Users Instruction Manual

Product Identification Information

Product Name: Longworth Dashboard Story
Model Number: V1.0

Pre-requisites

At Present, only those user individuals whose login credentials have been directly created within the database are able to access the application, and are limited to their assigned user-role view. It is important to note that for security purposes, all users will be required to change their passwords upon receipt of their login credentials.

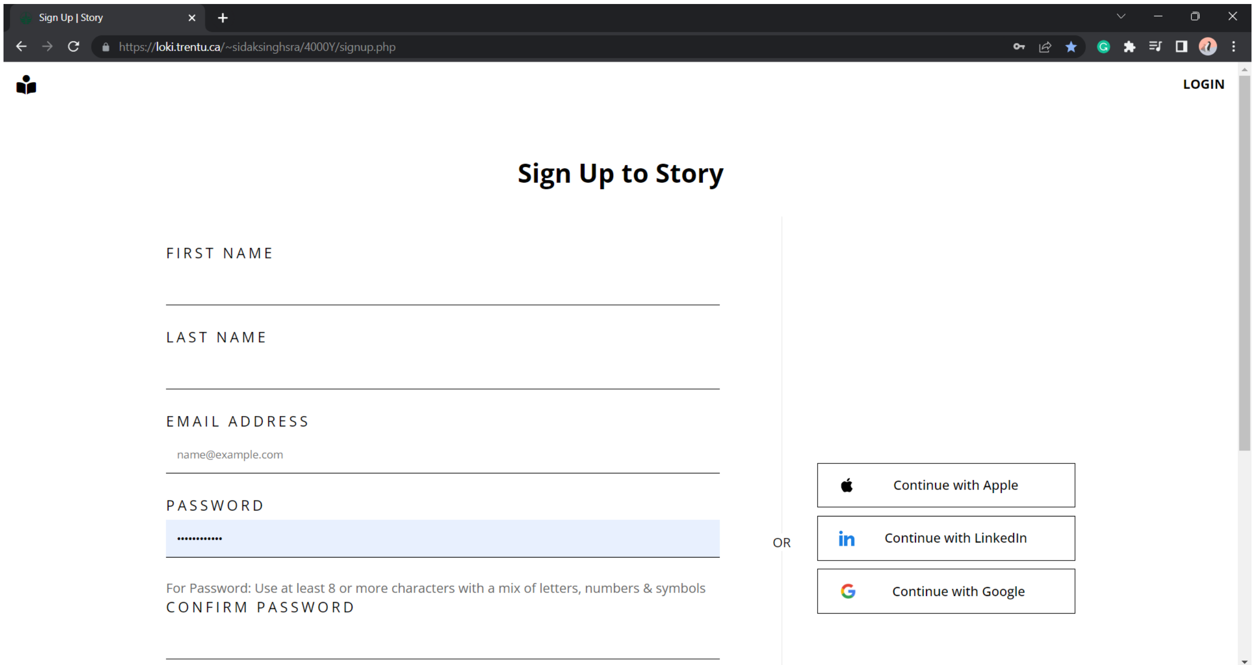
Adding New Users - Sign Up

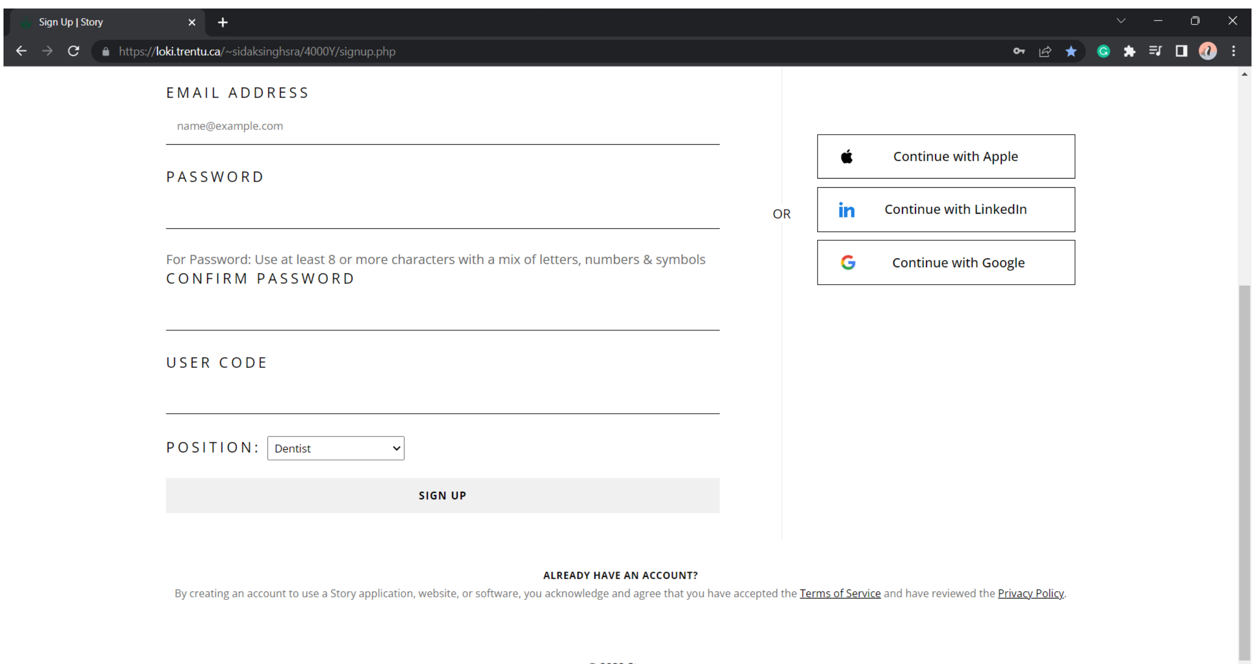
Welcome to the Story Website! To create your account, follow these simple steps:

- Access the Sign-Up Page: Visit our homepage and click the "Create Account" button located at the top right corner.

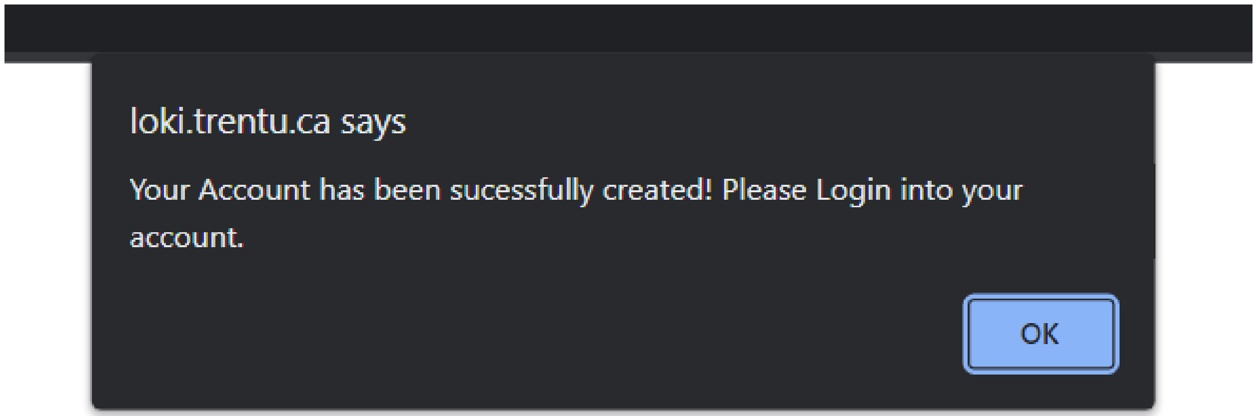
- Fill Out the Registration Form: On the Sign-Up page, provide your full name, a valid email address, and create a secure password. Enter the user code of maximum length - 5 (it should be given by the company) and select the position/role of your job. Don't forget to read to our Terms of Service and Privacy Policy.

Sign up Page: -





- Log In and Explore: After clicking on Sign Up button, your account will be registered.



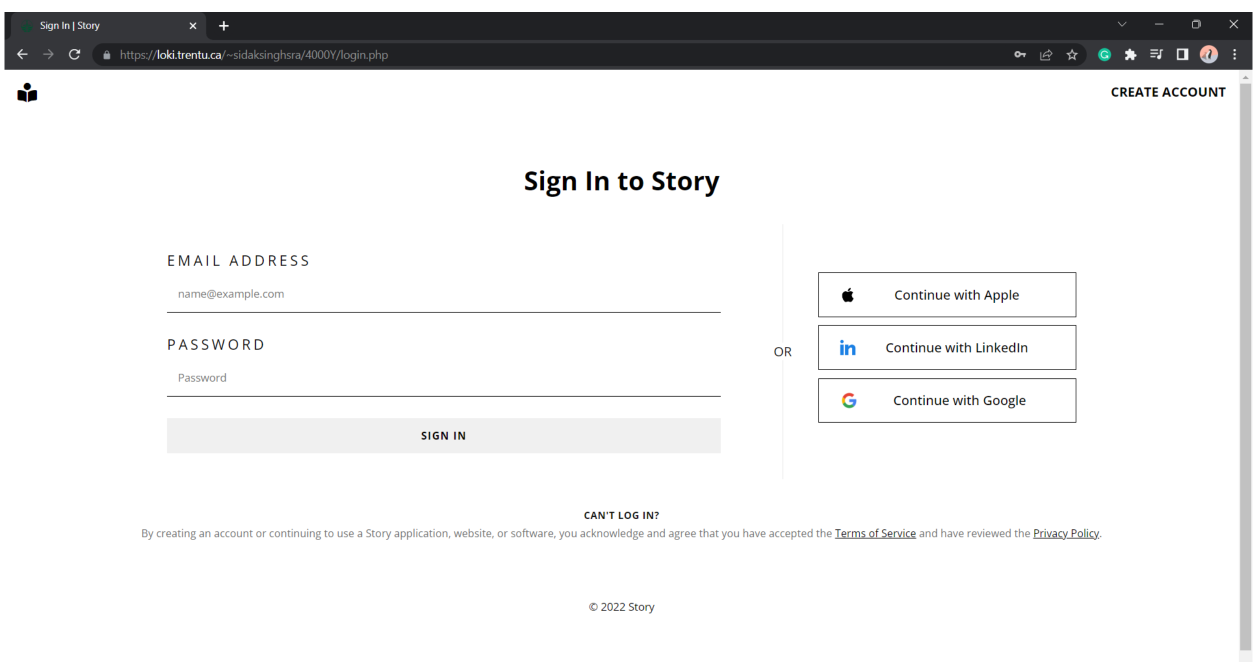
You will need to click ‘OK’ so that it will automatically re-direct you to the Log in Page.

Congratulations! Your account is now active. Use your email and password to log in and start exploring our platform.

Accessing the Application - Log In

Welcome to the Story Website! To log in to your account, follow these simple steps:

- Access the Login Page: Visit our homepage. You'll find the login section prominently displayed. Login page is basically our homepage:-

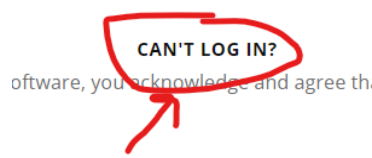


- Enter Credentials: In the designated fields, input your registered email address and password. Be sure to double-check for accuracy to avoid login issues.

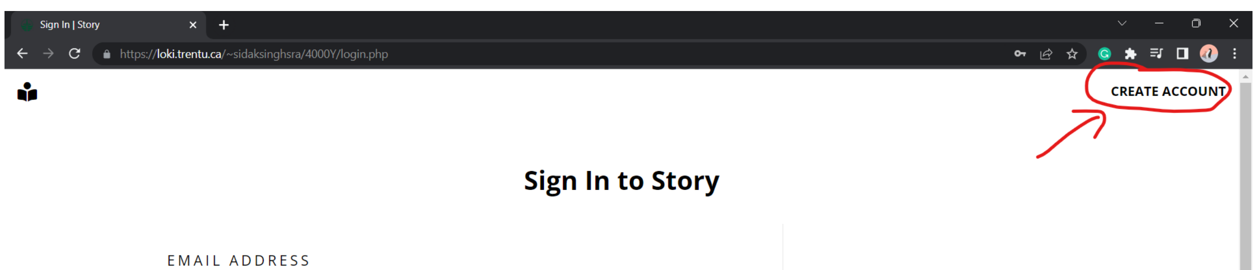
- Click 'SIGN IN'': Once you've entered your credentials, click the 'SIGN IN' button. If your information is correct, you'll be redirected to your personalized account dashboard, according to your user role.

Login page is also having the additional following functionalities: -

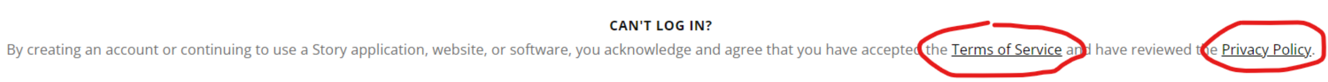
- Forgot Password? If you're having trouble remembering your password, click the 'CAN'T LOG IN?' link. Follow the on-screen instructions to reset your password and regain access to your account. We have provided the detailed information about how to reset your password in this user manual.



- New User? If you haven't created an account yet, click the 'Create Account' button to register!



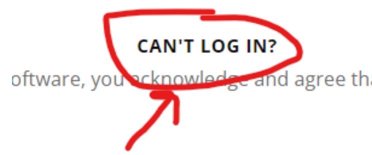
- Terms of Service & Privacy Policy: Familiarize yourself with our terms and privacy policy by clicking on the respective links available at the bottom of the homepage. It's important to understand and adhere to these guidelines while using our platform.



