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User Manual

1. Introduction

1.1 Purpose

The purpose of the system is to allow the easy management of multiple bookings and client information for a Heating Repair company.

It achieves this with the following features:

- Creation of Bookings
 - Does not Allow Bookings to be created at the same time as other bookings.
- The storing and editing of Client Information
 - Client Data can be searched edited and deleted using the user interface.
- The creation and sending of Invoices to clients who provide an email address.

1.2 Intended Audience

The intended audience for the system was Home Heat Gas Services – a gas and heating Repair Company. Although with minor changes to design (such as logos incorporated into the user interface) the system can easily be adapted for other companies that require the same system.

2. Installation

2.1 Prerequisites

2.1.1 Software

The system has been compiled to a windows executable (.exe) so no software prerequisites are needed before making use of the system.

2.1.1 Hardware Configuration

The following is required as a minimum to make use of every feature in the system:

- A keyboard and mouse for input
- A Visual Display Unit as output
- A Hard Disk Drive for file storage
- An Internet connection to carry out the emailing of Invoices
- A minimum of 512MB of main memory to carry out processing
- A Printer for printing Quotes and Invoices (if email is not an option).

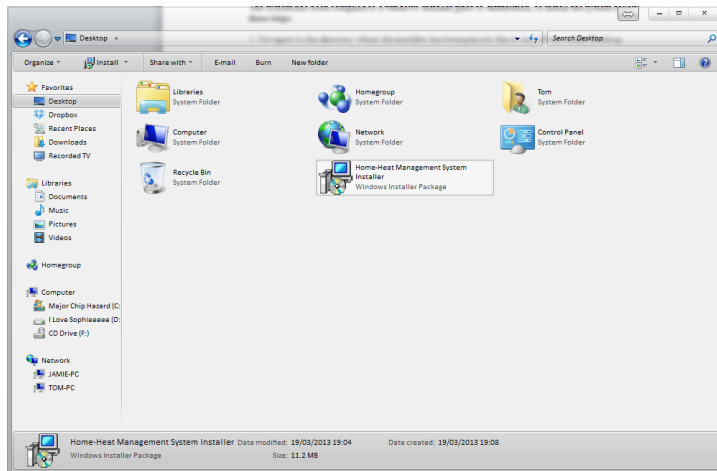
2.2 Operating System

The system was developed, tested and compiled solely on a Windows 7 64-Bit computer, this means that the default executable of the system will only run on a 64-Bit operating system. However a 32-Bit version will also be made in case the client does not have access to a 64-Bit machine.

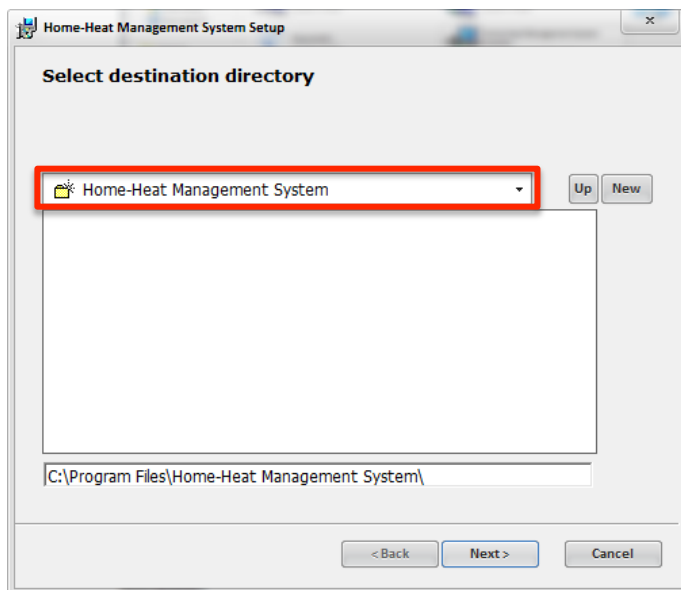
2.3 System Installation

The system has been compiled to a windows installer prior to distribution, to install the system follow these steps:

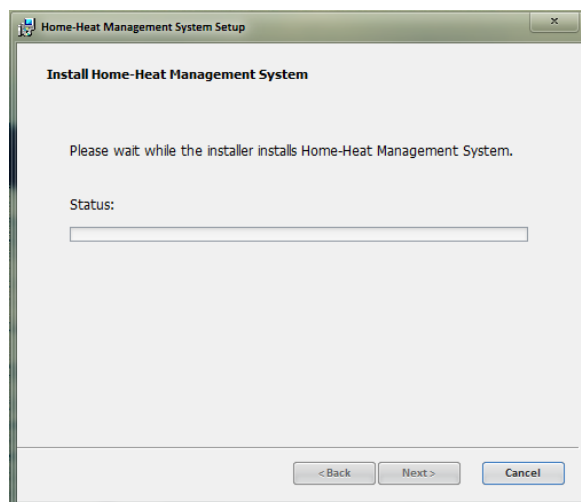
1. Navigate to the directory where the installer has been placed, this is case it was on the Desktop.



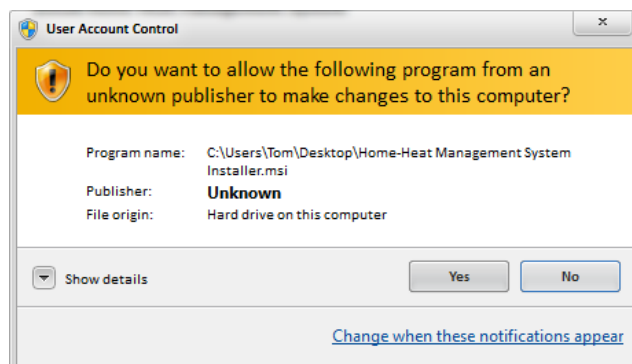
2. Double click with the left mouse button on the Installer to start the installation process.
3. Now choose a location to install the system using the drop down box highlighted in red below, I will be using the default location of "Program Files" for this demonstration.



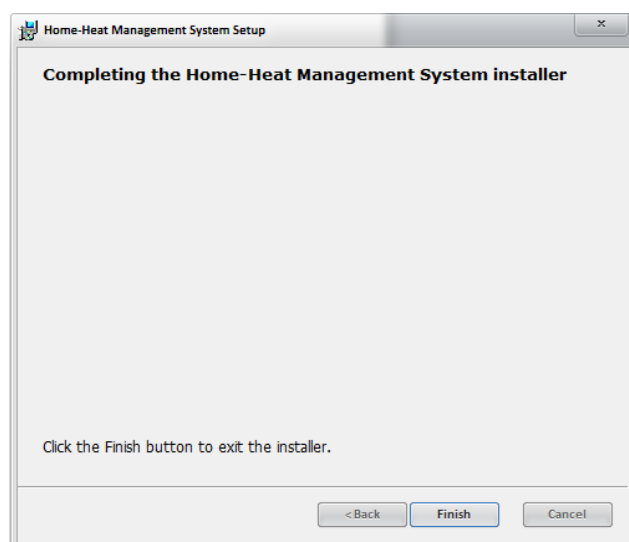
4. Click on the “Next Button” when ready to progress the installation.



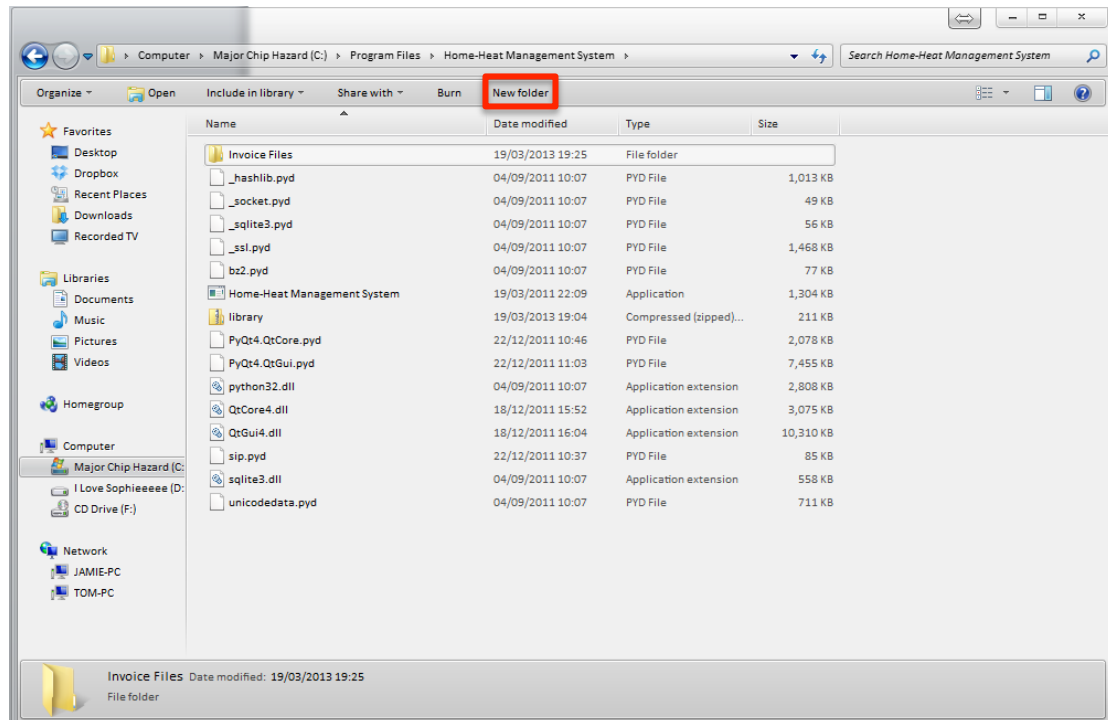
5. If a pop-up box appears asking for permission to install the system, click the “Yes” button.



