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*The Independent Software Provider*

# Customer Web Access

Overview v3.1 - Software Version 3.0.1

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# Overview

## Customer Web Access Summary

The customer web access module is a multi-featured tool which allows your customers to manage and access information regarding their contracts, jobs and quotes on their account securely. It is deployed as a web application which can be accessed from any modern web browser. It is driven by the same data that your Alarm Master installation runs on.

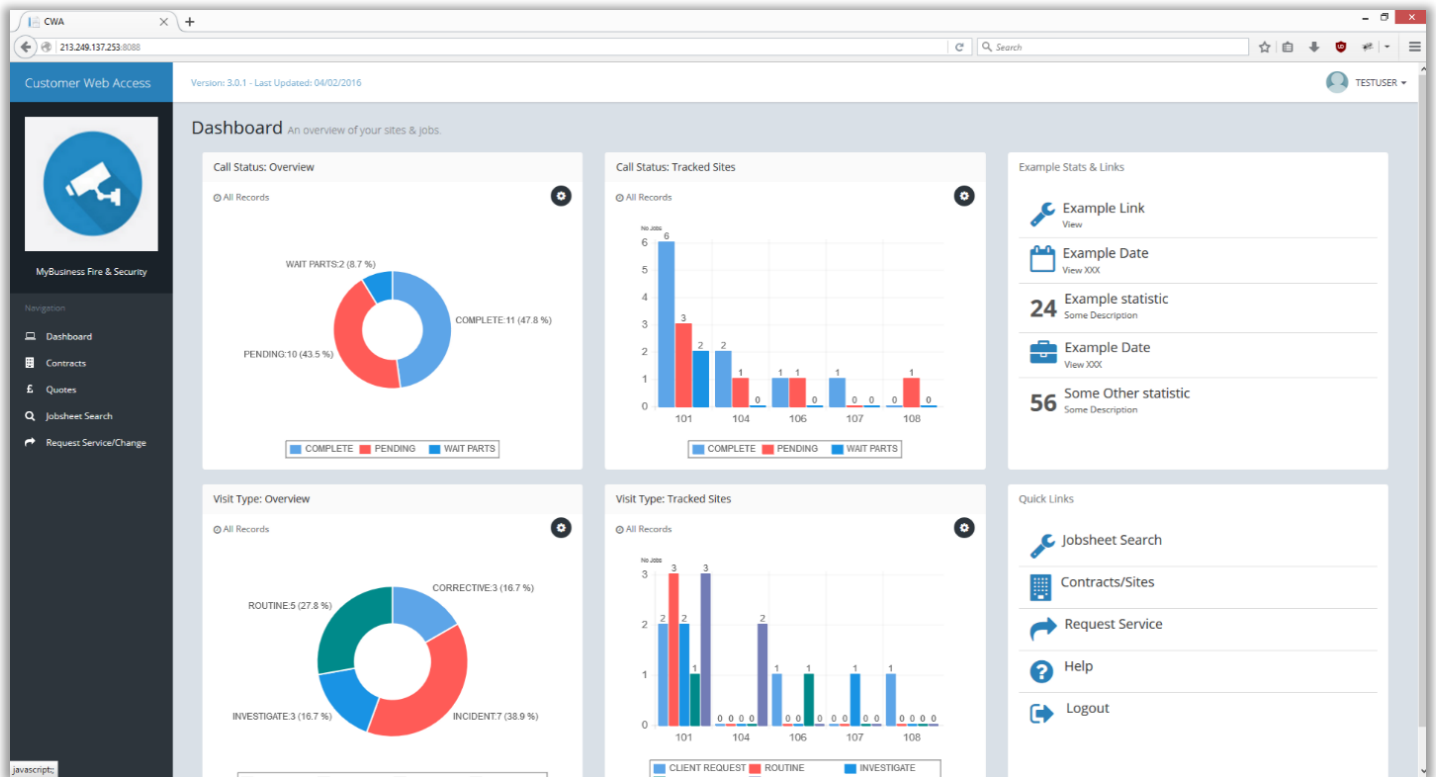
## Application Features

The application is split into the following, easy to navigate areas:

- **Dashboard**
  - The dashboard is an interactive, drill-down chart driven area where customers have access to breakdowns and quick stats about their contracts and jobs.
  - Charts can be configured depending on what they want them to breakdown, and in what time period the charts should look at.
  - A quick stats panel, allowing you to show customers a special subset of information specific to your business.
- **Contracts**
  - Basic contract details such as premises type, branches, expiry dates etc.
  - System details such as remote monitoring information and types.
  - Key holder details for the contract.
  - Download & upload documents into a special area in the contract's correspondence folder for quick document sharing.
- **Jobs & Jobsheets**
  - Basic job details such as status, the type of call, actions and special instructions.
  - Downloadable jobsheets\*.
- **Quotes**
  - Basic quote details of active quotes on the customer's account.
  - Allows the customer decide whether to accept or decline the quote, which automatically notifies them and your support desk of their decision.

\*Downloadable jobsheets requires our PDA package and the latest version of CompletedJobs installed on your server.

# Dashboard



## Overview

The dashboard serves as the backbone to the application and gives the user an easy to digest, quick look at the goings on with their sites/contracts. It is comprised of 3 distinct sections: Chart reporting, the Quick stats panel and the Quick Links Panel.

## Drilldown Charts

We package CWA with 4 charts out of the box. You can specify up to 2 additional charts as part of the price.

- 2x Donut charts to break down all jobs by their status/call type.
- 2x Multi-bar chart to break down all jobs by their contracts & statuses/call types.

