



ADVICE USER GUIDE

Version 1.0 | 19/03/2019

Centre & Candidate No.

71523 2260

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1.0 Introduction

1.1 Description

The purpose of this system is to deliver specific improvements to enhance the business. The following document will provide guidance on using the system, currently for the only partially functional sub-system: advice booking. To aid in performing specific tasks on the system, the user guide is a comprehensive walk-through that will allow the system to be used properly and efficiently. Each important step is carefully narrated to help the user.

The system has several sub-facilities, imperative to the required daily-use of the business, briefly summarised below:

- Appointments
- Customers
- Timetable / Schedule
- Reports (Monthly Statistics / Receipts)

However, there are other functionalities which interlink the sub-facilities which would prove useful through daily-use.

1.2 System Requirements

Hardware

	Minimum Requirements	Recommended Requirements
Processor	500 MHz	1 GHz
Memory	1 GB RAM	4 GB RAM
Storage	100 MB available space	1 GB available space
Graphics	128 MB DirectX 9 graphics device	128 MB DirectX 9 graphics device

Software

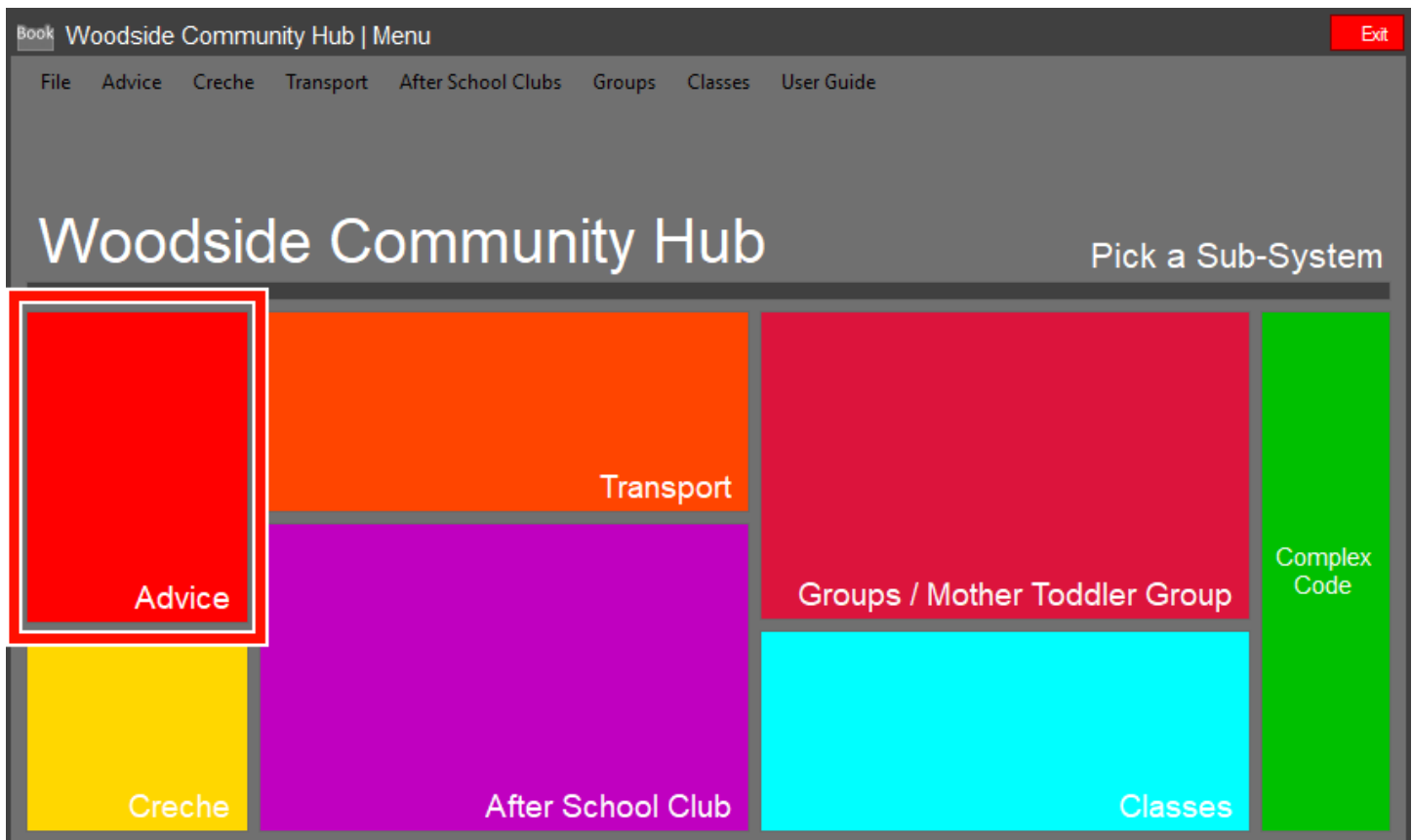
	Minimum Requirements	Recommended Requirements
Operating System	Windows XP SP3	Windows 10
.Net Environment	Visual Studio Express 2015	Visual Studio 2015 Professional

2.0 Form Navigation

2.1 Woodside Community Hub Menu

This menu is a hub to allow you to navigate to a selected sub-system; in this case, there is currently only one sub-system to venture to.

