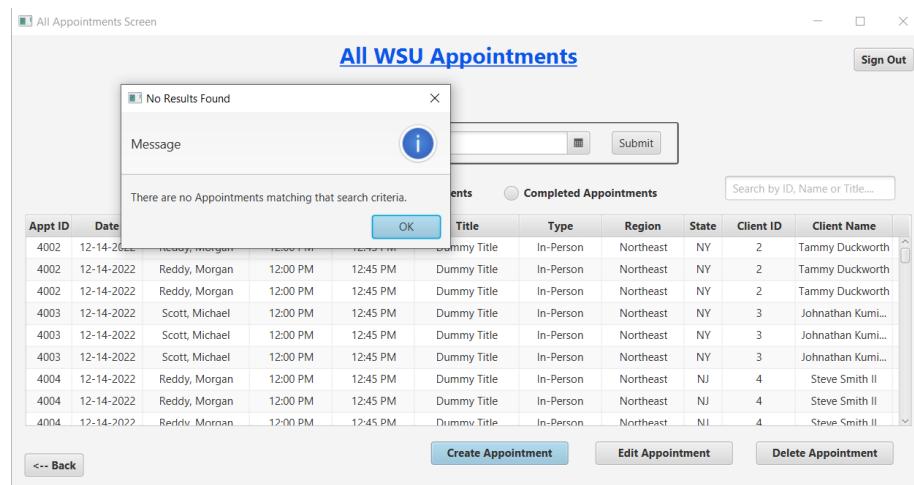
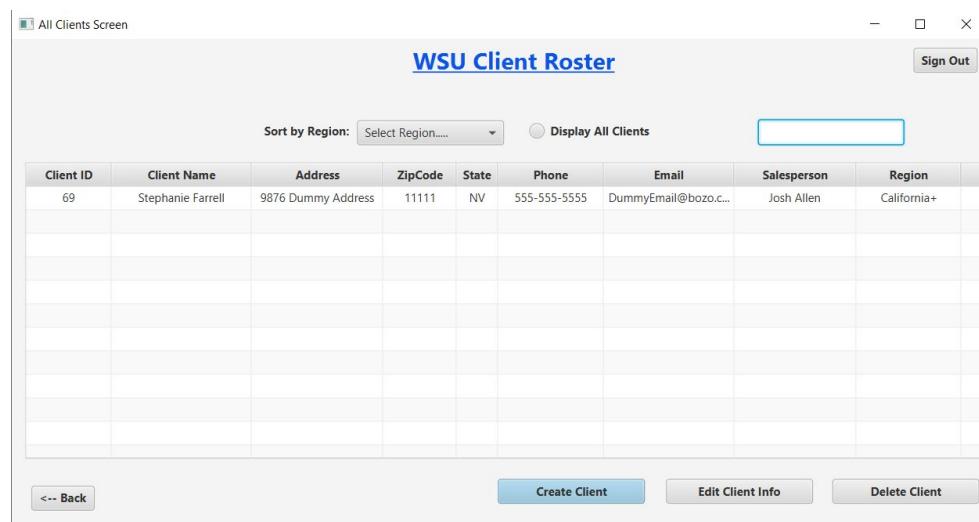
| Appt ID | Date | Salesperson | Start | End | Title | Type | Region | State | Client ID | Client Name |
|---------|------------|----------------|----------|----------|---------------|-----------|-------------|-------|-----------|-------------------|
| 4069 | 12-14-2022 | Allen, Josh | 12:00 PM | 12:45 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

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7.



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8.

Create New User Screen

Create New User

User Type: Administrator

Region: Select Region

First Name: Greg

Last Name: Farrell

Email: gfarrell

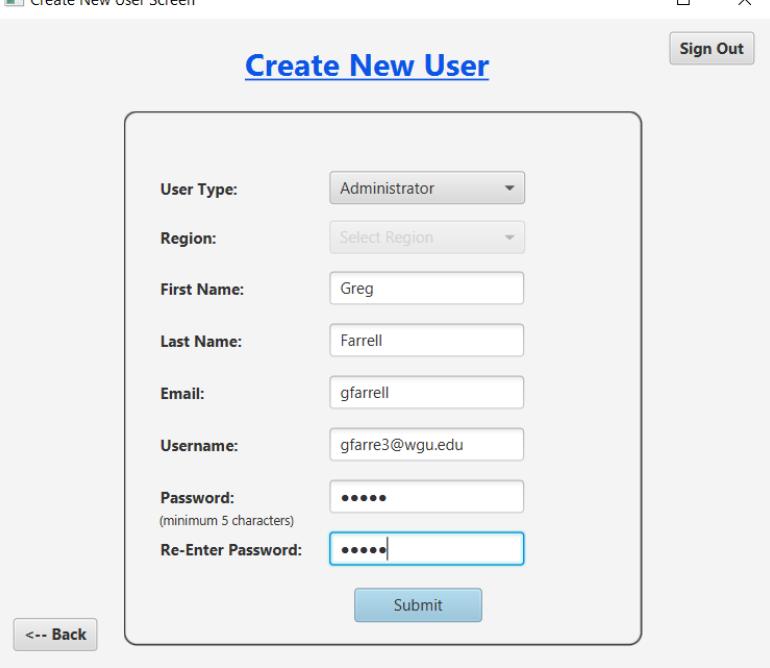
Username: gfarre3@wgu.edu

Password: •••••
(minimum 5 characters)

Re-Enter Password: •••••

Submit

<-- Back



9.

