

## Home Screen

The Home Tab deals with customer information and is the one you will spend 90% of your time in. The customer account can be selected by either using the drop down selector or typing in a partial name then selecting the account.



The buttons underneath the drop down selector box let the user choose what actions are available for the account displayed in the drop down selector box. These buttons are displayed throughout the account screens and can be used at any time to interact with the chosen account.

The Show Account, Document List, Audit Account button can be selected at any time to perform the selected operation on the chosen account.

The Add Account button can be selected at any time to add a new customer account to the system.

The Cancel button can be used to cancel out of any operation and return to this screen while in the Home Tab.

## Show Account

The show account button Lists the customer information and gives further option buttons at the bottom of the screen for editing the account or adding information. No changes can be made to the account while on this screen.

Account: Berk Greene : 2044

Show Account Document List Audit Account Add Account Cancel

Billing Name	Berk Greene	Owner Name	Account Number	2044	
Address	5091 Enim Street	Owner Address	Meter Serial Number	0	
Address 1		Owner Address 1	Physical Address		
City	Oak Ridge	Owner City	Meter Latitude		
State	CT	Owner State	Meter Longitude		
Zip	12761	Owner Zip	Customer Type	Bill to Billing mail	
Billing Email	ipsum.dolor@dignissim.edu	Owner Email	Account Active	Active	
Billing Phone	(989) 160-64	Owner Phone			
Billing Phone 2			Last Charge	\$	
Last Month Read	0	Last Read	0	Last Credit	\$
Last Month Usage	0	Last Usage	0	Account Balance	\$0.00

Account Note :

Edit Account Assign or Edit Rate Codes

Notes Work Orders Add Misc Charge Add Payment\Credit

All buttons on this screen with the exception of the Add Account and Cancel buttons perform the selected operation on the chosen account that is displayed in the drop down selector.

Current information is displayed in highlighted information at the bottom of the table. This information is updated automatically from data entered in other parts of the program.

The account note displayed here can be changed at any time by using the Edit Account button, this note is not permanent. Permanent notes for the account are entered by using the Notes button.

## Edit Account

This screen lets the user change the account information of the selected account.

Home Reports Readings Settings

Account: Berk Greene : 2044

Show Account Document List Audit Account Add Account Cancel

Billing Name	Berk Greene	Owner Name		Account Number	2044
Address	5091 Enim Street	Owner Address		Meter Serial Number	0
Address 1		Owner Address 1		Physical Address	
City	Oak Ridge	Owner City		Meter Latitude	
State	CT	Owner State		Meter Longitude	
Zip	12761	Owner Zip		Customer Type	Bill to Billing mail
Billing Email	ipsum.dolor@digniss	Owner Email		Account Active	Active
Billing Phone	(989) 160-64	Owner Phone		Read Order	0.000
CASS Sequence	0	Owner Cass Sequence	0	Last Month Read	0
Delivery Barcode		Owner Del Barcode		Last Read	0
CASS Deliverable		Owner CASS Deliverable		Last Month Usage	0
Billing Phone 2				Last Usage	0

Account Note

Update Account

It is on this screen that a temporary note can be edited that shows up on the Account Information Screen.

After making the necessary changes the Update Account button must be selected in order to save any changes made. Selecting Cancel or any of the top buttons will exit from this screen without saving any changes made.

## Assign Rate Codes

This screen allows the user to assign any rate codes to the customer account.

Account: Berk Greene : 2044

Show Account Document List Audit Account Add Account Cancel

Please use the Rate Codes required for this customer from the table on the right  
You may enter multiple codes by using a colon between the codes. Example (14:37:21)

Billing Name	Berk Greene
Account Number	2044
Rate Codes	1:2
Update Customer	

Rate Code	Name	Description	Amount
1	Monthly Water 3k	Monthly Water with 3000 gallons	23.32000
2	NMGRT	NM Gross Receipts Tax	1.35000

After making the necessary changes the Update Account button must be selected in order to save any changes made. Selecting Cancel or any of the top buttons will exit from this screen without saving any changes made.

## Notes

This screen adds permanent notes to the customer account. These notes will be listed here and cannot be changed.

The screenshot shows a web application interface with a top navigation bar containing 'Home', 'Reports', 'Readings', and 'Settings'. Below the navigation bar, there is a section for account selection with the text 'Account:' followed by a dropdown menu showing 'Berk Greene : 2044'. Below the dropdown are five buttons: 'Show Account', 'Document List', 'Audit Account', 'Add Account', and 'Cancel'. At the bottom left, there is a table with three columns: 'Date', 'Title', and 'Note'. Below the table is an 'Add Note' button.