1. Click the button, named “Advice”, to continue

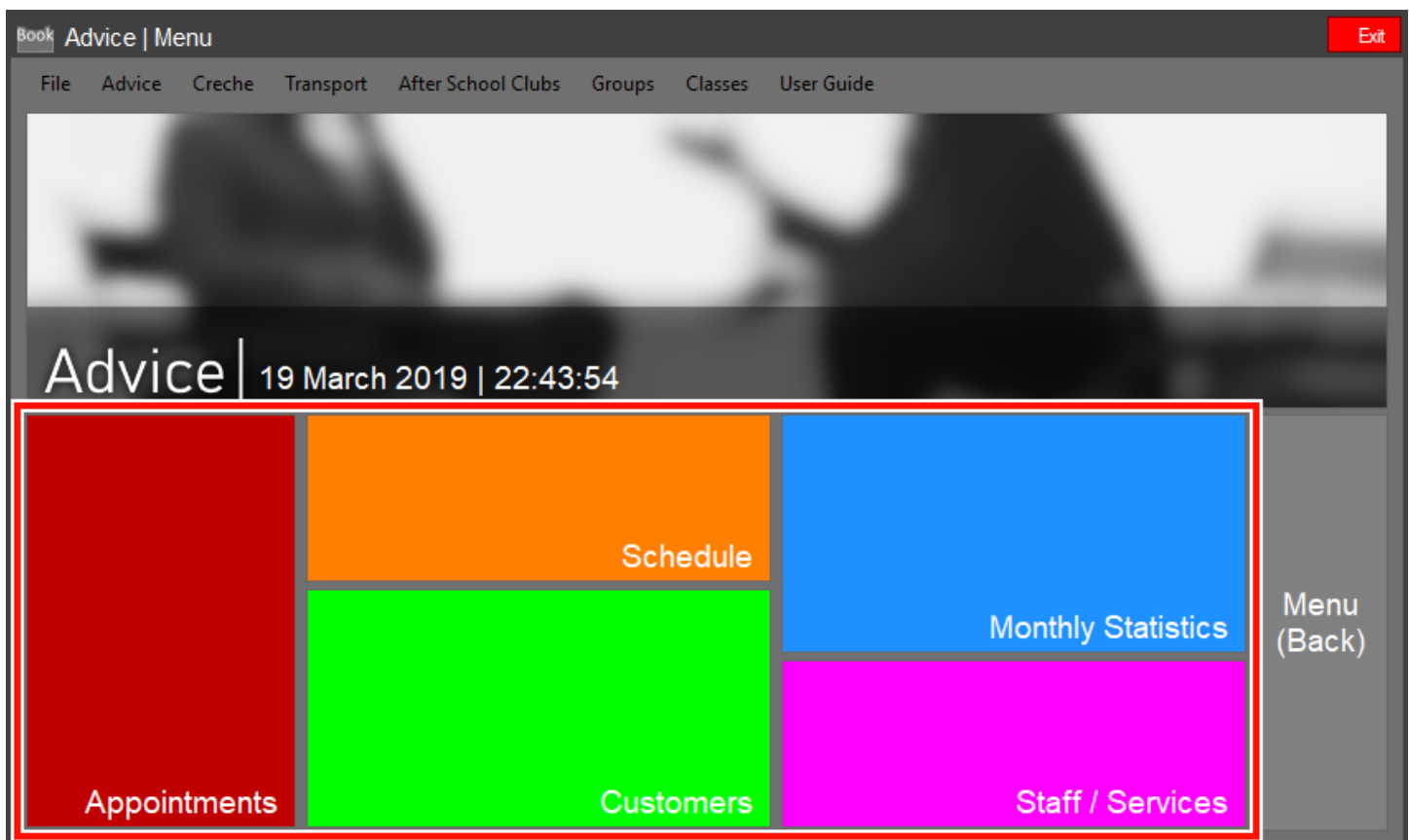


2.2 Advice Main Menu

The Advice Menu is a navigational form to branch off to all forms needed for the advice sub-system.

- Appointments – allows you to View, Add, Edit and Delete bookings
- Customers – allows you to View, Add, Edit and Delete customers
- Schedule – allows you to view the daily timetable, check in and generate receipt
- Monthly Statistics – compiles required, monthly and useful statistical information

Among the highlighted buttons, the functionality associated to the “Staff / Services” button has not been added yet. *Due to skill repetition, I have decided to leave this functionality out*



2.3 Navigation Bar

The navigation bar is universally accessible on every form, near the top. At any point in time, the navigation bar gives quick access to important forms of the entire system.

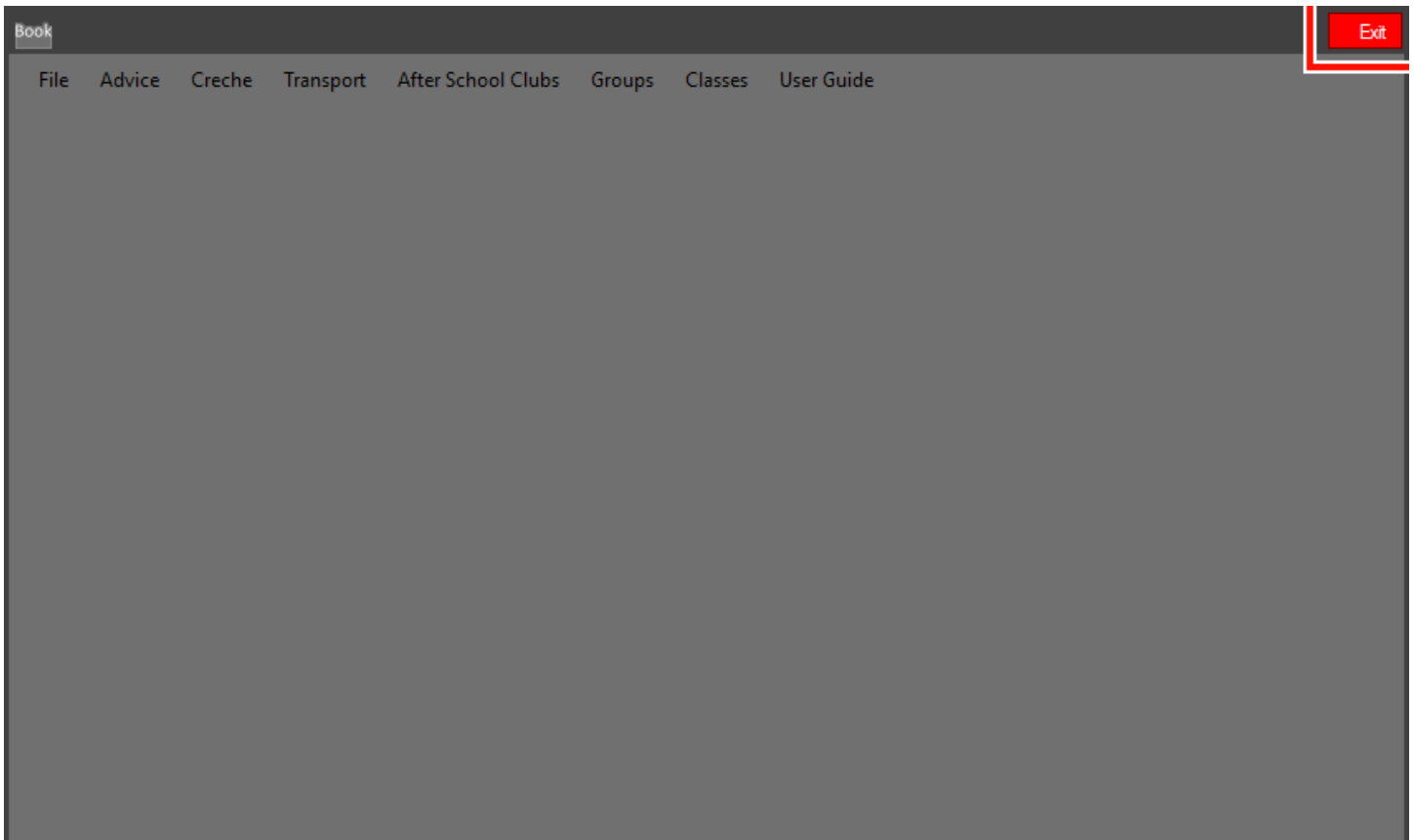
- File – reveal options that affect the whole system
- Advice – reveal options related to the advice sub-system
- Creche – reveal options related to the creche sub-system
- Transport – reveal options related to the transport sub-system
- After School Clubs – reveal options related to the after-school club sub-system
- Groups – reveal options related to the groups sub-system
- Classes – reveal options related to the classes sub-system
- User Guide – open the PDF document to the user guide (this guide)



2.4 Quitting the Application

Like the navigation bar (2.3), the button is an ever-present functionality in each form that allows you to quit the application. When approached with the message box, answer as needed.