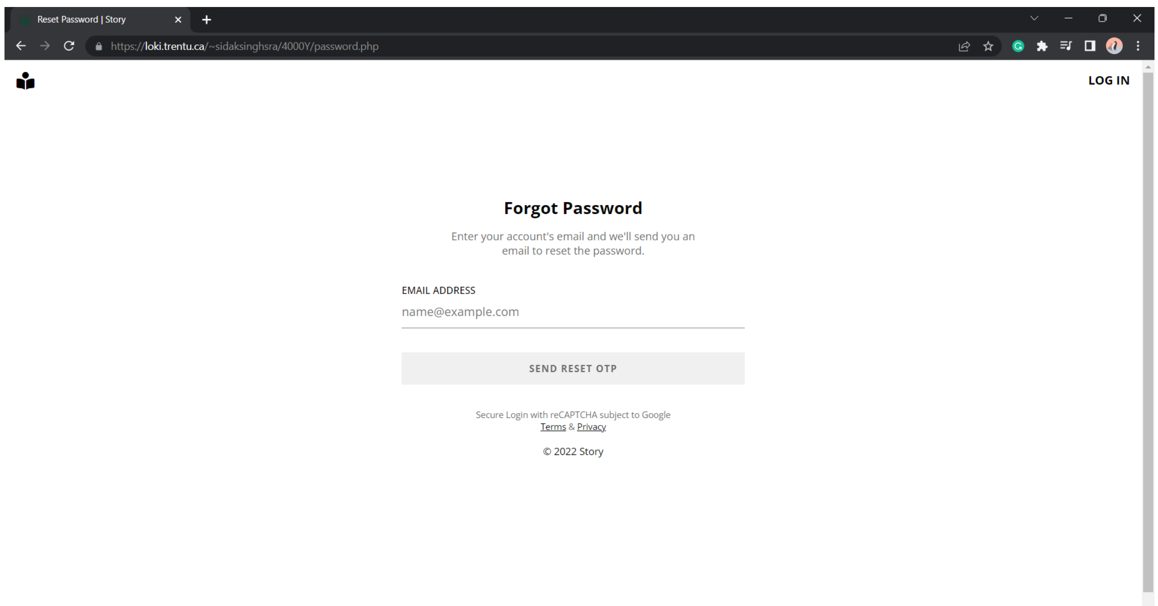
Change Password, Forgot Password, Reset Password

If you need to reset or change your password, follow these simple steps:

- Access Forgot Password Page: On the Login page, click the 'Can't login?' link. You'll be redirected to the Forgot Password page.

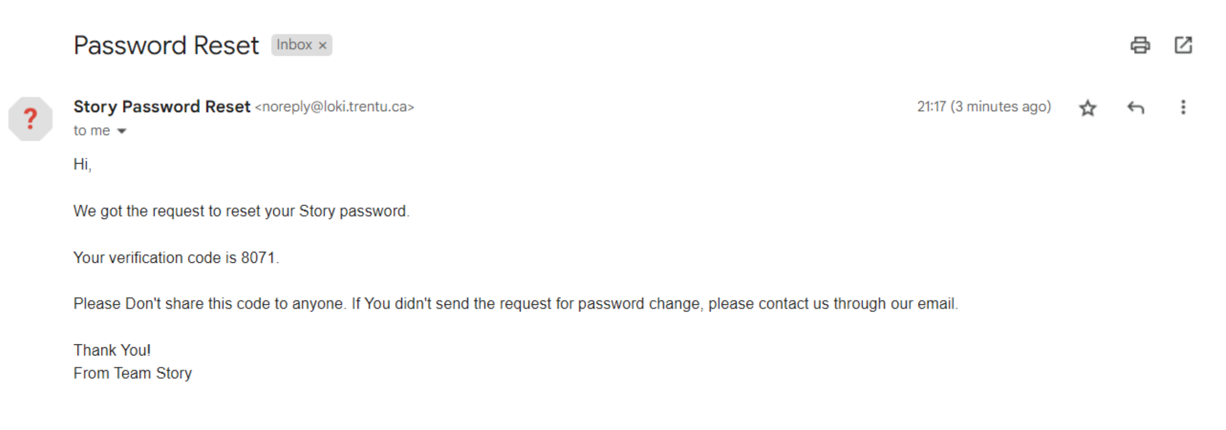


Forgot Password page: -

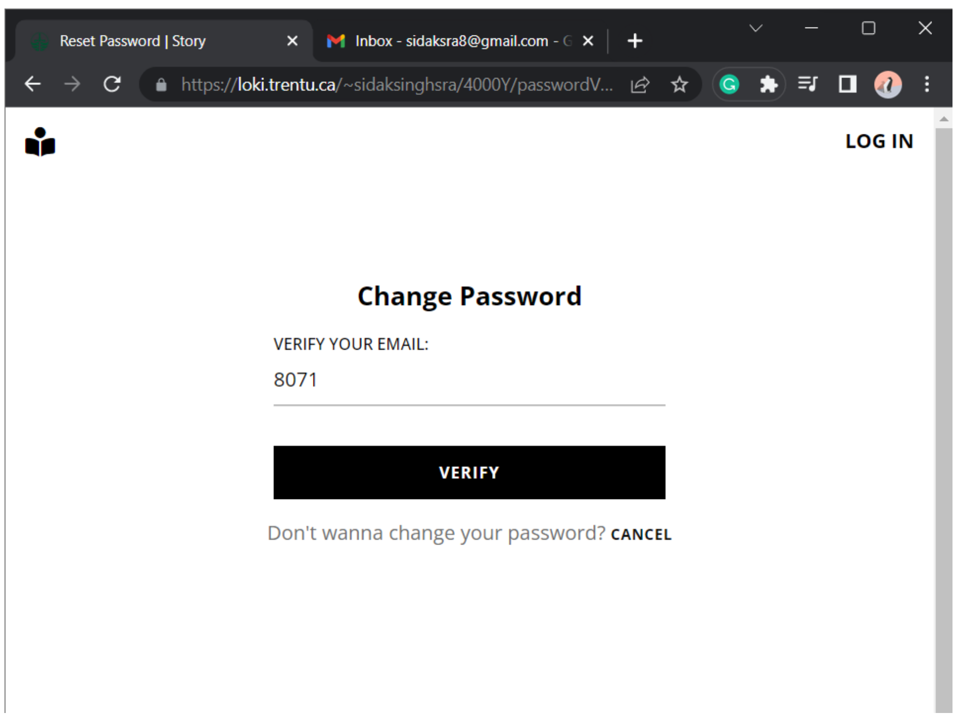


- Request Reset OTP: Enter your registered email address and click the 'Send Reset OTP' button. If your email address is registered with Story Website, you'll receive a 4-digit verification code.

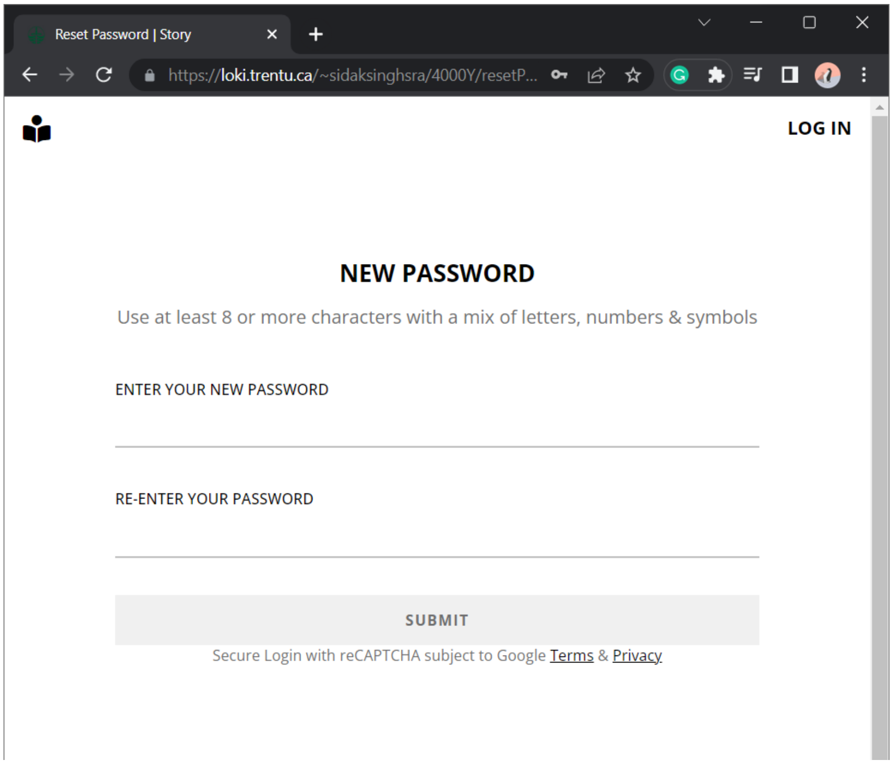
- Email Verification: Check your inbox for an email containing the unique 4-digit verification code. If your email isn't registered, you won't receive the code.



- Enter Verification Code: On the Verification page, input the 4-digit code from the email and click the 'Verify' button.

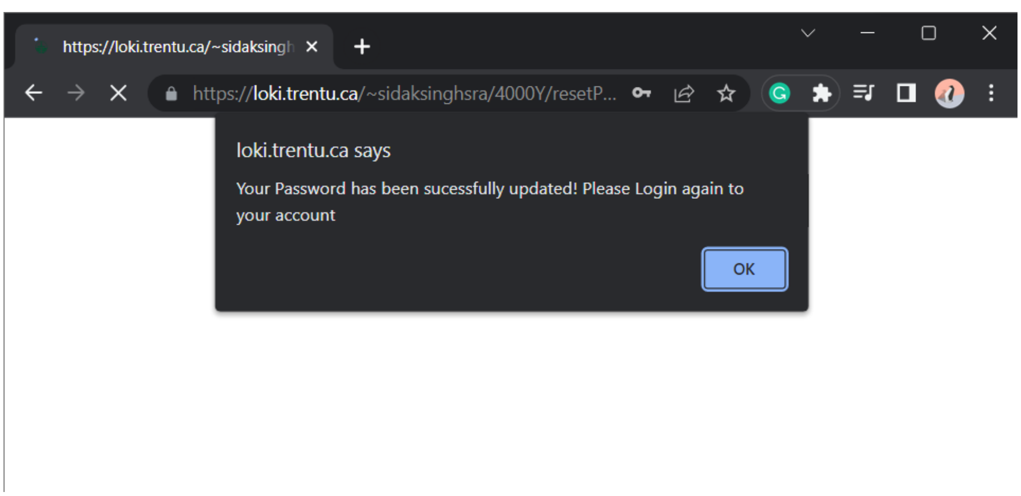


- You'll be redirected to the Reset Password page upon successful verification.



- Create a New Password: Enter a new password, following the guidelines of using at least 8 characters, including a mix of letters, numbers, and symbols. Re-enter the password for confirmation.

- Update Password: Click the 'Submit' button. An alert box will appear, confirming your password has been successfully updated. Return to Login Page: Click 'OK' on the alert box to be redirected to the Login page.

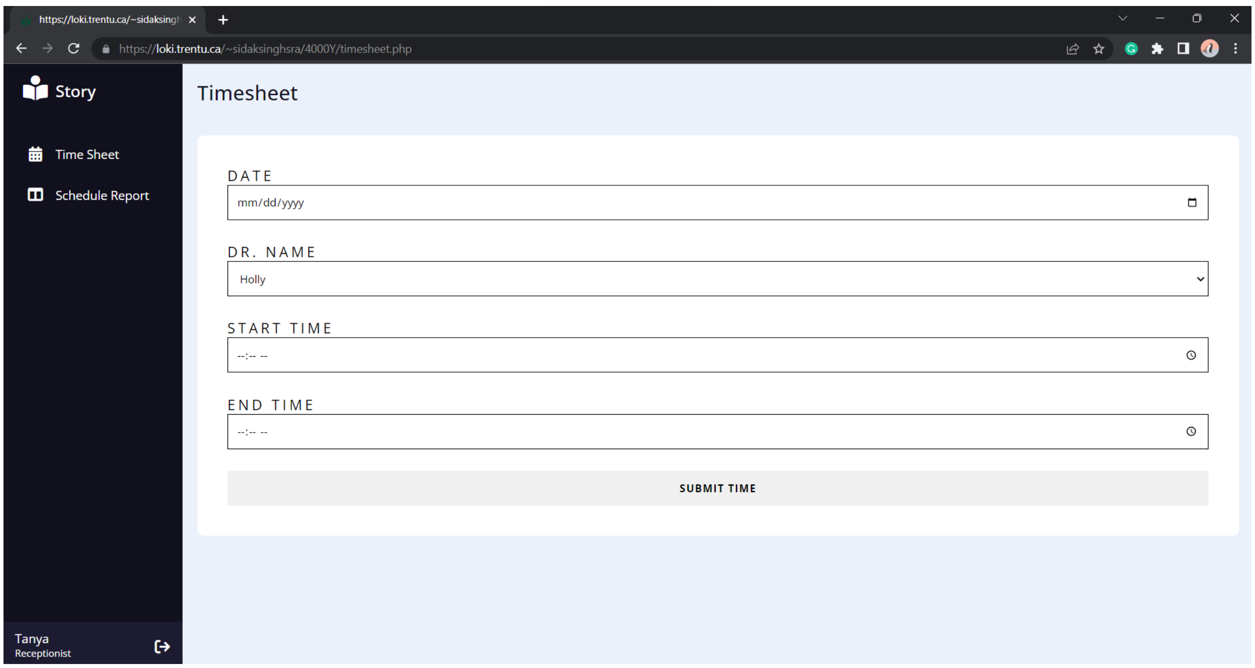


- You can now log in using your updated password.

