URL: https://staging.pabau.com/

Tasks

#1 Write a Jira ticket specification that will help a developer build the appointment cancellation feature from the Pabau 2 calendar.

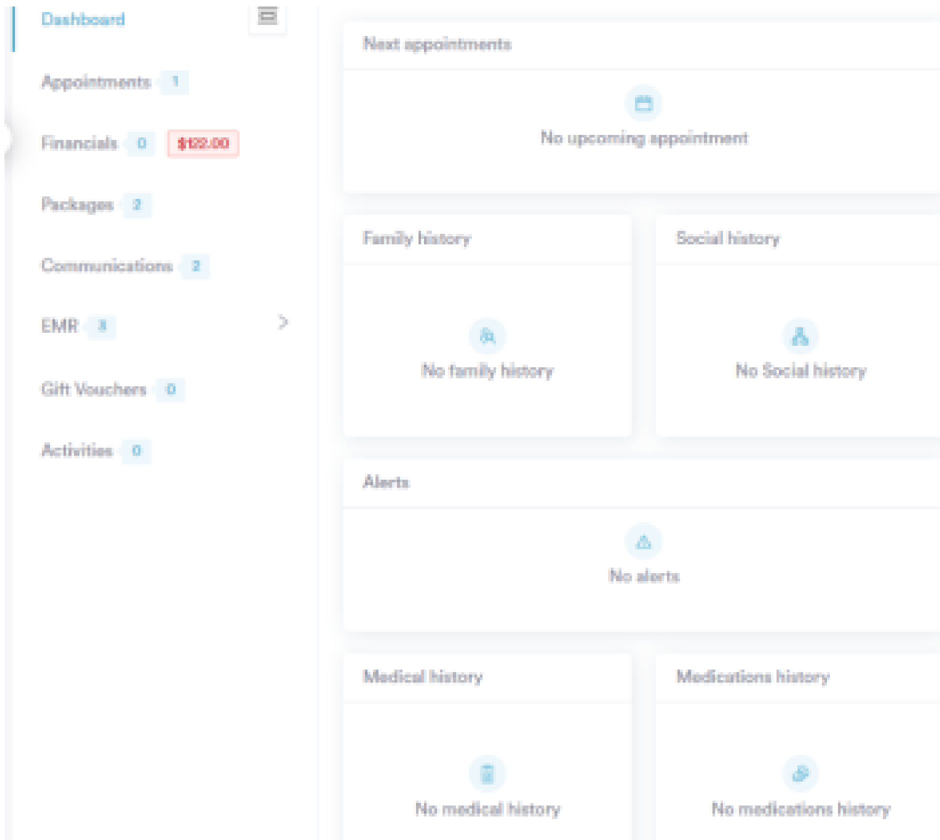
ANSWER:

Title: Calendar appointment cancellation feature

Description and steps:

- Open and log into the Pabau2.
- Once you're in, move to the left side of the screen to the sidebar.
- On the sidebar navigate to the third icon under the Pabau logo with a calendar. logo/picture (if it's not extended where it says *Calendar*).
- Click on the calendar.
- Once the calendar has opened, you will see on the screen rows and columns with time, date, and clinics.
- Go to any of the rows independent of the time, and click on the row's field.
- With this you will have a window open for scheduling a new appointment.
- In the scheduling window fill out the data fields just to make sure you can schedule a test appointment.
- Afterwards, once the appointment has been made, please book the appointment by clicking the blue button on the bottom of the appointment window.
- When the window closes and the appointment appears on the screen on the calendar, find your appointment and click on it.
- Once the small window pops out, check out the multiple feature-buttons that are for the appointment.
- There should be a Cancel option added to the already give features (*Edit Appointment, Reschedule, Treatment Note, Rebook, Start Pathway*)
- And make sure it's color-filled so it's a simple symbol for the users to recognize and try to not click it by mistake.