Administrator Home Screen

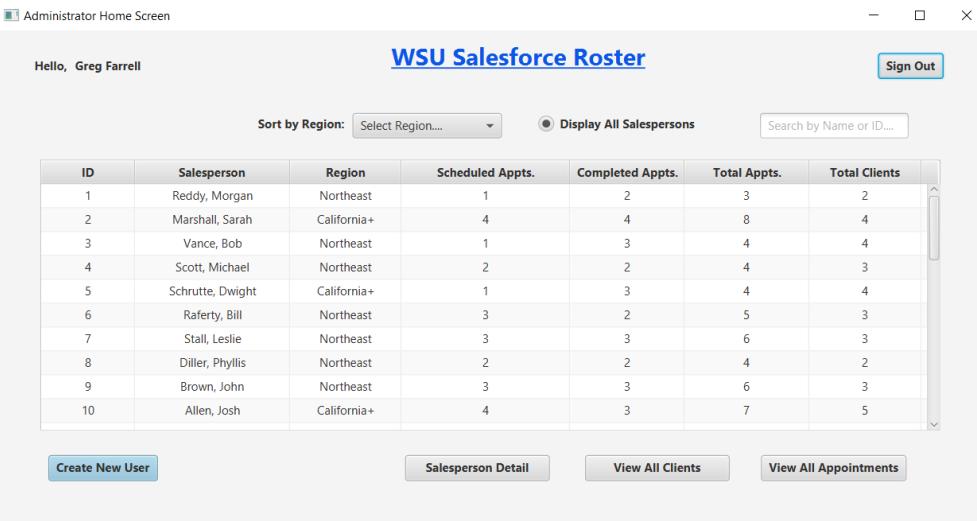
Hello, Greg Farrell

WSU Salesforce Roster

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**



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10.

Create New User Screen

Create New User

User Type: Salesperson

Region: California+

First Name: Biggie

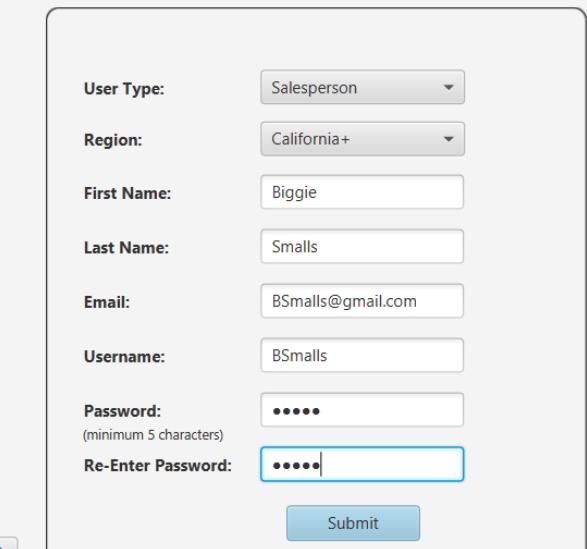
Last Name: Smalls

Email: BSmalls@gmail.com

Username: BSmalls

Password: •••••
(minimum 5 characters)

Re-Enter Password: •••••



10.

11.