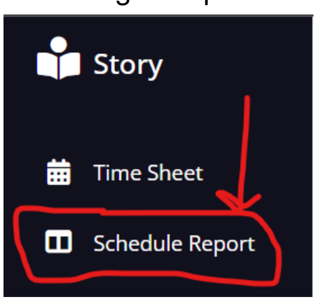
User Role Type - Receptionist

Welcome to the Receptionist Page! As a receptionist, you have access to various features, including viewing and managing timesheets for providers. Follow these simple steps to navigate the page:

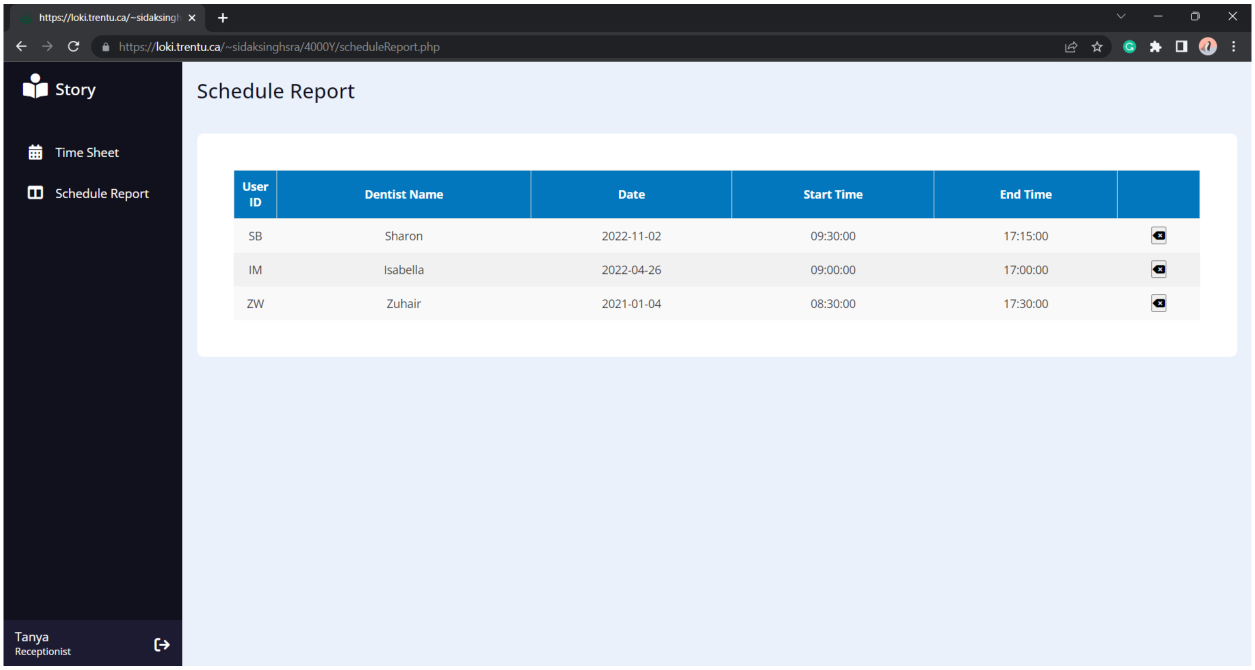
- Login: Access the main Login page and sign in with your receptionist credentials. You will be redirected to the Receptionist Page upon successful login.



- View Existing Timesheets: Click on the 'Schedule Report' link located in the left-hand side navigation panel.



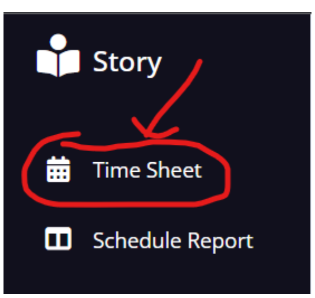
You will be redirected to the Schedule Report page, where you can view existing schedules for all doctors, including their User ID, Dentist Name, Date of Schedule, Start Time, End Time, and a Delete button.



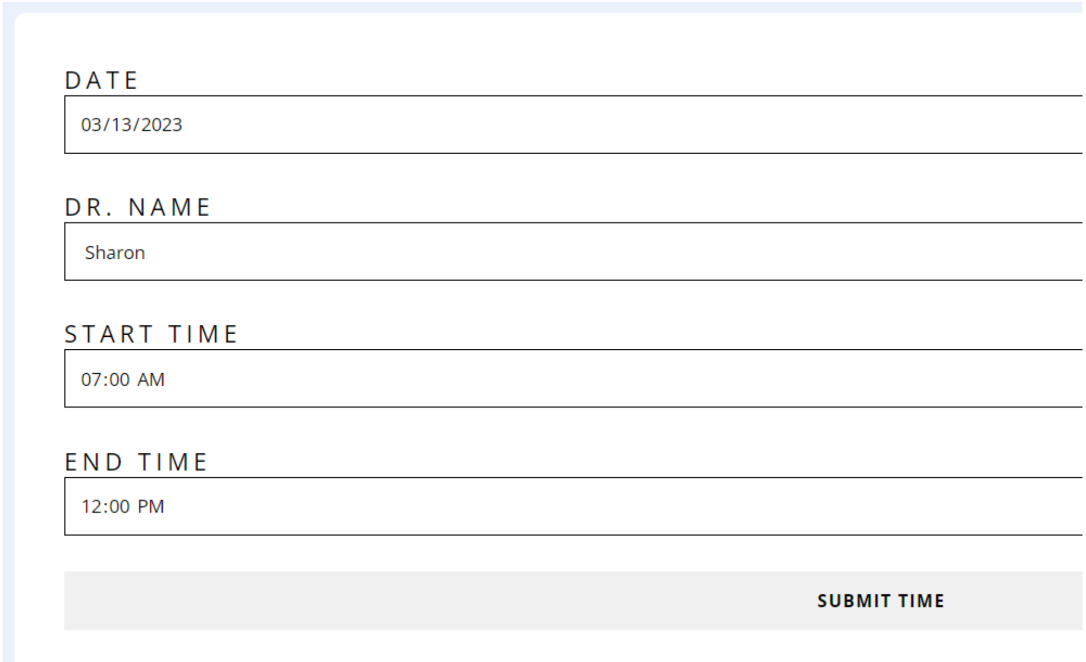
- Delete Schedule: To delete a schedule, click the 'Delete' button in the right-most column of the respective entry.

Add New Timesheet for Provider - Timesheet

- Access Timesheet Page: Click the 'Timesheet' link in the left-hand side navigation panel to be redirected to the Timesheet page.



- Enter Schedule Details: Input the required information, including Date, Dr. Name, Start Time, and End Time for the doctor's schedule.



- Submit Timesheet: Click the 'Submit Time' button to add the new schedule. You will be redirected to the Schedule Report page.

- View Updated Schedule: On the Schedule Report page, you can now see the newly added schedule for the particular provider on the top.

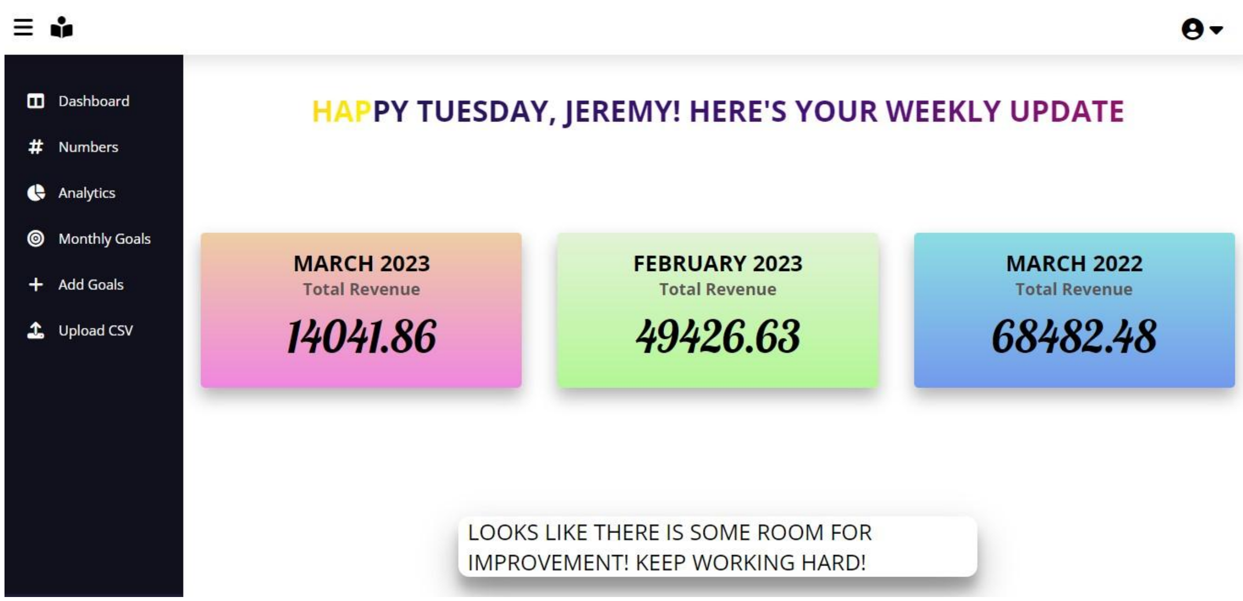
Schedule Report

User ID	Dentist Name	Date	Start Time	End Time	
SB	Sharon	2023-03-13	07:00:00	12:00:00	
SB	Sharon	2022-11-02	09:30:00	17:15:00	
IM	Isabella	2022-04-26	09:00:00	17:00:00	
ZW	Zuhair	2021-01-04	08:30:00	17:30:00	

User Role Type - Manager

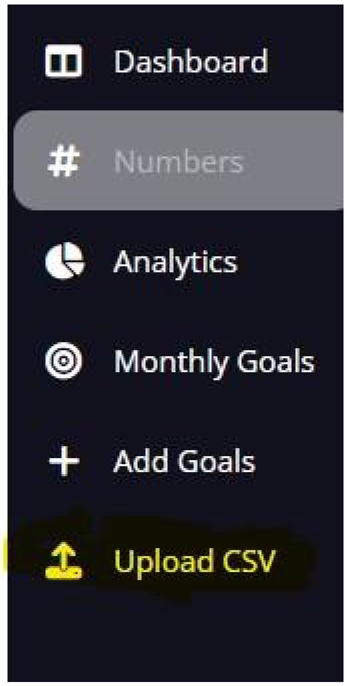
Home Screen - Dashboard Page

After a manager logins in using their credentials, they will be presented with this dashboard page. A manager has full access to the application and can see all that's doing within his/her facility. A manager will be able to to tell the difference in revenue between the current years and previous year amount for that mouth, also compared with the previous mouth right on the dashboard page.

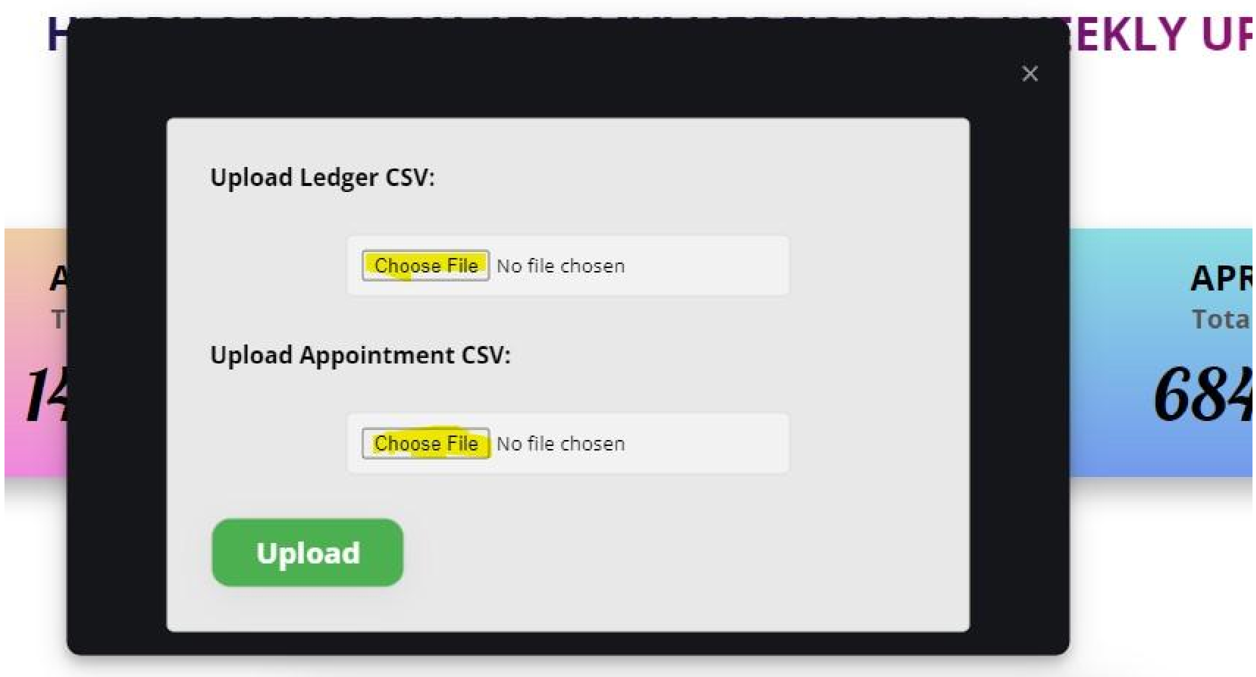


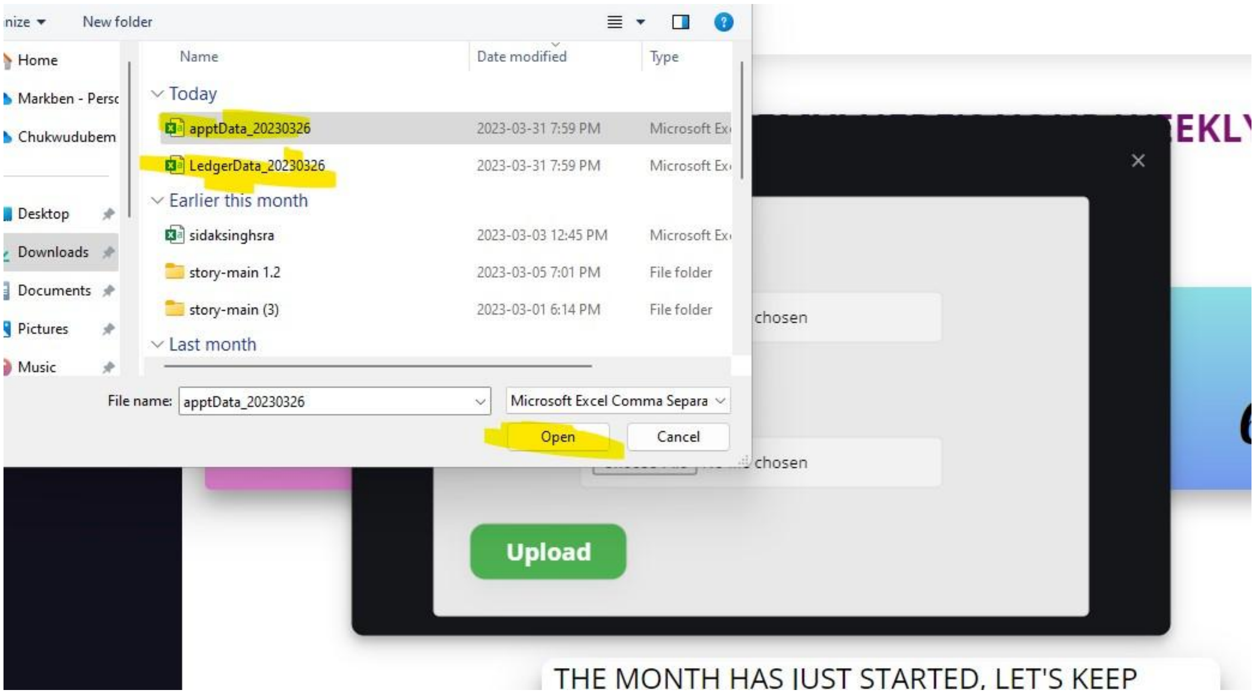
Upload Weekly New Data - Upload csv

1. To input the New Weekly Data data, have your csv files read to be uploaded.
2. Click on the “Upload CVSI ” Link on the navigation bar on the main dashboard page.