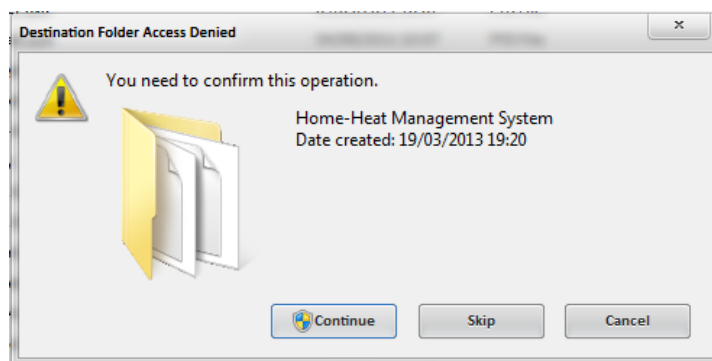
6. Click on the “Finish” button to close the installer.



7. Navigate to the Directory where you installed the system in the previous steps and click the “New Folder” button in the Windows Explorer (see red box below), name this folder “Invoice Files”.



8. If prompted for permission, click the “Continue” button.



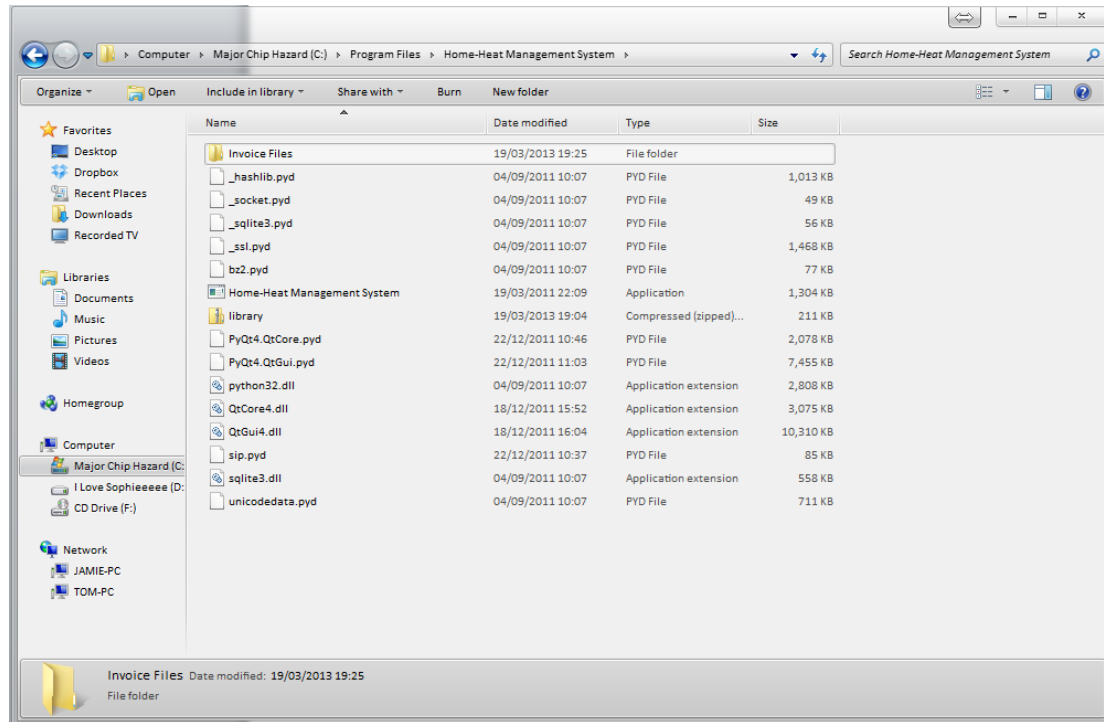
9. Installation Complete! See section “2.4 Running the System” for more information on running the newly installed system.

2.4 Running the System

Once the system has been installed as shown in section “2.3 System Installation” it can be ran by doing the following:

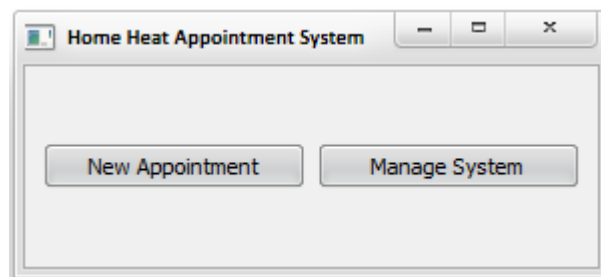
(If the system has been installed in a different directory than above it will still be ran the same way and be fully functional as long as the folder “Invoice Files” is inside the same directory as the system executable)

1. Navigate to the Folder where the system has been installed.



2. Double click with the left mouse button on the Executable to start running the system.

3. The System will now load and be displayed on the screen once loading is complete.



4. The system is now running! It can now be used as needed and closed at any time by click the “X” button at the top right of the window.

3. Tutorial

3.1 Introduction

In section I will break down how to use each part of the system in the sections below, each sub-section will include one feature of the system explained with detailed text instructions and annotated diagrams to assist you in running the system to its full extent.

3.2 Assumptions

No assumptions of computer knowledge have been made when creating the system so no assumed knowledge is included in the following tutorials. The only assumption made in the following tutorials is that the system is already running, to find out how to run the system see section “2.4 Running the System”.

3.3 Tutorial Questions

The Following sections will show you how to use each section of the system; they have been broken down into a Question and Answer format and can be referenced in the contents list below.

Contents:

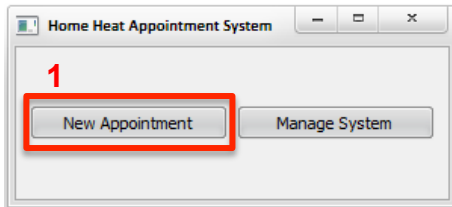
Section Number	Question	Page Number
3.3.1	“How do I create a new Appointment?”	Error! Bookmark not defined.
3.3.2	“How do I Manage different areas of the System?”	Error! Bookmark not defined.
3.3.3	“How do I find a Client already in the database?”	Error! Bookmark not defined.
3.3.4	“How do I add a Client without creating a Booking?”	12
3.3.5	“How do I update a Clients details once they are already in the database?”	14
3.3.6	“How do I delete a client from the System?”	15
3.3.7	“How do I find an Appointment already in the database?”	17
3.3.8	“How do I add an Appointment without creating a Booking?”	19
3.3.9	“How do I update an Appointment details once they are already in the database?”	21
3.3.10	“How do I delete an Appointment from the System?”	22
3.3.11	“How do I find a Job already in the database?”	23
3.3.12	“How do I add a Job without creating a Booking?”	25
3.3.13	“How do I update a Job details once they are already in the database?”	27
3.3.14	“How do I delete a Job from the System?”	28
3.3.15	“How do I create an Invoice ready to be sent to a customer?”	30
3.3.16	“How do I send an Invoice to a customer?”	31

3.3.1 Creating a New Appointment

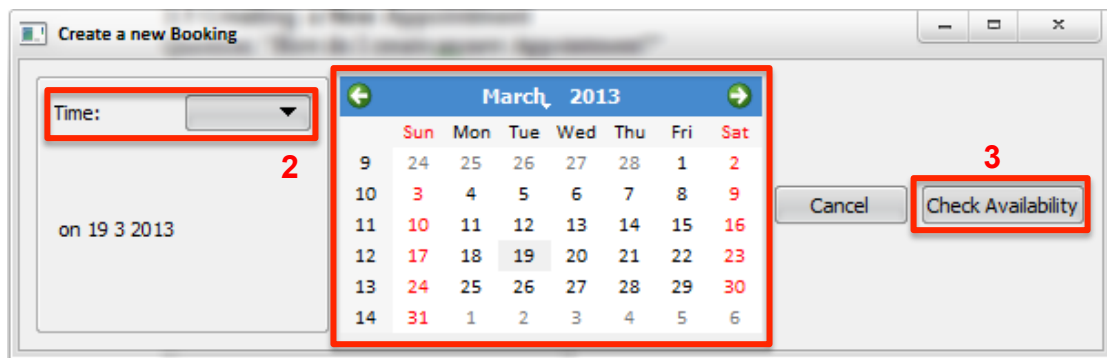
Question: “How do I create a new Appointment?”

Answer:

1. On the Main Menu click on the “New Appointment” button, the new booking screen will be displayed.



2. Choose a date from the calendar widget in the centre of the window and a time from the drop down box on the left of the window.



3. Click on the “Check Availability” button on the far right of window, if the time and date are available the window will progress to client and job information screen.
4. Enter the Client Information into the “Client Details” form on the left and the Job Information into the “Job Details” form on the right.

The screenshot shows a window titled 'Enter New Booking Details'. It has a search bar and two buttons: 'Search Client' and 'Create Booking'. The 'Create Booking' button is highlighted with a red box and labeled with a red '5'. Below the buttons, there are two main sections: 'Client Details' and 'Job Details'. The 'Client Details' section includes fields for ID, Title (a dropdown menu), Street No, Forename, Street Name, Surname, Town, Email, County, Phone No, and Postcode. The 'Job Details' section includes fields for ID, Job Details, Job Type (a dropdown menu), and Client ID. A large red box encompasses both the 'Client Details' and 'Job Details' sections, labeled with a red '4'.

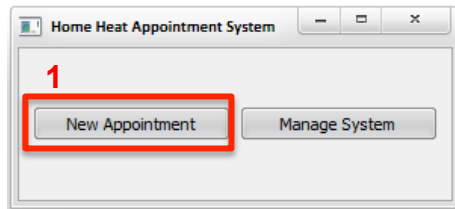
5. Click on the “Create Booking” button to finish!

