

## CheckMate User Guide

**Tip:** Logging In

**Tip:** Adding , searching and deleting records

**Tip:** Managers, Reps and receipts

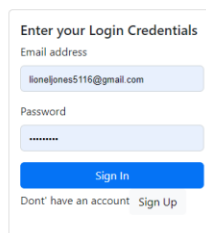
**Tip:** Deployment

**Tip:** Report(s)

**Tip:** Logging In

From the login screen

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The screenshot shows a login form with the title "Enter your Login Credentials". It contains two input fields: "Email address" with the value "lone@ones5116@gmail.com" and "Password" with masked characters "\*\*\*\*\*". Below the password field is a blue "Sign In" button. At the bottom, there is a link "Dont' have an account" followed by a "Sign Up" button.

Enter in your email address and password.

If you don't have on, select "signup" to create an account

Once logged in, The main menu will appear

Enter Credentials

User Name

lioneljones5116@gmail.com

Email address

Enter email

Password

\*\*\*\*\*

Sign Up

Already have an account ? Sign In

Enter your Login Credentials

Email address

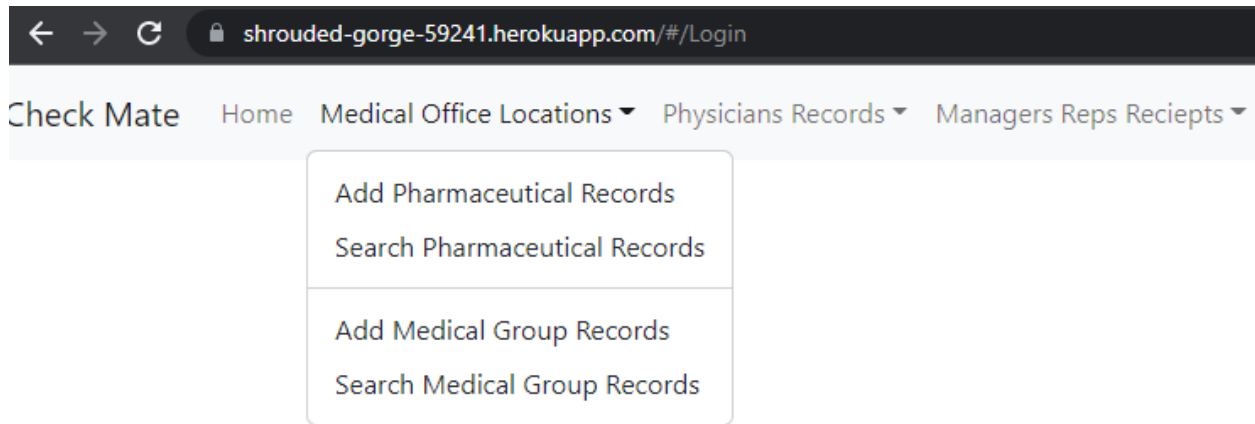
Enter email

Password

Sign In

Dont have an account Sign Up

**Tip:** Adding , searching and deleting records



Each screen has the same functionality in terms of adding. Updating and deleting record.

To add a record, select “add ....”

A screenshot of the 'Pharmaceutical Company Management Screen'. The form includes fields for 'Company Name', 'Phone', 'Email', 'Password', and 'Confirm Password'. There is a large text area for 'Notes'. At the bottom, there are four buttons: 'Submit' (blue), 'Update Record' (orange), 'Add New' (green), and 'Login' (white with a green border). The 'Update Record' button is disabled.

When in add mode, you will notice that the “Update Record” button is “disabled”

The submit button, adds a new record, You get a success message when the record is added.