The screenshot shows the same web application interface, but the 'Add Note' button has been selected, and the form fields are now visible. The 'Title' field is a text input box, and the 'Note' field is a larger text input box. Below these fields is an 'Add' button.

After making the necessary changes the Add button must be selected in order to save any changes made. Selecting Cancel or any of the top buttons will exit from this screen without saving any changes made.

## Work Orders

Any work orders assigned to the customer's account will be listed here, as well as the ability to add a new work order.

The screenshot displays a web application interface for managing work orders. At the top, there is a navigation bar with tabs for 'Home', 'Reports', 'Readings', and 'Settings'. Below this, an 'Account:' dropdown menu is set to 'Berk Greene : 2044'. A row of buttons includes 'Show Account', 'Document List', 'Audit Account', 'Add Account', and 'Cancel'. The main area features a table with four columns: 'WO ID', 'Entered Date', 'Last Updated Date', and 'Description of Problem'. The table contains one row with the following data: '10', '0000-00-00 00:00:00', '2012-07-19 07:25:49', and 'Leak'. A 'Leak' button is positioned within the 'Description of Problem' cell. Below the table, there is an 'Add Work Order' button.

WO ID	Entered Date	Last Updated Date	Description of Problem
10	0000-00-00 00:00:00	2012-07-19 07:25:49	Leak

The button in the Description of Problem column will bring up the selected work order for viewing or editing.

Home
Reports
Readings
Settings

Account: Berk Greene : 2044

Show Account
Document List
Audit Account
Add Account
Cancel

Account	2044	Meter ID	0
Address	5091 Enim Street	Meter Address	
Problem	Leak	Problem ext.	
Completion		Latitude	
Completion ext		Longitude	
Assigned to		Date Entered	0000-00-00 00:00:00
Entered by		Completed By	

Work / Part Description	Cost
Valve	150
	0
	0
	0
	0
Total Cost	0
Comments	

Update Work Order
Last Updated
2012-07-19 07:25:49

After making the necessary changes the Update Work Order or Add Work Order button must be selected in order to save any changes made. Selecting Cancel or any of the top buttons will exit from this screen without saving any changes made.

## Add Misc Charge

This screen allows a miscellaneous charge to be added to the currently selected customer account. Normal usage charges will be added when readings are entered and should not be entered here.

Home Reports Readings Settings

Account: Berk Greene : 2044 ▼

Show Account Document List Audit Account Add Account Cancel

Charge Type	LateFee ▼
Amount	
Reference	
Note	

Post Charge

The Charge Types are defined in the Settings Tab for your company.

After making the necessary changes the Post Charge button must be selected in order to save any changes made. Selecting Cancel or any of the top buttons will exit from this screen without saving any changes made.



## Add Payment/Credit

This screen allows a payment to be added to the currently selected customer account.

Account: Berk Greene : 2044 ▼

Show Account Document List Audit Account Add Account Cancel

Payment Type Cash ▼

Amount

Reference

Note

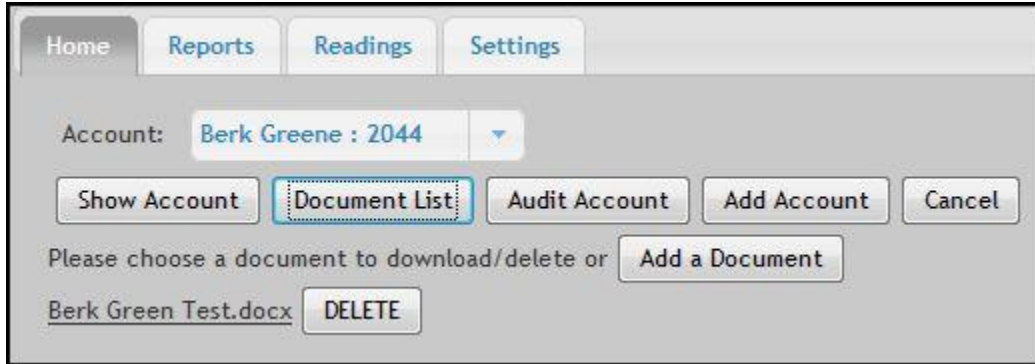
Post Payment

The Payment Types are defined in the Settings Tab for your company.

After making the necessary changes the Post Payment button must be selected in order to save any changes made. Selecting Cancel or any of the top buttons will exit from this screen without saving any changes made.