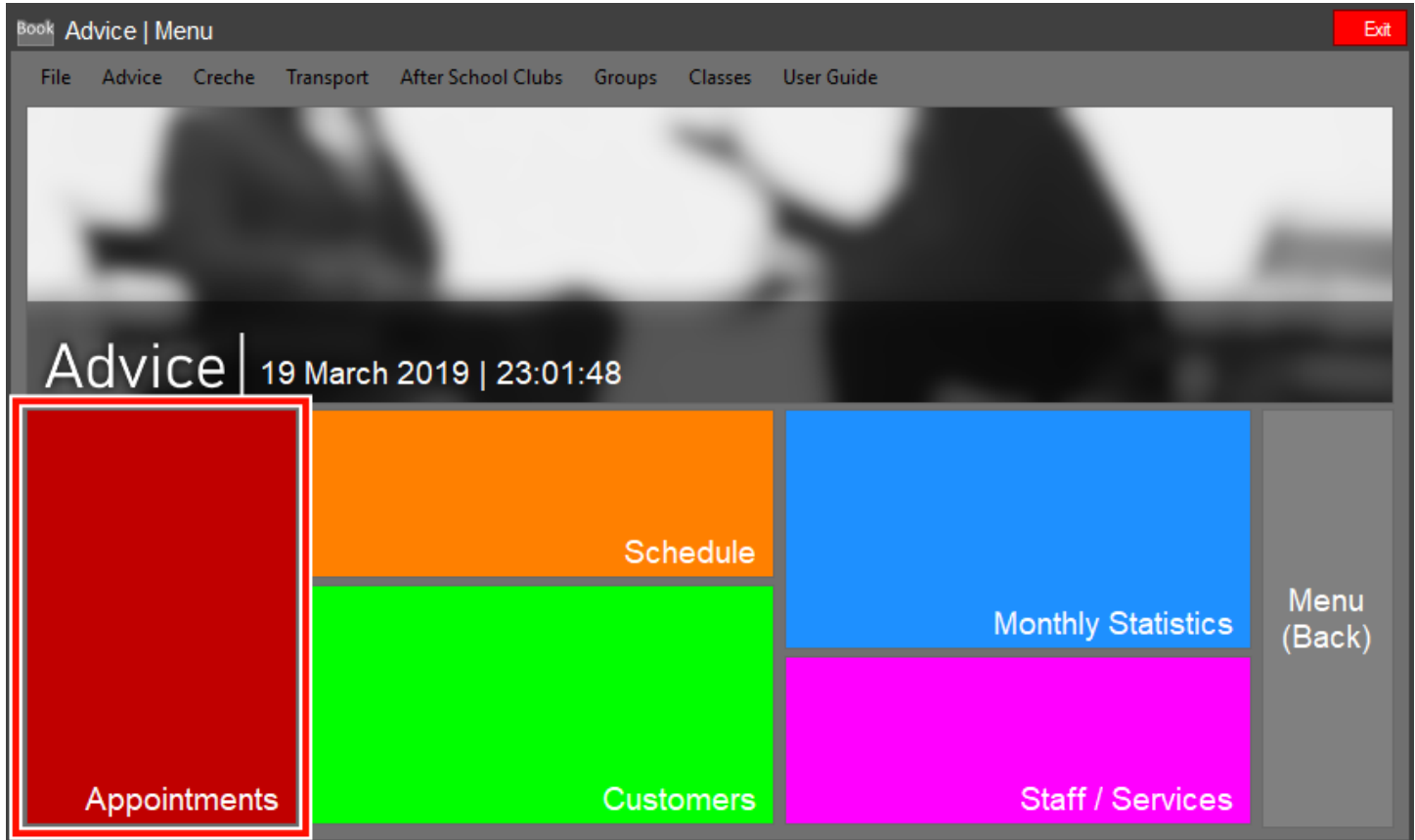
1. Click the top-right button, “Exit”



3.0 Appointments

3.1 Booking an Appointment

1. Click the “Appointments” button in the Advice Menu



2. Ensuring that the add section panel is showing, select a date for the appointment booking. Then, click the “Book” button.

View Appointments

File Advice Creche Transport After School Clubs Groups Classes User Guide

View Bookings

Customer (Not Specified) Status (N/A) March 2019 *
Staff (Not Specified) Priority (N/A) **Filter Results**

Bookings of Month: March 2019

Date Booked	Time	Customer	Service	Status
01/03/2019	10:00 - 11:00	David Memon	Housing Advice	Missed
01/03/2019	10:00 - 11:00	Naruto Uzumaki	Housing Advice	Missed
11/03/2019	11:00 - 12:00	David Memon	Housing Advice	Missed
11/03/2019	13:00 - 14:00	David Memon	Housing Advice	Missed
11/03/2019	14:00 - 15:00	David Memon	Financial Advice	Missed
22/03/2019	10:00 - 11:00	David Memon	Mental Heath Counselling	Upcoming
25/03/2019	14:00 - 15:00	David Memon	Financial Advice	Waiting

*Single click a row to manage booking, if not in section already

Add Section

Show Manage Booking Section

Select a specific day:
20 March 2019

Services are only available on the following days:
> Monday
> Wednesday
> Friday

Specific service availability is dependant on a certain day of the week. Please refer to the user guide or booking restriction in the program to find out.

Book | 20/03/2019

Office Spaces Available: 20

Back

Note:

To meet the business requirements, you can only book on the following days:

- Monday
- Wednesday
- Friday

The relevant dates span from the systems current date to two weeks from current date. In addition, when selecting a date, the office space availability is shown below the book button.

3. Fill in the fields (certain options are removed due to unavailability)

The screenshot shows a software window titled 'Book Advice | Add / Edit Booking' with a red 'Exit' button in the top right corner. Below the title bar is a menu bar with options: File, Advice, Creche, Transport, After School Clubs, Groups, Classes, and User Guide. The main area is titled 'Add Booking (20/03/2019)' and includes a 'Toggle booking priority:' section with a green 'Normal' button. Below this, there are two rows of dropdown menus. The first row has 'Customers' (showing 'David Merron (ID: 1)') and 'Priority' (showing 'Normal'), with a green 'Add New Customer' button between them. The second row has 'Time', 'Office(s) Available', and 'Service(s) Available' dropdowns. Below these are 'Staff Available' and 'Status of Booking' (showing 'Upcoming') dropdowns. A large text area labeled 'Brief Description' is at the bottom left. On the right side, there is a large grey rectangular area. At the bottom right, there are two buttons: a green 'Confirm Booking' button and a grey 'Cancel' button.

Note: During this booking process, we will be making a normal booking. The urgent booking functionality is distinctively different in function.

The follow combo boxes have notable restrictions to aid in creating a solid booking system:

- Customers – only active customers are shown in the combo box
- Time – depending on the customer and date, the times available will be deducted if the customer has an appoint already for one of the times, as the customer cannot attend two appointments at the same time and date in different rooms
- Office – depending on the time and date, the office available will be deducted if the office is already in use in that time and date, as an office will be in use
- Services – the services available depend on the date. Depending on the day of the week, certain services will be unavailable
- Staff – if a staff is already in use depending on time and date, the staff will be deducted from the list

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4. Click the "Confirm Booking" button and the booking is now booked

Book Advice | Add / Edit Booking Exit

File Advice Creche Transport After School Clubs Groups Classes User Guide

Add Booking (20/03/2019)

Toggle booking priority: **Normal**

Customers: Add New Customer Priority:

Time: Office(s) Available (4): Service(s) Available:

Staff Available (2): Status of Booking:

Brief Description

Computer science is the study of processes that interact with data and that can be represented as data in the form of programs. It enables the use of algorithms to manipulate, store, and communicate digital information. A computer scientist studies the theory of computation and the practice of designing software systems.