3.3.2 Managing the System

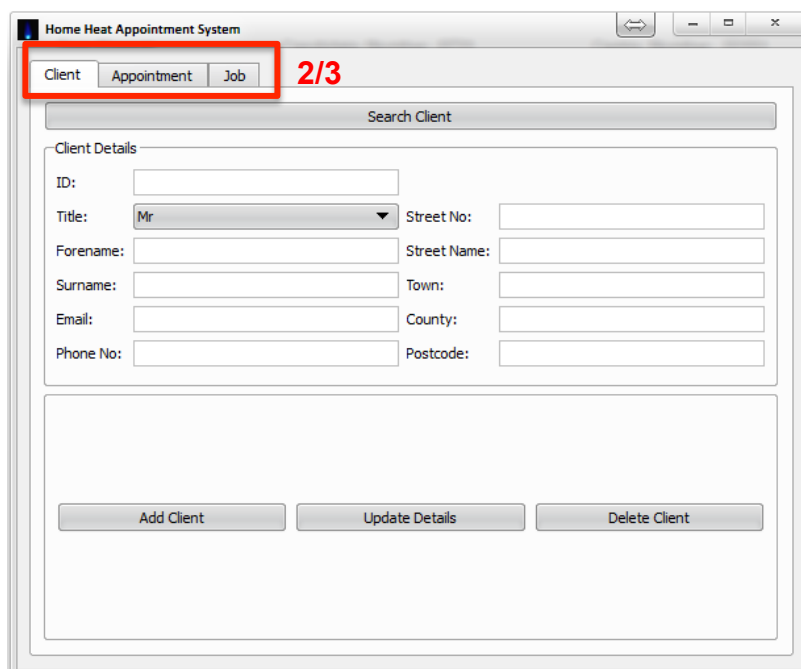
Question: "How do I manage different areas of the system?"

Answer:

1. On the Main Menu click on the "Manage System" button.



2. Here there are three Tabs; "Client", "Appointment" and "Job".
3. Click on the desired Tab to manage that area of the system.



3.3.3 Searching for a Client

Question: “How do I find a client already in the database?”

Answer:

1. Follow the section “3.2 Managing the System” to find out how to get to the management section of the system.
2. Click on the “Client” tab at the top of the window (It should be on this tab by default).
3. Click on the “Search” button under the Tabs, a search window will pop-up.

The screenshot shows the 'Home Heat Appointment System' window. At the top, there are three tabs: 'Client', 'Appointment', and 'Job'. The 'Client' tab is selected and highlighted with a red box and the number '2'. Below the tabs is a 'Search Client' section, also highlighted with a red box and the number '3'. This section contains a 'Client Details' form with the following fields: ID (text box), Title (dropdown menu with 'Mr' selected), Street No (text box), Forename (text box), Street Name (text box), Surname (text box), Town (text box), Email (text box), County (text box), Phone No (text box), and Postcode (text box). Below the form are three buttons: 'Add Client', 'Update Details', and 'Delete Client'.

4. In the criteria input box input the Forename of the Client and click on the “Search” button to the left of the box to search the database.

The screenshot shows a 'Searching...' window. At the top, there is a search criteria input box, highlighted with a red box and the number '4'. To the right of the input box is a 'Search' button, highlighted with a red box and the number '3'. Below the input box and button is a large empty area for search results.

5. Results will appear in the table at the lower half of the window, look through these results to find the required Client and note their ID on the far left of the table (First column).

6. Enter the Clients ID into the ID spin box above the table and click on the “Select ID” button to verify the selection.

The screenshot shows a window titled 'Searching...'. At the top, there is a search input field containing 'Tom' and a 'Search' button. Below this is an 'ID' spin box containing the value '0' and a 'Select ID' button. A table of search results is displayed below the spin box. The table has 12 columns: ID, Title, Forename, Surname, Email, Street No, Street Name, Town, County, Postcode, and Phone No. The first row of data shows ID '1', Title 'Mr', Forename 'Tom', Surname 'Piggott', Email 'mr_sheep21@ho...', Street No '3', Street Name 'Cedar Close', Town 'Melbourn', County 'Cambridge', Postcode 'SG86BL', and Phone No '01763233321'. A red box highlights the search input field, the ID spin box, and the table. A red number '6' is placed above the search input field, and a red number '5' is placed below the table.

ID	Title	Forename	Surname	Email	Street No	Street Name	Town	County	Postcode	Phone No
1	Mr	Tom	Piggott	mr_sheep21@ho...	3	Cedar Close	Melbourn	Cambridge	SG86BL	01763233321

7. The Search window will automatically close and return to the System Management window with the Client information fields populated.

The screenshot shows the 'Home Heat Appointment System' window. It has three tabs: 'Client', 'Appointment', and 'Job'. The 'Client' tab is selected. Below the tabs is a 'Search Client' button. Underneath is a 'Client Details' section with various input fields. The fields are populated with the following information: ID: 1, Title: Mr, Forename: Tom, Surname: Piggott, Email: mr_sheep21@hotmail.co.uk, Phone No: 01763233321, Street No: 3, Street Name: Cedar Close, Town: Melbourn, County: Cambridge, and Postcode: SG86BL. At the bottom of the window are three buttons: 'Add Client', 'Update Details', and 'Delete Client'.

3.3.4 Adding a Client

Question: “How do I add a Client without creating a Booking?”

Answer:

1. Follow the section “3.2 Managing the System” to find out how to get to the management section of the system.
2. Click on the “Client” tab at the top of the window (It should be on this tab by default).
3. Enter information for the Client into the “Client Details” input form.
4. Click on the “Add Client” button at the bottom of the window to add the client.

The screenshot shows the 'Home Heat Appointment System' window. At the top, there are three tabs: 'Client', 'Appointment', and 'Job'. The 'Client' tab is selected and highlighted with a red box, labeled with a red '2'. Below the tabs is a 'Search Client' input field. The main area contains a 'Client Details' form, which is outlined with a red box and labeled with a red '3'. The form includes the following fields: ID (text input), Title (dropdown menu with 'Mr' selected), Street No (text input with '0'), Forename (text input with 'Example'), Street Name (text input with 'Example'), Surname (text input with 'Example'), Town (text input with 'Example'), Email (text input with 'Example@Example.com'), County (text input with 'Example'), Phone No (text input with '0000000000'), and Postcode (text input with 'CB1 1XX'). At the bottom of the window, there are three buttons: 'Add Client', 'Update Details', and 'Delete Client'. The 'Add Client' button is highlighted with a red box and labeled with a red '4'.

5. A notification will pop up to verify the Client has been added.

The screenshot displays the 'Home Heat Appointment System' window. It features three tabs: 'Client', 'Appointment', and 'Job'. The 'Client' tab is active, showing a 'Search Client' button and a 'Client Details' section. The details include fields for ID (3), Title (Mr), Forename (Example), Surname (Example), Email (Example@Example.com), Phone No (0000000000), Street No (0), Street Name (Example), Town (Example), County (Example), and Postcode (CB1 1XX). A red box highlights a small notification window titled 'Added!' with the message 'Client added to the database!'. Below the details are three buttons: 'Add Client', 'Update Details', and 'Delete Client'.

Home Heat Appointment System

Client Appointment Job

Search Client

Client Details

ID: 3

Title: Mr

Forename: Example

Surname: Example

Email: Example@Example.com

Phone No: 0000000000

Street No: 0

Street Name: Example

Town: Example

County: Example

Postcode: CB1 1XX

Added!

Client added to the database!

Add Client Update Details Delete Client

3.3.5 Amending a Client

Question: “How do I update a Clients details once they are already in the database?”

Answer:

1. Follow the section “3.2 Managing the System” to find out how to get to the management section of the system.
2. Follow the section “3.3 Searching for a Client” to find the required Client.
3. Change any information the needs updating in the “Client Details” input form.
4. Click on the “Update Details” button, the new information will be amended to the database.

The screenshot displays the 'Home Heat Appointment System' window. It features three tabs: 'Client', 'Appointment', and 'Job'. The 'Client' tab is active, showing a 'Search Client' bar at the top. Below this is the 'Client Details' form, which is highlighted with a red box and labeled with a red '3'. The form contains the following fields:

ID:	3	Street No:	0
Title:	Mr	Street Name:	Example
Forename:	Amended Example	Town:	Example
Surname:	Example	County:	Example
Email:	Example@Example.com	Postcode:	CB1 1XX
Phone No:	0000000000		

At the bottom of the window, there are three buttons: 'Add Client', 'Update Details', and 'Delete Client'. The 'Update Details' button is highlighted with a red box and labeled with a red '4'.

3.3.6 Deleting a Client

Question: “How do I delete a client from the System?”

Answer:

Deletion of a Client CANNOT be undone

1. Follow the section “3.2 Managing the System” to find out how to get to the management section of the system.
2. Follow the section “3.3 Searching for a Client” to find the required Client.
3. Click on the “Delete Client” button, second change window will pop-up.

The screenshot shows the 'Home Heat Appointment System' window with the 'Client' tab selected. The 'Client Details' section contains the following fields:

ID:	3	Street No:	0
Title:	Mr	Street Name:	Example
Forename:	Amended Example	Town:	Example
Surname:	Example	County:	Example
Email:	Example@Example.com	Postcode:	CB1 1XX
Phone No:	0000000000		

At the bottom of the form, there are three buttons: 'Add Client', 'Update Details', and 'Delete Client'. The 'Delete Client' button is highlighted with a red box and a red number 3.

4. Click on the “Yes” button to verify the deletion of the client, clicking “No” will cancel the deletion.

The screenshot shows a confirmation dialog box titled 'Are you sure?'. It has two buttons: 'Yes' and 'No'. The 'Yes' button is highlighted with a red box and a red number 4.

