SIRA WATER APPLICATION

Bespoke Water Sales and Administration System

Overview

Purpose

The purpose of the system is to provide an integrated solution to administer SIRA water bookings and support all processes of water purchase and payment.

Functionality

- Create bookings
- Communicate booking details and contact details of buyers before and after booking
- Record meter readings
- Issue and send invoices
- Register payments
- Produce sales data

General Features

Features

- Cloud based, accessed via any browser
- Works on PC or Mac, Tablet and Phone
- Accessed by Water Customers, optional self-service booking and recording
- Accessed by Water Monitors
- Customers self-register if they want to use the system.
- Water Monitors enter bookings if they receive them via conventional methods
- An email 2 hours before the start of the booking informs customers about others before and after their booking
- Water Monitor or Customer enters meter readings
- The Water Monitor generates and sends an invoice with one single click
- Payments are registered by the water monitor.
- PayPal Payments (future)

User Registration

Customers can self-register as long as they exist in the Membership database, even when their membership is suspended or inactive.

From the login screen they click the sign up link to start the process.

SIRA WATER

SIRA Water bookings

Email Address * [Your email address registered w...]
Password * [ ]
☑ Remember login

[Login] Forgot Password

Do you have a **SIRA Water** Bookings account yet? With this system you can **book your water purchase**, record the water meter readings, view your invoices and more.

If you are a **member of SIRA**, you can **create an account yourself** to access the online Water booking system.

Please note this account is separate from your self-service account at sira.org.au, but you must use the same email address.

Sign up for online Water Bookings

Not a SIRA member and you are eligible? Join SIRA here.

SIRA WATER ADMIN

Register

You can register for online water bookings here. There are two steps to register:
1. Enter your email address and a password of your choice twice and click 'Get Account Activation Email'
2. The system will send you an email with a link. Click the link to open the Activate Account Screen and complete the process.

Provide your email address registered with SIRA

Email Address * [Enter email address with SIRA]
Choose a Password * [ ]
Repeat Password * [ ]

[Get Account Activation Email]

A informative message leads the customer to the membership site in case they are not registered in that system.

Your attempt to register was unsuccsessful. We cannot find a SIRA member record with the email address you provided below. The issue may be:

1. You have a different email address registered in the SIRA membership database. Check which email address is registered. You receive email from SIRA on this address.

OR

2. You are not a SIRA member. To Join SIRA, click the button below. If you have any issues with your membership, contact the SIRA Secretary via email on: Secretary@sira.org.au

[Join SIRA online]

Sat 1/10/2016 22:13
SIRA Secretary
Activate your online SIRA Water booking account

To ...

ⓘ If there are problems with how this message is displayed, click here to view it in a web browser.

Activate your online SIRA Water Booking Account

Dear Boyd Attewell,

Thank you for registering online. We have created your account.
For security reasons you cannot access the account until you have activated it.

To activate your account, click the link below and use your email address and your password:

Click here to complete the Activate Account process

In case you have problems activating your account please contact system support on ...

Thanks and happy water booking!

Regards,

The SIRA Water Team.

An email with an activation link is sent to the customer. After clicking the link the new user activates and logs into the system.

Activate Account

Email Address * [Your email address registered with SIRA]
Password * [ ]

[Activate and Login]

Welcome Screen

When logged in for the first time the user will be presented with a welcome screen. This can be skipped in future.
The screen shows information regarding the water line, the name and contact details of the water monitor and the operation times of the water line.

This page can be expanded to show the information from the 'Emergency Water Guidelines'.

Depending on the Customer's status this screen will show one or two messages informing about their status in relation to their eligibility to purchase water. One or two actions to remedy the issue are offered via two buttons, one to renew membership (link to the membership system) and one to sign the Emergency Non-Potable Water Agreement.

The system will not allow bookings to be made for the customer until they are remedied.

SIRA WATER   👤 Hubert van Mierlo ⏻

| Welcome | Current | Purchase History |

Welcome to the SIRA Water Booking System
☑ skip this screen next time

This system allows you to create a booking for water online. Below you will find all the information to get started.

You are connected to: Line 2
Your Water Monitor is: Hubert van Mierlo, Phone:

The operation times of your water line are as follows:

From every Sunday 10 a.m. to Tuesday 7 p.m.

1. To make a booking, click the 'Continue' button below and then 'New Water Booking' in the next screen.
2. Call your Water Monitor in case you have any questions.
3. We will email you with details about who is before you and after you, shortly before the booking commences.

Continue

Welcome to the SIRA Water Booking System
☑ skip this screen next time

This system allows you to create a booking for water online. Below you will find all the information to get started.