(Wikipedia)

Confirm Booking Cancel

Book Advice | View Appointments Exit

File Advice Creche Transport After School Clubs Groups Classes User Guide

View Appointments

View Bookings

Customer: Status: March 2019 *

Staff: Priority: Filter Results

Bookings of Month: March 2019

Date Booked	Time	Customer	Service	Status
01/03/2019	10:00 - 11:00	David Merron	Housing Advice	Missed
01/03/2019	10:00 - 11:00	Naruto Uzumaki	Housing Advice	Missed
11/03/2019	11:00 - 12:00	David Merron	Housing Advice	Missed
11/03/2019	13:00 - 14:00	David Merron	Housing Advice	Missed
11/03/2019	14:00 - 15:00	David Merron	Financial Advice	Missed
20/03/2019	10:00 - 11:00	David Merron	Housing Advice	Upcoming
22/03/2019	10:00 - 11:00	David Merron	Mental Health Counselling	Upcoming
25/03/2019	14:00 - 15:00	David Merron	Financial Advice	Waiting

*Single click a row to manage booking, if not in section already

Manage Section

Show Add Booking Section

Selected Row:

Date: 01/03/2019
Time: 10:00 - 11:00
Customer: David Merron
Staff: Jenni Williams
Priority: Normal

Check-In

View Booking

Generate Receipt

Back

3.1.1 Booking an Urgent Appointment

1. Ensure that the toggle appointment priority button is: urgent

The screenshot shows a software interface for adding a booking. At the top, there's a navigation bar with 'Book', 'Advice', and 'Add / Edit Booking'. Below this is a menu bar with 'File', 'Advice', 'Creche', 'Transport', 'After School Clubs', 'Groups', 'Classes', and 'User Guide'. The main form is titled 'Add Booking (20/03/2019)'. It features a 'Toggle Appointment Priority' button set to 'Urgent'. The form includes a 'Customers' section with a dropdown menu showing 'David Merron (ID: 1)' and a green 'Add New Customer' button. Below this are three columns of dropdown menus: 'Time' (10:00 - 11:00), 'Office(s) Available (4)', and 'Service(s) Available'. The next row contains 'Staff Available', 'Priority' (Urgent), and 'Status of Booking' (Upcoming). A 'Brief Description' text area is at the bottom left. On the right side, there's a large empty box. At the bottom right, there are two buttons: a green 'Confirm Booking' button and a grey 'Cancel' button.

The urgency booking is a special use case, which overrides normal bookings. When a booking is made, the booking is either in conflict or not in conflict with a booking. When “not in conflict”, the booking is made like normal, however the priority is set to “urgent” and therefore cannot be overridden by any other booking.

In the case of a conflicting booking with a normal priority booking, the booking will override the spot of the normal bookings and defer the normal booking two weeks from the original date. This linear system of deferral is a simple logic that just works.

3.2 Viewing an Appointment

1. Select the required booking, disregarding status

View Appointments

File Advice Creche Transport After School Clubs Groups Classes User Guide

View Bookings

Customer: (Not Specified) Status: (N/A) March 2019 *
 Staff: (Not Specified) Priority: (N/A) **Filter Results**

Manage Section
 Show Add Booking Section

Bookings of Month: March 2019

Date Booked	Time	Customer	Service	Status
01/03/2019	10:00 - 11:00	David Merron	Housing Advice	Missed
01/03/2019	10:00 - 11:00	Naruto Uzumaki	Housing Advice	Missed
11/03/2019	11:00 - 12:00	David Merron	Housing Advice	Missed
11/03/2019	13:00 - 14:00	David Merron	Housing Advice	Missed
11/03/2019	14:00 - 15:00	David Merron	Financial Advice	Missed
20/03/2019	10:00 - 11:00	David Merron	Housing Advice	Upcoming
22/03/2019	10:00 - 11:00	David Merron	Mental Health Counselling	Upcoming
25/03/2019	14:00 - 15:00	David Merron	Financial Advice	Waiting

*Single click a row to manage booking, if not in section already

Selected Row:
 Date: 20/03/2019
 Time: 10:00 - 11:00
 Customer: David Merron
 Staff: Jenni Williams
 Priority: Normal

Check-In
View / Edit Booking
Generate Receipt
 Back

Note: Make sure you show the manage section

2. Click the “View/Edit Booking” or “View Booking” button

4. View the appointment

Book Advice | Add / Edit Booking Exit

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Edit Booking (20/03/2019)

Customers
David Merron (ID: 1) ▼

Time 10:00 - 11:00 ▼	Office(s) Available (4) Office Room: 10 Floor: 1 ▼	Service(s) Available Housing Advice (ID: 1) ▼
Staff Available (2) Jenni Williams (ID: 1) ▼	Priority Normal ▼	Status of Booking Upcoming ▼

