Mathis Scheduling

User Guide

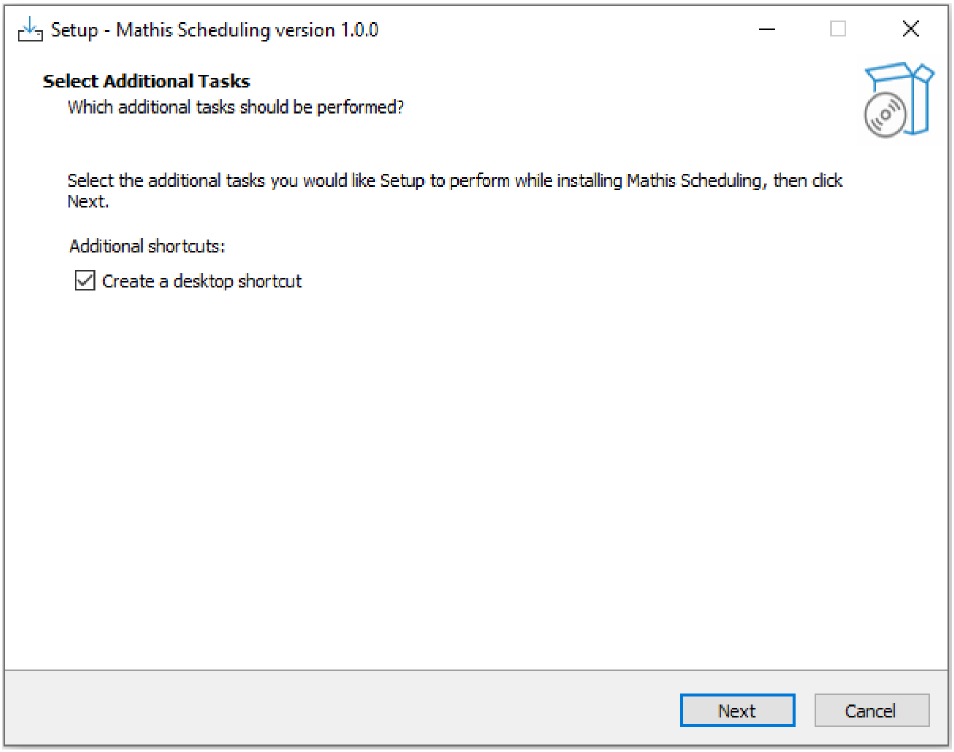
Introduction

This user guide will walk the user through installing and using the application. Although the deployment will be via Group Policy, these instructions allow manual installation. The following tasks are covered in detail:

- Installing the application
- Logging in to the application
- Creating, editing, and deleting customer records
- Creating, editing, and deleting appointment records
- Viewing generated reports

