



CUSTOMER ZONE

USER GUIDE



CUSTOMER ZONE MENU

The Customer Zone Menu appears on the left hand side of the screen. From here you can navigate to all of the sections contained within this guide.

MINIMISE THE MENU BY CLICKING THE THREE LINES

MENU LIST

Transaction Number	Transaction Type	C/D	Net	Vat	Gross	Reference	Outstanding Amount	Transaction Date
91884	Invoice	Debit	£1.00	£0.20	£1.20	91884	£1.20	14/12/2018
12903	Payment	Credit	£1.20	£0.00	£1.20	15447182233836489	£0.00	13/12/2018
91880	Invoice	Debit	£1.00	£0.20	£1.20	91880	£1.20	13/12/2018

Product	Qty	Collection Day	Collection Frequency	Next Collection Date
Food Caddy	1	Tuesday	Fortnightly	

The following pages detail all of the options in the menu list, along with navigation tips to find the information you require.

DASHBOARD

The Dashboard Screen shows your general account information, such as recent invoices, current balance, site information and your available documents. Updates to your account are highlighted by the bell icon next to your account details. This is the screen you will see upon logging in to your account.

The dashboard interface features a dark green header with the 'NWS' logo and a hamburger menu icon. A vertical sidebar on the left contains icons for home, documents, currency, chat, and user profile. The main content area is divided into several sections:

- SITE INFORMATION:** A green card with a blurred area and a 'My Office' label with a location pin icon.
- ACCOUNT DOCUMENTS:** A green card displaying 'N/A Documents' and a 'More info' link with a document icon.
- ACCOUNT DETAILS:** A green card showing the current balance as '£1.20' with a 'Pay Now' button and a card icon.
- LATEST INVOICE:** A green card titled 'RECENT INVOICES/TRANSACTIONS' showing a balance of '£1.20'.

Red vertical lines connect the callout boxes to their respective elements on the dashboard.

CURRENT SITES

If you operate multiple sites, you will be able to select which site you would like to view from this page.

You can return to this page using the second icon on the left hand site, to change between your sites.

The screenshot displays the 'Current Sites' interface. At the top left is the NWS logo and a menu icon. The main content area is titled 'Current Sites' and contains a table with the following structure:

Office	Phone	Contact
No data available in table		

Below the table, it indicates 'Showing 0 to 0 of 0 entries'. To the right of the table are 'Previous' and 'Next' navigation buttons. A search bar is located at the top right of the table area. A dropdown menu shows '10 entries'. A red vertical line originates from a green button labeled 'SITE LIST' at the bottom left and points to the table area.

DOCUMENTS

The third tab on the left hand side opens the Documents page, where you will be able to view this user guide, system generated account letters, and scanned correspondence we have recieved from you.

The screenshot displays the 'Documents' page in a web application. At the top left is the NWS logo and a menu icon. The page title is 'Documents'. Below the title, there is a search bar and a dropdown menu set to '10 entries'. The main content area features a table with the following columns: 'Description', 'Uploaded Date', 'Office', and 'Actions'. The table is currently empty, with the text 'No data available in table' centered within it. Below the table, it says 'Showing 0 to 0 of 0 entries' and includes 'Previous' and 'Next' buttons. A red vertical line points from a green button labeled 'DOCUMENT LIST' to the table area.

MY OFFICE

The My Office Tab details your account overview. Here you can see your account details, the type of collections you have, the collection day, and your future collection details.

The screenshot shows the 'My Office' portal interface for 'Andy Hulme Portal Test - 2'. The interface is divided into several sections:

- Account Details:** Located at the top left, it lists fields such as Account Number, Customer, Balance, Alpha, and Address. A red line connects this section to a green callout box labeled 'ACCOUNT DETAILS'.
- Contact Details:** Located at the top right, it lists fields such as Contact, Phone, Mobile, and Email. A red line connects this section to a green callout box labeled 'CONTACT DETAILS'.
- Collection Information:** Located in the middle left, it includes a 'Scheduled Collections' tab, a 'Show 10 entries' dropdown, and a search bar. A red line connects this section to a green callout box labeled 'COLLECTION INFORMATION'.
- Collection Schedule:** A table with columns for Product, Qty, Collection Day, Collection Frequency, and Next Collection Date. A red line connects this section to a green callout box labeled 'COLLECTION SCHEDULE'.
- Next Collection:** Located at the bottom right, it includes a 'Showing 1 to 1 of 1 entries' message and a pagination control with 'Previous', '1', and 'Next' buttons. A red line connects this section to a green callout box labeled 'NEXT COLLECTION'.

Product	Qty	Collection Day	Collection Frequency	Next Collection Date
Food Caddy	1	Tuesday	Fortnightly	-

TRANSACTIONS

The sixth tab details all recent transactions, with payment information, the ability to pay an invoice online, and the option to download previous invoices as required.

The screenshot displays a web interface for managing transactions. At the top, there is a green header with the 'NWS' logo and a notification bell. Below the header, the page title is 'Transactions'. A 'Show 10 entries' dropdown is visible. The main content is a table with columns: Transaction Number, Transaction Type, C/D, Net, Vat, Gross, Reference, Outstanding Amount, and Transaction Date. Three rows are shown, with the first and third rows marked as 'New' and having a 'Pay Now' button. Below the table, there are filter boxes for 'Filter by Transaction Number' and 'Filter by Transaction Date'. At the bottom right, there are 'Previous', '1', and 'Next' navigation buttons. Four callouts in green rounded rectangles point to specific elements: 'PAY NOW BUTTON' points to a button in the table; 'TRANSACTION LIST' points to the table header; 'TRANSACTION INFORMATION' points to the table columns; and 'DOWNLOAD BUTTONS' points to the download icons in the table.

Transaction Number	Transaction Type	C/D	Net	Vat	Gross	Reference	Outstanding Amount	Transaction Date
New 91884	Invoice	Debit	£1.00	£0.20	£1.20	91884	£1.20	14/12/2018
12903	Payment	Credit	£1.20	£0.00	£1.20	15447182233836489	£0.00	13/12/2018
New 91880	Invoice	Debit	£1.00	£0.20	£1.20	91880	£1.20	13/12/2018

REQUESTS

The seventh tab allows you to send messages to request account details, change your collections schedules, or request additional account information.

Requests

REQUEST LIST

Show 10 entries

Search:

Notes	Type	Status	Date
No data available in table			

Showing 0 to 0 of 0 entries

Previous Next

REQUEST STATUS

ADD A REQUEST

Add new Request



NWS



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