



TechSoft Systems Inc
Innovating the future

CIS 4375 User Manual

Professor: Jose Martinez
Prepared By: TechSoft Systems Inc
Prepared For: Smile Architects
Project Sponsors: Dr. Truong Le
Date Submitted: 4/12/22

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University of Houston
College of Technology
Spring 2022



Project Name: Dental Scheduling and Appointment System	Team Name: TechSoft Systems Inc.	Team Logo:  TechSoft Systems Inc Innovating the future
Project Manager: David Obitade	Document Name: User Manual	
Project Sponsor: Dr. Truong Le	Company: Smile Architects	Date: 4/12/22

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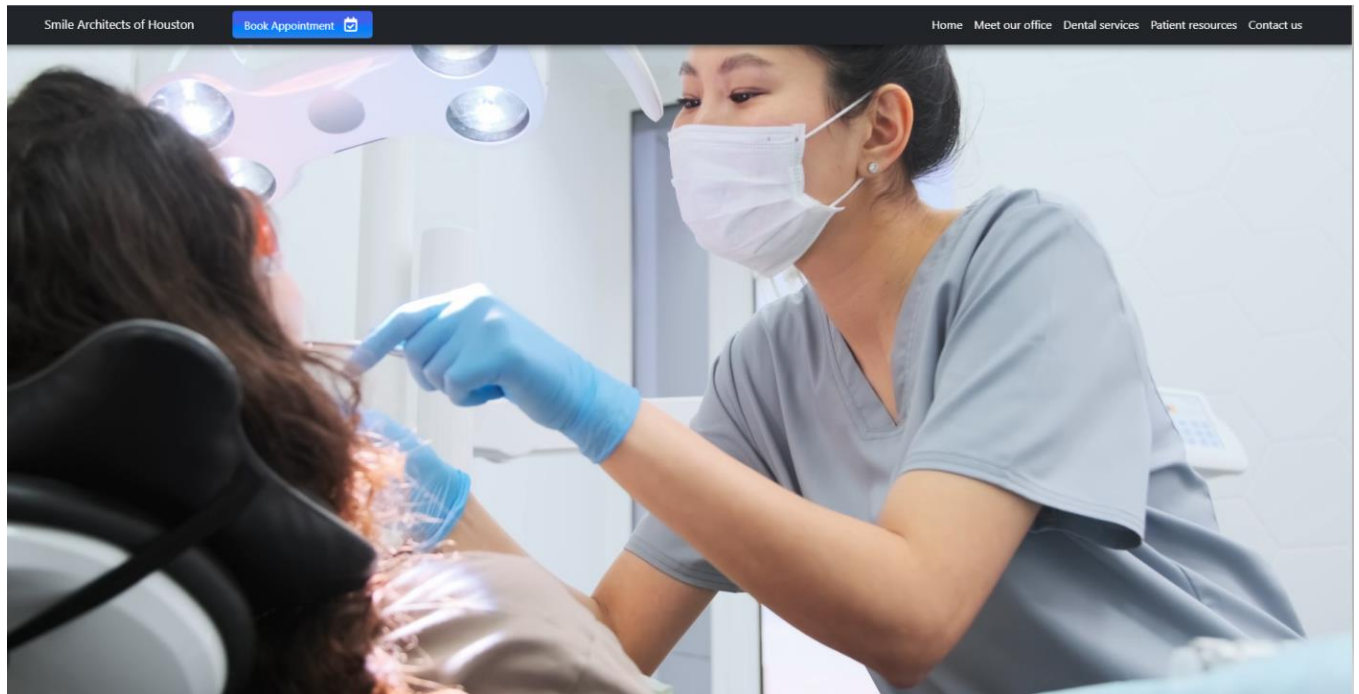
User Manual

A user manual is a guide that is intended to assist users with a product, service, or application.