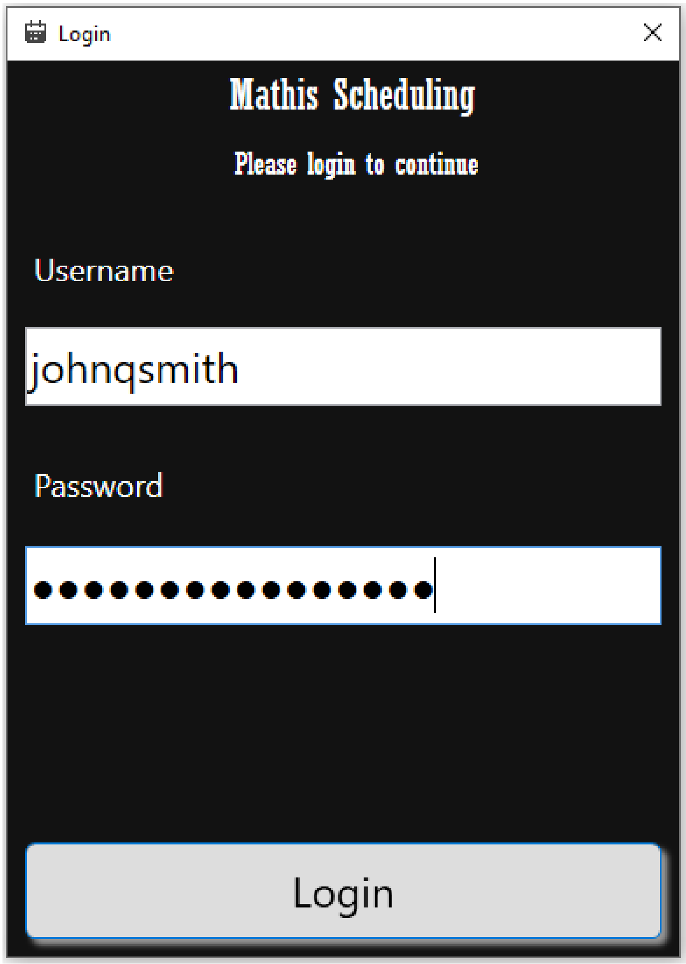
Installation and Using the Application

The application will be delivered as a single executable installer – simply run this file to begin the installation.



Application Login

When launching the application, the user will be presented with a login form requiring a username and password combination. Enter the user credentials provided by the network administrator and click the button labeled "Login".



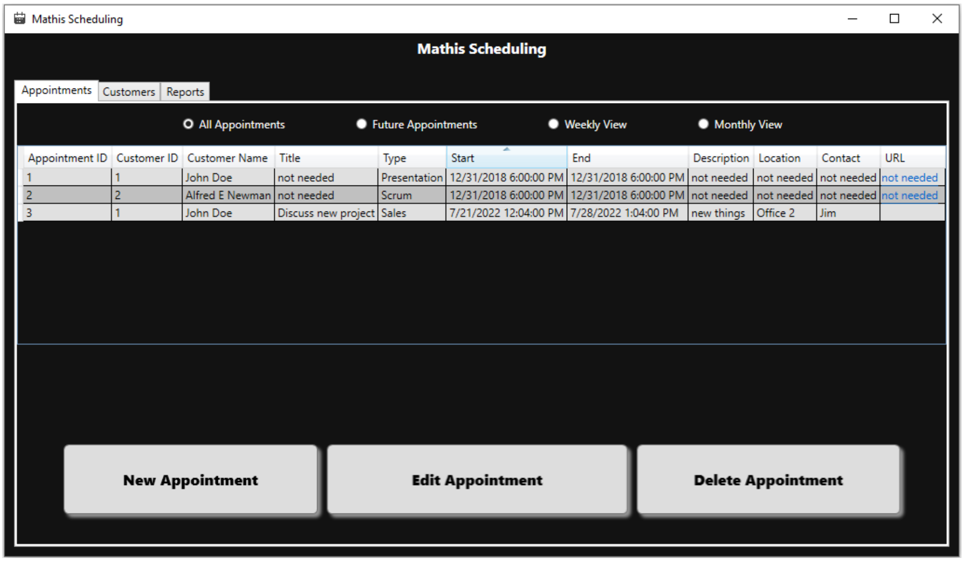
DEFAULT USER FOR EVALUATION PURPOSES:

Username: test

Password: test

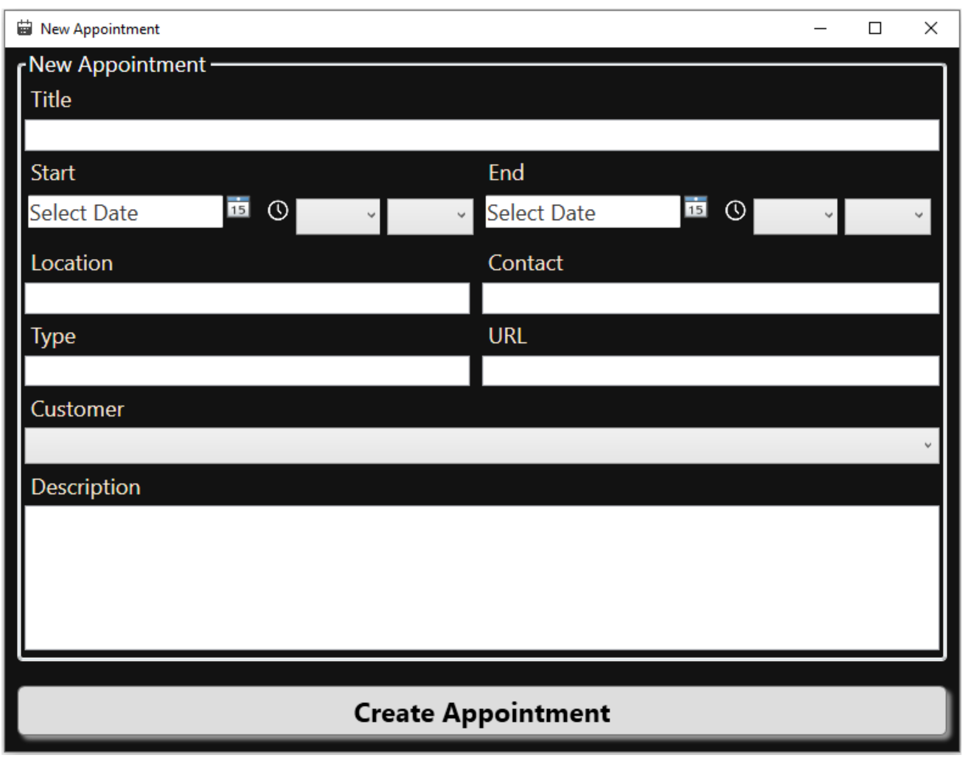
Appointments

The first screen to appear after a successful login will be the Appointments List. This screen gives an overview of all scheduled appointments by default and can be filtered by weekly and monthly views.



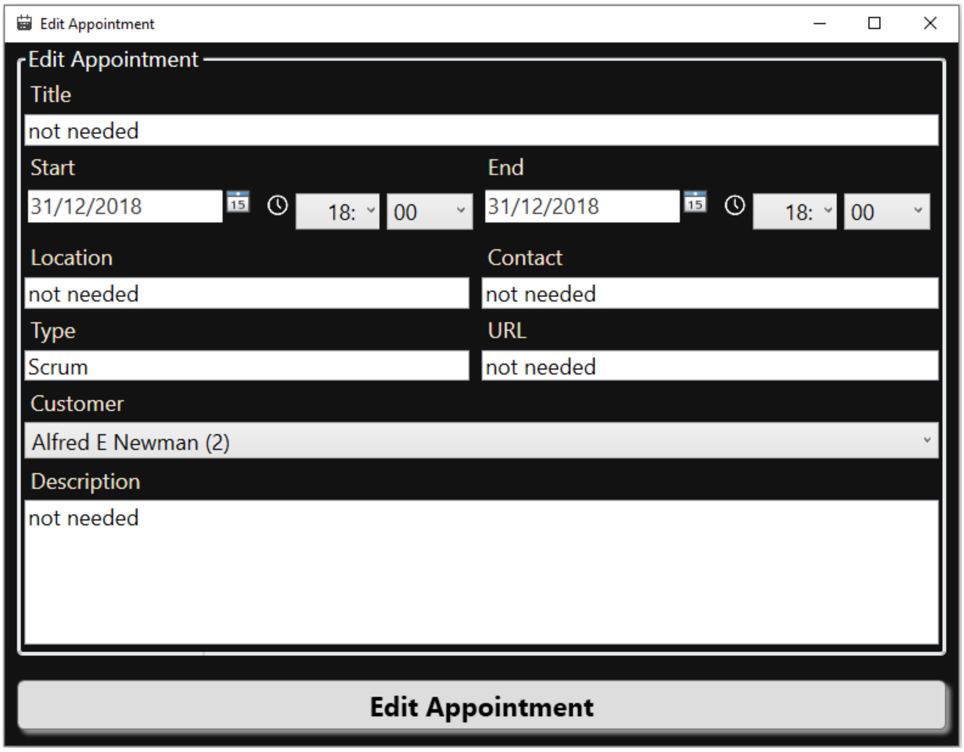
Create a New Appointment

To create a new appointment, click the “Appointments” tab, and then click the “New Appointment” button to open the dialog to create a new appointment.



Edit an Appointment

To edit an appointment, click the “Appointments” tab, select the desired appointment, and then click the “Edit Appointment” button to open the dialog to edit the appointment.

