



Customer Zone

User Guide

Contents

- Your Dashboard
- Current Sites
- Documents
- My Office
- Reports
- Waste Transfer Notes
 - Skips
 - Trade
- Transactions
 - Recent Transactions
 - Invoice Payment
- Requests
- Logins
 - Head Office
 - Subsite
- Help

Your Dashboard

Your dashboard is your homescreen in the Cawleys Customer Zone. Navigate using the customer zone menu on the left hand side of the screen or use the short cut buttons on the dashboard. Updates and notifications to your account are shown on the right.

The dashboard interface is shown with several callout boxes pointing to specific elements:

- Navigation Menu:** Points to the left-hand sidebar menu containing items like Dashboard, Current Sites, Documents, My Office, Weights Reports, Waste Transfer Notes, Transactions, Requests, and Logins.
- View your Site Details:** Points to the top-left dashboard widget showing '804575' and '1 Covent Garden Close'.
- Download useful Documents and Posters:** Points to the top-middle dashboard widget showing 'N/A Documents'.
- Notifications:** Points to the notification bell icon in the top right corner.
- Your Current:** Points to the 'BALANCE £0.00' widget.
- View latest Invoices:** Points to the 'INVOICE PAYMENTS £0.00' widget.

A blue banner at the bottom of the dashboard states: "All information shown is subject to month end checks".

Current Sites

If you have multiple sites or locations these can be accessed by selecting 'Current Sites' from the menu bar. You can shrink the menu bar by clicking the bars to the right of the Cawleys logo.

Click the bars to shrink or expand the menu

Current Sites

Show 10 entries

Search:

Office	Phone	Contact	Balance
Stacey - Test Site 2 - 812240 - 2 Covent Garden Close - LU4 8QB			£0.00

Showing 1 to 1 of 1 entries

Previous 1 Next

Click on a site (Office) to view more details

Documents

Useful documents are available to download in this section ranging from our Waste Carrier's License and other compliance documentation to posters, service and recycling guides. You will also be able to see photographs relating to failed collections which are classified as 'Problem Jobs'.

The screenshot displays the 'Documents' section of the Cawleys Customer Portal. The page header includes the Cawleys logo, a menu icon, and the user's account information: '804576 - Customer Portal'. The main content area features a table of documents with the following columns: Description, Type, Uploaded Date, Office, and Actions. The table lists several documents, including 'Problem Jobs' and 'General Document' types. A red callout box with the text 'Click to download your chosen document.' points to a 'Download' button in the Actions column of the first row. A vertical red button labeled 'Chat now' is positioned on the right side of the table.

Description	Type	Uploaded Date	Office	Actions
Docket: R1898633 - Account: 804576	Problem Jobs	26/06/2020 08:56	Customer Portal - 804576 - 1 Covent Garden Close - LU4 8QB	Remove Download
Docket: R1898633 - Account: 804576	Problem Jobs	26/06/2020 08:36	Customer Portal - 804576 - 1 Covent Garden Close - LU4 8QB	Remove Download
Infinity Recycling Scheme	General Document	25/06/2020 09:40	Public Document	Download
Wheelie Bin Signage	General Document	25/06/2020 09:39	Public Document	Download
Waste Journey - What Happens to your waste	General Document	25/06/2020 09:39	Public Document	Download
PPE Waste Poster	General Document	25/06/2020 09:39	Public Document	Download
PPE Advice	General Document	25/06/2020 09:39	Public Document	Download
Waste Management Licence - MK	Compliance Documents	25/06/2020 09:38	Public Document	Download
Waste Management Licence - WB	Compliance Documents	25/06/2020 09:38	Public Document	Download
Waste Management Licence - Luton	Compliance Documents	25/06/2020 09:38	Public Document	Download

My Office

Here you can see an overview of your account including your account details, scheduled collection frequency and days and the date of the next collection. Using the tabs you can view your most recent transactions, reports and your Waste Transfer Notes for both scheduled trade waste collections (sacks, carts and RELs) and skip collections including rollons and palletised waste.