Brief Description
LOL

Delete Booking
Save Booking
Cancel

3.3 Editing an Appointment

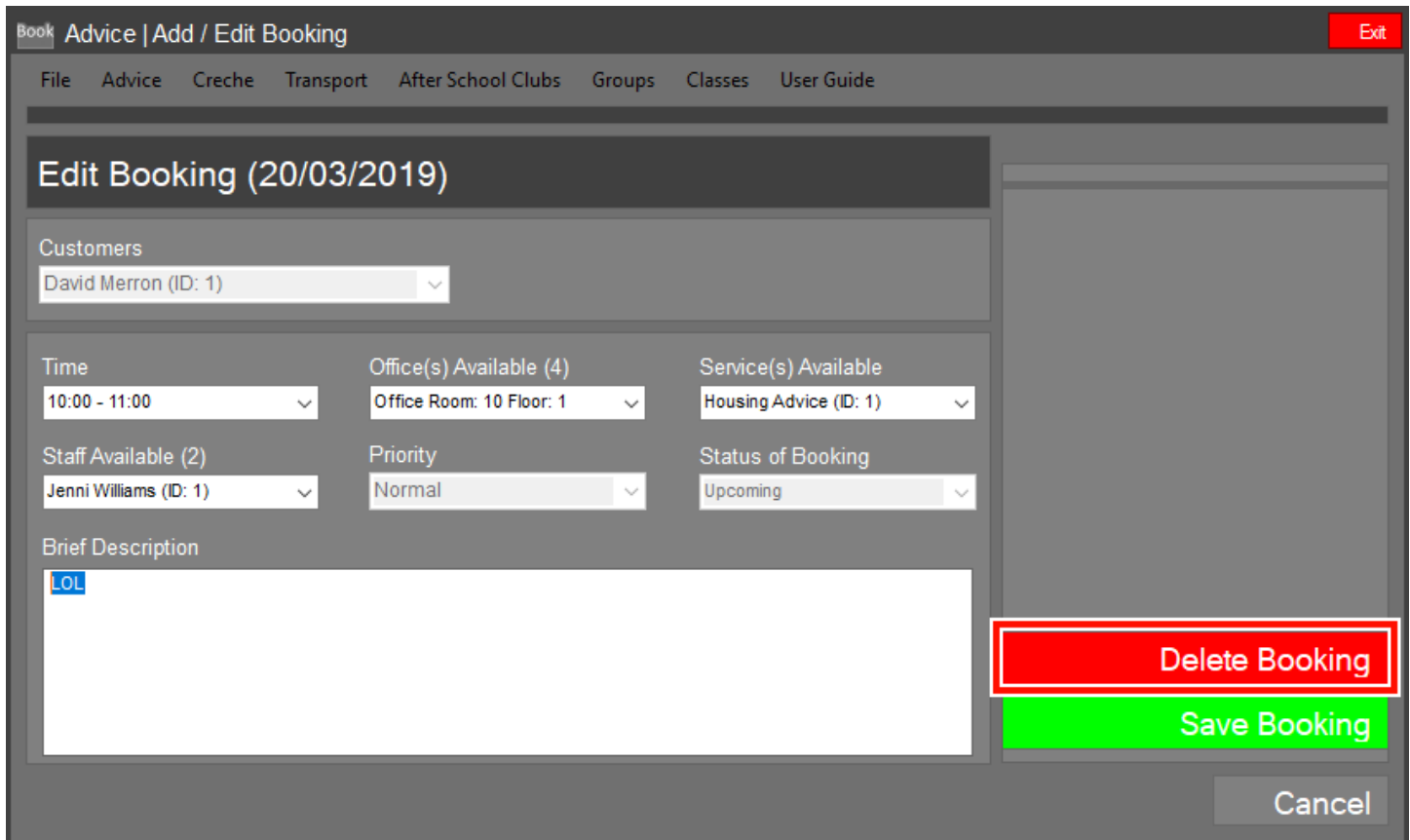
1. Change details to suit need and then click “Save Booking” button

The screenshot shows a software interface for editing a booking. The title bar reads 'Book Advice | Add / Edit Booking' with an 'Exit' button on the right. A menu bar includes 'File', 'Advice', 'Creche', 'Transport', 'After School Clubs', 'Groups', 'Classes', and 'User Guide'. The main heading is 'Edit Booking (20/03/2019)'. Below this, there are several sections: 'Customers' with a dropdown menu showing 'David Merron (ID: 1)'; 'Time' with a dropdown menu showing '10:00 - 11:00'; 'Office(s) Available (4)' with a dropdown menu showing 'Office Room: 10 Floor: 1'; 'Service(s) Available' with a dropdown menu showing 'Housing Advice (ID: 1)'; 'Staff Available (2)' with a dropdown menu showing 'Jenni Williams (ID: 1)'; 'Priority' with a dropdown menu showing 'Normal'; and 'Status of Booking' with a dropdown menu showing 'Upcoming'. There is also a 'Brief Description' text area containing the text 'LOL'. On the right side, there are two buttons: 'Delete Booking' (red) and 'Save Booking' (green, highlighted with a red border). At the bottom right, there is a 'Cancel' button.

Note: There are certain changes that aren't available due to business requirements. Also, only booking of status, "Waiting" and "Upcoming" may be edited. Other statuses cannot be edited and thus all the inputs will be disabled.

3.4 Deleting / Cancelling an Appointment

1. Click the “Delete Booking” button



Book | Advice | Add / Edit Booking Exit

File Advice Creche Transport After School Clubs Groups Classes User Guide

Edit Booking (20/03/2019)

Customers
David Merron (ID: 1) ▼

Time
10:00 - 11:00 ▼

Office(s) Available (4)
Office Room: 10 Floor: 1 ▼

Service(s) Available
Housing Advice (ID: 1) ▼

Staff Available (2)
Jenni Williams (ID: 1) ▼

Priority
Normal ▼

Status of Booking
Upcoming ▼

Brief Description
LOL

Delete Booking
Save Booking
Cancel

Note: Due to the severity of deleting a booking, a message box will prompt you for confirmation, just in case

4.0 Customers

4.1 Adding a Customer

1. Click the “Add New Customer” button

The screenshot shows a web application interface for managing customers. At the top, there is a navigation bar with a 'Book' button and a 'View Customers' link. Below this is a menu bar with options: File, Advice, Creche, Transport, After School Clubs, Groups, Classes, and User Guide. The main content area is divided into two sections. On the left, there is a 'List of Customers' section with a search bar and a list of customer names and IDs. The first item, 'David Merron (ID: 1)', is highlighted. Below the list is a green button labeled 'Add New Customer'. On the right, there is a detailed view for 'David Merron'. This view includes a 'More Options' button, 'Basic Info' (Age: 18, Date of Birth: 01/03/2001), 'Contact' (Email: DM2000@gmail.com, TelNo: 07782597311), and 'Address' (1, Coursework Street, Town | Belfast, Postcode | BT6 1SA). Below this is a section for 'Upcoming Appointments' with a table showing three appointments. At the bottom right, there is a 'Back' button.

Book Advice | View Customers Exit

File Advice Creche Transport After School Clubs Groups Classes User Guide

List of Customers

Search...

David Merron (ID: 1)
Diego Collado (ID: 2)
Daniel Sloan (ID: 3)
Sam McCooey (ID: 4)
Jack Knox-Bradley (ID: 5)
Luke McFarlane (ID: 6)
Manus McColgan (ID: 7)
Mateusz Rosinski (ID: 8)
Ben Millis (ID: 9)
Kar Hay Ho (ID: 10)
Vince Junior (ID: 15)

David Merron More Options

Basic Info: Age | 18
Date of Birth | 01/03/2001

Contact: DM2000@gmail.com
TelNo: 07782597311

Address: 1, Coursework Street
Town | Belfast
Postcode | BT6 1SA

Upcoming Appointments

Date Booked	Time	Customer	Service	Status
20/03/2019	10:00 - 11:00	David Merron	Housing Advice	Upcoming
22/03/2019	10:00 - 11:00	David Merron	Mental Heath Counselling	Upcoming
25/03/2019	14:00 - 15:00	David Merron	FinancialAdvice	Waiting

Add New Customer

Back

2. Fill in fields

Book Advice | Add / Edit Customer Exit

File Advice Creche Transport After School Clubs Groups Classes User Guide

Add a New Customer

Customers Name

First Name

Last Name

Date of Birth
20 March 2001

Address

Town

Postcode

Email Address

Telephone No.

Finalize Details

Customers Name

ID: 20

Name Fill

Date of Birth Valid

Address and Town Fill

Postcode Fill

Email Fill

Tel No. Fill

Add New Customer

Cancel

Book Advice | Add / Edit Customer Exit

File Advice Creche Transport After School Clubs Groups Classes User Guide

Add a New Customer

Victor Buttersworth

First Name

Last Name

Date of Birth
20 March 2001

Address

Town

Postcode

Email Address

Telephone No.