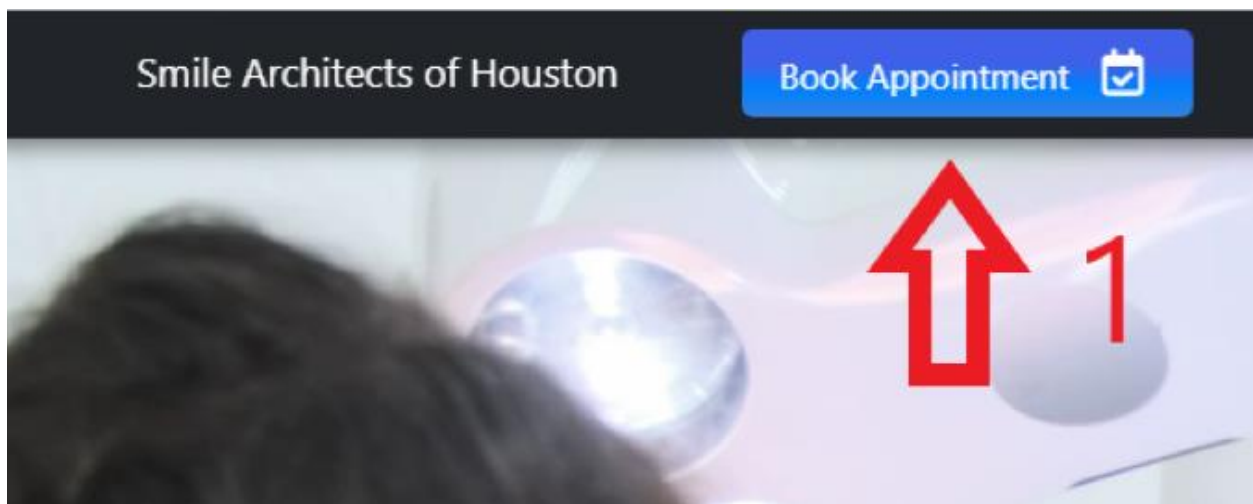
This user manual was created by a member of TechSoft Systems Inc and will be included when the system is given to the project sponsor. The purpose of this user manual is to illustrate and explain how to use the application using non-technical vocabulary. This manual will contain key functions and features of our application and the user will be able to understand, as well as use our application.


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Website



Book Appointment



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1. Book Appointment as patient


Enter Personal Information

BOOK AN APPOINTMENT


First we need some personal details



Continue

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Enter Insurance Information



Do you have insurance?

Insurance provider *

Group number

Member ID


☐ Policy holder same as patient?