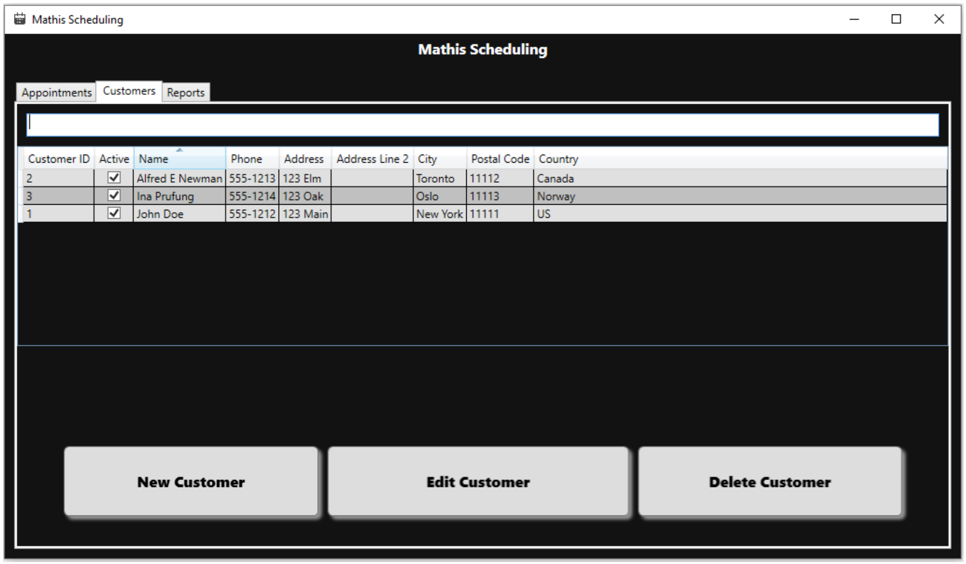


Delete an Appointment

To delete an appointment, click the “Appointments” tab, select the desired appointment, and then click the “Delete Appointment” button.

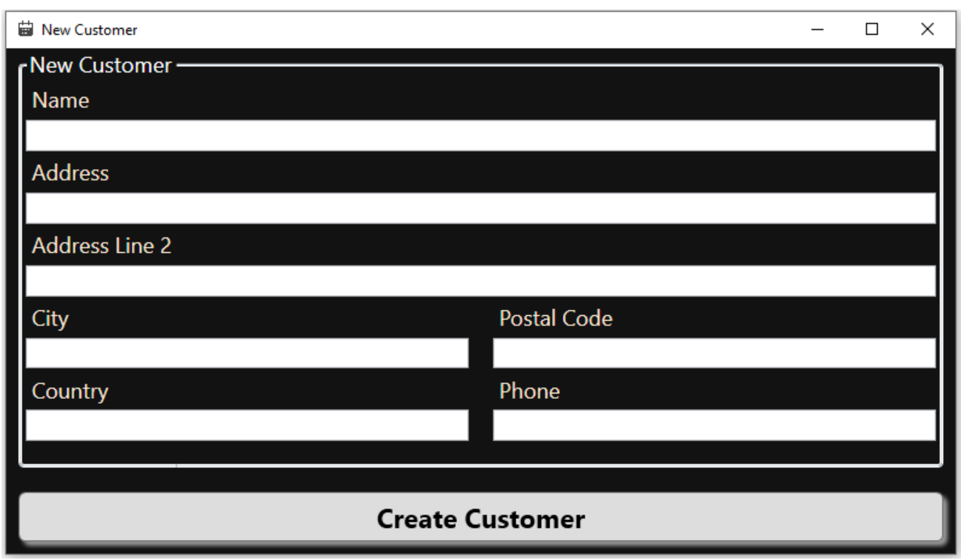
Customers

To view the customer list and access other customer-related functionality, click the “Customers” tab at the top of the window.