Stacey Test - 804576

Account Number: 804576
Customer: Stacey Test
Balance: £0.00
Alpha: Stacey Test
Address: 1 Covent Garden Close, Luton, Beds, Beds

Contact: Stacey Boylston
Phone:
Mobile:
Email:

Scheduled Collections | Recent Transactions | Reports | Trades Transfer Notes | Skips Transfer Notes

Show 10 entries

Product	Qty	Collection Day	Collection Frequency	Next Collection Date
CART1100 General Commercial Waste	1	Monday	Weekly	15/10/2018
CART1100 General Commercial Waste	1	Monday	Weekly	15/10/2018

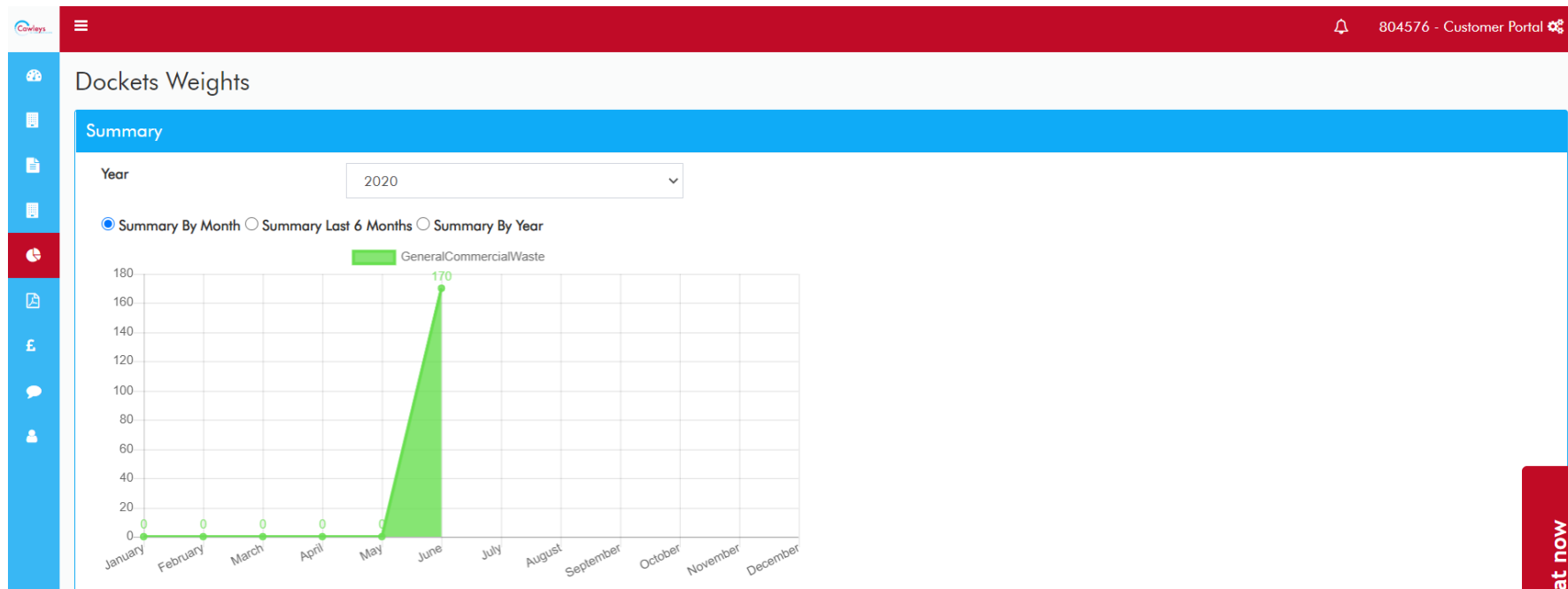
Showing 1 to 2 of 2 entries

Previous 1 Next

View your collection schedule and next collection date here

Reports

You can view summary waste reports through the main menu Weights Reports option or the Reports tab on My Office. Reports only reflect eurocart (wheelie bin) and REL (Rear End Loader) work. Skips, rollons and palletised waste are not currently incorporated.



Waste Transfer Notes

You can download your individual transfer notes for trade and skip work here. These can also be emailed directly to you should you prefer.

The screenshot displays two sections of the Cawleys Customer Portal. The top section, 'Skips Transfer Notes', shows a table with columns for Job Number, Skip Type, Confirmed Date, and Address. It indicates 'No data available in table'. The bottom section, 'Trades Transfer Notes', shows a table with columns for Docket Number, Container, Completed Date, and Quantity. It contains four entries, each with a 'Transfer Note' button. A red callout box with the text 'Download a WTN here' and an arrow points to the 'Transfer Note' button for the first entry in the Trades section.

Job Number	Skip Type	Confirmed Date	Address
No data available in table			

Docket Number	Container	Completed Date	Quantity	Transfer Note
R1900810	CART1100 General Commercial Waste	29/06/2020	3	Transfer Note
R1900808	CART1100 General Commercial Waste	29/06/2020	1	Transfer Note
R1900788	CART1100 General Commercial Waste	29/06/2020	1	Transfer Note
R1897188	CART1100 General Commercial Waste	25/06/2020	1	Transfer Note

Transactions

Your invoices will be available to download in Transactions. You can also view and make invoice payments here. You can choose to view all recent transactions or only invoices available to pay by selecting Invoice Payment.