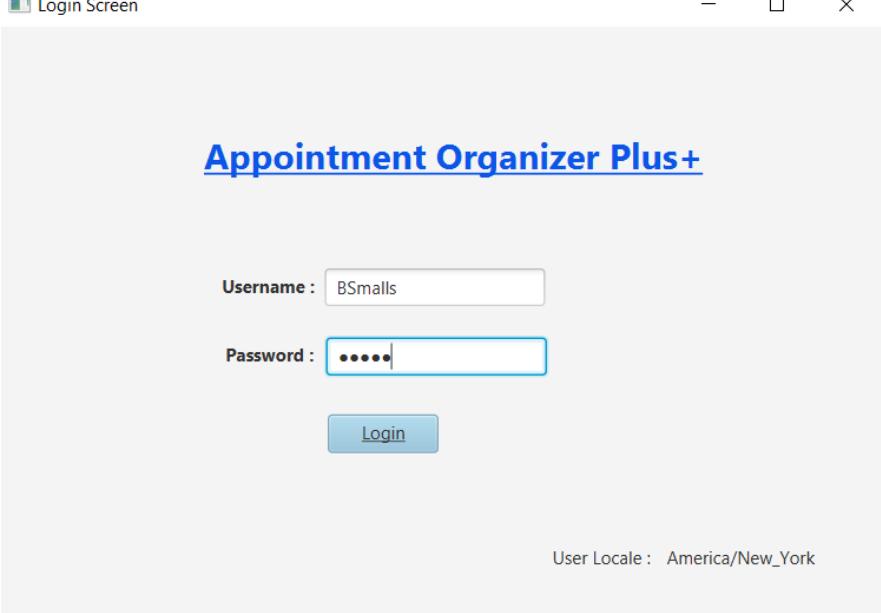
Login Screen

Appointment Organizer Plus+

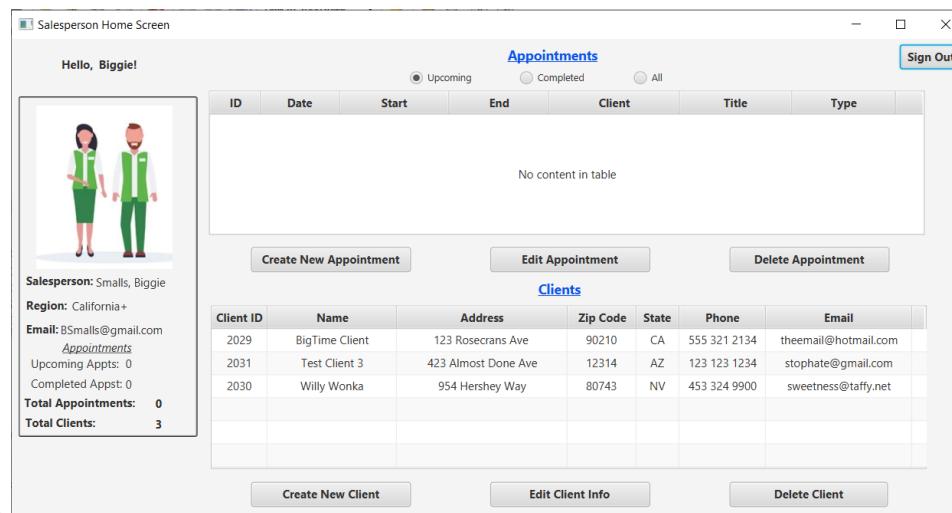
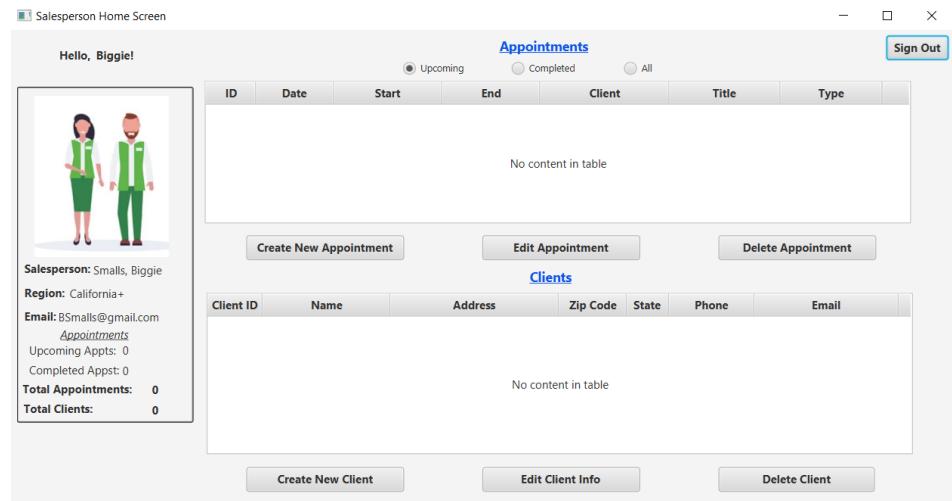
Username : BSmalls