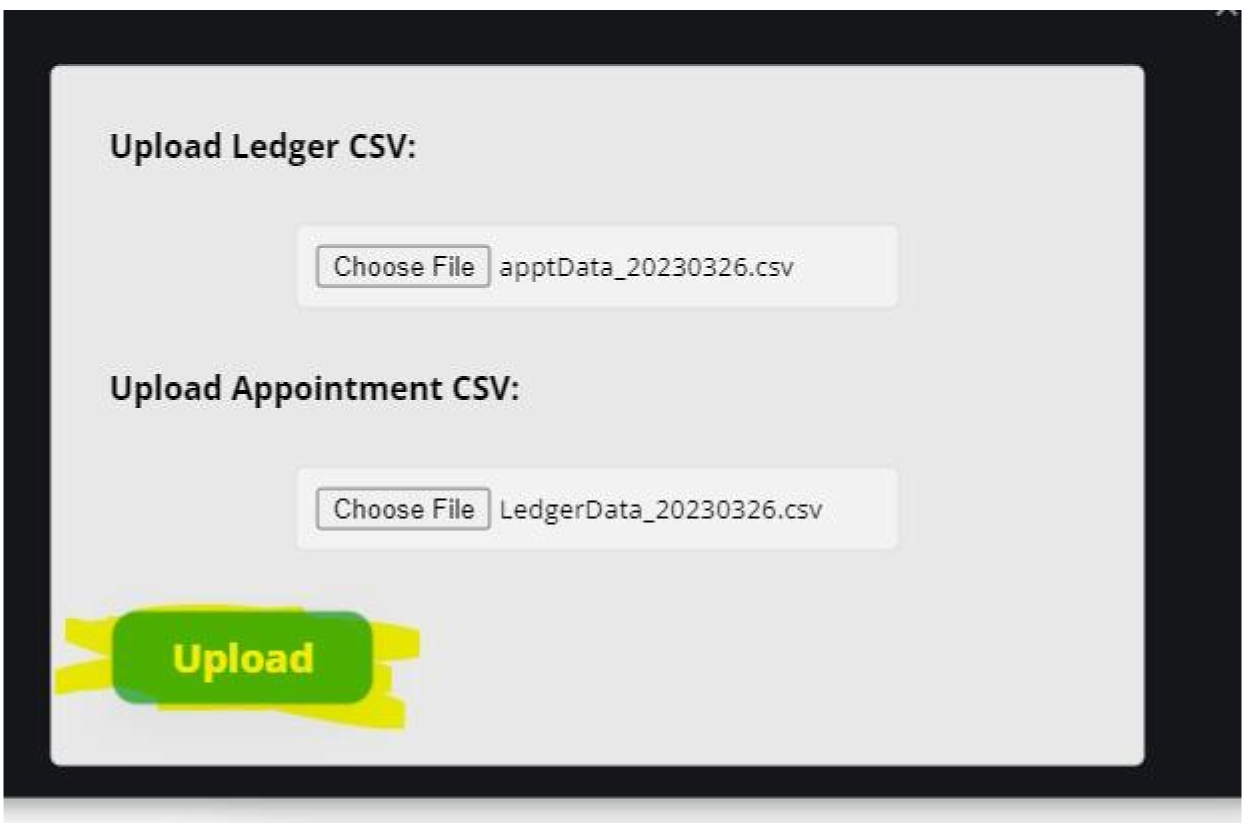


3. Once that is clicked you will be shown a new page, on that new page click on the "chosen file" button for both/either Upload Ledger CSV and Upload Appointment CSV, then locate your files in your system then select it to be uploaded.



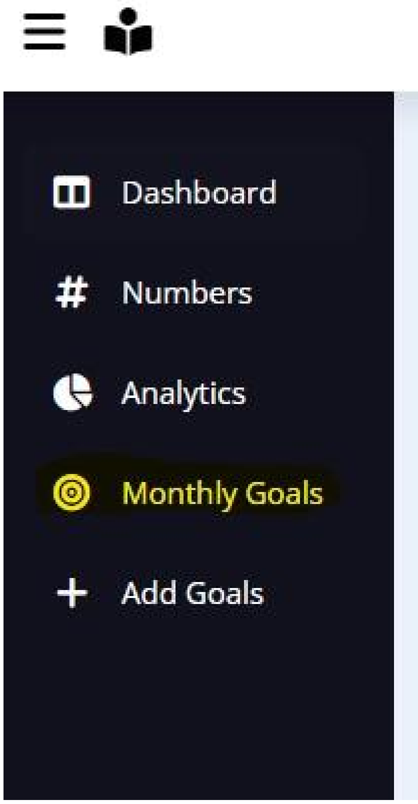


4. Once both files are ready to be uploaded, click in the upload button.

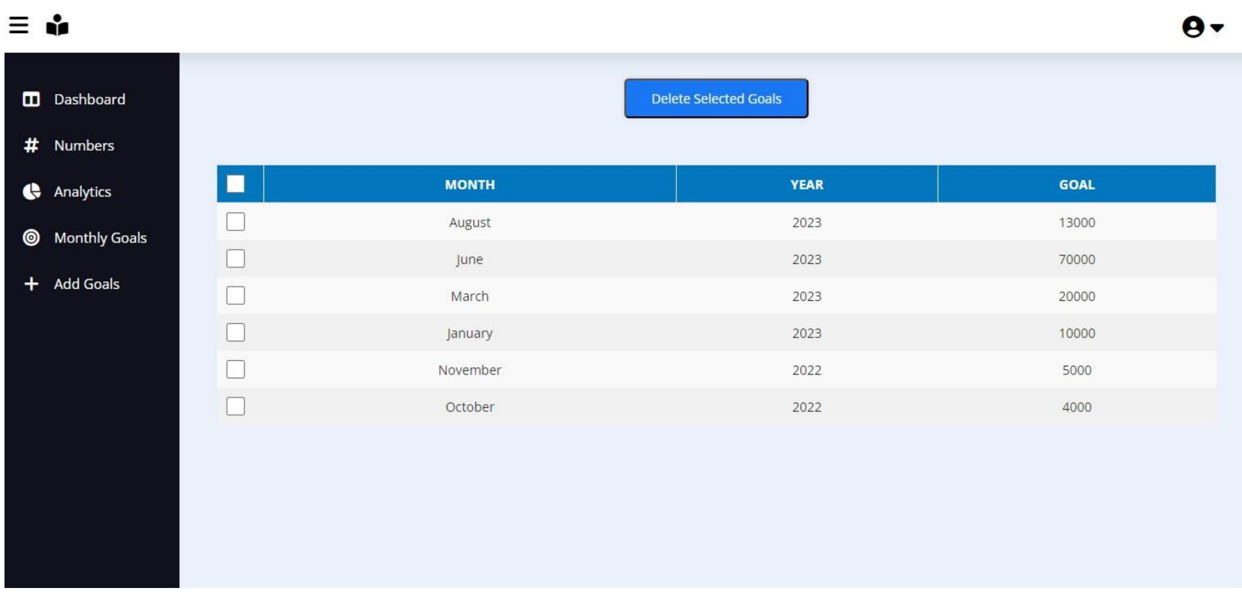


View Clinic’s All Monthly Goals - Monthly Goals

1. To check All Monthly Goals, Click on the “Monthly Goal ” Link on the navigation bar on the main dashboard page

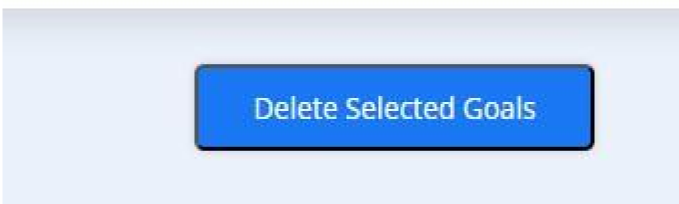


2. Once on the page the Manger will be able to view all previous monthly goals and current goal, the goals are divided into into 3 different categories, Year, Month and Amount



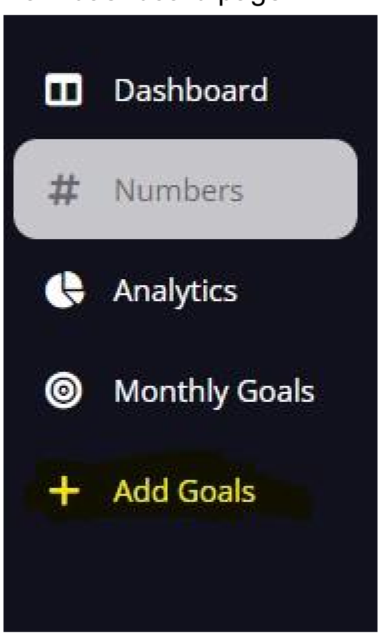
3. You can Delete Monthly Goals by clicking on the check-boxes then, clicking on Delete Selected Goals, by clicking on the top left box you will select all Monthly Goals that have been created.

☑	MONTH	YEAR	GOAL
☑	August	2023	13000
☑	June	2023	70000
☑	March	2023	20000
☑	January	2023	10000
☑	November	2022	5000
☑	October	2022	4000