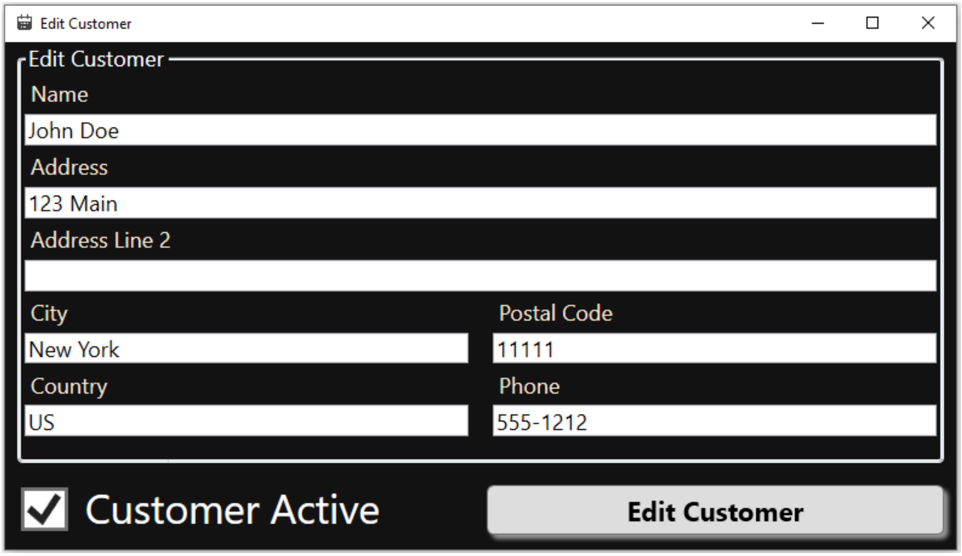
Create a New Customer

To create a new customer, click the “Customers” tab, and then click the “New Customer” button to open the dialog to create a new customer.



Edit a Customer

To edit a customer, click the “Customers” tab, select the desired customer, and then click the “Edit Customer” button to open the dialog to edit the customer.