All charts are interactive, in that each segment of a donut and each bar of a bar chart can be clicked on to drilldown to the data that it represents. These are configurable, and can generate subsets of information such as only statuses that the user cares about or even from specific time periods etc.

## Quick Stats Panel

This panel shows your customers' statistics, dates and other data that you might wish your customer to see as soon as they login to the application.

## Quick Links Panel

This area will direct your users over to different parts of the application, and can also support more links should you wish to have your own services shown on this panel.

## Contracts

The screenshot displays the 'Contracts' web interface for contract 0002/01. The header shows the contract ID and address: 'Contract: 0002/01 Address: Unit 6, 59 Whiffler Road, Spalding, Lincs, RR3 2TW / System Type: Intruder Alarm and/or PA Alarm'. The interface is divided into several sections:

- Contract Details:** A table with fields: Contract Ref (0002/01), Branch (Not Found), Property Type (Not Found), Client (Rockware Bakery), Address (Unit 6, 59 Whiffler Road, Spalding, Lincs, RR3 2TW), Contract Expiry (01/01/0001), and UPRN (Not Found).
- System Details:** A table with fields: System Type (Intruder Alarm and/or PA Alarm), Signal Type (RedCARE plus GSM), Remotely monitored?, Central Station (Not Found), Digi No (Not Found), and URN (Not Found).
- Overview Panel:** Contains 'Outstanding Jobs' (View), and two 'Example Date' items (View XXX).
- Site Keyholders:** A table with columns: Contact, Category, Telephone, E-Mail, and Address. It shows two entries for Mr R Stewart, one for PREMISES and one for ACCOUNTING, both at the same address. A search bar and pagination (Showing 1 to 2 of 2 entries) are also present.
- Files for this Contract:** A file manager interface with an 'Upload File' button. It shows a 'Site Folder' containing files: doc1.docx, doc2.xlsx, and doc3.pdf. Instructions for viewing and uploading files are provided.

## Summary

The contracts section of CWA provides your users with an overview of each contract that you have set for them to govern. It shows items such as basic contract details, system details, key holders and documents.

The contract area is split into clear sections for easy traversal:

- **Basic contract details:** This shows information such as premises type, branch and address etc.
- **System details:** Information in the database concerning the system, detailing its type and remote monitoring details.
- **Overview panel:** Similar to the dashboard's "Quick Stats Panel" in that there is room here to show users quick stats regarding the contract.
- **Key holders panel:** Basic details regarding the key holders for this contract/site.
- **File access:** A Windows style folder/file hierarchy showing all files in a special folder for this contract linked to Alarm Master's correspondence folders. Users can download and upload documents here.

## Jobs & Jobsheets

Jobsheet: 9008 in-depth jobsheet details Home / Jobsheets 9008

DATE ON SITE  
30/03/2009

VISIT TYPE  
INVESTIGATE

STATUS  
COMPLETE

CONTRACT REF  
107

PDF Jobsheets  
▲ 9008 10/10/2014 21:00:01

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Instructions

Actions

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Site Address	156 Milton Way, Staveley, Brightside, Leeds,	Revisit	N
Call Date	19/05/2006	Charge	Y
Call Time	11:34:00	Order No	
Arrival Time	09:00:00		
Appointment Date	20/05/2006		
Appointment Time	16:00:00		
Finish Date	30/09/2009		

## Summary

The job section of the application provides a quick way for customers to see the main details of the job. This covers information such as when the engineer arrived on site, what actions were undertaken and what the status of the job is currently. If the user wants to see more information, they can download a copy of the jobsheet for their records in PDF format. This saves them having to call/E-Mail your support desk for this information.

Jobsheets are only downloadable in PDF format if you have our PDA package which generates the necessary information to be printed out. We also provide a standard jobsheet out of the box which shows your company details/logo.

## Quotes

**Quotes**

**QUOTE LIST:** This panel serves to list all active quotes on your account.  
**ACCEPT/DECLINE:** Clicking "ACCEPT" or "DECLINE" will dispatch an E-Mail to our support staff and to yourself. If you wish to go ahead with a quote, we will be in touch shortly after you've made your decision.

Show 10 entries Search:

Quote Ref	Quote	Status	Notes	Date Quoted	Accept	Decline
I-B-0017M	£600	QUOTED		21/08/2006	Accept	Decline
I-B-0002A	£855	QUOTED		17/04/2006	Accept	Decline
I-B-0005A	£695	QUOTED		17/04/2006	Accept	Decline
I-B-0007A	£533	QUOTED		17/04/2006	Accept	Decline
I-D-0001A	£1222	QUOTED		11/06/2006	Accept	Decline
I-B-0001M	£2478.47	QUOTED		04/05/2006	Accept	Decline

Showing 1 to 6 of 6 entries Previous 1 Next

## Summary

This section will list all active quotes for this user. It shows basic details for each quote such as the reference number, how much was quoted and the description of the work to be done. The user can accept or decline these quotes. This will then change its status and also dispatch an E-Mail to your support desk and the user detailing the quote and decision made.



## Other Features

### Request Service/Change

The user can fill in a request form which will dispatch an E-Mail detailing the request to your support team – helping to reduce call volumes.

### Back End Administration

A backend administration portal supports the application which allows you to do the following:

- View user details and manage access to the application
  - Modify user details
  - Delete users
  - Add new users
- Configure the application
  - This includes application styling, access limits etc.

For more information and access to the online demo for the Customer Web Access module, please call our enquiries line on 01482 607350.