Password : •••••

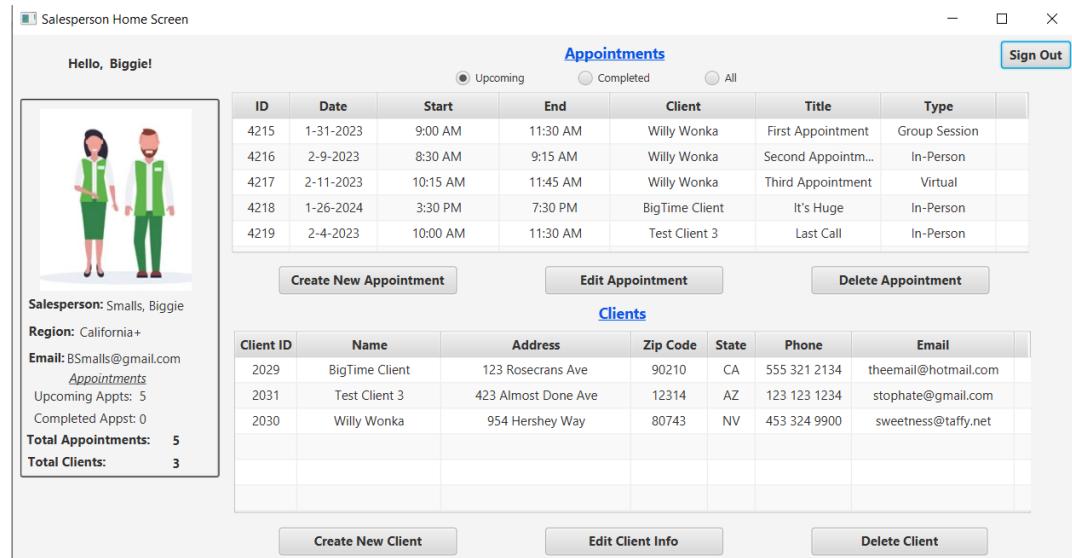
User Locale : America/New_York



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12.



13.

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14.

Edit Appointment Screen

Create New Appointment

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 Smalls

Customer: Willy Wonka

Conflicting Appointment
Error
Salesperson already scheduled 9:00 AM to 11:30 AM

OK

<-- Back

Submit

This screenshot shows the 'Create New Appointment' form. The 'Type' field is set to 'Virtual'. A modal dialog box titled 'Conflicting Appointment' is displayed, indicating an 'Error' with the message 'Salesperson already scheduled 9:00 AM to 11:30 AM'. The 'OK' button of the modal is visible. At the bottom of the main window, there are '<-- Back' and 'Submit' buttons.

15.

Edit Appointment Screen

Create New Appointment

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

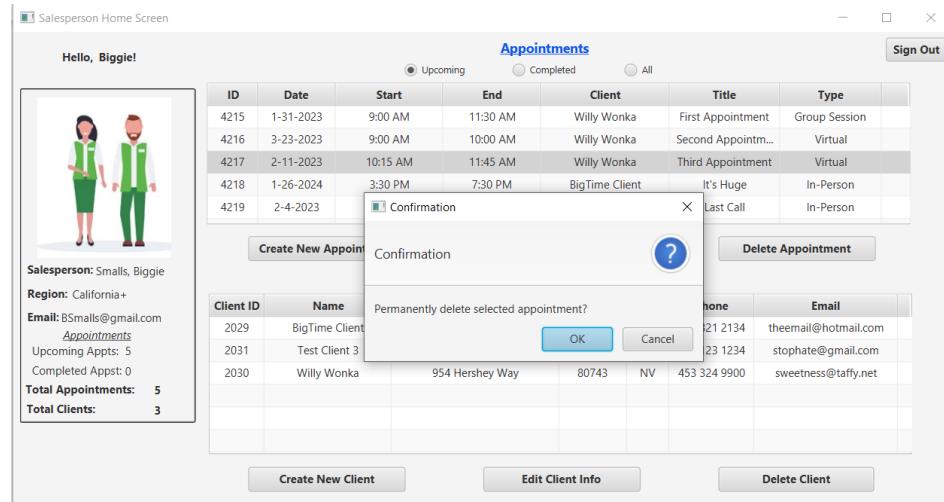
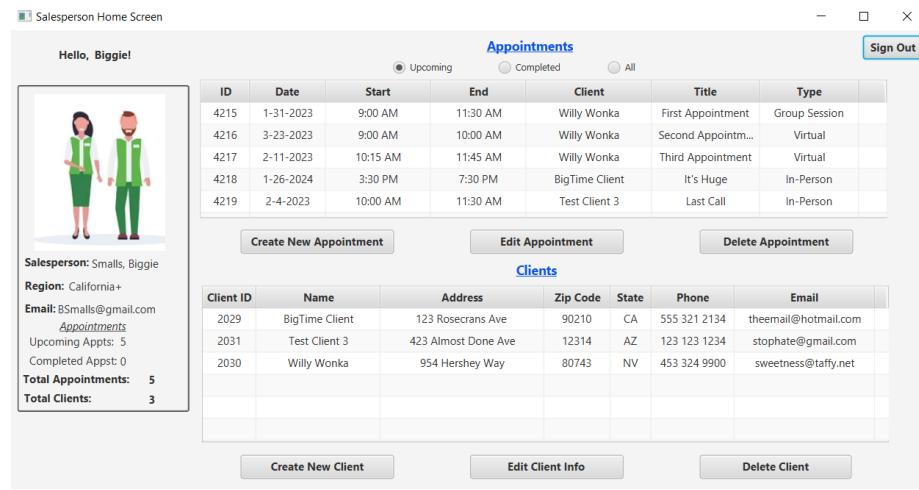
Customer: Willy Wonka