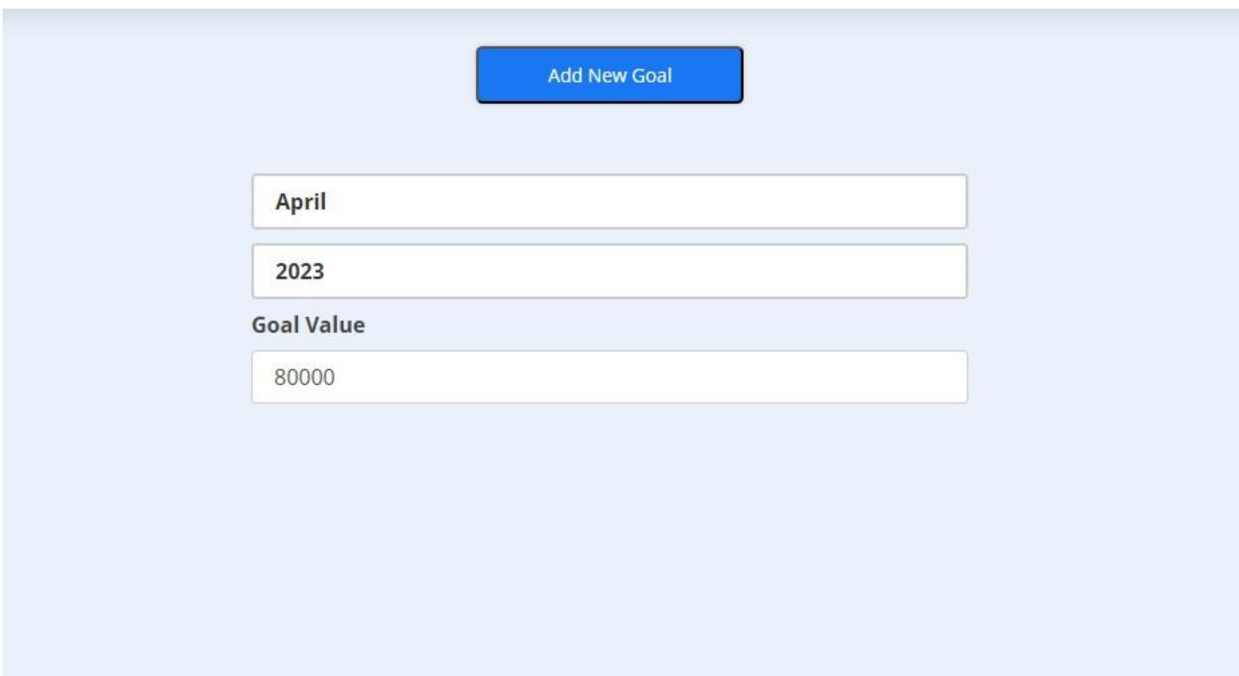
Add a New Monthly Goal - Add Goals

1. To create a new Monthly Goal, Click on the “New Goals ” Link on the navigation bar on the main dashboard page

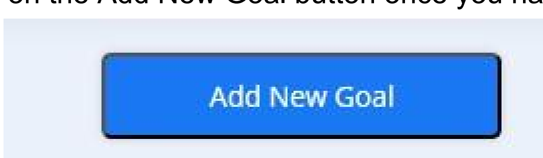


2. You will see this page

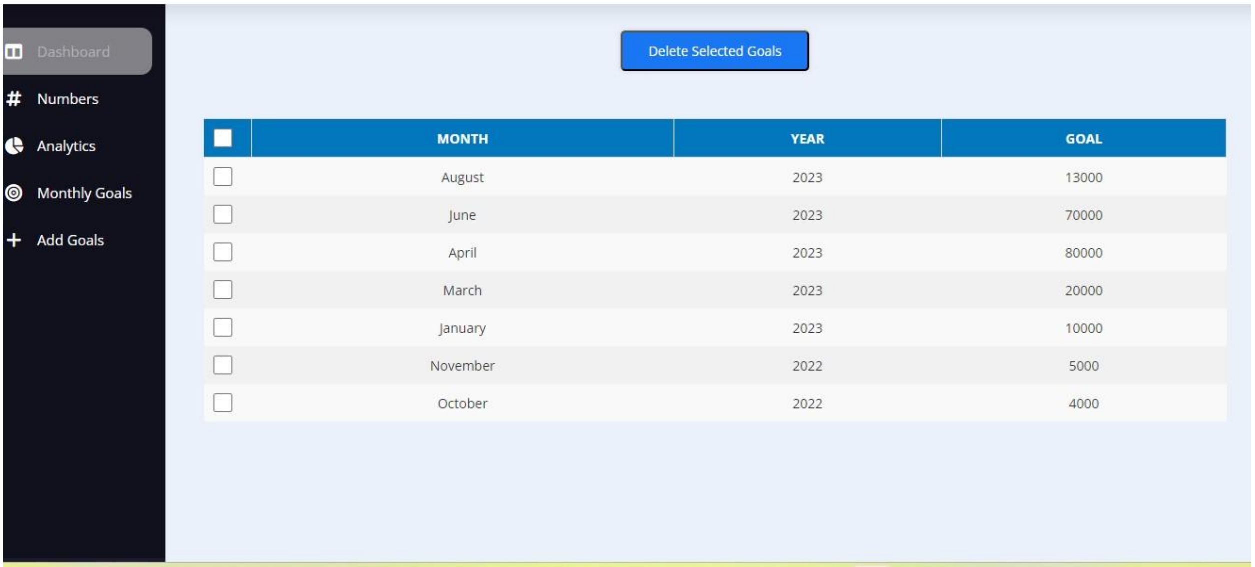
3. You will have to select a month of the year, and the year you want the goal set for, you will also have to input the amount you want the new goal to be.



4. Click on the Add New Goal button once you have all fields filled out for your new goal.

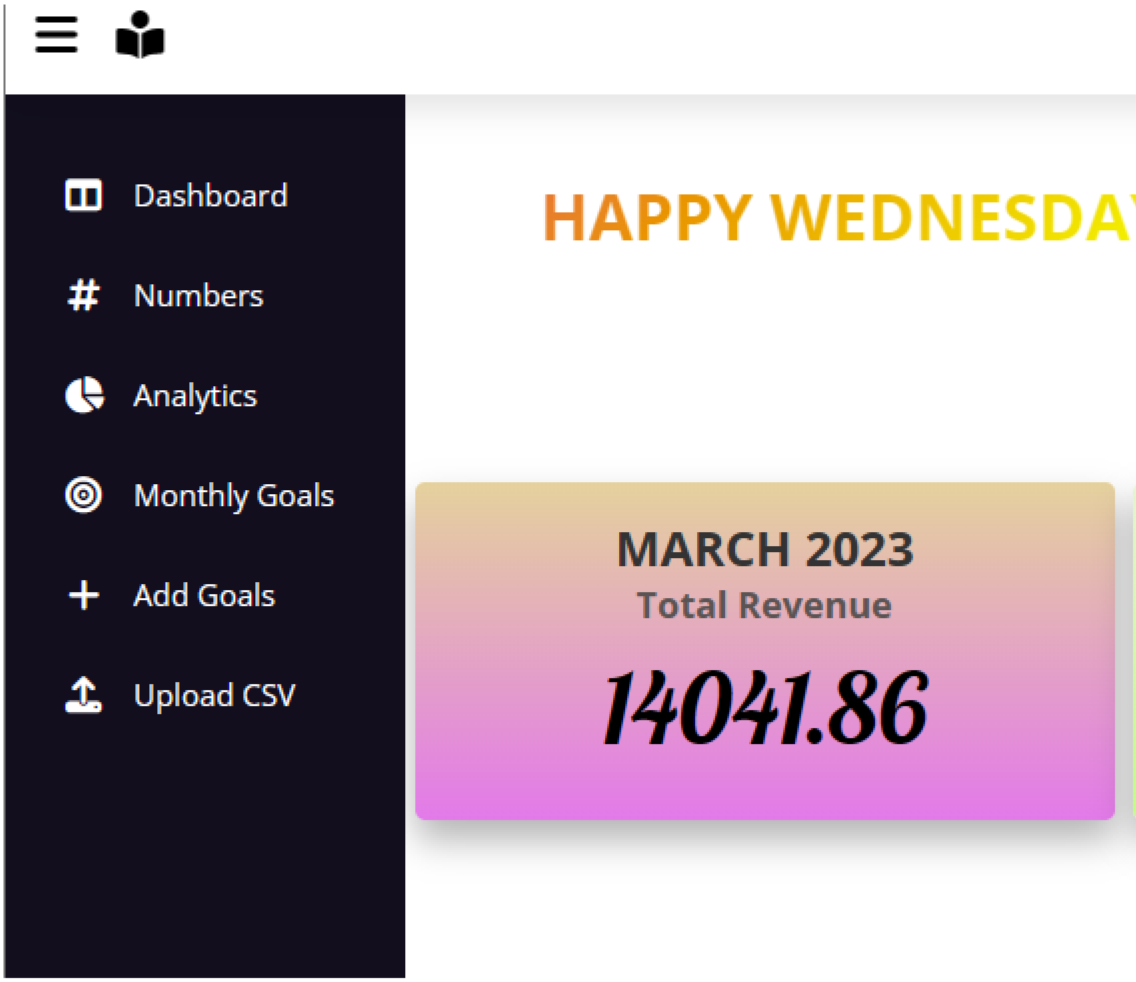


5. After clicking the button you will be redirected to the goals page where you can see the new goal you created.



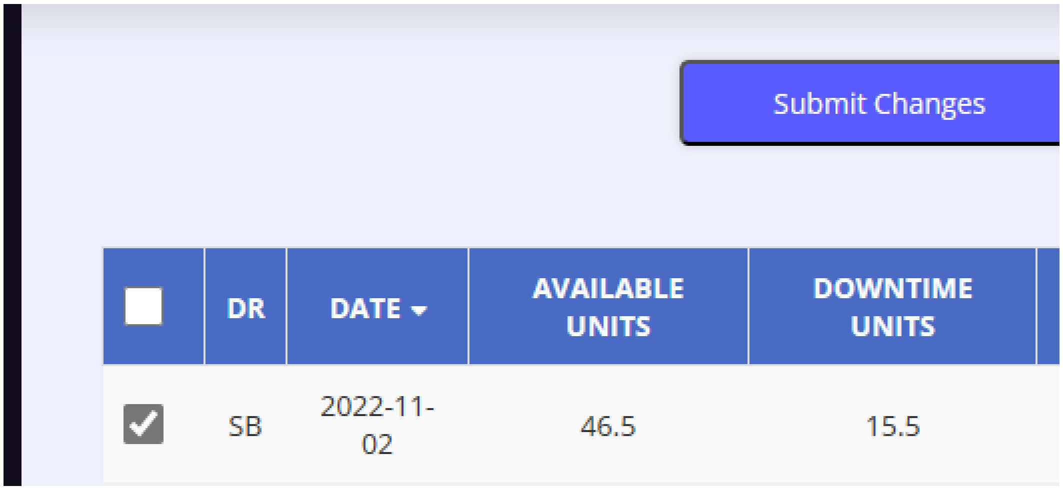
Compare Resources Daily Hours and Revenue - Numbers Page

1. Click on the Number tab on the left hand side

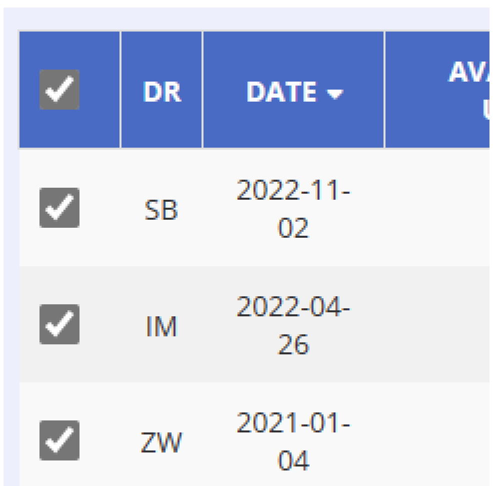


2. You are then taken to the numbers page where you can you can see the production of the entire team, their production, and their available hours behind

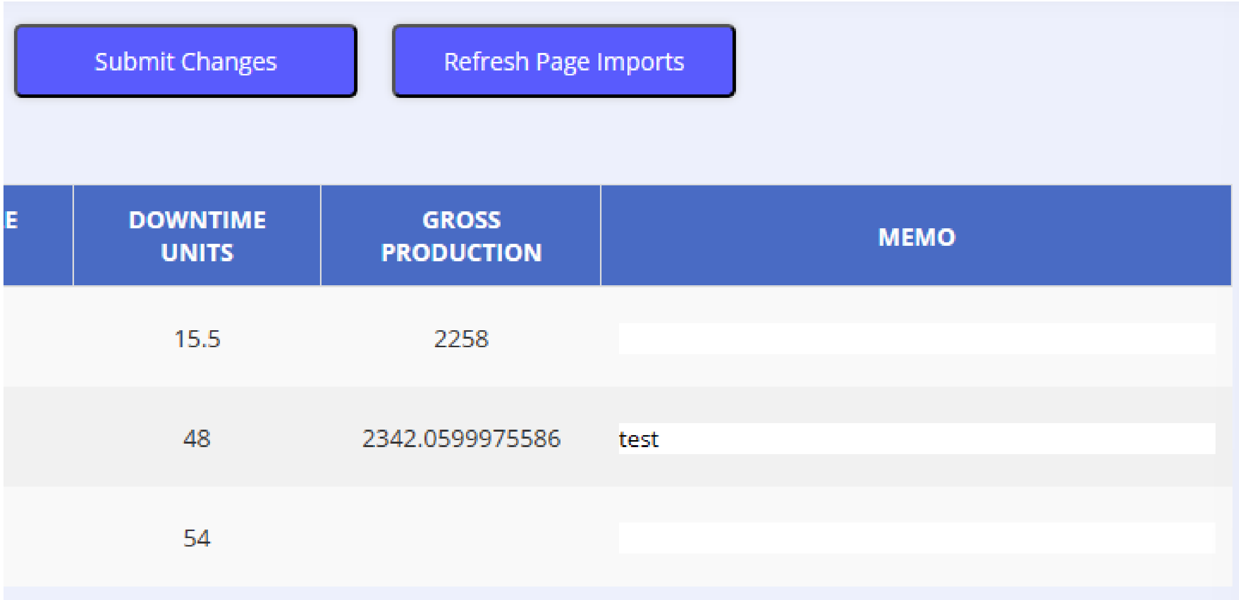
3. By clicking on the check-boxes you can select certain Doctor's information, clicking on Sumbit Changes will delete the check-box you have selected

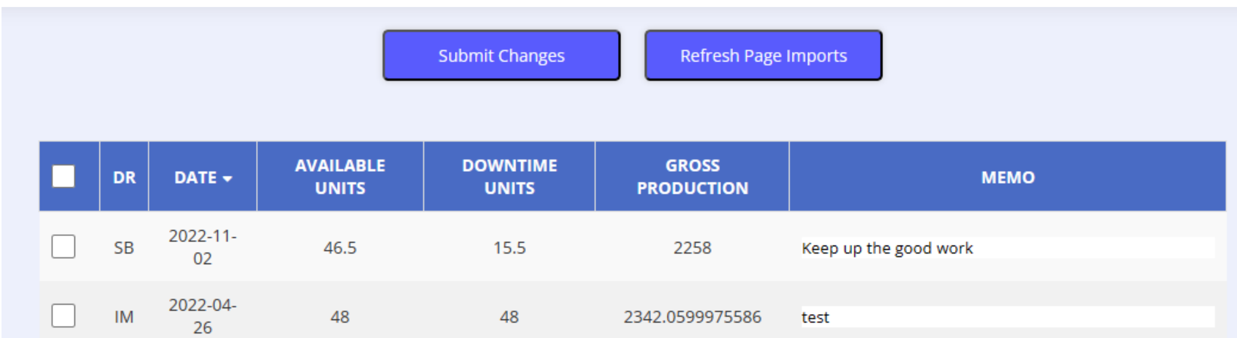


4. Clicking on the top left box will select all the check-boxes in that row



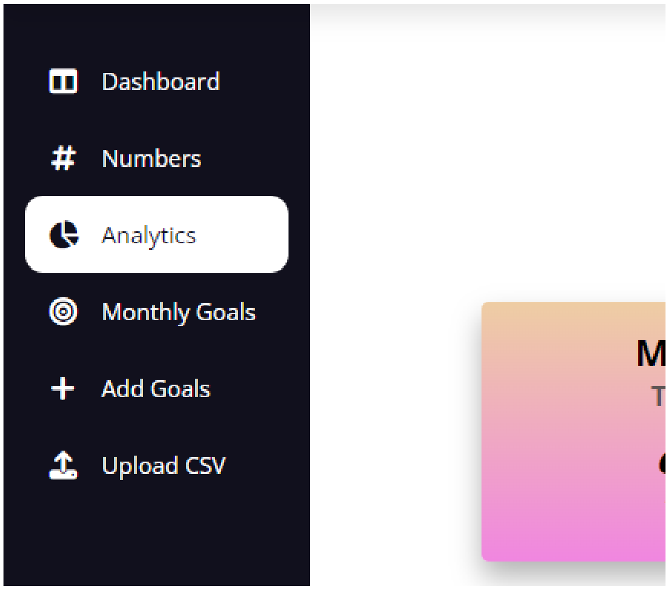
5. As a Manager you can also leave notes for your Doctors to see in the memo section, press on submit changes to save your note.



