# Users

## I want you to create a catalog for adding users. There are few users that will use the portal and each will have different access. I need to be able to add a user such that automatically have the access.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  |  | ADMIN | RECEPTION | NURSE | DENTIST |
| PAYMENTS |  |  |  |  |  |
|  | ADD PAYMENT | See / edit | See / edit | See / edit | - |
|  | DAILY CASH-UP | See / edit | See / edit | See / edit | - |
|  | DAILY REPORT | See / edit | See / edit | See / edit | - |
|  | FULL REPORT | See / edit | - | - | - |
|  | ADD INCOME/REPEATING | See / edit | - | - | - |
|  | ADD EXPENSE/REPEATING | See / edit | - | - | - |
|  | ACCOUNT | See / edit | - | - | - |
|  |  |  |  |  |  |
| ALIGNERS | ADD NEW | See / edit | See / edit | See / edit | See / edit |
|  | NEW CASES | See / edit | - | - | -? |
|  | TOTAL | See / edit | - | - | -? |
|  | ARCHIVE | See / edit | - | - | -? |
|  |  |  |  |  |  |
| REFERRALS | ADD NEW | See / edit | See / edit | See / edit | See / edit |
|  | NEW PATIENTS | See / edit | See / edit | See / edit | See |
|  | TOTAL | See / edit | See / edit | See / edit | See |
|  | ARCHIVE | See / edit | See | See | See |
|  |  |  |  |  |  |
| LABORATORY | ADD LAB WORK | See / edit | See / edit | See / edit | See / edit |
|  | LAB PENDING | See / edit | See / edit | See / edit | See / edit |
|  | LAB ARCHIVED | See / edit | - | - | - |
|  |  |  |  |  |  |
| ORDER | ADD NEW ORDER | See / edit | See / edit | See / edit | See / edit |
|  | ORDER PAGE | See / edit | See | See / edit | See / edit |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

## Admin add these users (Reception & Nurse) and set password.

## Dentists are those that will register online. For this group I need to add option to reset the password

# Payments:

## Add payments will stay the same

## Daily-cash-up will stay the same

## DAILY REPORT >>> no change

## FULL REPORT >>> no change

## ADD INCOME/REPEATING >>> no change

## ADD EXPENSE/REPEATIN >>> no change

### Account >>> I need changes here:: please check excel. I want to merge pending and full report.

pending + Report == Name as ACCOUNTs of the month: it brings all the payments of the existing month - All incomes: from cash-up & from ADD INCOMES goes to the TOP of the page - All expenses, monthly repeating or any other expense will goes to the 2nd part of the page - At the end of each line we still have 3 options: edit / delete as save 1- Edit: opens the entry to be edited. 2- Delete will delete the entry 3- **SAVE**: it saves the entry, stays on the same page but change the color of the line to show that it had been done.

# Aligners:

In this page, a dentist will send me a patient.

How does this page work?

1. A registered dentist click on “ADD NEW” and fill the form and submit it
2. It will appear on “NEW ENTRIES PAGE”.
3. I design the treatment and submit it to them via portal. (<https://behnam.eu.pythonanywhere.com/patientdetail>).
4. The dentist will see the treatment and either: accept/review/on-hold/decline the work. And it will grouped according. TREATMENT is requested on the

|  |  |  |
| --- | --- | --- |
| treatment |  | progress |
| 3D |  | ACCEPTED |
|  |  |  |
| Full TMT |  | ACCEPTED |
|  |  |  |
|  |  | ACCEPTED |
|  |  |  |
|  |  | ACCEPTED |
|  |  |  |
|  |  | ACCEPTED |
|  |  |  |

1. Then admin will deal with it further by by editing on status / stage and action

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Status |  | stage |  | NOTE |  | ACTION |
| ready |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| ready |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| ready |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| ready |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| ready |  |  |  |  |  |  |

1. When the case is finished, I will change the action to TC and then it will move the entry to “ARCHIVE”

# Referral

We use this area when a dentist sends us a patient for treatment. Check excel

Lab stays the same

Order the same