Policy holder date of birth
mm/dd/yyyy

Policy holder first name


Policy holder last name

Continue

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Select An Appointment

BOOK AN APPOINTMENT



Select an appointment

—

Tue April 12th

☐

+

7:00 am

8:00 am

9:00 am

10:00 am

11:00 am


12:00 pm

2:00 pm

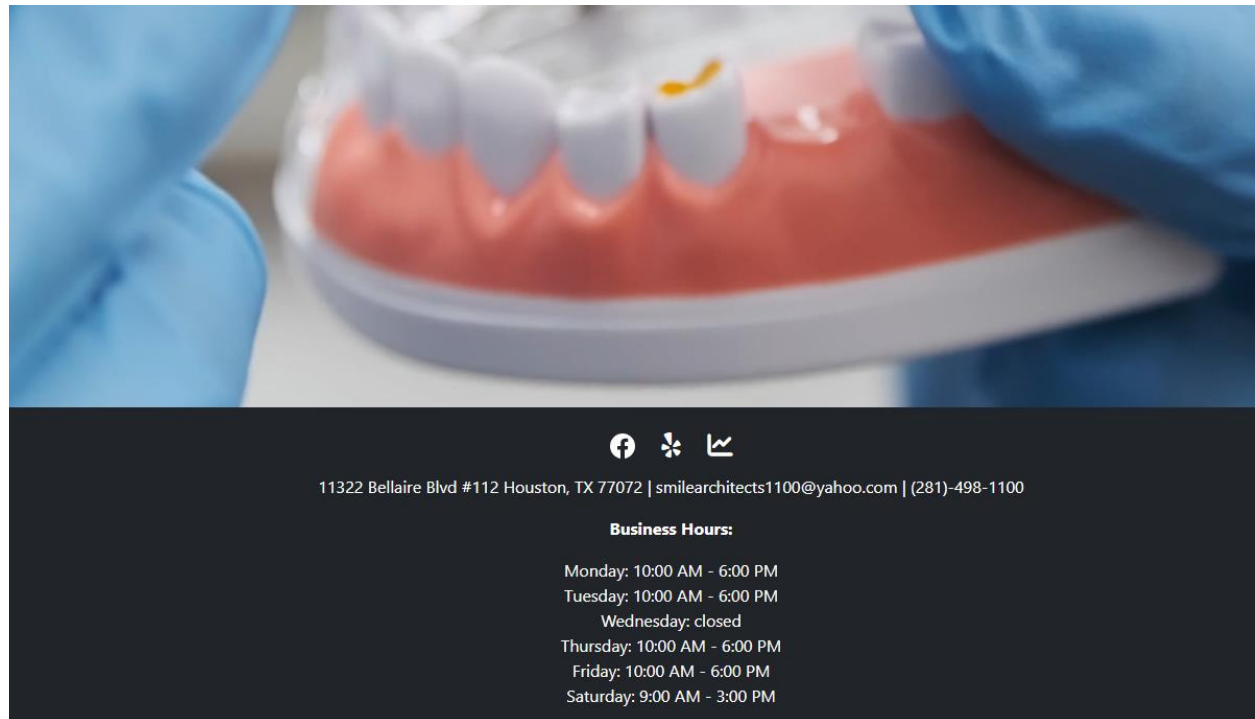
Pick a service


▼

Finish

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Bottom of Website




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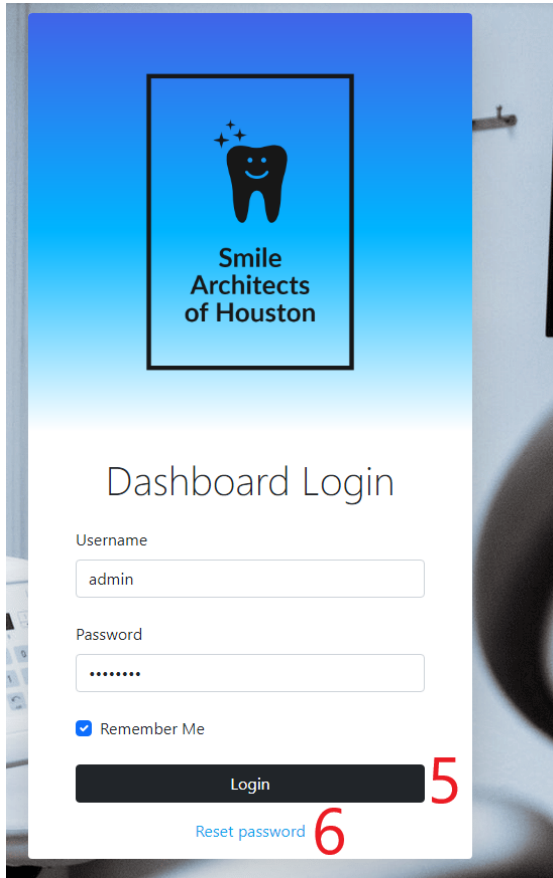
2. Facebook

3. Yelp Reviews

4. User Login

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Employee Login



Smile Architects of Houston

Dashboard Login

Username
admin

Password
.....