Finalize Details

Customers Name

ID: 20

Name Valid

Date of Birth Valid

Address and Town Valid

Postcode Valid

Email Valid

Tel No. Valid

Add New Customer

Cancel

Validation:

- Name: the first name and last name must only contain letters and be filled
- Date of Birth: the date of birth must be 18+ years old
- Postcode: must be within UK regulation in terms of format, etc.
- Email: must contain letter before '@' and after
- Tele No: must be of length 11 and only contain numbers

3. Click “Add New Customer” button

The screenshot shows a software application window titled 'Book Advice | Add / Edit Customer'. The main heading is 'Add a New Customer'. Below this, the name 'Victor Buttersworth' is displayed. The form fields are as follows:

Field	Value
First Name	Victor
Last Name	Buttersworth
Date of Birth	20 March 2001
Address	20 Crown Street
Town	Belfast
Postcode	BT6 6SA
Email Address	Victor@gmail.com
Telephone No.	03350943586

On the right side, under 'Finalize Details', there is a summary of the entered data with validation status:

Field	Validation Status
ID: 20	
Name	Valid
Date of Birth	Valid
Address and Town	Valid
Postcode	Valid
Email	Valid
Tel No.	Valid

At the bottom right, there is a green button labeled 'Add New Customer' which is highlighted with a red border, and a grey 'Cancel' button.

Note: this button checks the validation, if not valid, you will be notified. However, if valid, the user will be added.

4.2 Viewing a Customer

1. Select a customer on the left. On the right, the details are shown

The screenshot shows a web application interface titled 'Book Advice | View Customers'. The interface is divided into two main sections. On the left, there is a 'List of Customers' section with a search bar and a list of customer names and IDs. The first item, 'David Merron (ID: 1)', is highlighted with a red box. Below the list is a green button labeled 'Add New Customer'. On the right, there is a detailed view for 'David Merron', which is also highlighted with a red box. This view includes a 'More Options' button, 'Basic Info' (Age, Date of Birth, Contact), 'Address', and 'Upcoming Appointments' (a table of booked appointments).

List of Customers

Search...

David Merron (ID: 1)

Diego Corrado (ID: 2)

Daniel Sloan (ID: 3)

Sam McCooley (ID: 4)

Jack Knox-Bradley (ID: 5)

Luke McFarlane (ID: 6)

Manus McColgan (ID: 7)

Mateusz Rosinski (ID: 8)

Ben Millis (ID: 9)

Kar Hay Ho (ID: 10)

Vince Junior (ID: 15)

Add New Customer

David Merron **More Options**

Basic Info: Age | 18
Date of Birth | 01/03/2001
Contact: DM2000@gmail.com
TelNo: 07782597311

Address: 1, Coursework Street
Town | Belfast
Postcode | BT6 1SA

Upcoming Appointments

Date Booked	Time	Customer	Service	Status
20/03/2019	10:00 - 11:00	David Merron	Housing Advice	Upcoming
22/03/2019	10:00 - 11:00	David Merron	Mental Health Counselling	Upcoming
25/03/2019	14:00 - 15:00	David Merron	Financial Advice	Waiting

Back

4.3 Editing a Customer

1. Select a customer and click “More Options” button

The screenshot shows a web application interface for managing customers. At the top, there is a navigation bar with 'Book Advice | View Customers' and an 'Exit' button. Below this is a menu with options: File, Advice, Creche, Transport, After School Clubs, Groups, Classes, and User Guide. The main content area is divided into two sections. On the left, 'List of Customers' contains a search bar and a list of customer names with their IDs. 'David Merron (ID: 1)' is selected. At the bottom of this list is a green 'Add New Customer' button. On the right, the details for 'David Merron' are displayed. A red box highlights the 'More Options' button in the top right corner of this section. Below the name, there are fields for 'Basic Info' (Age, Date of Birth), 'Contact' (Email, TelNo), and 'Address' (Street, Town, Postcode). At the bottom of the details section is a table titled 'Upcoming Appointments' with columns for Date Booked, Time, Customer, Service, and Status. A 'Back' button is located at the bottom right of the interface.

Book Advice | View Customers Exit

File Advice Creche Transport After School Clubs Groups Classes User Guide

List of Customers

Search...

- David Merron (ID: 1)
- Diego Collado (ID: 2)
- Daniel Sloan (ID: 3)
- Sam McCooley (ID: 4)
- Jack Knox-Bradley (ID: 5)
- Luke McFarlane (ID: 6)
- Manus McColgan (ID: 7)
- Mateusz Rosinski (ID: 8)
- Ben Millis (ID: 9)
- Kar Hay Ho (ID: 10)
- Vince Junior (ID: 15)

Add New Customer

David Merron

More Options

Basic Info: Age | 18
Date of Birth | 01/03/2001

Contact: DM2000@gmail.com
TelNo: 07782597311

Address: 1, Coursework Street
Town | Belfast
Postcode | BT6 1SA

Upcoming Appointments

Date Booked	Time	Customer	Service	Status
20/03/2019	10:00 - 11:00	David Merron	Housing Advice	Upcoming
22/03/2019	10:00 - 11:00	David Merron	Mental Heath Counselling	Upcoming
25/03/2019	14:00 - 15:00	David Merron	Financial Advice	Waiting

Back

Candidate Number: 2260

Centre Number: 71523

2. Change the details as need and click the “Save Customer Details” button, all validity from add booking applies

Book Advice | Edit/Delete Customer **Exit**

File Advice Creche Transport After School Clubs Groups Classes User Guide

Edit/Delete Existing Customer

David Merron

First Name	Last Name	
David	Merron	
Date of Birth		
01 March 2001		
Address	Town	Postcode
1, Coursework Street	Belfast	BT6 1SA
Email Address		
DM2000@gmail.com		
Telephone No.		
07782597311		

Finalize Details

Customers Name

ID: 1

Name	Valid
Date of Birth	Valid
Address and Town	Valid
Postcode	Valid
Email	Valid
Tel No.	Valid

Deactivate Customer

Save Customer Details

Cancel

4.4 Deactivating a Customer

1. Click the “Deactivate Customer” button

Edit/Delete Existing Customer

David Merron

First Name	Last Name	
David	Merron	
Date of Birth		
01 March 2001		
Address	Town	Postcode
1, Coursework Street	Belfast	BT6 1SA
Email Address		
DM2000@gmail.com		
Telephone No.		
07782597311		

Finalize Details

Customers Name

ID: 1

Name	Valid
Date of Birth	Valid
Address and Town	Valid
Postcode	Valid
Email	Valid
Tel No.	Valid

Deactivate Customer

Save Customer Details

Cancel

Note: To avoid deception, I have titled this deactivation as the customer will still be saved in the database but not useable. Also, refer to 6.2.2 in the user guide, to further understand the consequence of deactivating a customer.

5.0 Schedule

5.1 Viewing the Schedule

1. Select the “Schedule” button in the Advice Menu (2.2)

Book Advice | Office Diary Exit

File Advice Creche Transport After School Clubs Groups Classes User Guide

Daily Schedule View - Today

Select a date to view: 20 March 2019

Upcoming
Waiting
Missed
Checked In

Office	10:00 - 11:00	11:00 - 12:00	Lunch	13:00 - 14:00	14:00 - 15:00
Room: 10	David Merron				
Room: 20					
Room: 30	Sam McCooey				
Room: 40					

Booking Information

Customer: Sam McCooey Description: test

Priority: Normal

Staff: Sam Duggan

Generate Receipt

Check-In

Back

Note: As reference in the top right of the form, each cell is colour coordinated to the status (a selected booking is grey). Also, when selecting a customer, at the bottom, specific information is shown.