Record Added/Updated

## Pharmaceutical Company Management Screen

Company Name

Phone

Email

Password

Confirm Password

Notes

Submit

Update Record

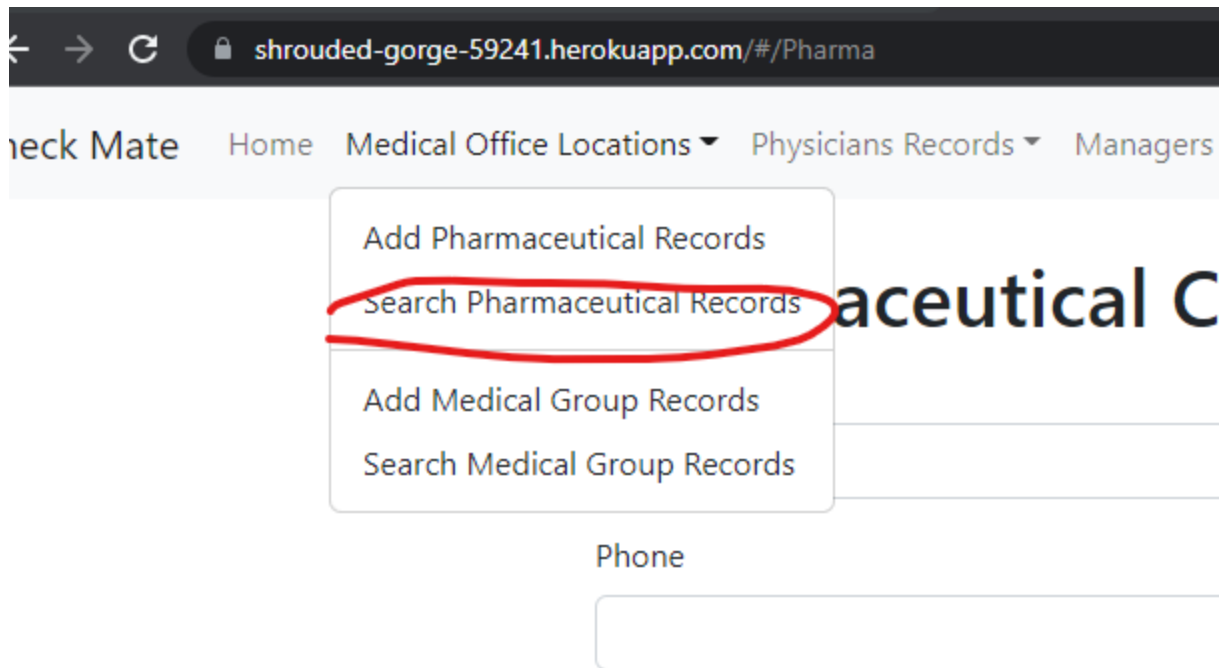
Add New

Login

The Add New Button, clears the screen for you to add another record (but by default, when you add a new record, the screen clears automatically),

### SEARCHING FOR A RECORD

To search for a record:



Each search screen has it's own set of criteria, in the example below, I selected "all" from the Enter Search Criteria dropdown:

Check Mate Home Medical Office Locations Physicians Records Managers Reps Receipts Search Login/Authenticate

### Search Pharmaceutical Companies

**Enter Search Criteria**

All

Email Enter Email Name Name

Search Records

**Search Results**

_id	Name	Phone	Email	Edit	Delete
63549190fe74bf00a27dcfa5	Memorial Health	713-654-0987	mmhealth@gmail.com		
6354a04dd5e97ead84326278	Herman Hospital System	713-876-0987	corsonmemorial@gmail.com		
635d67df82a25da0f032367b	Tony Baker Pharm Company	713-098-8765	tonybaker@pharma.com		

Showing rows 1 to 3 of 3

To Delete record, hit the trashcan



To view a record, hit the binoculars



## Pharmaceutical Company Management Screen

Company Name  
Memorial Health

Phone 713-654-0987 Email mmhealth@gmail.com

Password  
\*\*\*\*\*

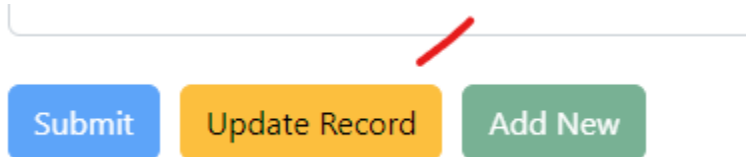
Confirm Password

Notes  
Good Pharma Company and I will stay employed with them

Submit Update Record Add New

Login

As you can see above, the update record button



Is now “enabled” for “update” the existing record. The **Submit and Add new buttons are “disabled”**

**Tip:** Managers, Reps and receipts

## Managers, Reps and Receipts

shrouded-gorge-59241.herokuapp.com/#/Pharma?id=63549190fe/4bf00a2/dcta5

Check Mate Home Medical Office Locations Physicians Records Managers Reps Receipts Search

## Pharmaceutical Company Manager

Company Name

Memorial Health

Phone

713-654-0987

Password

.....