<-- Back

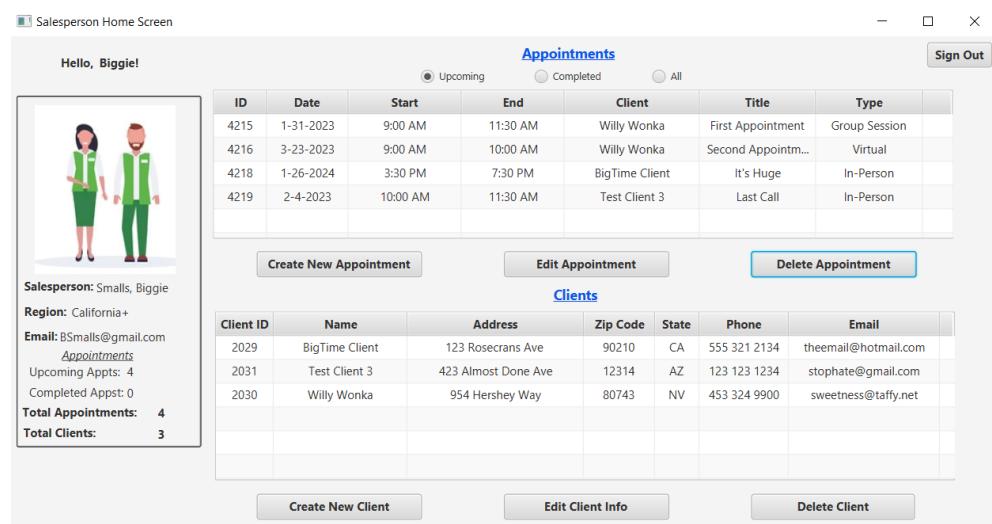
Submit

This screenshot shows the 'Create New Appointment' form with the same fields as the previous one, but the date has been changed to '3/23/2023'. The 'Submit' button at the bottom is highlighted in blue, indicating the form is ready to be submitted.