6.0 Appointment Management

6.1 Manual Status Update: Checking In

1. Select a booking and click check-in

View Appointments

File Advice Creche Transport After School Clubs Groups Classes User Guide

View Bookings

Customer: (Not Specified) Status: (N/A) March 2019

Staff: (Not Specified) Priority: (N/A) **Filter Results**

Bookings of Month: March 2019

Date Booked	Time	Customer	Service	Status
01/03/2019	10:00 - 11:00	Naruto Uzumaki	Housing Advice	Missed
11/03/2019	11:00 - 12:00	David Merron	Housing Advice	Missed
11/03/2019	13:00 - 14:00	David Merron	Housing Advice	Missed
11/03/2019	14:00 - 15:00	David Merron	Financial Advice	Missed
20/03/2019	10:00 - 11:00	David Merron	Housing Advice	Upcoming
20/03/2019	10:00 - 11:00	Sam McCooley	Mental Health Counselling	Upcoming
22/03/2019	10:00 - 11:00	David Merron	Mental Health Counselling	Upcoming
25/03/2019	14:00 - 15:00	David Merron	Financial Advice	Waiting

*Single click a row to manage booking, if not in section already

Manage Section

Show Add Booking Section

Selected Row:

Date: 20/03/2019
Time: 10:00 - 11:00
Customer: David Merron
Staff: Jenni Williams
Priority: Normal

Check-In

View / Edit Booking

Generate Receipt

Back

Note: You can only check in a booking with the same time and date of the selected booking. Also, as a prerequisite to the step, you need to make sure that the manage section is shown.

6.2 Automatic Status Update

6.2.1 Updating Passed Bookings

1. This function executes every time the program is loaded up

View Appointments

File Advice Creche Transport After School Clubs Groups Classes User Guide

View Bookings

Customer: (Not Specified) Status: (N/A) March 2019

Staff: (Not Specified) Priority: (N/A) **Filter Results**

Bookings of Month: March 2019

Date Booked	Time	Customer	Service	Status
01/03/2019	10:00 - 11:00	David Merron	Housing Advice	Missed
01/03/2019	10:00 - 11:00	Naruto Uzumaki	Housing Advice	Missed
11/03/2019	11:00 - 12:00	David Merron	Housing Advice	Missed
11/03/2019	13:00 - 14:00	David Merron	Housing Advice	Missed
11/03/2019	14:00 - 15:00	David Merron	Financial Advice	Missed
20/03/2019	10:00 - 11:00	David Merron	Housing Advice	Upcoming
20/03/2019	10:00 - 11:00	Sam McCooey	Mental Heath Counselling	Upcoming
22/03/2019	10:00 - 11:00	David Merron	Mental Heath Counselling	Upcoming
25/03/2019	14:00 - 15:00	David Merron	Financial Advice	Waiting

*Single click a row to manage booking, if not in section already

Manage Section

Show Add Booking Section

Selected Row:

Date: 25/03/2019
Time: 14:00 - 15:00
Customer: David Merron
Staff: Norgan Trovick
Priority: Urgent

Check-In

View / Edit Booking

Generate Receipt

Back

Note: Based on the likelihood the computer the system is used on will be rebooted every day, when the program loads, the program will check if there are bookings that are upcoming / waiting that have passed the systems "todays" date. If so, the booking will be marked missed. This is because the booking was not checked-in in time and therefore it will ensure bookings have the correct status.

6.2.2 Deletion of Future Bookings after Customer Deactivation

1. When a customer is deactivated, future bookings will be deleted

View Appointments

File Advice Creche Transport After School Clubs Groups Classes User Guide

View Bookings

Customer: (Not Specified) Status: (N/A) March 2019

Staff: (Not Specified) Priority: (N/A) **Filter Results**

Bookings of Month: March 2019

Date Booked	Time	Customer	Service	Status
01/03/2019	10:00 - 11:00	Naruto Uzumaki	Housing Advice	Missed
11/03/2019	11:00 - 12:00	David Merron	Housing Advice	Missed
11/03/2019	13:00 - 14:00	David Merron	Housing Advice	Missed
11/03/2019	14:00 - 15:00	David Merron	Financial Advice	Missed
20/03/2019	10:00 - 11:00	David Merron	Housing Advice	Upcoming
20/03/2019	10:00 - 11:00	Sam McCooley	Mental Heath Counselling	Upcoming
22/03/2019	10:00 - 11:00	David Merron	Mental Heath Counselling	Upcoming
25/03/2019	14:00 - 15:00	David Merron	Financial Advice	Waiting

*Single click a row to manage booking, if not in section already

Add Section

Show Manage Booking Section

Select a specific day: 20 March 2019

Services are only available on the following days:
 > Monday
 > Wednesday
 > Friday

Specific service availability is dependant on a certain day of the week. Please refer to the user guide or booking restriction in the program to find out.