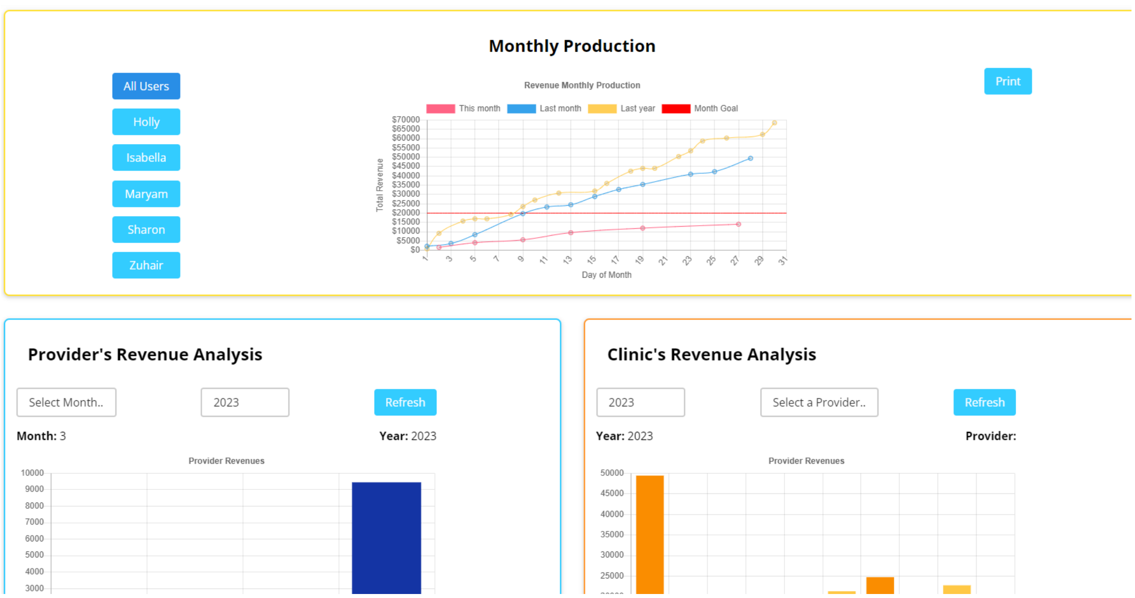


Check Clinic Revenue Trend - Analysis Page

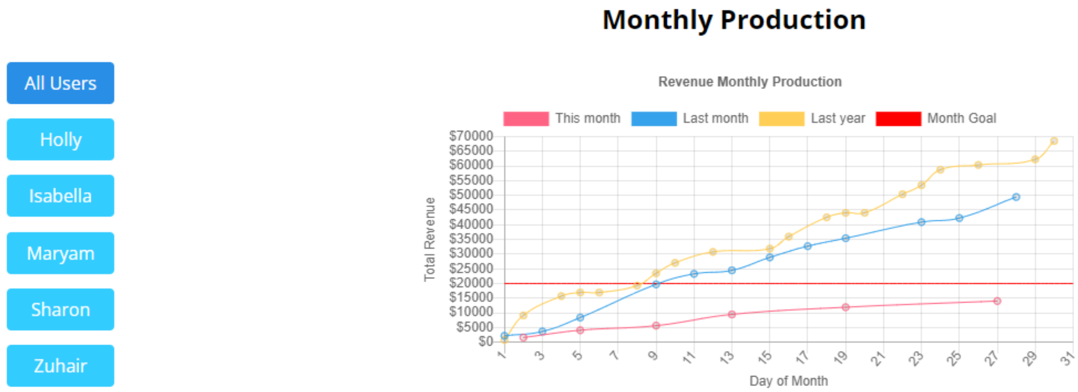
1. To check all charts and trends on Analysis Page, Click on the “Analysis” Link on the navigation bar on the main dashboard page



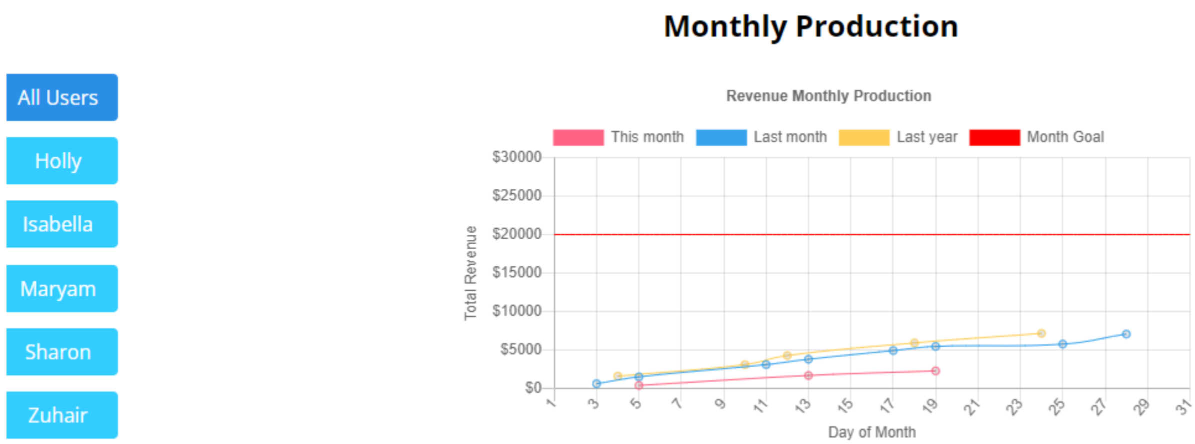
2. You will see this page with 3 charts



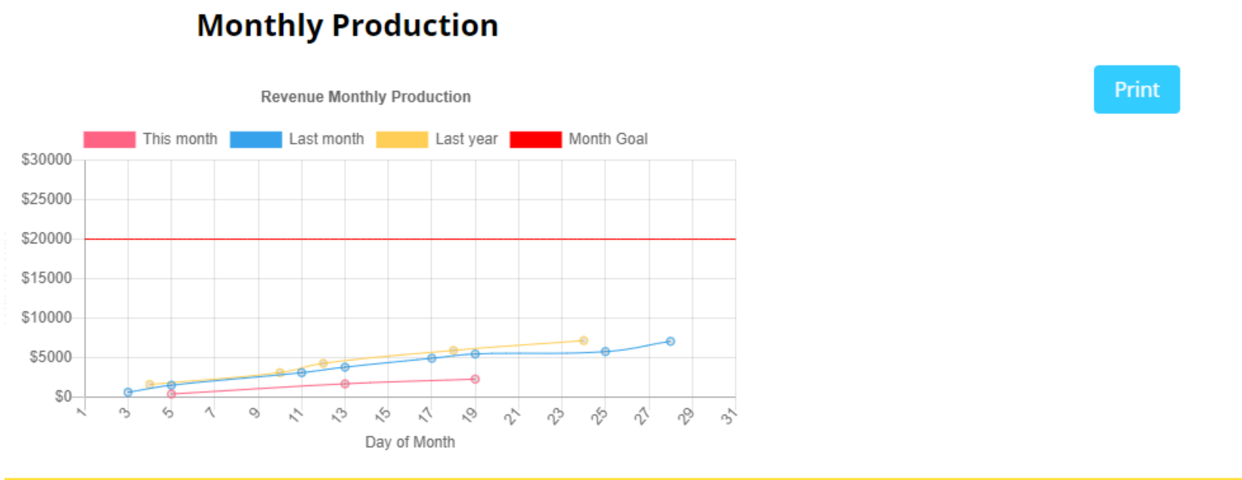
3. The first chart on the top is a line graph that compares the Revenue Trend for the Clinic for Current Month with the Previous Month and Last Year Current Month. The Pink line represents the current month's revenue trent till current date, blue line represents that last month's revenue trend over the month and the yellow line represents the revenue trend for last year current month/



4. You can choose a particular service provider to check the revenue earned only by that service provider. The below graph is for Dr Isabella

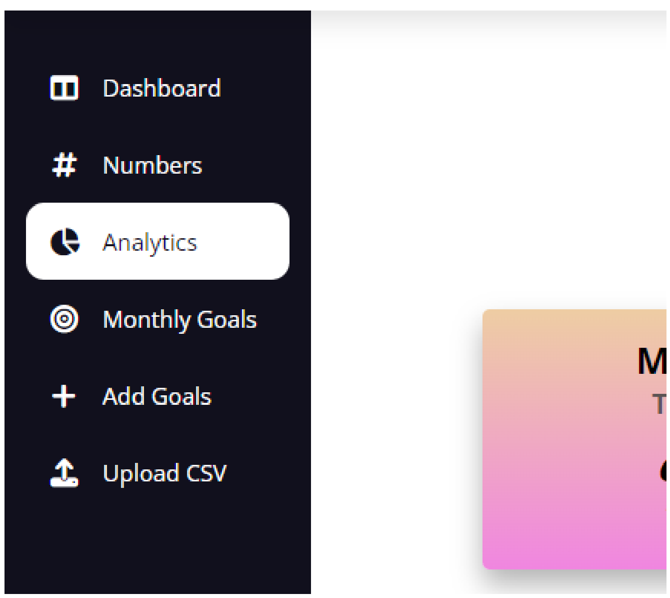


5. To switch back to all Users view, Click on “All Users” Button
6. This chart can be printed by clicking the print button on the right. The print dialog box will appear where you can choose your printing conditions and printer.

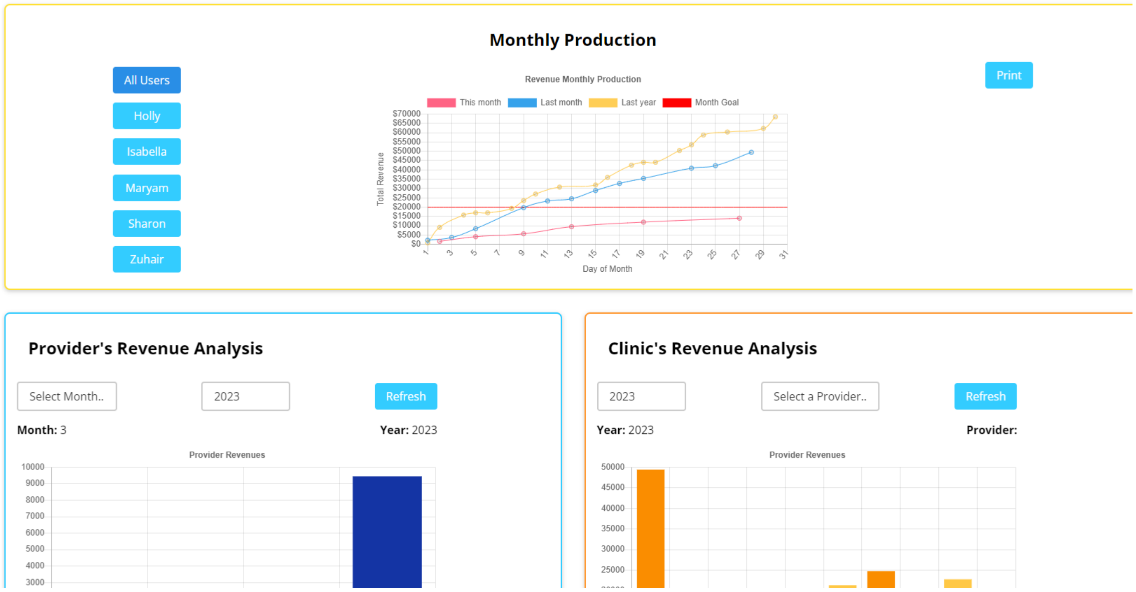


Compare Provider Revenue for a Month - Analysis Page

1. To check all charts and trends on Analysis Page, Click on the “Analysis” Link on the navigation bar on the main dashboard page