- Add Manager Records
- Search Manager Records
- Add Rep Records
- Search Rep Records
- Add Receipts
- Search Receipts

On these three screens, there relationships:

**A Rep Record “has” to have a manager, a Receipt record “has” to have a rep.**

So first we add a Manager:

Go to Search to see a list of managers in your system:

Check Mate Home Medical Office Locations Physicians Records Managers Reps Receipts Search Login/Authenticate

## Search Managers

Enter Search Criteria

All

Email Territory Division

Enter Email Territory Division

Search Records

### Search Results

_id	Last	First	Division	Division	Email	Edit	Delete
6355d6e81252bbcc02c342a6	Felton	Darryl	Galleria	Galleria	dfettion@yahoo.com		
6355d7241252bbcc02c342aa	Malrons	Karl	New Barrington	New Barrington	emarlonsman@gmail.com		

10 Showing rows 1 to 2 of 2

1

When we add a Rep record there is a “dropdown” with the list of managers shown above.

Below is the dropdown:

heck Mate   Home   Medical Office Locations ▾   Physicians Records ▾   Managers Reps Receipts ▾

## Rep Management Screen

Karl Malrons

--Select Manager--

Darryl Felton

**Karl Malrons**

David

First Name

Michaels

Territory

Washington Avenue

Phone

987-098-4653

Email

dmicals@yahoo.com

Annual Budget

75000

Notes

Hmm

The same goes for when entering a receipt:

heck Mate   Home   Medical Office Locations ▾   Physicians Records ▾   Managers Reps Receipts ▾

## Search Reps

Enter Search Criteria

All

Manager Name

Enter Manager Name

Email

Enter Email

Territory

Territory

Search Results

_id	FirstName	LastName	Territory	ManagerName	Email	Edit	Delete
6356962a2a2059745df153fa	Jones	Lionel	Beltway 8	Darryl Felton	ljones@yahoo.com		
63569b7d0fc9330d56e8c006	Michaels	David	Washington Avenue	Karl Malrons	dmicals@yahoo.com		
6356dfc7661a7f5b717874d9	Goode	Karle	Deason Area	Darryl Felton	kgoode@yahoo.com		

10 ▾

Showing rows 1 to 3 of 3

1



Check Mate

Home

Medical Office Locations

Physicians Records

Managers Reps Receipts

Search

Login/Authenticate

Receipt Management Screen

Goode Karle

--Select Rep--  
Jones Lionel  
Michaels David  
Goode Karle

Amount

567

Shared Amount

200

Date

10/12/2022

Event

Where does it come from?  
Contrary to popular belief, Lorem Ipsum is not simply random text. It has roots in a piece of classical Latin literature from 45 BC, making it over 2000 years old. Richard McClintock, a Latin professor at Hampden-Sydney Coll

Doctors

Mark Roberts, Carl Stone MD

**Tip: Report(s)**

Reports can be accessed:

s /Reciepts

Reports

Login/Authenticate

Receipt Report

Rep Report

And also as shown below, you can export the results to .csv file

Check Mate Home Medical Office Locations Physicians Records Managers Reps Receipts Reports Login/Authenticate

### Receipt Report

Enter Search Criteria  
All

Representative Restaurant  
Restaurant

Search Records

Date	Rep	Restaurant	Amount	SharedAmount	Doctors
9/12/2022	Michaels David	Hugos Fine Fish	350	0	Dr Larry Shaw
10/12/2022	Goode Karle	Papas Steak House	567	200	Mark Roberts, Carl Stone MD