5. The pop-up window will automatically close and return to the “Manage System” window.
6. A notification will be displayed verifying the deletion of the client.

The screenshot displays the 'Home Heat Appointment System' window. At the top, there are three tabs: 'Client', 'Appointment', and 'Job'. Below the tabs is a 'Search Client' button. The 'Client Details' section contains several input fields: ID, Title (set to 'Mr'), Street No., Forename, Street Name, Surname, Town, Email, County, Phone No., and Postcode. A red number '6' is positioned above the Phone No. field. A red rectangular box highlights a small dialog box titled 'Record Deleted!' with a close button. The dialog box contains the text 'Record successfully deleted!'. At the bottom of the main window, there are three buttons: 'Add Client', 'Update Details', and 'Delete Client'.

3.3.7 Searching for an Appointment

Question: “How do I find an Appointment already in the database?”

Answer:

1. Follow the section “3.2 Managing the System” to find out how to get to the management section of the system.
2. Click on the “Appointment” tab at the top of the window.
3. Click on the “Search” button under the Tabs, a search window will pop-up.

The screenshot shows the 'Home Heat Appointment System' window. At the top, there are three tabs: 'Client', 'Appointment', and 'Job'. The 'Appointment' tab is selected and highlighted with a red box and a red number '2'. Below the tabs is a 'Search Appointment' form. The form has a title bar 'Search Appointment' and a red box around it with a red number '3'. The form contains the following fields: 'ID:' (text box), 'Date:' (dropdown menu showing '2013.03.19'), 'Time:' (text box), 'Job ID:' (dropdown menu showing '1: Boiler Repair for Client: Tom Piggott'), and 'Invoice ID:' (dropdown menu). Below the form are three buttons: 'Add Appointment', 'Update Details', and 'Delete Appointment'.

4. In the criteria input box input the Date of the Appointment in the format “YYYY/M/DD” and click on the “Search” button to the left of the box to search the database.
5. Results will appear in the table at the lower half of the window, look through these results to find the required Appointment and note their ID on the far left of the table (First column).
6. Enter the Appointments ID into the ID spin box above the table and click on the “Select ID” button to verify the selection.

The screenshot shows the 'Searching...' window. At the top, there is a search criteria input box with the text '2013/2/20' and a 'Search' button. Below the input box is a table with the following data:

ID	Date	Time	JobID	InvoiceID
1 1	2013/2/20	12:00	1	3
2 2	2013/2/20	12:00	1	3

Below the table is a red box with a red number '5'. To the right of the table is a 'Select ID' button.

7. The Search window will automatically close and return to the System Management window with the Appointment information fields populated.

The screenshot shows a software window titled "Home Heat Appointment System". It has three tabs: "Client", "Appointment", and "Job", with "Appointment" currently selected. Inside the window, there is a "Search Appointment" button at the top. Below it is a section titled "Appointment Details" containing several input fields: "ID:" with the value "1", "Date:" with the value "2013.03.19", "Time:" with the value "12:00", "Job ID:" with a dropdown menu showing "1: Boiler Repair for Client: Tom Piggott", and "Invoice ID:" with an empty dropdown menu. At the bottom of the window, there are three buttons: "Add Appointment", "Update Details", and "Delete Appointment".

3.3.8 Adding an Appointment

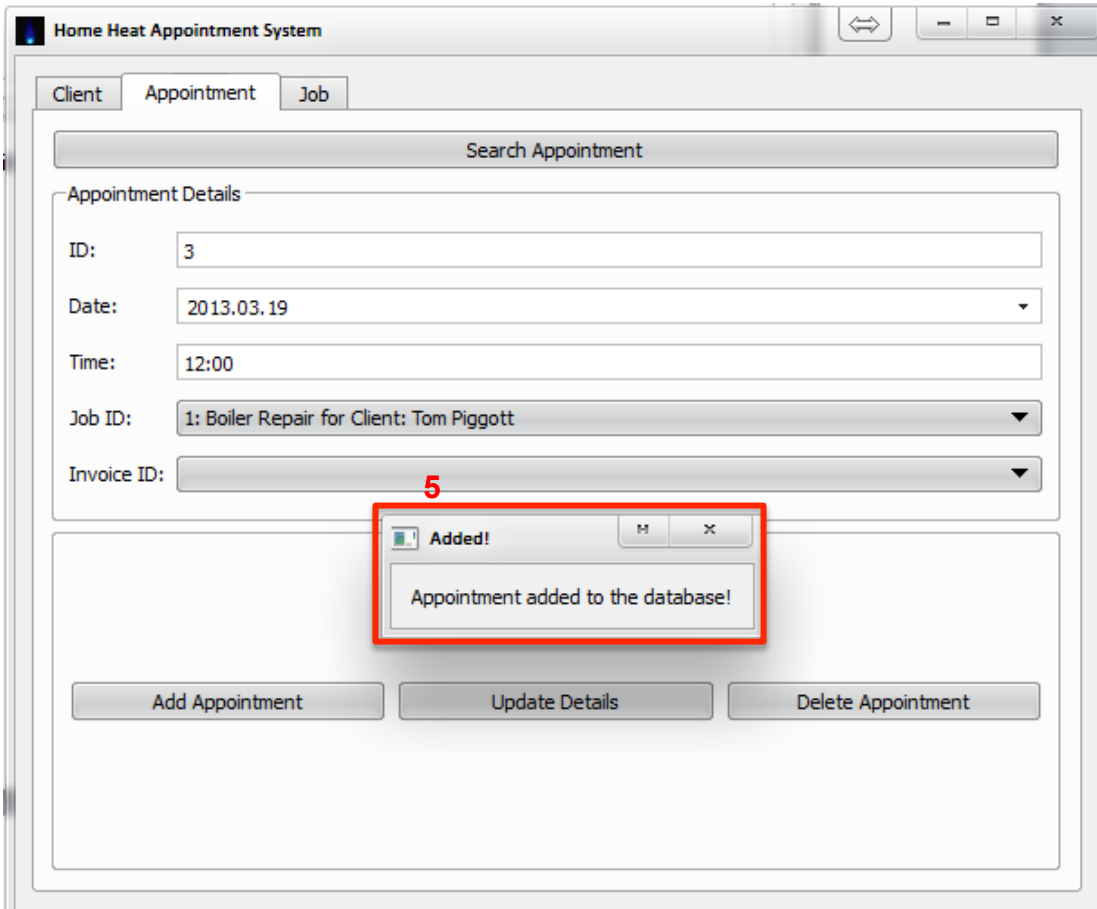
Question: “How do I add an Appointment without creating a Booking?”

Answer:

1. Follow the section “3.2 Managing the System” to find out how to get to the management section of the system.
2. Click on the “Appointment” tab at the top of the window (It should be on this tab by default).
3. Enter information for the Appointment into the “Appointment Details” input form.
4. Click on the “Add Appointment” button at the bottom of the window to add the Appointment.

The screenshot shows the 'Home Heat Appointment System' window. At the top, there are three tabs: 'Client', 'Appointment', and 'Job'. The 'Appointment' tab is selected and highlighted with a red box, with a red '2' next to it. Below the tabs is a 'Search Appointment' button. The main area is titled 'Appointment Details' and contains several input fields: 'ID:' with a red '3' next to it, 'Date:' with the value '2013.03.19', 'Time:' with the value '12:00', 'Job ID:' with a dropdown menu showing '1: Boiler Repair for Client: Tom Piggott', and 'Invoice ID:' with a dropdown menu. At the bottom of the window, there are three buttons: 'Add Appointment', 'Update Details', and 'Delete Appointment'. The 'Add Appointment' button is highlighted with a red box, with a red '4' next to it.

5. A notification will pop up to verify the Appointment has been added.



The screenshot displays the 'Home Heat Appointment System' window. It features three tabs: 'Client', 'Appointment', and 'Job'. The 'Appointment' tab is active. A 'Search Appointment' button is located at the top. Below it, the 'Appointment Details' section contains several input fields: 'ID' (value: 3), 'Date' (value: 2013.03.19), 'Time' (value: 12:00), 'Job ID' (value: 1: Boiler Repair for Client: Tom Piggott), and 'Invoice ID' (empty). A red number '5' is placed above the 'Invoice ID' field. A notification pop-up window, titled 'Added!', is centered over the form, displaying the message 'Appointment added to the database!'. At the bottom of the main window, there are three buttons: 'Add Appointment', 'Update Details', and 'Delete Appointment'.

3.3.9 Amending an Appointment

Question: “How do I update an Appointment details once they are already in the database?”

Answer:

1. Follow the section “3.2 Managing the System” to find out how to get to the management section of the system.
2. Follow the section “3.7 Searching for an Appointment” to find the required Appointment.
3. Change any information the needs updating in the “Appointment Details” input form.
4. Click on the “Update Details” button, the new information will be amended to the database.

The screenshot displays the 'Home Heat Appointment System' window. At the top, there are three tabs: 'Client', 'Appointment', and 'Job'. Below the tabs is a 'Search Appointment' button, which is highlighted with a red box and the number '3'. The main area contains the 'Appointment Details' form, which is also highlighted with a red box. The form includes the following fields:

- ID: 2
- Date: 2013.03.19
- Time: 13:00
- Job ID: 1: Boiler Repair for Client: Tom Piggott
- Invoice ID: (empty)

At the bottom of the window, there are three buttons: 'Add Appointment', 'Update Details', and 'Delete Appointment'. The 'Update Details' button is highlighted with a red box and the number '4'.