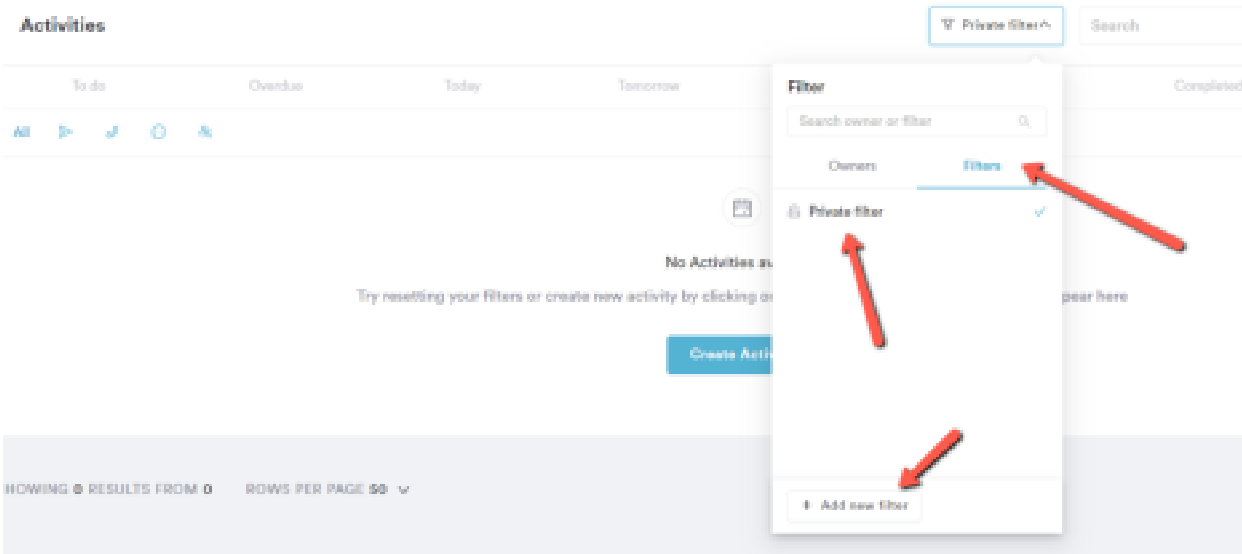
#2 Elaborate on where the information in these widgets on the client card come from:



ANSWER:

- This is the Client card which is accessed by going to the sidebar on the main screen and clicking on the Clients button. Afterwards once the list of all clients to scroll through is loaded, either quick search the client or scroll to them and click them to open.
- Every widget pulls information relevant to the client card according to the input of the user and/or of the client's scheduling.
    - The Appointments widget pulls from the bookings, so if there are incoming bookings they will be displayed, if not they will stay in the history in the Appointments section of the client card, not on the dashboard with widgets.
    - The other ones like medical history, medication history, family and etc. come from the EMR data of the client collected.

#3 Describe to a new colleague how the custom filters feature works in Pabau, on the Activities page - include how adding a new feature works:



ANSWER:

- The custom filter feature in Pabau in the Activities section is a unique feature that helps the users to sort out and filter their activities, whether they are just under Activities, Clients or Leads.
- To access this go to the top of the Activities section and click on the small button that says *Select a person*, which will open a window drop-down for the filtering.
- Here you can use an already ready-to-go filter created from before, or you can create new ones.
- To create a new one according to your need, click on the button in this small window that says *Add new filter*.
- Then 70% of the screen will be covered by a new window which contains all the separate conditions for the filtering that will be needed to get to where you want to be with the results.
- Other options are Visibility, to show it to all users of the software or only to the creator of the filter.
- Main conditions-filters are the activity one and the ANY conditions. Here you can set up conditions on which the sorting is put out.
- You can delete conditions, change then, mark them *To do* or *Done*,
- And once you are done, you can click *Preview* at the bottom of the window to see the results of your filtering.

#4 You are a QA tester, and are approached by a developer in a direct message asking you to test their ticket as soon as possible. Describe the actions you would take, below.

ANSWER:

First things first, I would find and open the ticket, whilst having the dev on the side to ask him more about the ticket and the problem to get better insights into the matter.

Second, analyze the problem and make a plan on how the ticket fits into my own daily plan, tasks and work. If there is space for it and time it would be done, but this would also depend on my communication with my lead to make sure I have the go-to green light to work on this new ticket and not on a higher priority or other tasks.

Third, start work on the ticket or not, given my time slots in my schedule and if there is a go-to from the lead. If it's all ready to go, then I'll be testing the ticket as soon as possible.