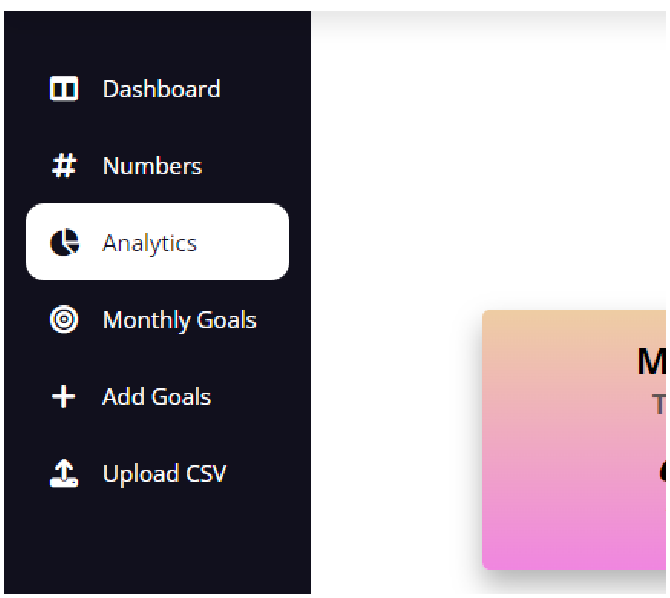


2. You will see this page with 3 charts

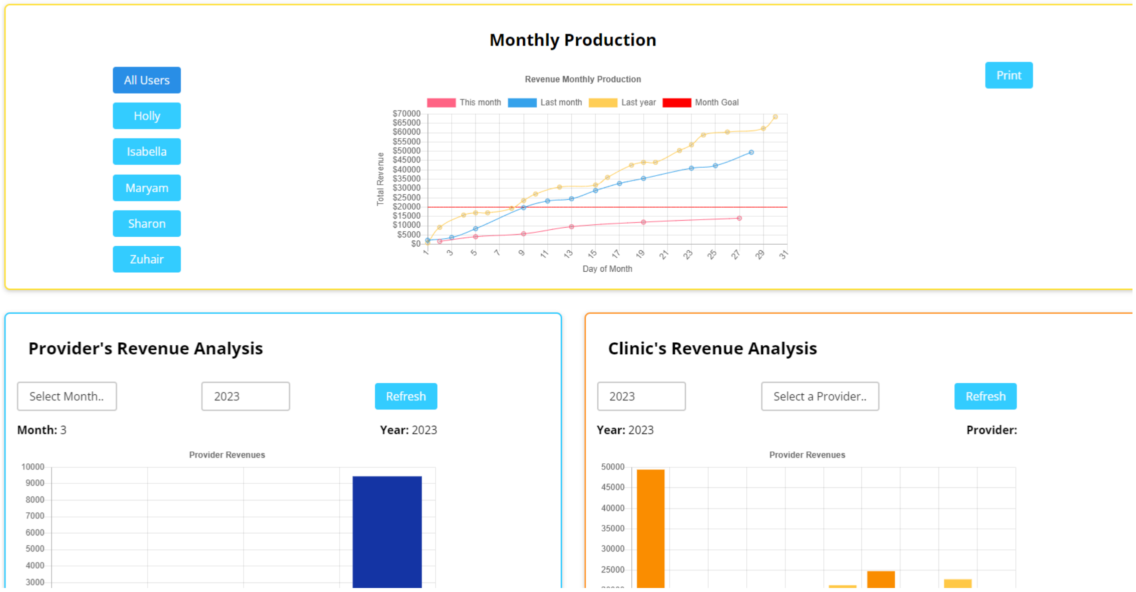


Compare Clinic Revenue (Month-wise for a Year)- Analysis Page

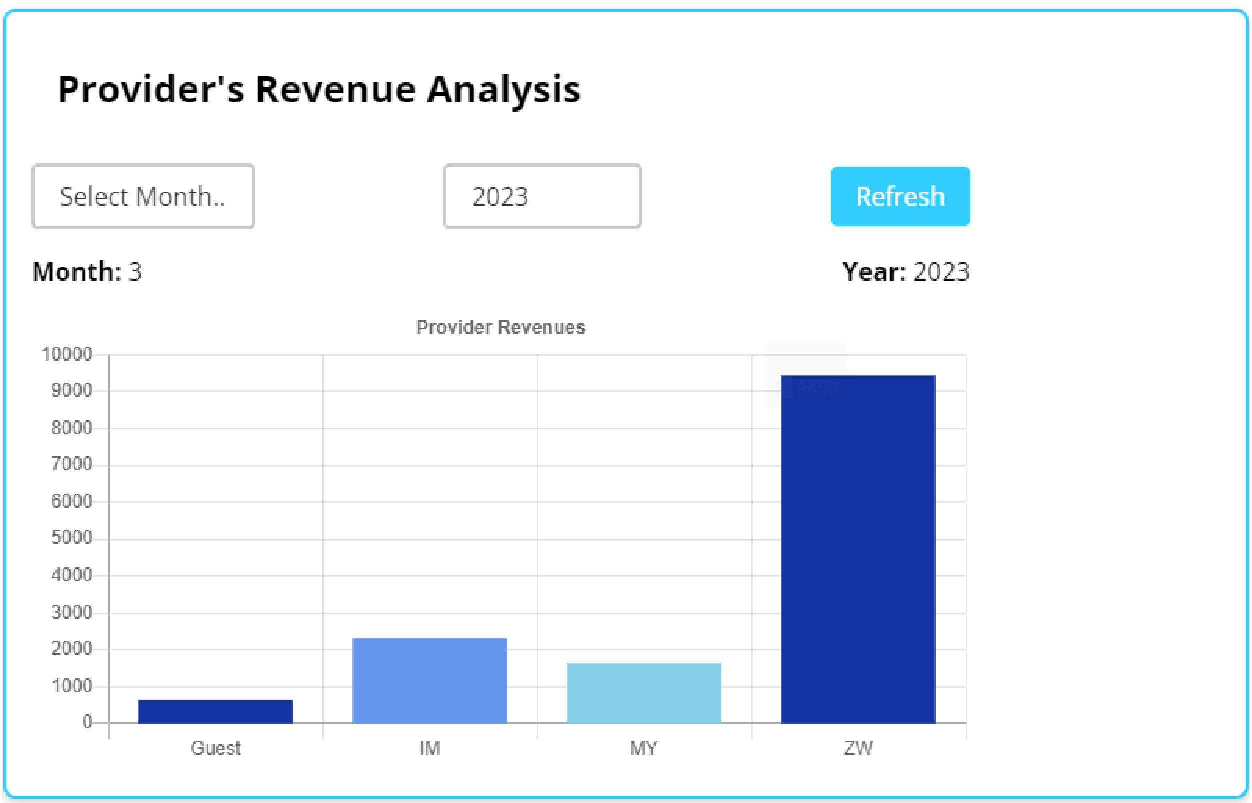
1. To check all charts and trends on Analysis Page, Click on the “Analysis” Link on the navigation bar on the main dashboard page



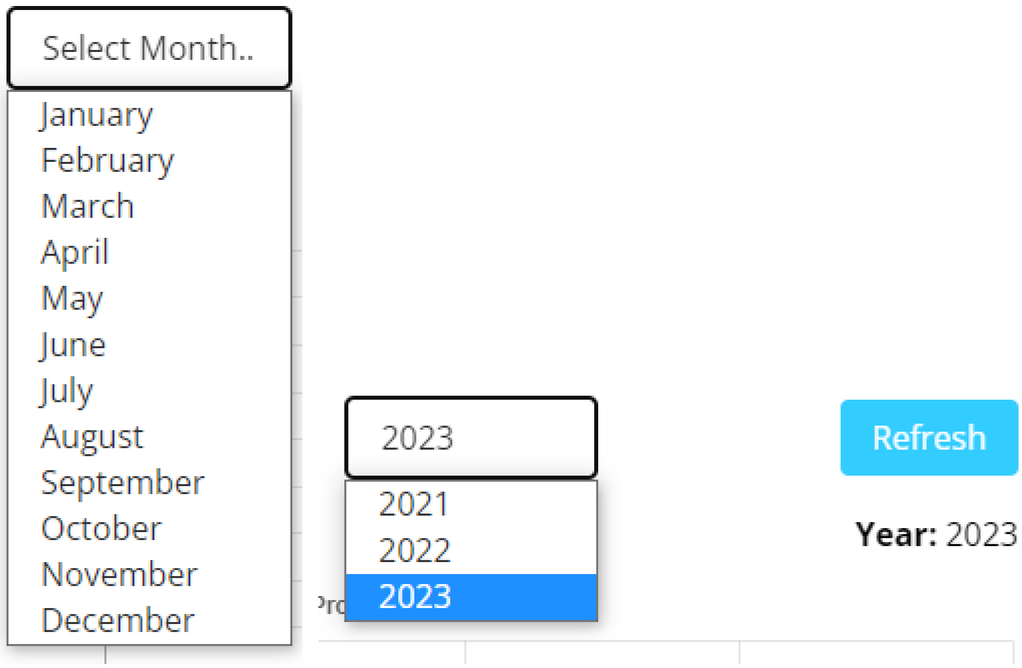
2. You will see this page with 3 charts



3. The chart on the bottom left corner, demonstrates a comparative Revenue Analysis for each provider for the current month of the year by default.

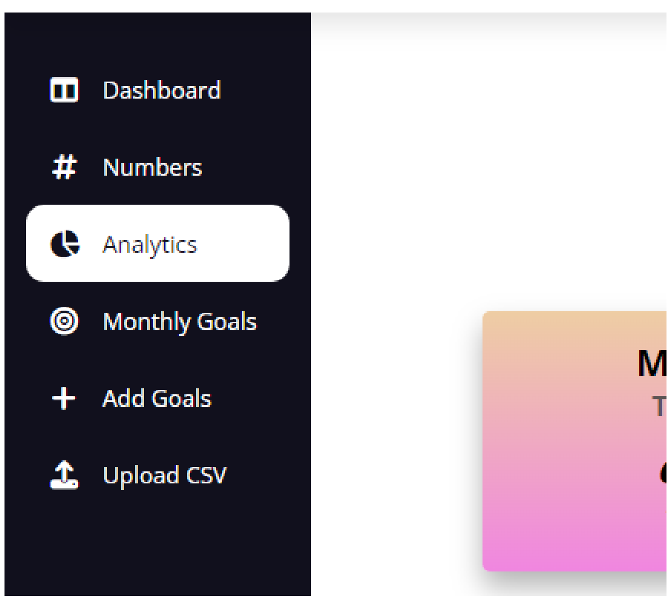


4. To compare provider revenues for a different month or year, just choose the desired date from the dropdowns and hit “Refresh” Button

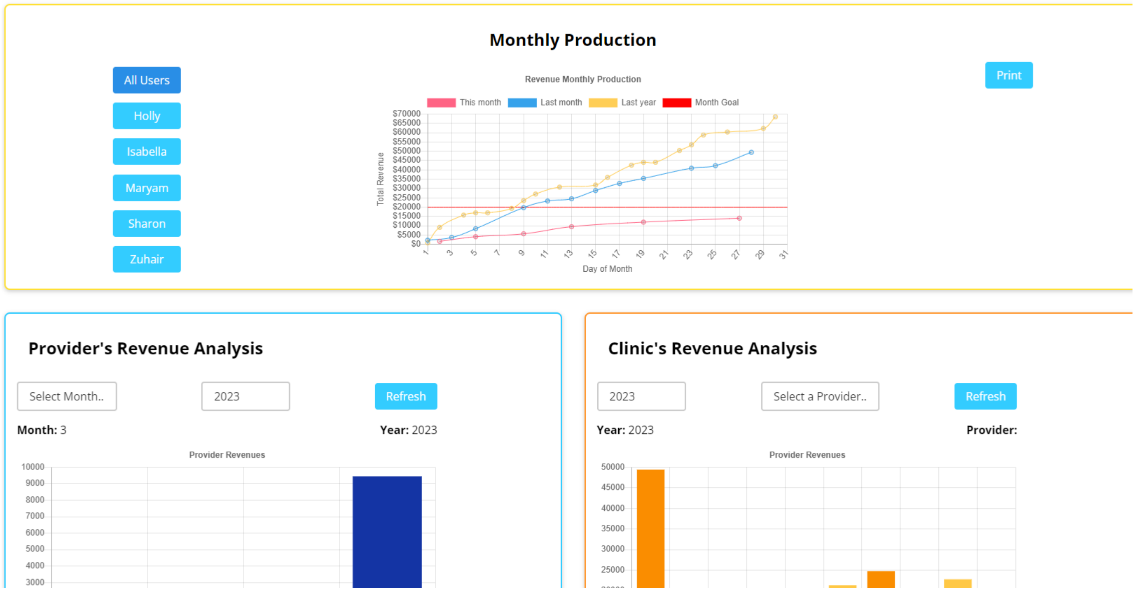


Compare Revenue by a Provider (Month-wise for a Year) - Analysis Page

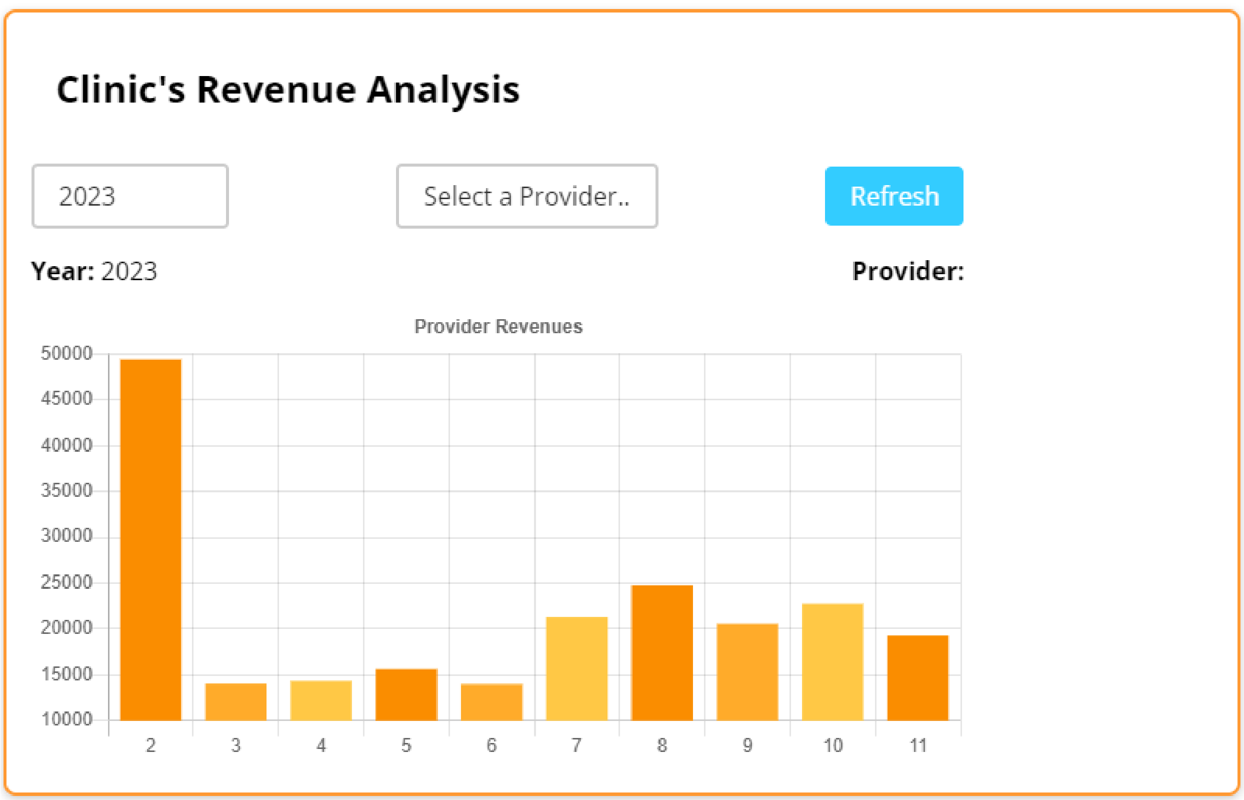
1. To check all charts and trends on Analysis Page, Click on the “Analysis” Link on the navigation bar on the main dashboard page