Showing rows 1 to 2 of 2

Export to CSV

Check Mate Home Medical Office Locations Physicians Records Managers / Reps /Receipts Reports Login/Authenticate

## Pharmaceutical Rep Report

Enter Search Criteria  
All

Manager Name  
Enter Manager Name

Email Territory  
Enter Email Territory

Search Records

FirstName	LastName	Territory	ManagerName	Phone	Email	AnnualBudget
Jones	Lionel	Beltway 8	Darryl Felton	713-987-7654	ljones@yahoo.com	25000
Michaels	David	Washington Avenue	Karl Malrons	987-098-4653	dmicals@yahoo.com	75000
Goode	Karle	Deason Area	Darryl Felton	765-098-9876	kgoode@yahoo.com	30000

Showing rows 1 to 3 of 3

Export to CSV

### Tip: Deployment

There are two ways of viewing the application

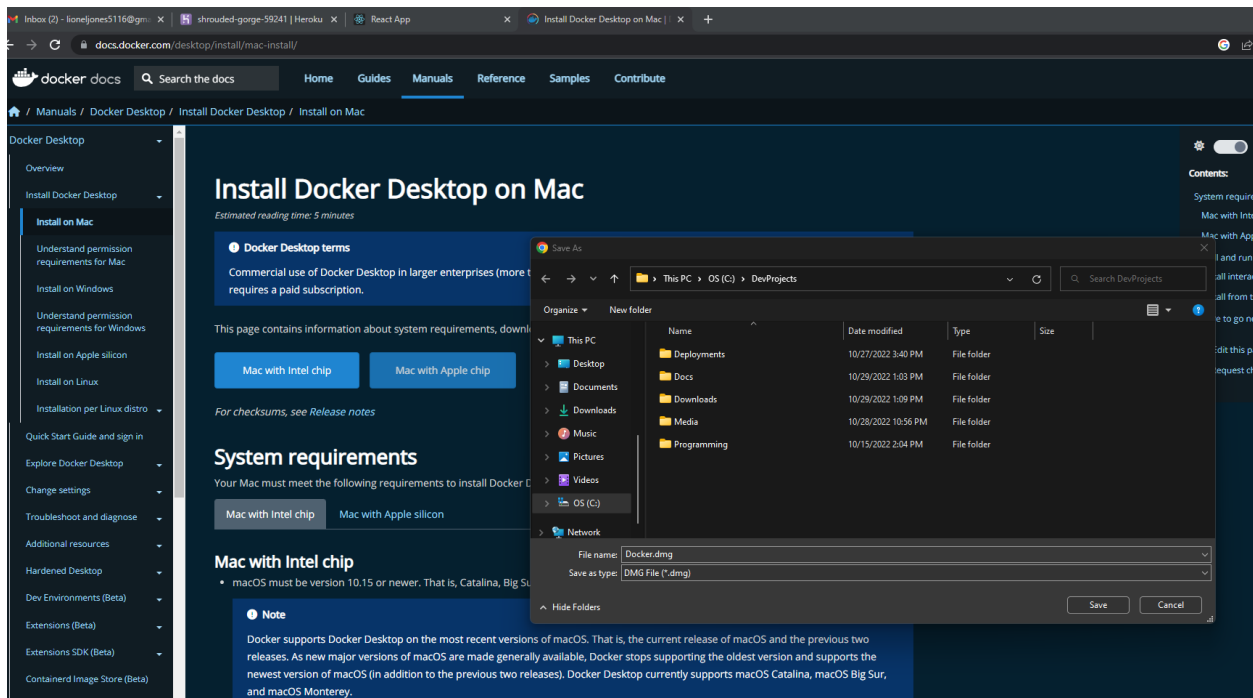
#### Step One:

There will be a link to a hosted site on Heroku (**Shared later**)