☒ Remember Me

Login


[Reset password](#)




5. Login to dashboard

6. Employee reset password


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Employee Dashboard



View Appointments: Tuesday April 12th, 2022

Time Slot	Patient	Service	Select
7:00 am			
8:00 am			
9:00 am			
10:00 am			
11:00 am			
12:00 pm			
1:00 pm	Josh Wilson	Oral Surgery	

Patient Information: April 12th, 2022 at 1:00 pm

Cancel Appointment

Date of birth:

July 28th, 1995

Email:

josh.wilson1995@gmail.com

Phone number:

703-895-6047

Zip code:

66666

Insurance provider:

No insurance


Group number:

Member ID:

Policy holder first name:

Policy holder last name:

Policy holder date of birth:

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<

View Appointments: Tuesday April 12th, 2022

>


Time Slot	Patient	Service	Select
7:00 am			
8:00 am			
9:00 am			
10:00 am			
11:00 am			
12:00 pm			
1:00 pm	Josh Wilson	Oral Surgery	<input checked="" type="radio"/>

Patient Information: April 12th, 2022 at 1:00 pm


Cancel Appointment

Date of birth:

Email:


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7. Cancel Patient Appointment

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Monday	Tuesday ☺	Thursday ☺	Friday ☺	Saturday ☺
2:00 pm	2:00 pm	6:00 pm	8:00 pm	11:00 pm
1:00 pm	1:00 pm	5:00 pm	7:00 pm	10:00 pm
12:00 pm	12:00 pm	4:00 pm	6:00 pm	9:00 pm
11:00 am	11:00 am	3:00 pm	5:00 pm	8:00 pm
10:00 am	10:00 am	2:00 pm	4:00 pm	7:00 pm
9:00 am	9:00 am	1:00 pm	3:00 pm	6:00 pm
8:00 am	8:00 am	12:00 pm	2:00 pm	5:00 pm
7:00 am	7:00 am	11:00 am	1:00 pm	4:00 pm

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10

Schedule Visible Build Schedule: Week of Monday April 11th, 2022

Add Appointment

Day:

Time:

Add

Copy A Day

From:

To:

Copy

Copy A Week

From:

To:

Copy

11 12 13

8. Delete a day of appointments


9. Delete an appointment time slot

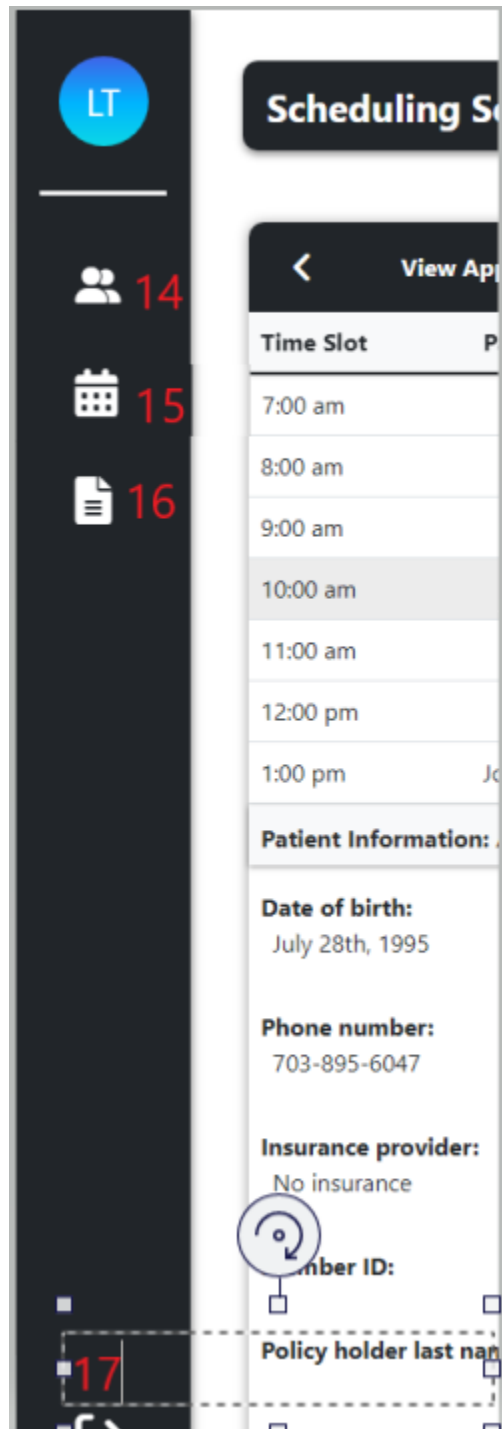
10. Toggle to make schedule visible or invisible for patient to book appointments