2. You will see this page with 3 charts

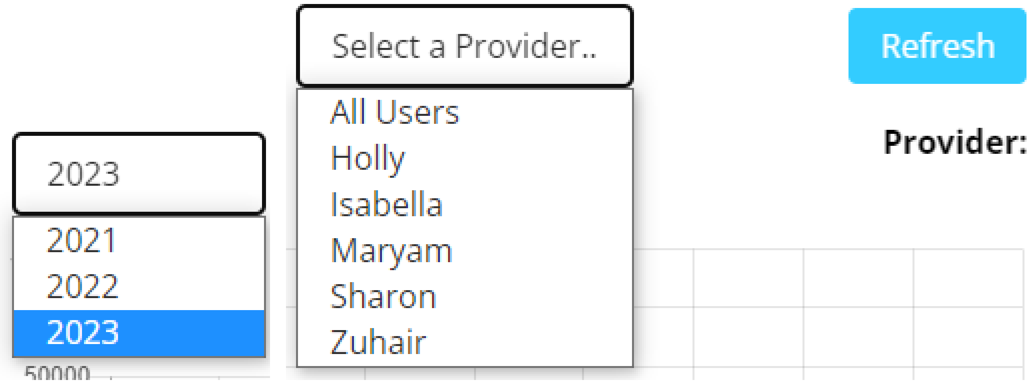


3. The chart on the bottom right demonstrates the revenue performance of your clinic for each month of the year. By default, the revenue analysis is done for the current year



4. You can also choose a particular provider if you wish to do a revenue analysis by a certain provider for a particular year by choosing values from the dropdown and hitting

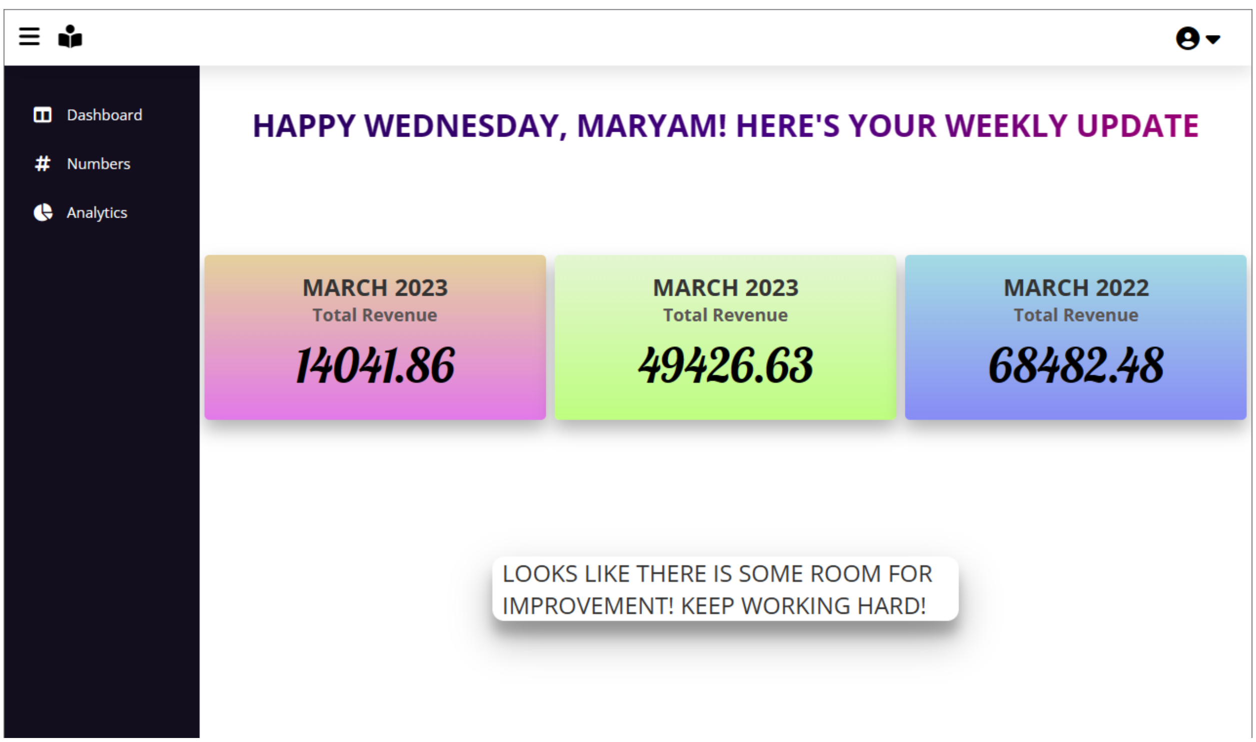
the refresh button. Click on the “All Users” Button and current year to get back to the default view.



User Role Type - Dentist/Hygienist

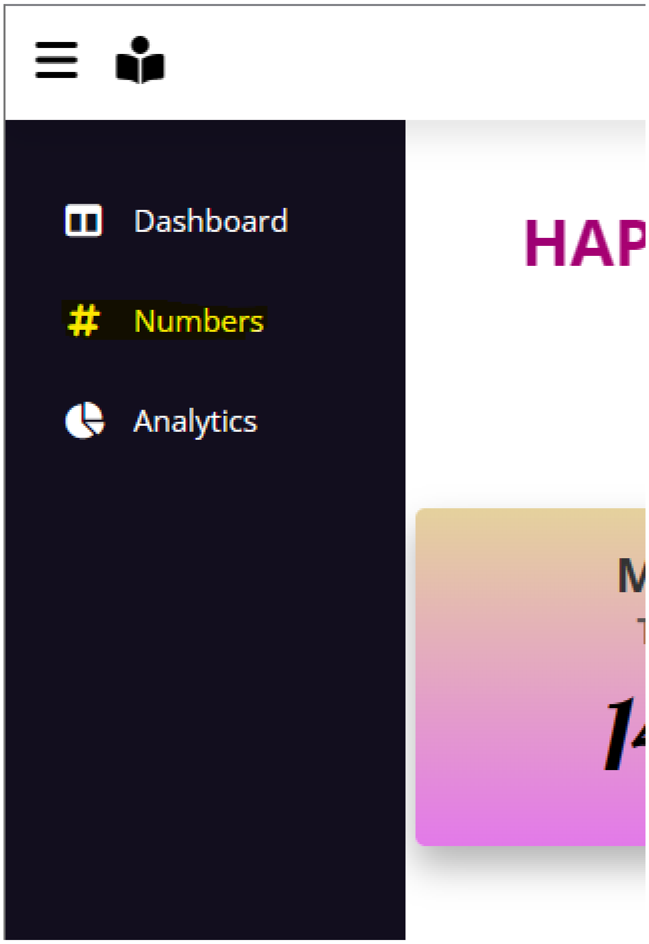
Home Screen - Dashboard Page

1. This is the dashboard page that a Dentist will see when logged in

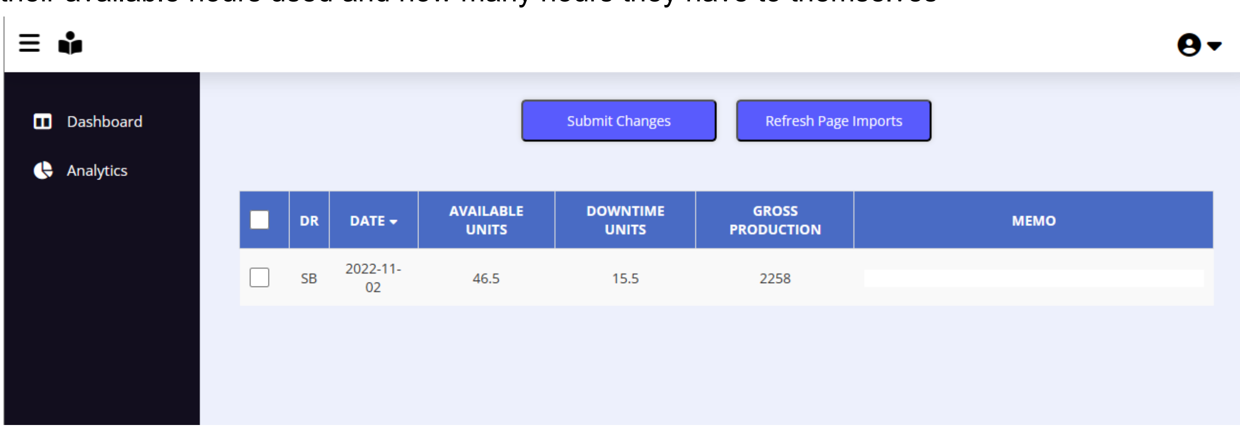


Compare Individual Daily Hours and Revenue - Numbers Page

1. On dashboard page click the Numbers tab to be taken to the numbers page

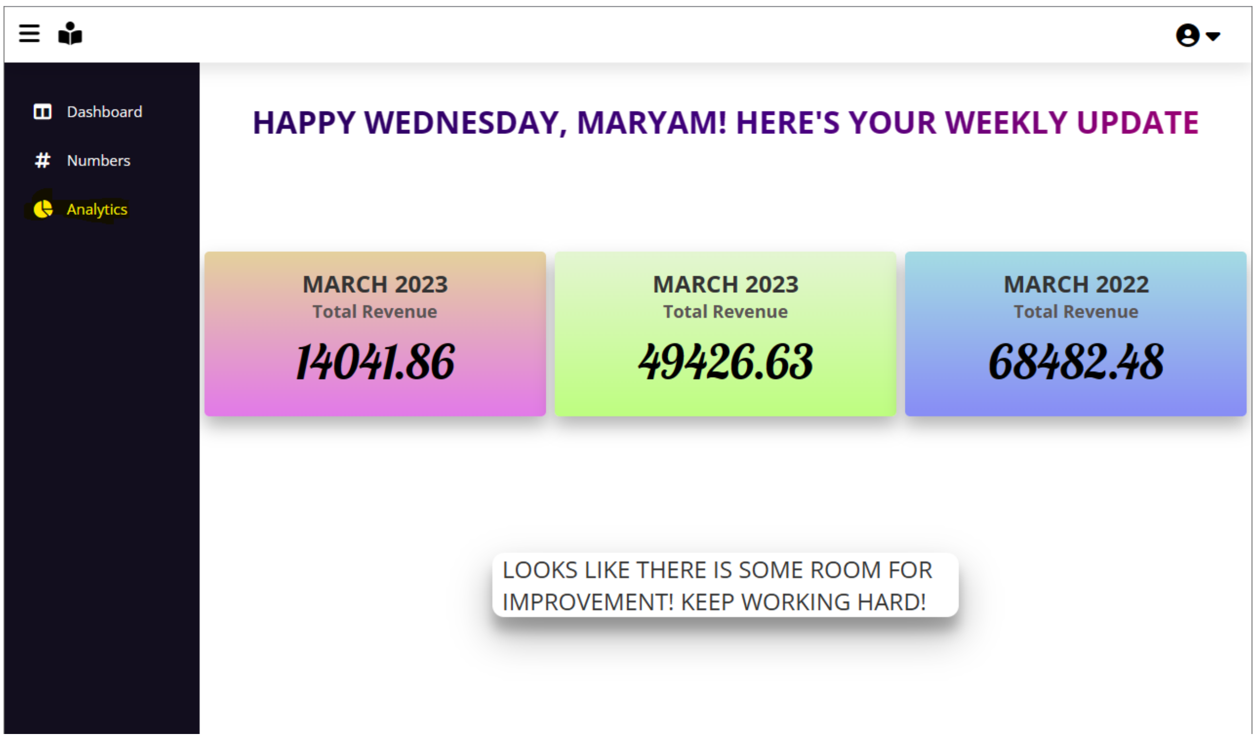


2. Once on the page the Dentist will be able to compare the revenue they generated verses their available hours used and how many hours they have to themselves

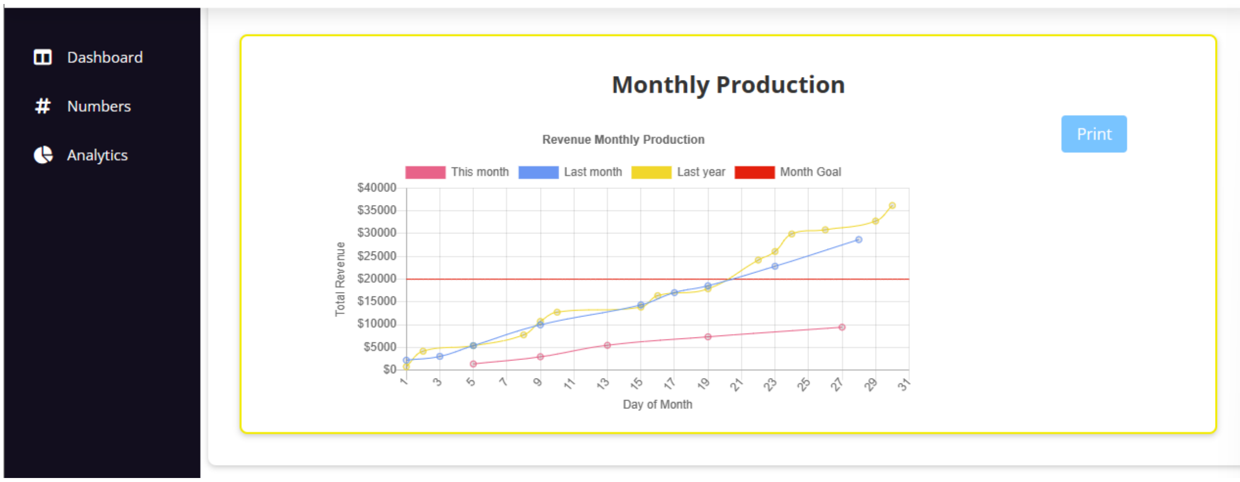


Check Individual Revenue Trend - Analysis Page

1. When logged in as a Dentist click on the Anayltics tab to be taken to the analytics page



2. Once on the Analytics page the Dentist will be able to see their revenue based on the current month, last month and last year same month on a line graph. Additionally the Dentist will be able to see the monthly revenue goal set by the manager.



3. By pressing the print button you will be able to print out the graph