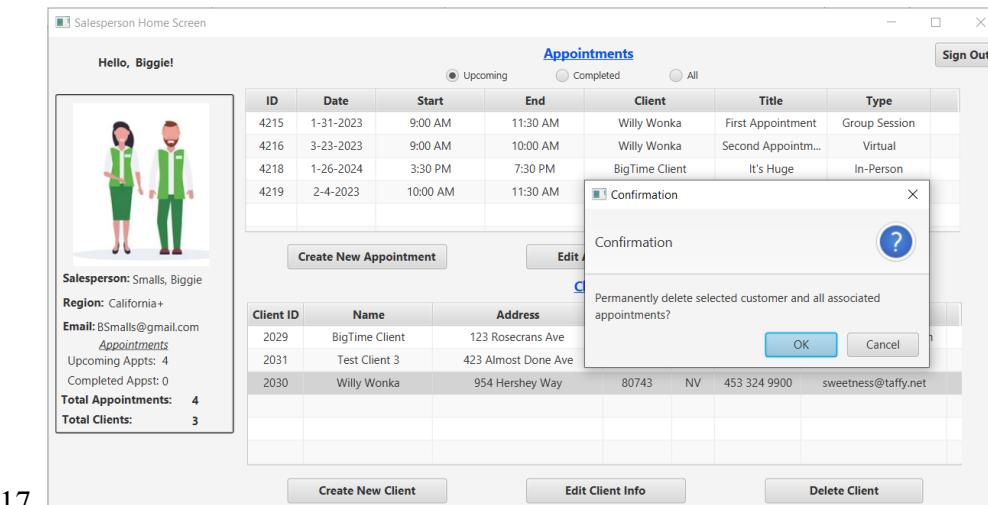
Appointment Organizer+



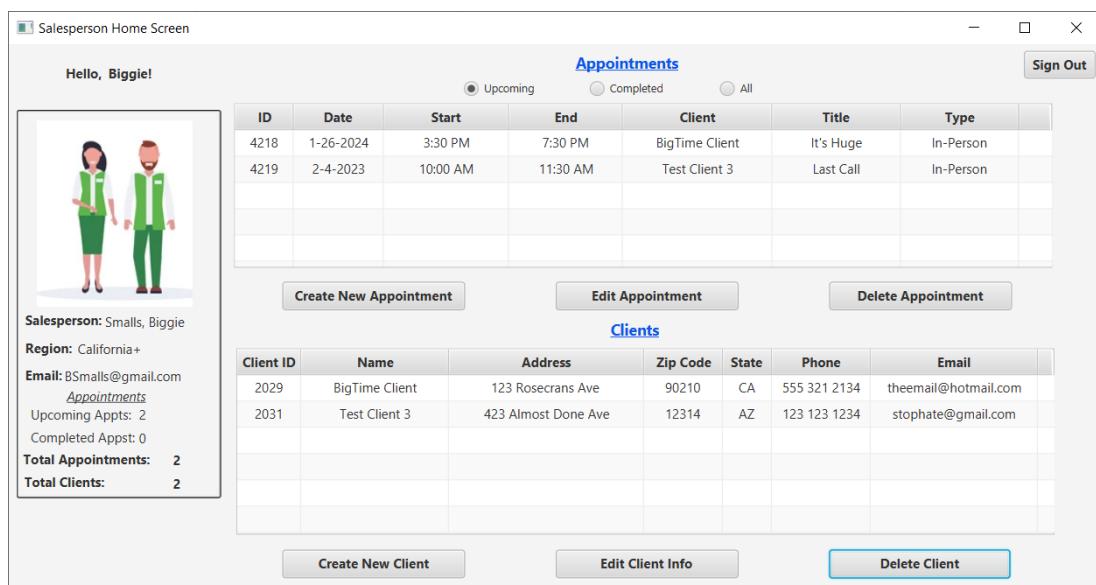
16.



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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.

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- 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.

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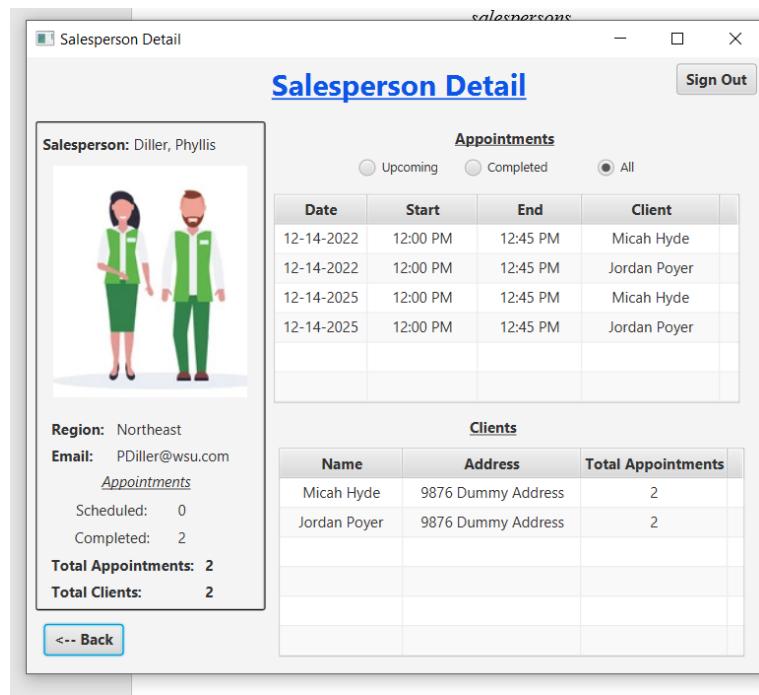
The screenshot shows a Windows application window titled "Administrator Home Screen". Inside, a title bar says "WSU Salesforce Roster". A message "Hello, WGU Evaluator" is displayed. There are buttons for "Sign Out", "Sort by Region: Select Region....", "Display All Salespersons" (which is selected), and "Search by Name or ID....". Below is a table with columns: ID, Salesperson, Region, Scheduled Appts., Completed Appts., Total Appts., and Total Clients. The data is as follows:

| ID | Salesperson | Region | Scheduled Appts. | Completed Appts. | Total Appts. | Total Clients |
|----|------------------|-------------|------------------|------------------|--------------|---------------|
| 1 | Reddy, Morgan | Northeast | 0 | 2 | 2 | 2 |
| 2 | Marshall, Sarah | California+ | 0 | 4 | 4 | 4 |
| 3 | Vance, Bob | Northeast | 1 | 3 | 4 | 4 |
| 4 | Scott, Michael | Northeast | 0 | 2 | 2 | 3 |
| 5 | Schrutte, Dwight | California+ | 0 | 3 | 3 | 4 |
| 6 | Raferty, Bill | Northeast | 0 | 2 | 2 | 3 |
| 7 | Stall, Leslie | Northeast | 0 | 3 | 3 | 3 |
| 8 | Diller, Phyllis | Northeast | 0 | 2 | 2 | 2 |
| 9 | Brown, John | Northeast | 0 | 3 | 3 | 3 |
| 10 | Allen, Josh | California+ | 0 | 4 | 4 | 5 |

Buttons at the bottom include "Create New User", "Salesperson Detail", "View All Clients", and "View All Appointments". A note at the bottom says "Wishes to sort by any of the column categories."

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.*

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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.