The screenshot shows the 'Transactions' page in the Cawleys Customer Portal. The page has a red header with the Cawleys logo and a notification bell. A blue sidebar on the left contains navigation icons. The main content area displays a table of transactions with columns for Transaction Number, Transaction Type, C/D, Net, Vat, Gross, Reference, Outstanding Amount, and Transaction Date. A 'Pay Now' button is visible in the top left of the table area. A dropdown menu is open on the left, showing 'Recent Transactions' and 'Invoice Payment' options. A 'Chat now' button is on the right. Several red callout boxes provide instructions: one points to the dropdown menu, another to the 'Pay Now' buttons, and a third to a filter dropdown at the bottom.

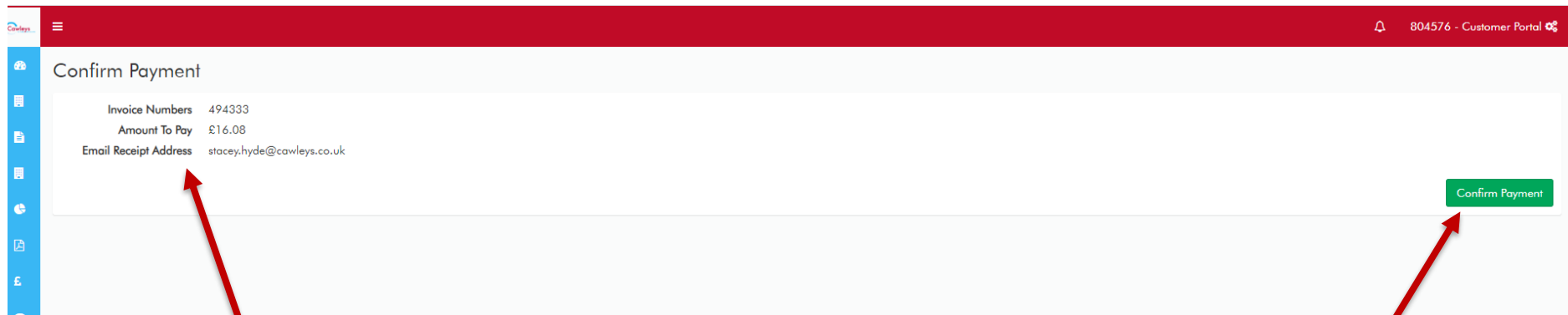
Transaction Number	Transaction Type	C/D	Net	Vat	Gross	Reference	Outstanding Amount	Transaction Date
56605	Payment	Credit	£2.64	£0.00	£2.64	MRNPU078161006356214	£0.00	29/06/2020
316065	Invoice	Debit	£2.20	£0.44	£2.64	316065	£0.00	29/06/2020
56533	Payment	Credit	£4.32	£0.00	£4.32	MRNPU078161006346730	£0.00	26/06/2020
56026	Invoice	Debit	£3.60	£0.72	£4.32	316026	£0.00	
412	Payment	Credit	£1.92	£0.00	£1.92	MRNPU078161006330398	£0.00	
56019	Invoice	Debit	£1.92	£0.00	£1.92	316019	£0.00	
30232			£1.20		£1.20	MRNPU078161006107400	£0.00	17/06/2020
56194			£1.20		£1.20	MRNPU078161006167772	£0.00	17/06/2020
<input type="checkbox"/> 310247			£16.08		£16.08	310247	£16.08	31/05/2020
<input type="checkbox"/> 310360	Invoice	Debit	£13.40	£2.68	£16.08	310360	£16.08	31/05/2020

Callouts:

- Select all Recent Transactions or just invoices available for payment here
- Choose Pay Now to pay an invoice
- Click drop down to filter by transaction type (invoice, payment, credit etc)

Pay Now

You can pay individual invoices through our secure payment portal. Select Pay Now against the invoice you wish to pay and you will see a confirmation screen like the one below. When you confirm the payment it will take you through to the payment portal to make your secure card payment. A receipt will be invoiced to the email address shown on the confirmation screen.



The screenshot shows a web interface for confirming a payment. At the top, there is a red header with the Cawleys logo on the left and a notification bell and '804576 - Customer Portal' on the right. Below the header is a blue sidebar with various icons. The main content area is titled 'Confirm Payment' and contains the following information:

Invoice Numbers	494333
Amount To Pay	£16.08
Email Receipt Address	stacey.hyde@cawleys.co.uk

At the bottom right of the form, there is a green button labeled 'Confirm Payment'.