11. Add appointment time slot

12. Copy a day of appointments from one day to another

13. Copy a week of appointments from one week to another

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Scheduling

View Appointments

Time Slot	Patient
7:00 am	
8:00 am	
9:00 am	
10:00 am	
11:00 am	
12:00 pm	
1:00 pm	John Doe

Patient Information:


Date of birth:
July 28th, 1995

Phone number:
703-895-6047

Insurance provider:
No insurance

Member ID:

Policy holder last name:

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14. Employee Profiles

15. Scheduling Services

16. Analytics


17. Log out

Employee Profiles

Employee Profiles						
Filter employees by any field...						Q
First Name	Last Name	Email	Phone	Active	Permissions	Add Employee 18
Le	Truong	smilearchitects@yahoo.com	281-498-1101	Yes	Administrator	Edit 19
Test	Tester	testtester@gmail.com	111-111-1111	Yes	Read-only	Edit
Randall	Truong	rtruong@gmail.com	571-645-1953	Yes	Administrator	Edit
Ricky	Thomas	rthomas@gmail.com	832-555-9741	Yes	Administrator	Edit
David	King	dking@gmail.com	832-666-1645	Yes	Administrator	Edit
Kevin	Nguyen	knguyen@gmail.com	832-777-9763	Yes	Administrator	Edit
Andy	Luong	aluong@gmail.com	832-444-4665	Yes	Administrator	Edit
Joshua	Wilson	josh.wilson1995@gmail.com	703-895-6047	Yes	Administrator	Edit
Daniel	Torres	dtorres@gmail.com	832-333-4863	Yes	Administrator	Edit
Michael	Suddreth	msuddreth@gmail.com	703-726-9022	No	Read-only	Edit

18. Add Employee

19. Edit Employee

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Add Employee

Add new employee



First Name

Last Name

Email

Ex. email@email.com

Phone

Ex. xxx-xxx-xxxx


Employee Credentials

Username

Password

- ☐ Admin access
☐ Read-write access
☒ Read-only access

Submit

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Edit Employee

Edit employee information ×

First Name

David

Last Name

King

Email

dking@gmail.com

Ex. email@email.com

Phone

832-666-1645

Ex. xxx-xxx-xxxx

Employee Credentials

☒ Active Employee


☒ Admin access

☐ Read-only access

☐ Read-write access

Save Changes

Delete Employee

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Analytics Page

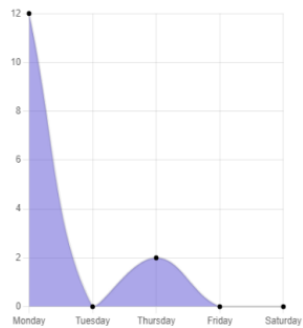
Analytics

Most used Services (last month)

examination other whitening
bonding and minor restoration oral surgery



Appointment Frequency (last month)



Top Zipcodes Distribution (last month)

77070 20147 74321 66666
64391



Search appointment records...

From: mm/dd/yyyy

To: mm/dd/yyyy



Date	Time	Service	Zip	Phone	Email	First Name	Last Name
April 4th, 2022	7:00 am	Other	74321	315-456-9702	DavidKing@gmail.com	David	Obitade
April 4th, 2022	7:01 am	Whitening	20147	654-771-6541	JacobSuddreth@gmail.com	Jake	Suddreth
April 4th, 2022	8:00 am	Oral Surgery	20147	703-726-9022	MichaelSuddreth@gmail.com	Michael	Suddreth
April 4th, 2022	9:00 am	Endodontics	20147	703-726-9022	Jessicasuddreth@gmail.com	Jessica	Suddreth
April 4th, 2022	10:00 am	Bonding and Minor Restoration	77070	123-456-7898	RandallTruong@gmail.com	Randall	Truong
April 4th, 2022	11:00 am	Examination	77070	703-895-6047	iosh.wilson1995@gmail.com	Josh	Wilson