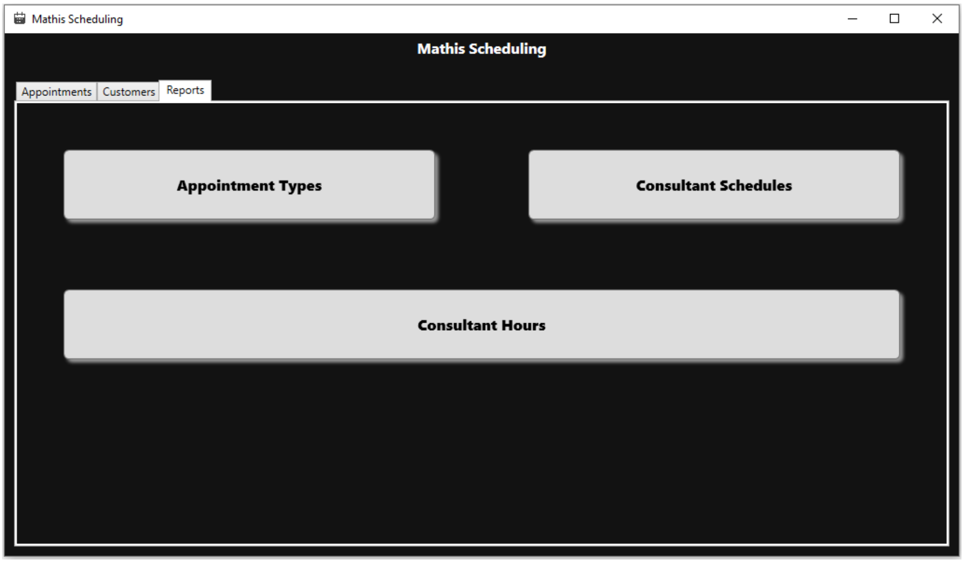


Delete a Customer

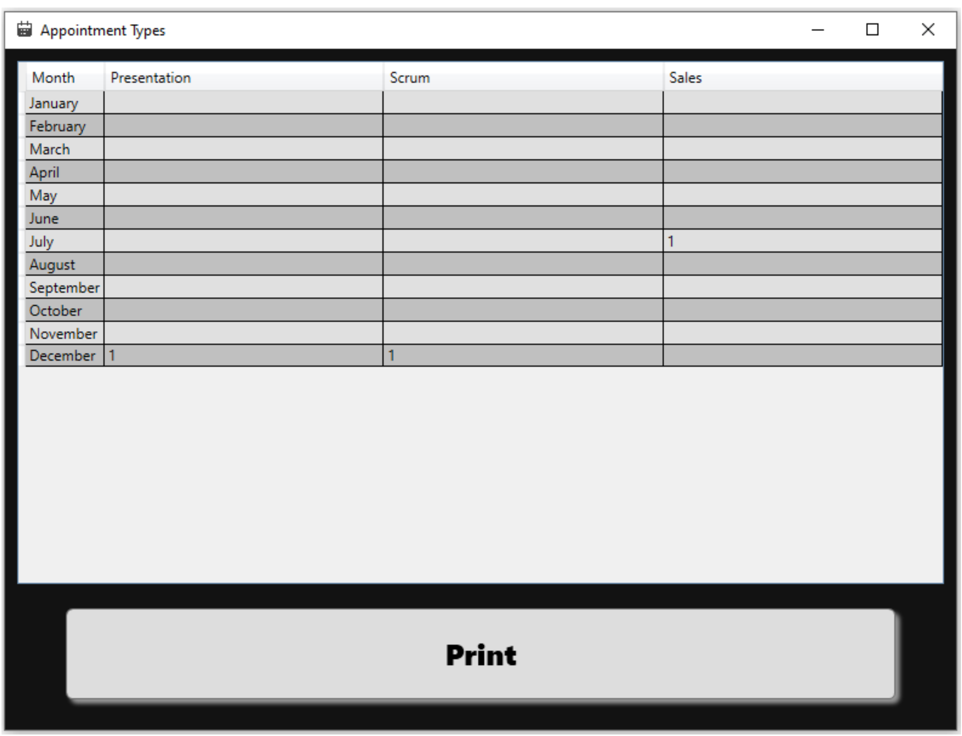
To delete a customer, click the “Customers” tab, select the desired customer, and then click the “Delete Customer” button.

Reports

To access and generate the available types of reports, click the "Reports" tab and click the appropriate report button to generate the report.

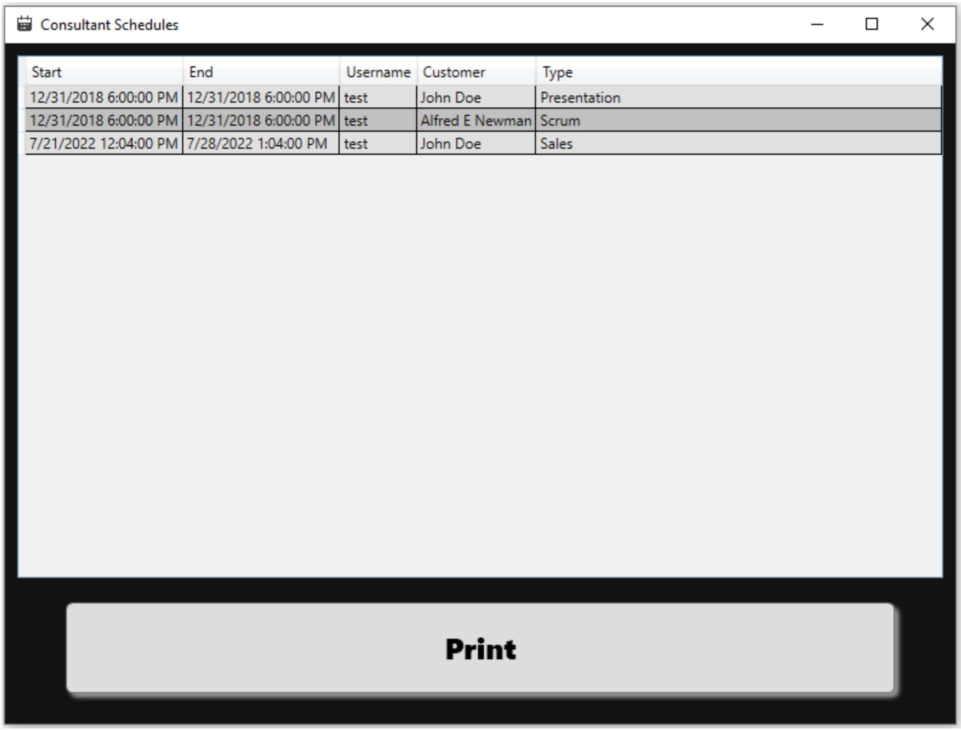


Report: Appointment Types



Month	Presentation	Scrum	Sales
January			
February			
March			
April			
May			
June			
July			1
August			
September			
October			
November			
December	1	1	

Report: Consultant Schedules



Report: Consultant Hours