Your receipt will be emailed to your email address which will be shown here.

Confirm Payment here
(payment is NOT made at this point)

Make a Request

You can submit requests relating to your services or account through the Cawleys Customer Zone. This includes collection requests and other enquiries. Requests are logged and shown as below.

Requests

Show 10 entries

Search:

Notes	Type	Status	Date
test	General Enquiry	Received	29/06/2020
test 23/06	Skip/Rollon Exchange	Received	23/06/2020
An extra collection please Stacey	Extra Collection Request	Received	23/06/2020

Previous 1 Next

Add new Request

Click here to submit a new request

Type

Please select a request type

Please select a request type

Extra Collection Request

Skip/Rollon Exchange

Additional Service

General Enquiry

Invoice Query

Notes

Select the request type here from the dropdown list and enter the details in the Notes box which will show beneath.

Additional Logins

As a Head Office user you are able to set up further logins for your account in the Logins section. There are two types of login – Head Office and Sub Office. If you have multiple sites against your account you can set up users to have access only to their individual site or Sub Office. In this instance they will not see any transactions such as invoices and payments because these only exist against the Head Office. However Sub Office users will be able to see documents, site services, schedules and make requests.

The screenshot displays the 'Head Office Logins' section of the Cawleys Customer Portal. The page includes a search bar, a table with 0 entries, and a 'New Login' button. A red arrow points from the 'New Login' button to a red callout box. Another red arrow points from the 'Sub Offices Logins' menu item to another red callout box.

Select New Login to set up a new portal user in your organisation

Select Sub Offices Logins to set up a login for a single site in your organisation.

Additional Logins cont.

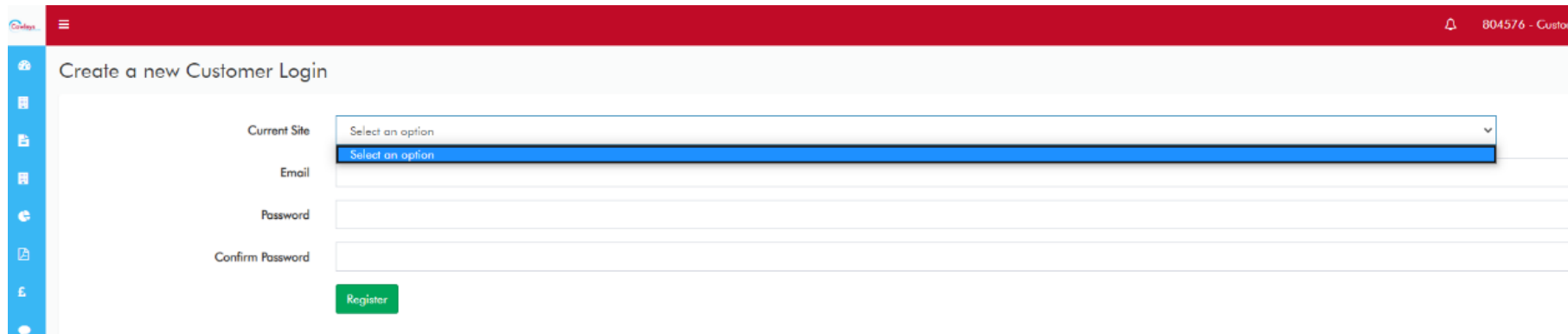
When creating an individual sub office or site login you will select the site from the available list in the options and then continue with entering the user email and password.

Head Office:



The screenshot shows the 'Create a new Company Login' form. The header is dark red with the Cawleys logo on the left and '804576 - Customer Portal' on the right. A blue sidebar on the left contains navigation icons. The form itself is white and contains three input fields: 'Email', 'Password', and 'Confirm Password'. A green 'Register' button is positioned below the 'Confirm Password' field.

Sub Office:



The screenshot shows the 'Create a new Customer Login' form. The header is dark red with the Cawleys logo on the left and '804576 - Custom' on the right. A blue sidebar on the left contains navigation icons. The form is white and includes a dropdown menu for 'Current Site' with 'Select an option' selected. Below this are input fields for 'Email', 'Password', and 'Confirm Password'. A green 'Register' button is located at the bottom of the form.

Help

If you need further help using the Cawleys Customer Zone you can access our instant web chat function to talk to a member of our team (it is a real person and not a chatbot!) from the portal itself.

Alternatively please contact our team by phone or email.

Tel: 01582 572525

Email: commercial.support@cawleys.co.uk