The screenshot shows the "All Clients Screen" window titled "WSU Client Roster". It features a table with columns for Client ID, Client Name, Address, ZipCode, State, Phone, Email, Salesperson, and Region. The table contains 15 rows of sample data. At the top, there are filters for "Sort by Region" (with a dropdown menu "Select Region...."), "Display All Clients" (radio button selected), and a search bar "Search by Name or ID...". At the bottom, there are buttons for "Create Client", "Edit Client Info", and "Delete Client", along with a "Back" button.

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.

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- 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.

The screenshot shows a window titled "Create New Client Screen". Inside, a form titled "New Client Info" is displayed. The form contains the following fields:

- 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

At the bottom left is a "Save" button, and at the bottom left corner is a "Back" button labeled "<-- Back". In the top right corner, there is a "Sign Out" button.

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- 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.*

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The screenshot shows a Windows application window titled "All Appointments Screen". At the top, there is a header bar with the title "All WSU Appointments" and a "Sign Out" button. Below the header is a search bar labeled "Select Date Range:" with two date input fields and a "Submit" button. Underneath the search bar are three radio buttons: "All Appointments", "Upcoming Appointments" (which is selected), and "Completed Appointments". To the right of these buttons is a search input field with the placeholder "Search by ID, Name or Title....". The main content area is a table with the following columns: Appt ID, Date, Salesperson, Start, End, Title, Type, Region, State, Client ID, and Client Name. The table contains 10 rows of sample data. At the bottom of the table are three buttons: "Create Appointment", "Edit Appointment", and "Delete Appointment". On the left side of the table, there is a "Back" button.

| 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 | Dummvy Title | In-Person | Northeast | CT | 13 | Tom Michaels |

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

- The table columns themselves can be clicked to reorder the table if the user wishes order sort by any of the table column categories.
- The radio buttons allow the user to sort by Upcoming, Completed or All appointments.
- 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.
- If an empty search is entered the table will also repopulate with all appointments.
- The custom date range allows the user to search over a specified period of time.
 - 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)

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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-based application window titled "Create Appointment Screen". At the top right are standard window controls: a minus sign for minimize, a square for maximize/minimize, and an X for close. Below the title bar is a header with the text "Create New Appointment" in blue and a "Sign Out" button. The main area contains several form fields:

- Appointment ID:** A text input field labeled "Appointment ID".
- Title:** A text input field labeled "Enter Title".
- Date:** A date input field labeled "Select Date" with a calendar icon.
- Start Time:** A dropdown menu labeled "Select Start".
- End Time:** A dropdown menu labeled "Select End".
- Type:** A dropdown menu labeled "Select Type".
- State:** A dropdown menu labeled "Select State". This field has a blue border, indicating it is currently selected or focused.
- Region:** A dropdown menu labeled "Select Region".
- Salesperson:** A dropdown menu labeled "Select Salesperson".
- Customer:** A dropdown menu labeled "Select Customer".

At the bottom left is a "Back" button labeled "<-- Back". At the bottom center is a large blue "Submit" button. To the right of the "Submit" button is a "Reset" 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.
- 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

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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.*

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- 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 window titled "Create New User Screen". At the top right are standard window controls: a minus sign for minimize, a square for maximize/minimize, and an X for close. To the right of the title bar is a "Sign Out" button. The main content area is titled "Create New User" in blue text. Below this is a form with the following fields:

| | |
|-------------------------------------|-------------------|
| User Type: | Select User Type |
| Region: | Select Region |
| First Name: | Enter First Name |
| Last Name: | Enter Last Name |
| Email: | Enter Email |
| Username: | Enter Username |
| Password: (minimum 5 characters) | Enter Password |
| Re-Enter Password: | Re-Enter Password |

At the bottom left of the form is a "Submit" button. In the bottom left corner of the entire window is a "Back" button labeled "<-- Back".

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.*

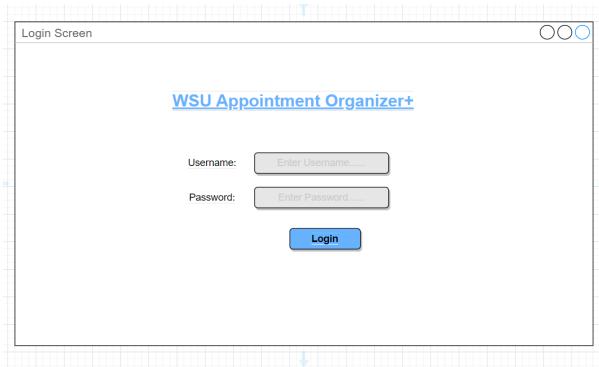
Appointment Organizer+

- 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:

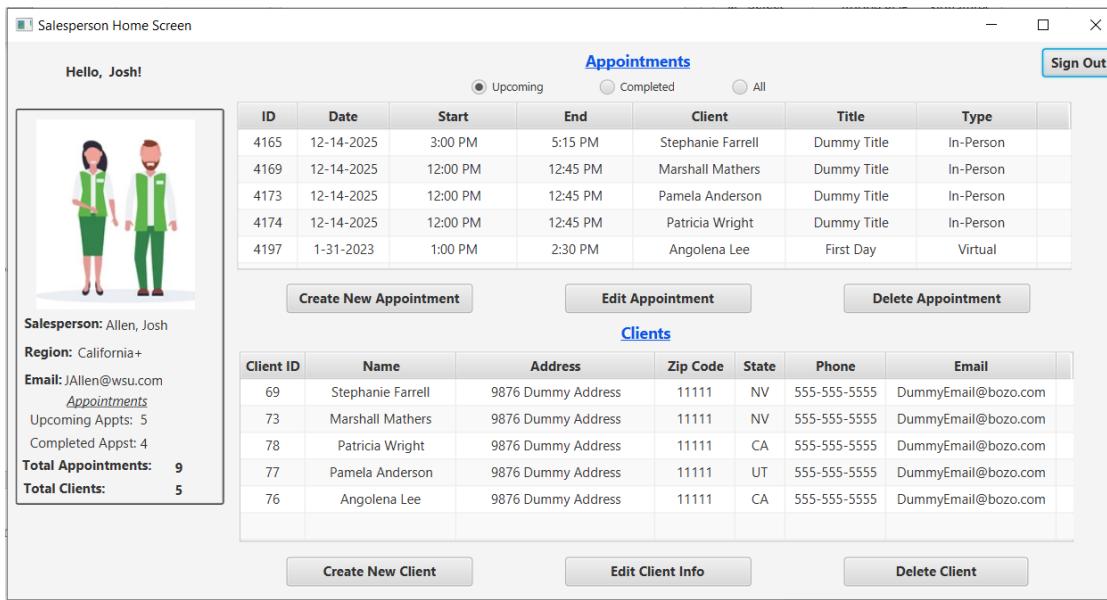


2. There are a variety of dummy users entered into the database, enter: Username: user10, Password: 12345

Salesperson Home Screen

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

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- 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.

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- 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.

The screenshot shows the 'New Client Info' form within a window titled 'Create New Client Screen'. The form is designed for inputting client details. It includes fields for Customer ID (Autogenerated ID...), First Name, Last Name, Address, Zip Code, State (dropdown menu), Phone, Email, Region (dropdown menu), and Salesperson (dropdown menu). A 'Save' button is located at the bottom right of the form area. Navigation buttons for '<-- Back' and 'Sign Out' are visible on the left and right sides of the window respectively.

| New Client Info | |
|-----------------|---|
| Customer ID: | Autogenerated ID... |
| First Name: | <input type="text"/> |
| Last Name: | <input type="text"/> Enter Last Name |
| Address: | <input type="text"/> Enter Address |
| Zip Code: | <input type="text"/> Enter Zip Code |
| State: | Select State |
| Phone: | <input type="text"/> Enter Phone Number |
| Email: | <input type="text"/> Enter Email |
| Region: | California+ |
| Salesperson: | Josh Allen |
| Save | |

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- 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 the "Edit Client Info" screen. The window title is "Edit Client Info". On the right side, there is a "Sign Out" button. The main area contains the following form 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 left is a "Back" button labeled "<-- Back". At the bottom center is a "Save" button.

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- 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.

The screenshot shows the 'Create New Appointment' screen. At the top right is a 'Sign Out' button. Below it are several input fields:

- Appointment ID:** A text input field labeled 'Appointment ID'.
- Title:** A text input field labeled 'Enter Title'.
- Date:** A date picker labeled 'Select Date' with a calendar icon.
- Start Time:** A dropdown menu labeled 'Select Start'.
- End Time:** A dropdown menu labeled 'Select End'.
- Type:** A dropdown menu labeled 'Select Type'.
- State:** A dropdown menu labeled 'Select State' with a blue border, indicating it is selected.
- Region:** A dropdown menu labeled 'California+'.
- Salesperson:** A dropdown menu labeled 'Josh Allen'.
- Customer:** A dropdown menu labeled 'Select Customer'.

At the bottom are two buttons: '<-- Back' and '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.

Appointment Organizer+

- 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 the 'Edit Appointment Info' window. At the top right is a 'Sign Out' button. The main area contains the following form fields:

| | |
|-----------------|-----------------|
| Appointment ID: | 4174 |
| Title: | Dummy Title |
| Date: | 12/14/2025 |
| Start Time: | 12:00 PM |
| End Time: | 12:45 PM |
| Type: | In-Person |
| State: | California |
| Region: | California + |
| Salesperson: | Josh Allen |
| Customer: | Patricia Wright |

At the bottom 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.

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- 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.