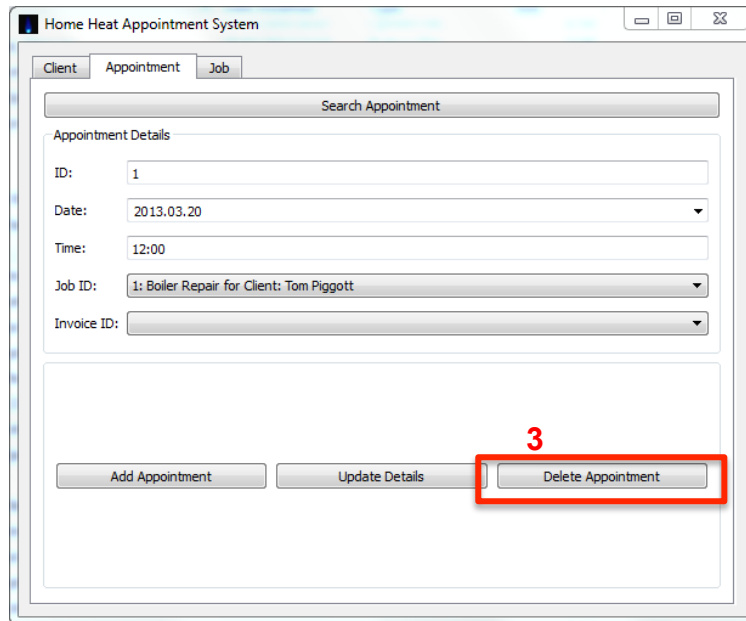
3.3.10 Deleting an Appointment

Question: “How do I delete an Appointment from the System?”

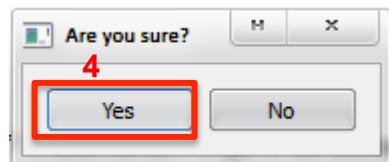
Answer:

Deletion of an Appointment CANNOT be undone

1. Follow the section “3.2 Managing the System” to find out how to get to the management section of the system.
2. Follow the section “3.7 Searching for an Appointment” to find the required Appointment.
3. Click on the “Delete Appointment” button, second change window will pop-up.



4. Click on the “Yes” button to verify the deletion of the appointment, clicking “No” will cancel the deletion.



5. The pop-up window will automatically close and return to the “Manage System” window.
6. A notification will be displayed verifying the deletion of the appointment.

3.3.11 Searching for a Job

Question: “How do I find a Job already in the database?”

Answer:

1. Follow the section “3.2 Managing the System” to find out how to get to the management section of the system.
2. Click on the “Job” tab at the top of the window (It should be on this tab by default).
3. Click on the “Search” button under the Tabs, a search window will pop-up.

4. In the criteria input box input the Number 0 and click on the “Search” button to the left of the box to search the database, the number 0 indicates all of the jobs that do not have the “Paid” variable set to True.
5. Results will appear in the table at the lower half of the window, look through these results to find the required Job and note their ID on the far left of the table (First column).
6. Enter the Job ID into the ID spin box above the table and click on the “Select ID” button to verify the selection.

ID	Details	Hours Taken	Total Cost	Quote Approved	Invoice Sent	Payment Received	Job Type	Client ID
1	Basic Boiler Rep...	2	60	1	1	0	1	1

7. The Search window will automatically close and return to the System Management window with the Job information fields populated.

The screenshot shows a software window titled "Home Heat Appointment System". It has three tabs: "Client", "Appointment", and "Job", with "Job" currently selected. Below the tabs is a "Search Job" button. The main area is titled "Job Details" and contains several input fields and checkboxes:

- ID: 1
- Job Details: Basic Boiler Repair
- Hours Taken: 2
- Total Price £: 60
- Quote Approved?: ☒
- Invoice Sent?: ☒
- Payment Received?: ☐
- Job Type: Boiler Repair (dropdown menu)
- Client ID: 1: Tom Piggott (dropdown menu)

At the bottom, there are two sections of controls:

- Basic Controls:** Add Job, Update Details, Delete Job
- Invoice Controls:** Create Invoice, Send Invoice

3.3.12 Adding a Job

Question: “How do I add a Job without creating a Booking?”

Answer:

1. Follow the section “3.2 Managing the System” to find out how to get to the management section of the system.
2. Click on the “Job” tab at the top of the window (It should be on this tab by default).
3. Enter information for the Job into the “Job Details” input form.
4. Click on the “Add Job” button at the bottom of the window to add the Job.

The screenshot displays the 'Home Heat Appointment System' window. At the top, there are three tabs: 'Client', 'Appointment', and 'Job'. The 'Job' tab is selected and highlighted with a red box and a red number '2'. Below the tabs is a 'Search Job' button. The main area is divided into two sections: 'Job Details' and 'Basic Controls'. The 'Job Details' section is enclosed in a red box and contains the following fields: 'ID:' (with a red number '3' next to it), 'Job Details:' (containing 'Example Details'), 'Hours Taken:' (containing '5'), 'Total Price £:' (containing '100'), 'Quote Approved?:' (checked), 'Invoice Sent?:' (checked), 'Payment Received?:' (unchecked), 'Job Type:' (a dropdown menu showing 'Boiler Installation'), and 'Client ID:' (a dropdown menu showing '1: Tom Piggott'). The 'Basic Controls' section is also enclosed in a red box and contains three buttons: 'Add Job' (highlighted with a red box and a red number '4'), 'Update Details', and 'Delete Job'. To the right of the 'Basic Controls' is the 'Invoice Controls' section, which contains two buttons: 'Create Invoice' and 'Send Invoice'.

5. A notification will pop up to verify the Job has been added.

The screenshot displays the 'Home Heat Appointment System' window. It features three tabs: 'Client', 'Appointment', and 'Job', with the 'Job' tab currently selected. A 'Search Job' button is located at the top of the 'Job' tab. Below this, the 'Job Details' section contains several input fields: 'ID:' with the value '2', 'Job Details:' with 'Example Details', 'Hours Taken:' with '5', and 'Total Price £:' with '100'. There are also checkboxes for 'Quote Approved?:' (checked), 'Invoice Sent?:' (checked), and 'Payment Received?:' (unchecked). A dropdown menu for 'Job Type:' shows 'Boiler Installation', and another dropdown for 'Client ID:' shows '1: Tom Piggott'. A red box highlights a notification dialog box that has popped up, displaying the text 'Added!' and 'Job added to the database!'. The dialog box has a red border and a red 'X' button. Below the 'Job Details' section, there are two columns of controls. The 'Basic Controls' column contains three buttons: 'Add Job', 'Update Details', and 'Delete Job'. The 'Invoice Controls' column contains two buttons: 'Create Invoice' and 'Send Invoice'.

Home Heat Appointment System

Client Appointment Job

Search Job

Job Details

ID: 2

Job Details: Example Details

Hours Taken: 5

Total Price £: 100

Quote Approved?: ☒

Invoice Sent?: ☒

Payment Received?: ☐

Job Type: Boiler Installation

Client ID: 1: Tom Piggott

Added!

Job added to the database!

Basic Controls

Add Job

Update Details

Delete Job

Invoice Controls

Create Invoice

Send Invoice

3.3.13 Amending a Job

Question: “How do I update a Job details once they are already in the database?”

Answer:

1. Follow the section “3.2 Managing the System” to find out how to get to the management section of the system.
2. Follow the section “3.11 Searching for a Client” to find the required Job.
3. Change any information the needs updating in the “Job Details” input form.
4. Click on the “Update Details” button, the new information will be amended to the database.

The screenshot displays the 'Home Heat Appointment System' window. At the top, there are three tabs: 'Client', 'Appointment', and 'Job'. Below the tabs is a 'Search Job' button. The 'Job Details' section is highlighted with a red box and contains the following fields:

- ID: 3 (with a red '3' next to it)
- Job Details: Example Details Amended
- Hours Taken: 5
- Total Price £: 100
- Quote Approved?: ☒
- Invoice Sent?: ☒
- Payment Received?: ☐
- Job Type: Boiler Installation (dropdown menu)
- Client ID: 1: Tom Piggott (dropdown menu)

Below the 'Job Details' section are two groups of buttons:

- Basic Controls:** Add Job, Update Details (highlighted with a red box and a red '4' next to it), Delete Job
- Invoice Controls:** Create Invoice, Send Invoice

3.3.14 Deleting a Job

Question: “How do I delete a Job from the System?”

Answer:

Deletion of a Job CANNOT be undone

1. Follow the section “3.2 Managing the System” to find out how to get to the management section of the system.
2. Follow the section “3.11 Searching for a Job” to find the required Job.
3. Click on the “Delete Job” button, second change window will pop-up.

The screenshot shows the 'Home Heat Appointment System' window with the 'Job' tab selected. The 'Job Details' section contains fields for ID, Job Details (Example Details), Hours Taken (5), Total Price £ (100), Quote Approved? (checked), Invoice Sent? (checked), Payment Received? (unchecked), Job Type (Boiler Installation), and Client ID (1: Tom Piggott). Below this are two sections: 'Basic Controls' and 'Invoice Controls'. The 'Basic Controls' section has three buttons: 'Add Job', 'Update Details', and 'Delete Job'. The 'Delete Job' button is highlighted with a red box and labeled with a red '3'. The 'Invoice Controls' section has two buttons: 'Create Invoice' and 'Send Invoice'.

4. Click on the “Yes” button to verify the deletion of the Job, clicking “No” will cancel the deletion.

The screenshot shows a small dialog box titled 'Are you sure?'. It has two buttons: 'Yes' and 'No'. The 'Yes' button is highlighted with a red box and labeled with a red '4'.