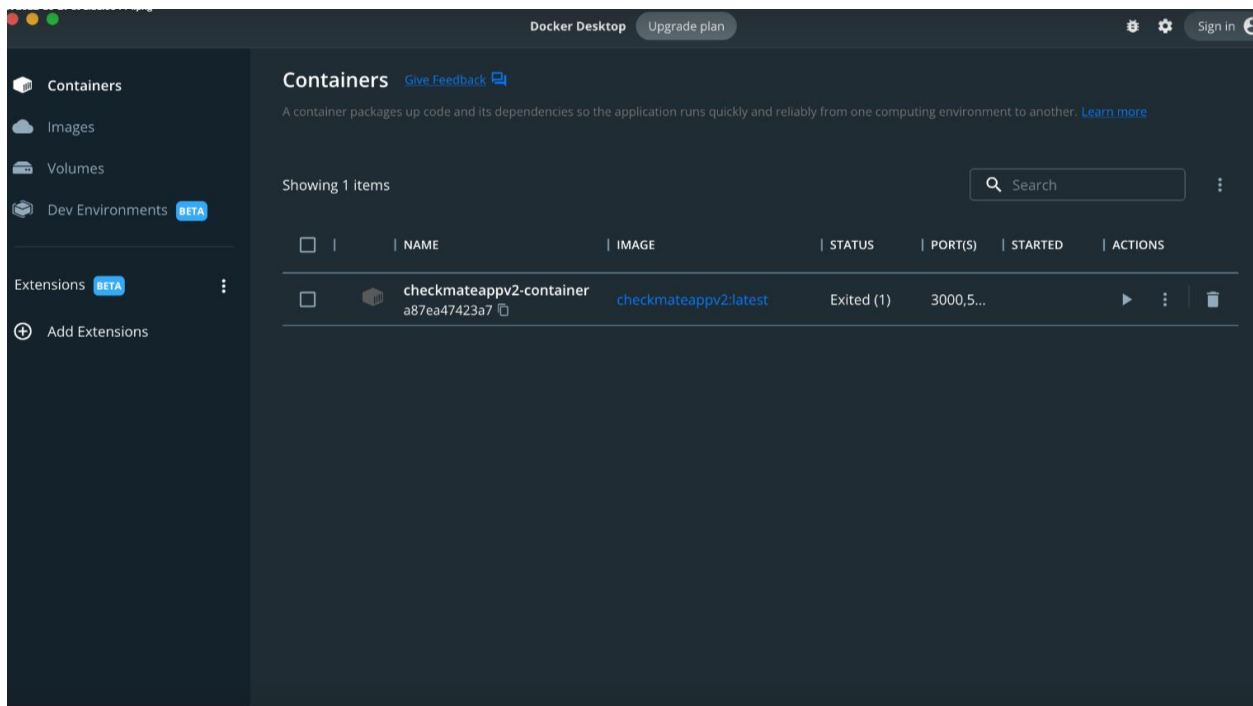
#### Step Two:

**Docker** Local container install

<https://docs.docker.com/desktop/install/mac-install/>



Docker allows you run the application as an image installed locally on your computer. When docker is setup and installed and the container is created, you will see the container for it when you start docker up.



You hit the run icon

	NAME	IMAGE	STATUS	PORT(S)	STARTED	ACTIONS
	<b>checkmateappv2-container</b> a87ea47423a7	<a href="#">checkmateappv2:latest</a>	Exited (1)	3000,5...		

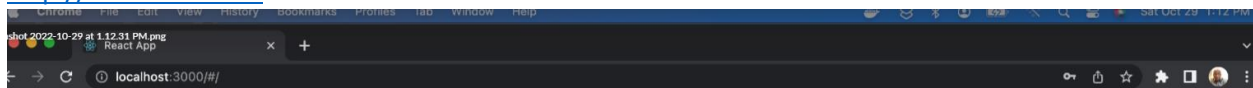
When it is running, you will see the status – started

Showing 1 items

	NAME	IMAGE	STATUS	PORT(S)	STARTED	ACTIONS
	<b>checkmateappv2-container</b> a87ea47423a7	<a href="#">checkmateappv2:latest</a>	Running	3000,5...	14 seconds ag	

Then you can go to your browser and type:

<http://localhost:3000>



Enter your Login Credentials

Email address

Password

Don't have an account