Book | Today

Office Spaces Available: 18

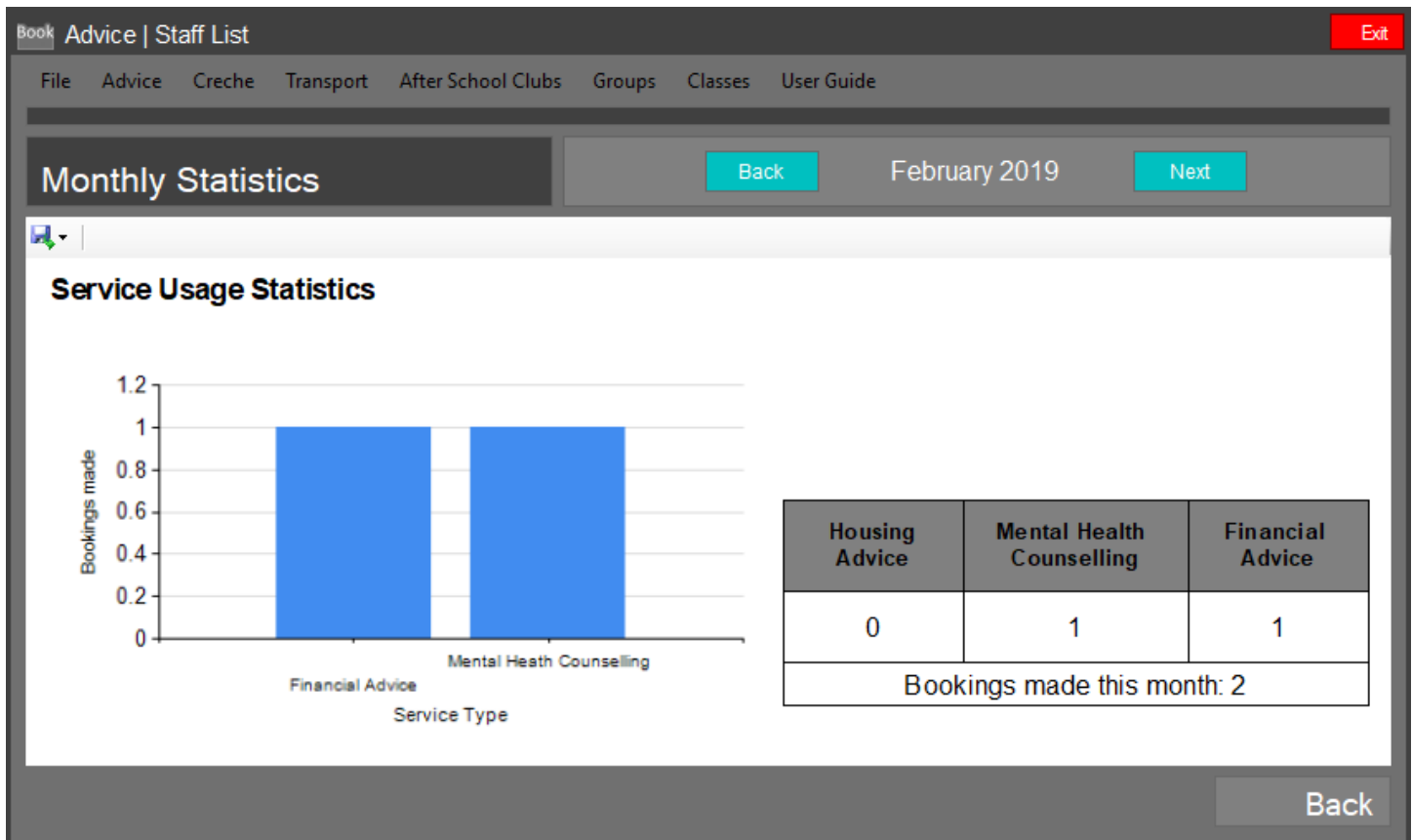
Back

Note: The highlighted bookings are all bookings associated to David Merron in the current month. As you can see, the bookings for this person have varying statuses. If, for example, the customer: David Merron was deactivated, the bookings of status Upcoming and Waiting will be deleted. In this case, only three bookings will be deleted.

7.0 Reports

7.1 Viewing the Monthly Statistics

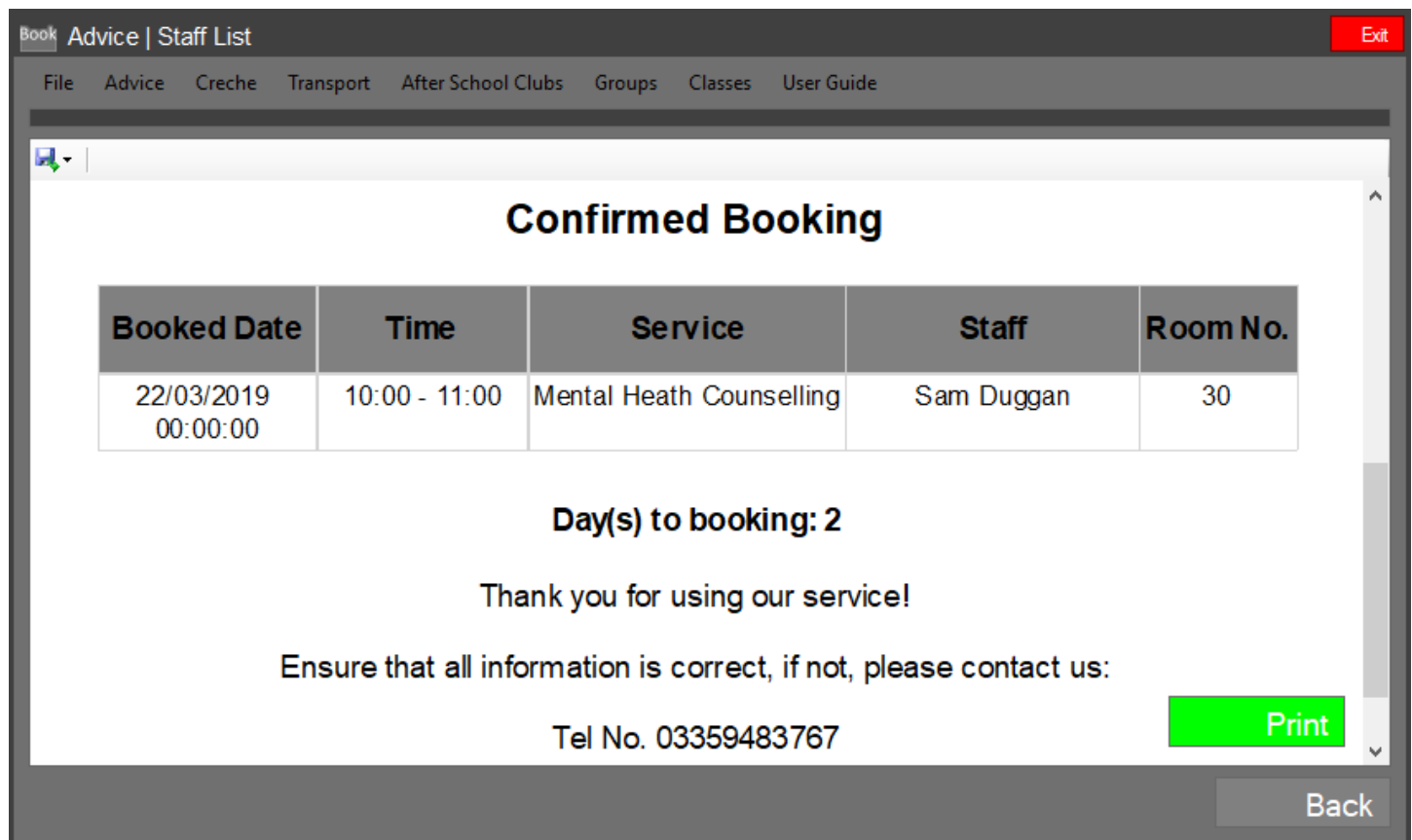
1. Select a month with bookings



Note: You can only view past months; not the current month as it has not passed yet

7.2 Generating the Receipt

1. Select a booking (3.2 / 5.1) and click the “Generate Receipt” button



The screenshot shows a software application window titled 'Book Advice | Staff List' with a red 'Exit' button in the top right corner. Below the title bar is a menu bar with options: File, Advice, Creche, Transport, After School Clubs, Groups, Classes, and User Guide. The main content area is titled 'Confirmed Booking' and contains a table with booking details.

Booked Date	Time	Service	Staff	Room No.
22/03/2019 00:00:00	10:00 - 11:00	Mental Heath Counselling	Sam Duggan	30

Below the table, the text 'Day(s) to booking: 2' is displayed. This is followed by 'Thank you for using our service!' and 'Ensure that all information is correct, if not, please contact us:'. The telephone number 'Tel No. 03359483767' is shown at the bottom left of the main content area. A green 'Print' button is located at the bottom right of the main content area. At the very bottom right of the application window is a grey 'Back' button.

Note: In the bottom-right, there is a “print” button which allows you to physically print a copy of the receipt