5. The pop-up window will automatically close and return to the “Manage System” window.

6. A notification will be displayed verifying the deletion of the Job.

The screenshot displays the 'Home Heat Appointment System' window. At the top, there are three tabs: 'Client', 'Appointment', and 'Job'. The 'Job' tab is selected. Below the tabs is a 'Search Job' button. The main area is titled 'Job Details' and contains several input fields: 'ID:' with the value '2', 'Job Details:', 'Hours Taken:', and 'Total Price £:'. Below these are three checkboxes for 'Quote Approved?:', 'Invoice Sent?:', and 'Payment Received?:', all of which are currently unchecked. The 'Job Type:' dropdown menu is set to 'Boiler Repair', and the 'Client ID:' dropdown menu is set to '1: Tom Piggott'. A red number '6' is placed above a small dialog box that has appeared. The dialog box has a title bar that says 'Record D...' and contains the text 'Record successfully deleted!'. At the bottom of the window, there are two sections: 'Basic Controls' with buttons for 'Add Job', 'Update Details', and 'Delete Job'; and 'Invoice Controls' with buttons for 'Create Invoice' and 'Send Invoice'.

3.3.15 Create an Invoice

Question: “How do I create an Invoice ready to be sent to a customer?”

Answer:

1. Follow the section “3.2 Managing the System” to find out how to get to the management section of the system.
2. Follow the section “3.11 Searching for a Job” to find the required Job.
3. Click on the “Create Invoice” button to generate the invoice, no notification will be displayed but the file can be found in the “Invoice Files” folder inside the same directory of the system executable.

Home Heat Appointment System

Client Appointment Job

Search Job

Job Details

ID: 1

Job Details: Basic Boiler Repair

Hours Taken: 2

Total Price £: 60

Quote Approved?: ☒

Invoice Sent?: ☒

Payment Received?: ☐

Job Type: Boiler Repair

Client ID: 1: Tom Piggott

Basic Controls

Add Job

Update Details

Delete Job

Invoice Controls 3

Create Invoice

Send Invoice

3.3.16 Sending an Invoice

Question: “How do I send an Invoice to a customer?”

Answer*:

1. Follow section “3.15 Generating an Invoice” to create the invoice.
2. Click on the “Send Invoice” button to send the Invoice to the Client.

The screenshot shows the 'Home Heat Appointment System' window with the 'Job' tab selected. The 'Job Details' section contains the following fields:

- ID: 1
- Job Details: Basic Boiler Repair
- Hours Taken: 2
- Total Price £: 60
- Quote Approved?: ☒
- Invoice Sent?: ☐
- Payment Received?: ☐
- Job Type: Boiler Repair (dropdown)
- Client ID: 1: Tom Piggott (dropdown)

Below the job details are two sections of controls:

- Basic Controls:** Add Job, Update Details, Delete Job
- Invoice Controls:** Create Invoice, Send Invoice

The 'Send Invoice' button in the Invoice Controls section is highlighted with a red rectangle and a red number 3.

**Invoices can only be sent if an email address has been provided for the relevant Client.*

3.2 Saving the System

All saving of files is done internally and handled completely by the system automatically; this includes the database used by the system and the generated invoice files, therefore no manual saving is required on the users behalf. This means that even with the program running all of the files should already be saved due to the database being saved after each use to avoid data loss from program crashes or other errors, although before backing up data it would always be best to close the program first to ensure all saves are made.

4. Errors

Certain sections of the system may raise an error in certain circumstances, each of these are described below with a tutorial on recovering from said error.

4.1 Sending Invoices

If a Client does not have an email address in their record inside the database then the email will fail to send but no error will be shown, this is due to how the system is compiled.

To solve the Error you will need to do either of the following:

Option 1:

1. Find which client the invoice is for, this can be found on the job tab.

The screenshot shows the 'Job' tab of the 'Home Heat Appointment System'. The 'Client ID' dropdown menu is highlighted with a red box, displaying '1: Tom Piggott'. The form includes fields for Job ID (1), Job Details (Basic Boiler Repair), Hours Taken (5), Total Price (£60), and checkboxes for Quote Approved, Invoice Sent, and Payment Received. At the bottom, there are buttons for 'Add Job', 'Update Details', 'Delete Job', 'Create Invoice', and 'Send Invoice'.

2. Open the client tab and load the needed client and enter their email address.

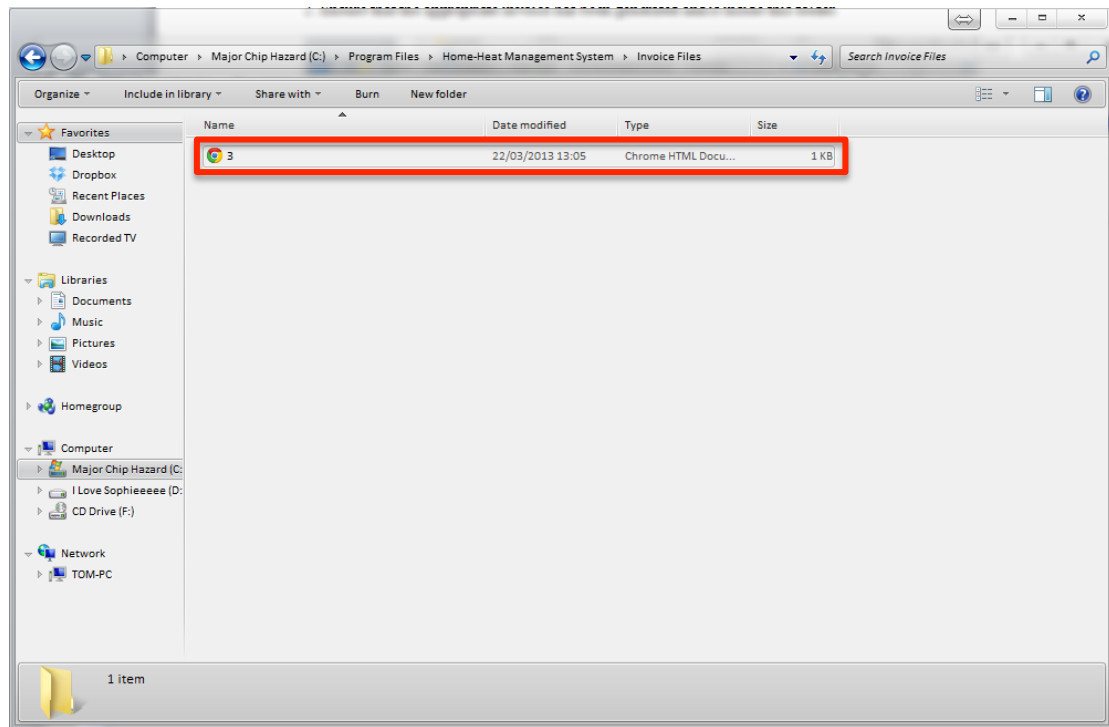
The screenshot shows the 'Client' tab of the 'Home Heat Appointment System'. The 'Email' field is highlighted with a red box, containing the text 'EXAMPLE@EXAMPLE.COM'. The form includes fields for Client ID (1), Title (Mr), Forename (Tom), Surname (Piggott), Phone No (01763233321), Street No (3), Street Name (Cedar Close), Town (Melbourn), County (Cambridge), and Postcode (SG86BL). At the bottom, there are buttons for 'Add Client', 'Update Details', and 'Delete Client'.

3. Amend the client and try to send the invoice again from the job tab.

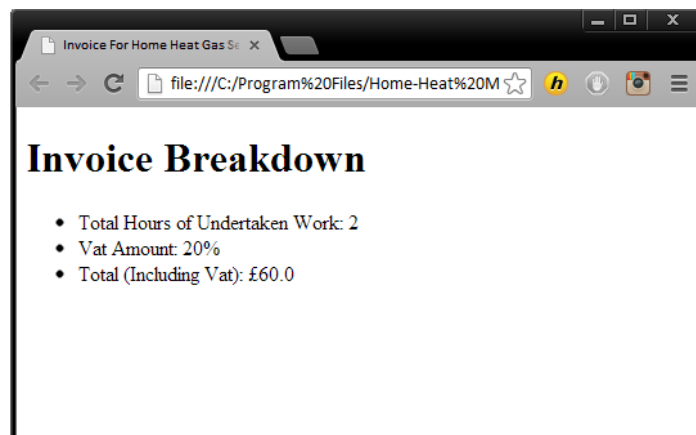
4. The error should now be solved!

Option 2:

1. Navigate to the installation Directory of the system and open the folder named “Invoice Files”
2. Ensure that the appropriate invoice has been generated and is inside this folder.



3. Double Click the relevant invoice file to open it inside your computers default web browser.



4. Hold down the CTRL key on the keyboard and press P, this will pop-up a window to print the document.
5. Print the Invoice off and deliver it to the Client manually.