## Document List

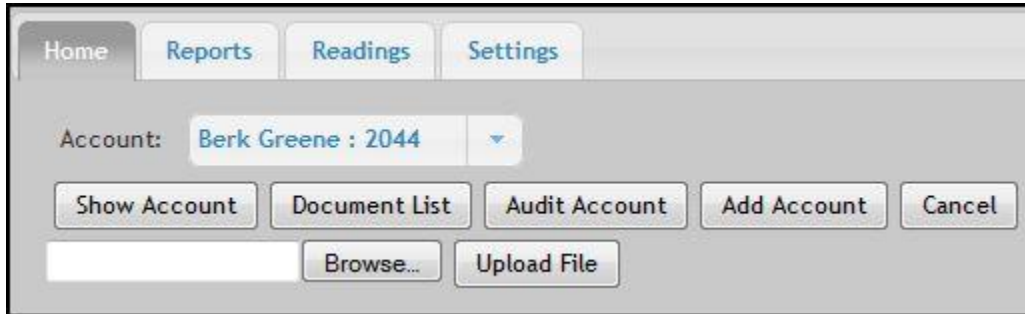
This screen lists any documents attached to the current customer account as well as lets the user upload any new documents.



The screenshot shows a web interface with a top navigation bar containing 'Home', 'Reports', 'Readings', and 'Settings'. Below this, there is an 'Account:' dropdown menu currently set to 'Berk Greene : 2044'. A row of buttons includes 'Show Account', 'Document List' (which is highlighted with a red dashed border), 'Audit Account', 'Add Account', and 'Cancel'. Below the buttons, a text prompt reads 'Please choose a document to download/delete or' followed by an 'Add a Document' button. At the bottom, the text 'Berk Green Test.docx' is displayed next to a 'DELETE' button.

Any documents will have a link listed in order to view or download.

To add a new document the user can browse their computer for the document and then select the Upload File button. Clicking the mouse in the text box will also bring up the file browsing window.



This screenshot shows the same interface as the previous one, but with the 'Document List' button selected. Below the row of buttons, there is a text input field, a 'Browse...' button, and an 'Upload File' button.

After uploading a new document a new tab in your browser will inform you of a successful upload to the storage area.

## Audit Account

This screen displays the selected customer's account balance history.

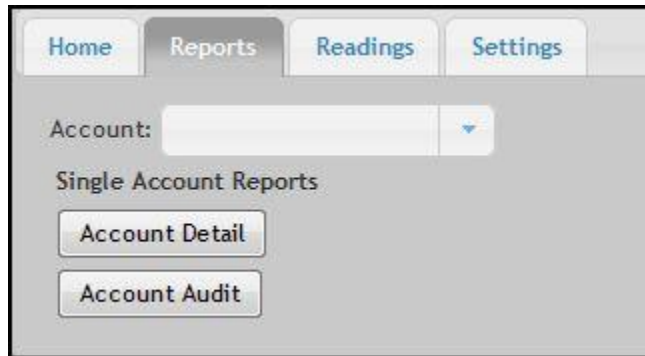
The screenshot shows a web application interface for auditing an account. At the top, there are navigation tabs: Home, Reports, Readings, and Settings. Below these, the 'Account:' dropdown menu is set to 'Berk Greene : 2044'. A row of buttons includes 'Show Account', 'Document List', 'Audit Account' (which is highlighted with a blue dashed border), 'Add Account', and 'Cancel'. Below the buttons is a table with 8 columns: Date, Type, Debit Amount, Credit Amount, Usage, Reference, Note, and Balance. The table contains two rows of data. The first row, representing a debit, has a yellow background and shows a 'Usage Fee' of 50.00 on 2012-07-19 at 07:47:15, with a balance of 50.00. The second row, representing a credit, has a green background and shows a 'Check' of 0.00 on 2012-07-19 at 07:47:48, with a balance of 25.00. At the bottom of the screen, there are two buttons: 'Add Misc Charge' and 'Add Payment\Credit'.

Date	Type	Debit Amount	Credit Amount	Usage	Reference	Note	Balance
2012-07-19 07:47:15	Usage Fee	50.00	0.00	0	July	Extra Usage	50.00
2012-07-19 07:47:48	Check	0.00	25.00	0	July Extra Usage	#4327	25.00

The user can also enter any miscellaneous charges and payments in this screen. Charges and Credits are color coded for easy recognition.

## Reports Tab

This screen lists the reports that can be run on the selected account.



The summary reports will pop up in another tab on the browser and let the user print or save the report.