5. Limitations

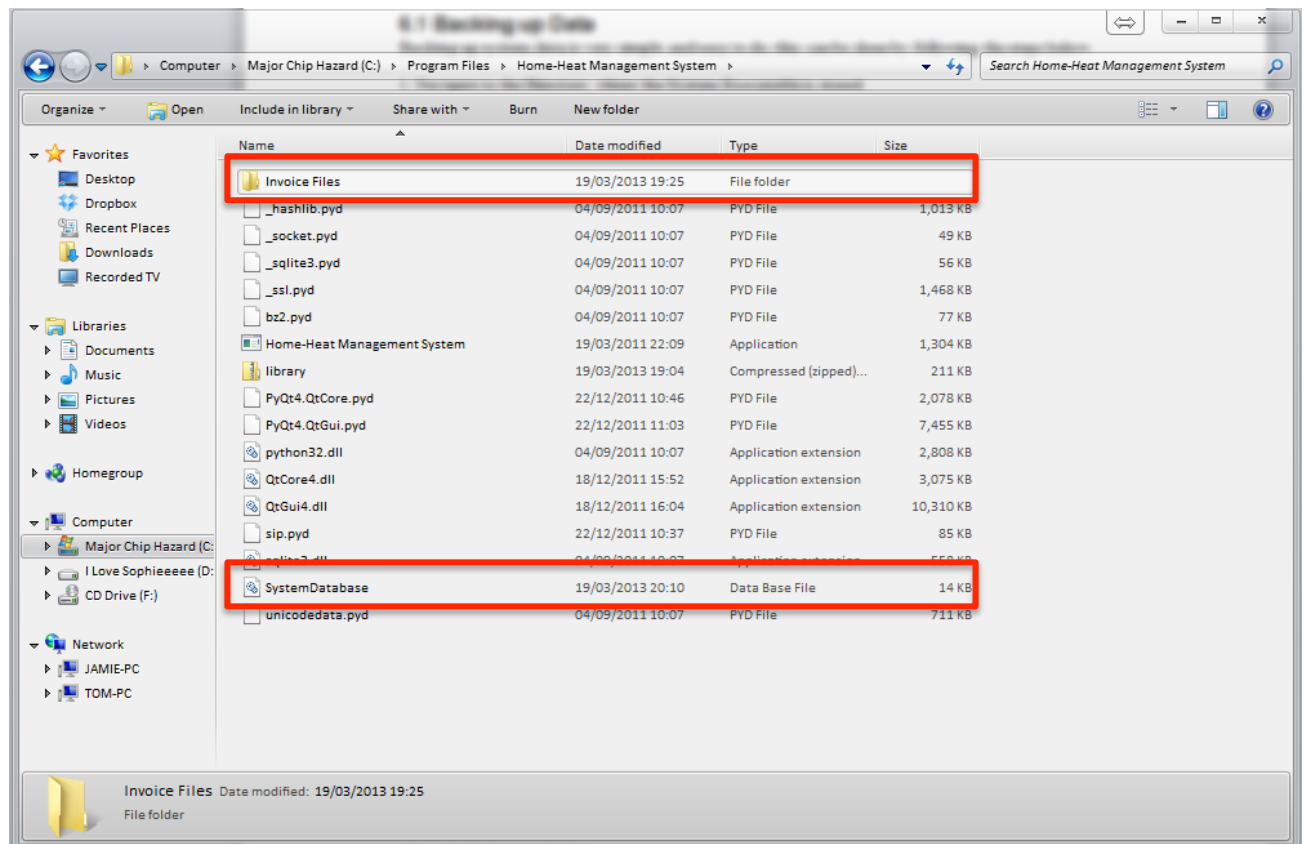
Currently the system does everything it was proposed to do in the design and analysis sections, although if a Client does not have an Email address then an invoice file would need to be printed manually by the User instead of emailing the Invoice.

6. System Recovery

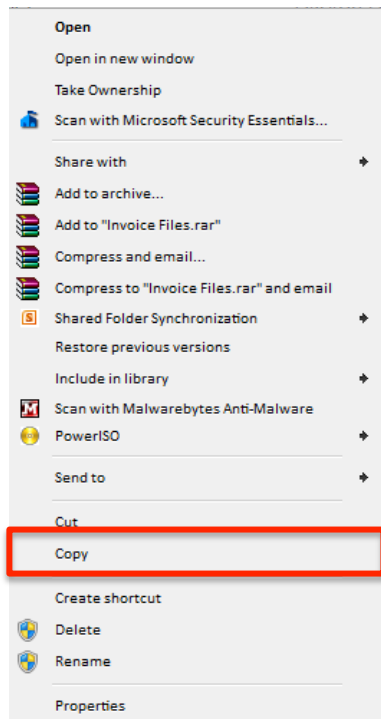
6.1 Backing up Data

Backing up system data is very simple and easy to do; this can be done by following the steps below:

1. Navigate to the Directory where the System Executable is stored.
2. Now save changes you have made in the System and close it if it is running.
3. Hold down the “Ctrl” button on the keyboard and left click on the “Invoice Files” folder, now without letting go of the Ctrl button left click on the “SystemDatabase.db” file.



4. With both the folder and file selected right click on one of them and click “Copy”.

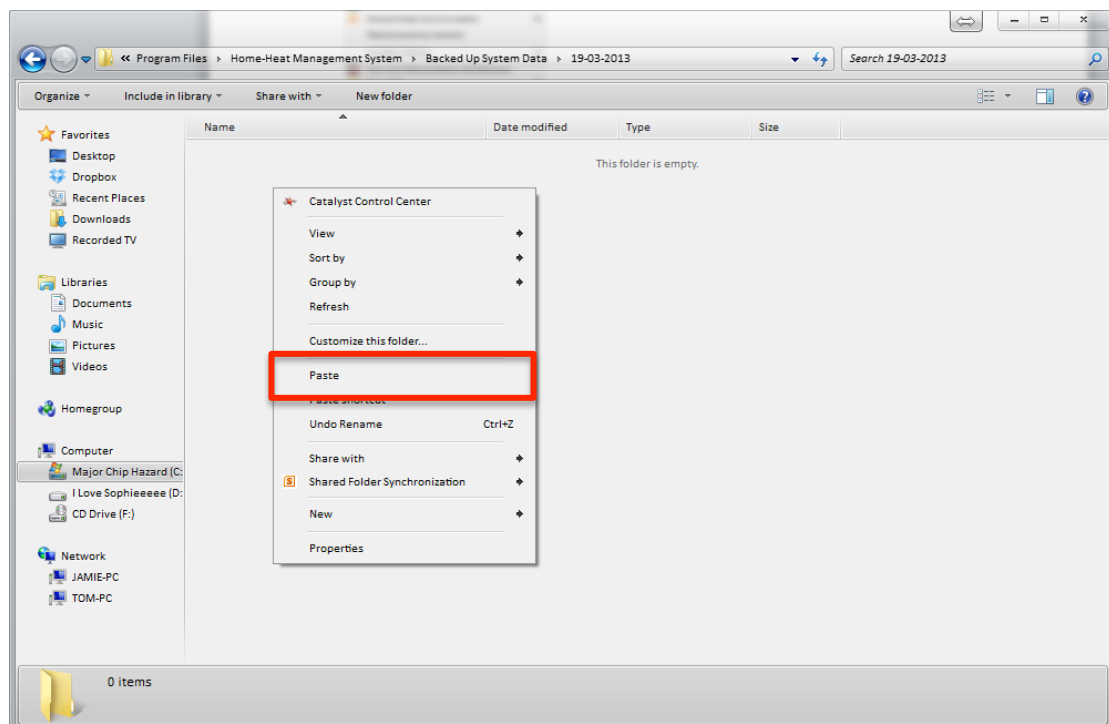


5. *Optional* Navigate to a different Directory to save the Backed-Up too such as a different HDD or a USB stick.

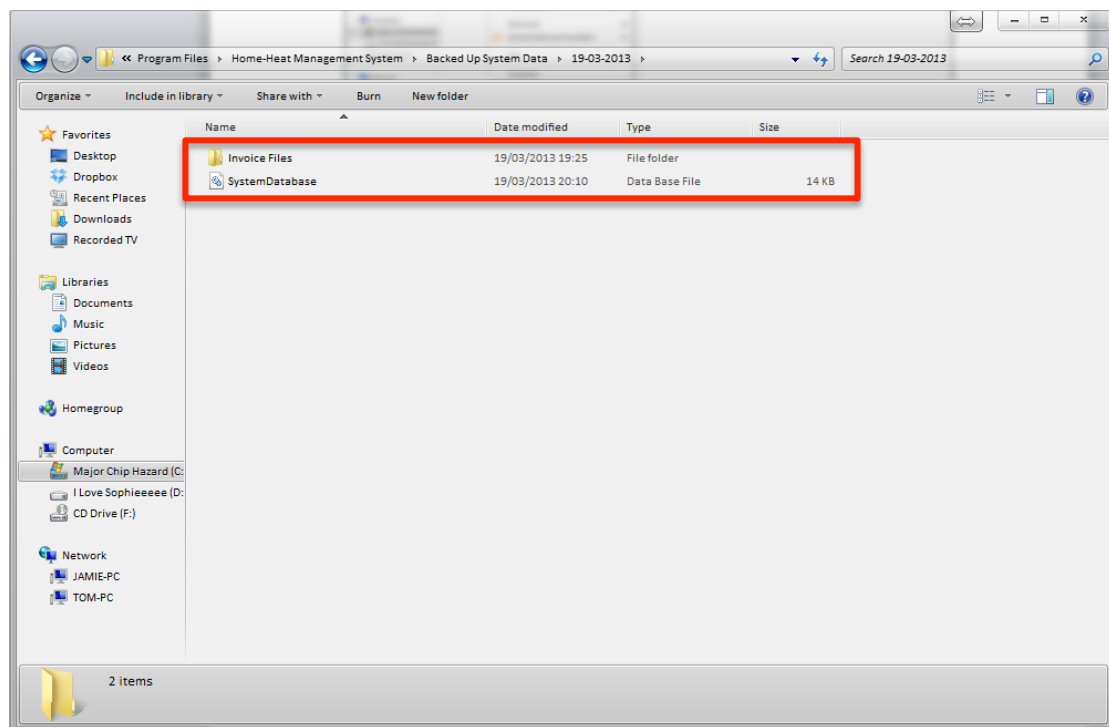
6. Once you have chosen where you want to save the Data to create a new folder and name it “Backed Up System Data” or something similar so you know what is inside the folder.

7. Open the newly created folder and create another folder and name it today's date, for example I used “19-03-2013”, this makes it a lot easier to know when backups were taken.

8. Open the dated folder and right click inside the Windows Explorer window and click “Paste”.



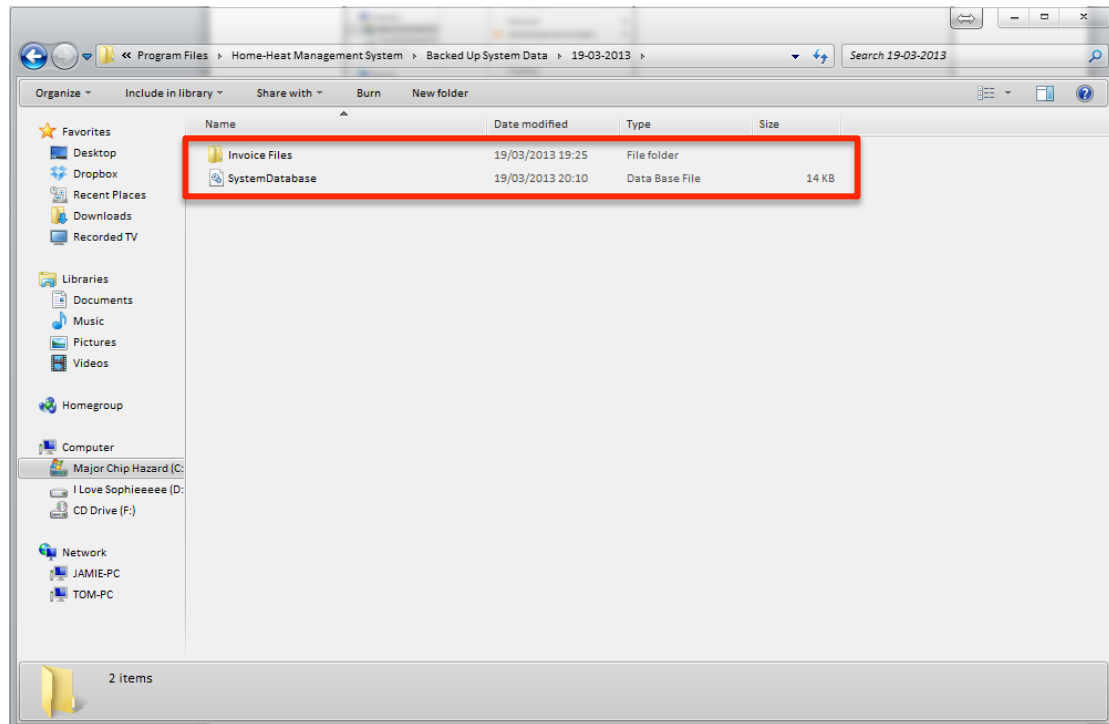
9. The data is now backed up and can be restored if needed!



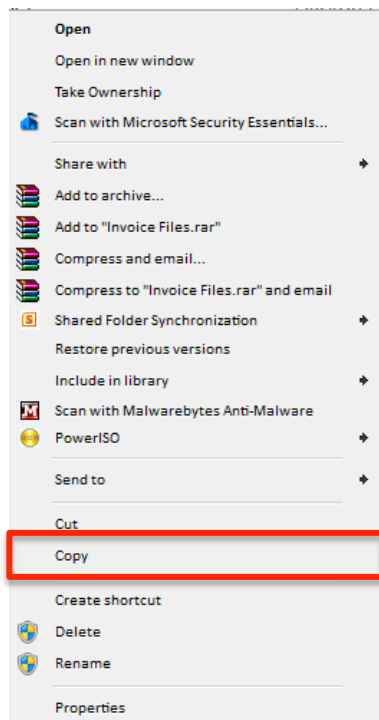
6.2 Restoring Data

In the event of data needing to be restored you must do the following:

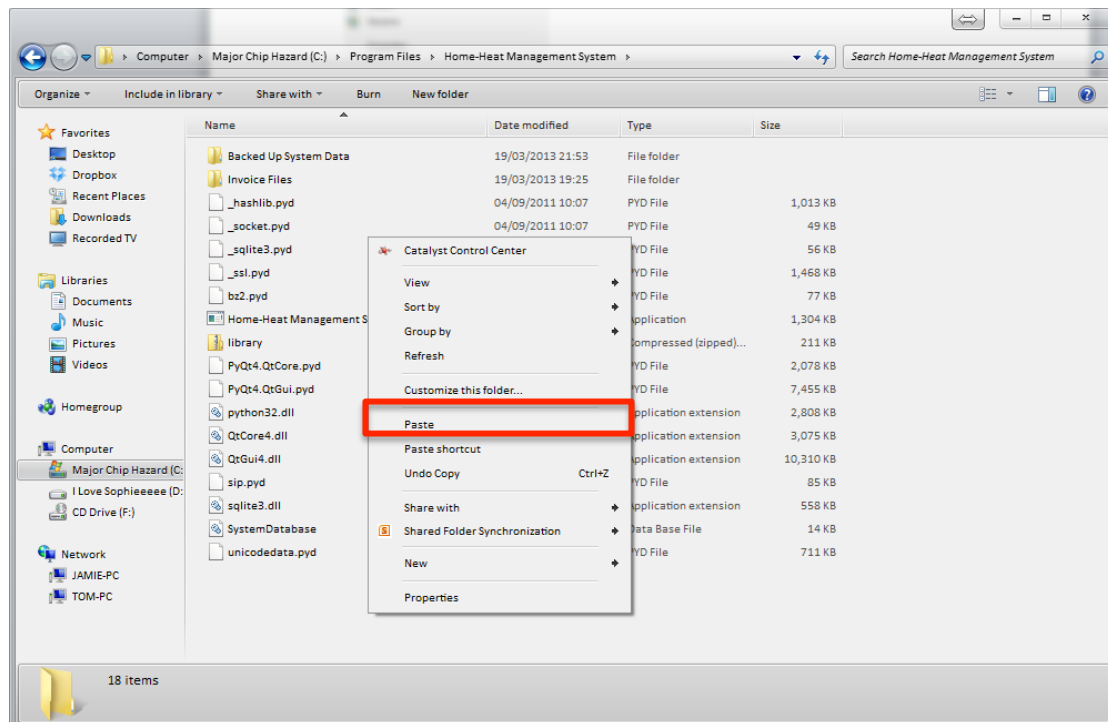
1. Navigate to the Directory where backups were stored in section “5.1 Backing up Data”.
2. Open the desired dated Back-Up folder.
3. Hold down “Ctrl” and select both the “Invoice Files” folder and the “SystemDatabase.db” file.



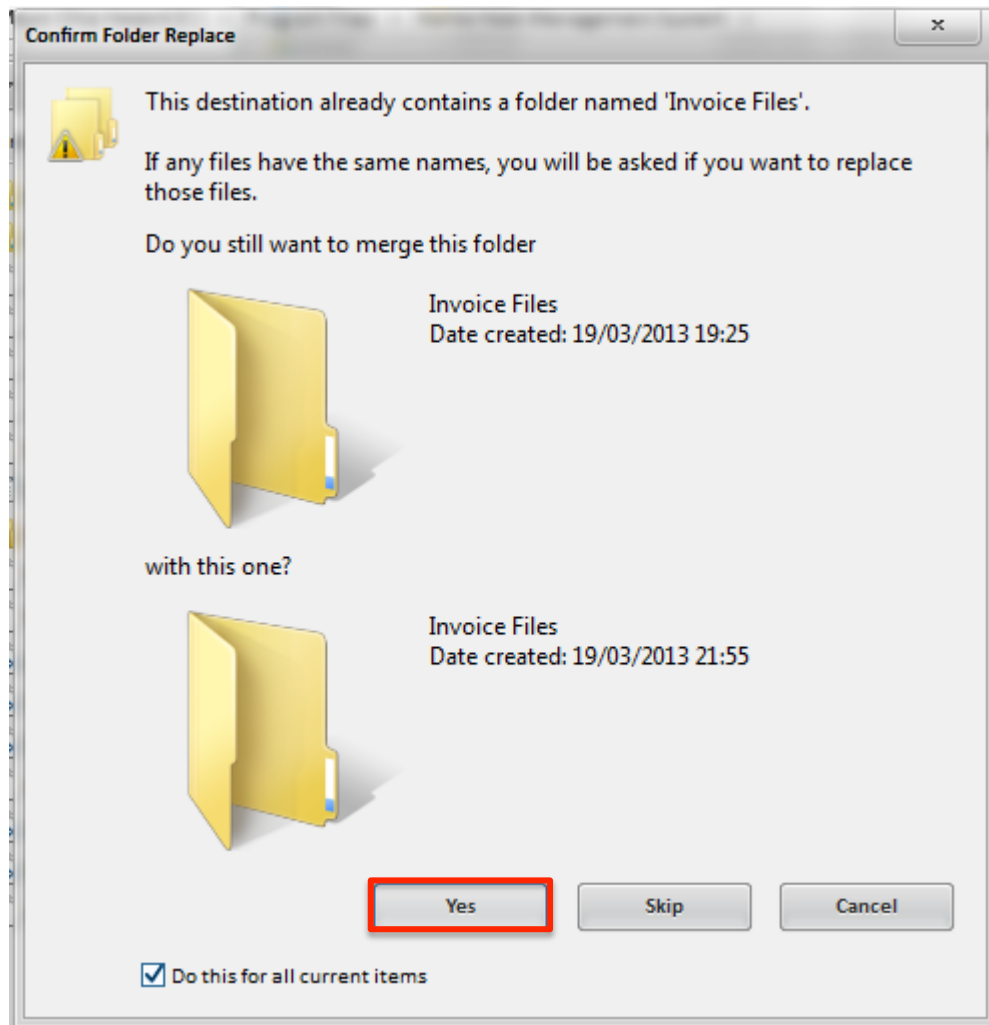
4. Right click one of them and click on “Copy”



5. Navigate to the Directory of the installed System.
6. Right click inside the Windows Explorer window and click on “Paste”.



7. When prompted check the “Do this for all current items” tick box at the bottom of the window and then click the “Yes” button, this will replace all of the new files with the new ones.



8. Back-Up complete! The system will now use the replaced files instead of the old ones.