The provision of Emergency Non-potable Water is an essential service that SIRA provides to the community and comes with some risk. SIRA members share joint responsibility for the waterline and water bookings will only be accepted from SIRA members who complete and sign the Agreement for Sale of Non-Potable Water.

Not Eligble: You must sign a water agreement to become eligible for water purchase.

Sign the Water Agreement

Renew your SIRA Membership

You are connected to: Line 2
Your Water Monitor is: Hubert van Mierlo, Phone:

The operation times of your water line are as follows:

From every Sunday 10 a.m. to Tuesday 7 p.m.

1. To make a booking, click the 'Continue' button below and then 'New Water Booking' in the next screen.
2. Call your Water Monitor in case you have any questions.
3. We will email you with details about who is before you and after you, shortly before the booking commences.

Continue

Agreement

The customer, if needed can enter into the agreement right away from within the system. Customer data is pre-filled and does not need to be entered.

The three confirmation check boxes need to be ticked at the bottom of the screen after which the customer clicks the 'Submit Agreement' button.

An email with the agreement is sent to the customer. The agreement date is entered into the database and bookings will be enabled (if membership is active) right away.

Current Screen

This screen is the home page for customers. If the Welcome screen is set to be skipped, this is the screen that is visible after logging in.

On larger screens, the customer details are shown, with the intention that the customer checks and is aware that the details are correct. (On mobile screens this info is hidden to save space).

Current Water Bookings
This lists the bookings that are 'open', from New to Finished (more about booking status later).
Clicking on the booking opens the booking to see it's details or to enter meter readings.

Open Invoices
This lists all unpaid invoices. Clicking will open the invoice in view mode.

The 'New Water Booking' button is visible when the customer is eligible, otherwise a message is shown.

The user clicks this button to create a booking.

About booking rules

The system has rules built in to ensure that bookings are entered correctly. These rules apply both to self-service and the Water Line Monitor entering the booking.

Rules can be set on a per-line basis (but can be the same for all lines) and can be changed at any time by the system administrator.

Rule	Example Setting	Explanation
Maximum Number of concurrent open bookings	2 bookings	This rule is needed so that customers cannot book many bookings ahead of time and thereby preventing others to book. This also forces a customer to pay outstanding invoices before making a new booking.
Maximum Duration of Booking	12 hours	Set to a reasonable length under circumstances, to ensure all customers can obtain a slot. The time could for example be reduced in periods of drought.
Minimum duration of gaps between bookings	4 hours	When bookings are made that are not exactly starting when a previous booking starts, leaving a small gap (say 2 hours) could make that gap unutilised.
Line Operation times	As per Guidelines	Although these times have been fixed for a long period of time, the system administrator can vary these on request.

There is a possibility to build in an 'override' function that Water Monitors could use, however we are not sure if this is necessary

New Booking

The system calculates the available slots from Line Operation times and existing bookings. Clicking the 'See more time slots' button will search for available slots in the next week.

The user chooses the slot that he/she wants the booking to be in.

Two drop-down boxes ('Start Booking' and 'Finish Booking') are used to select a start and a finish time for the booking.

'Create Booking' is clicked to lock the booking in. A confirmation email is sent.

Preparation

The booking can be accessed from the 'Current' Screen.

The system will send an email to the customer 2 hours prior to the start of the booking. This email contains details about the customers before and after the booking so that they can get in touch to coordinate the handovers.

About booking Status

Status	Details	Who can update
New	New and confirmed booking. Can be cancelled	Cust /WM
Started	Meter readings can be entered Can be cancelled	Cust /WM
Finished	Meter readings have been entered and validated. The Water Monitor can now create the invoice.	WM
Invoiced	Invoice(s) sent by Water Monitor. Invoices not yet paid. Can be reverted to 'Started' in case meter readings need changed.	WM
Paid	Invoice(s) paid. Invoices	WM
Cancelled	No longer active as booking. Can be deleted.	-

'Start Booking' is clicked to start recording the meter readings.

When a booking is cancelled by the customer of the Water Monitor, an email is sent to confirm this to both customer and Water Monitor.

Record Meter Readings

The start and finish meter readings can be recorded.
Optionally:
1. If the previous' booking finish meter or next booking's start meter is already recorded, this can be 'copied' over with one click.
2. A photo can be added when using a phone connected to the internet. This can increase the certainty of the reading being correct.

The recording screens also provide details of the adjacent bookings.
The recording process is completed by clicking 'Finish Recording' and an automatic email is sent to the Water Monitor.
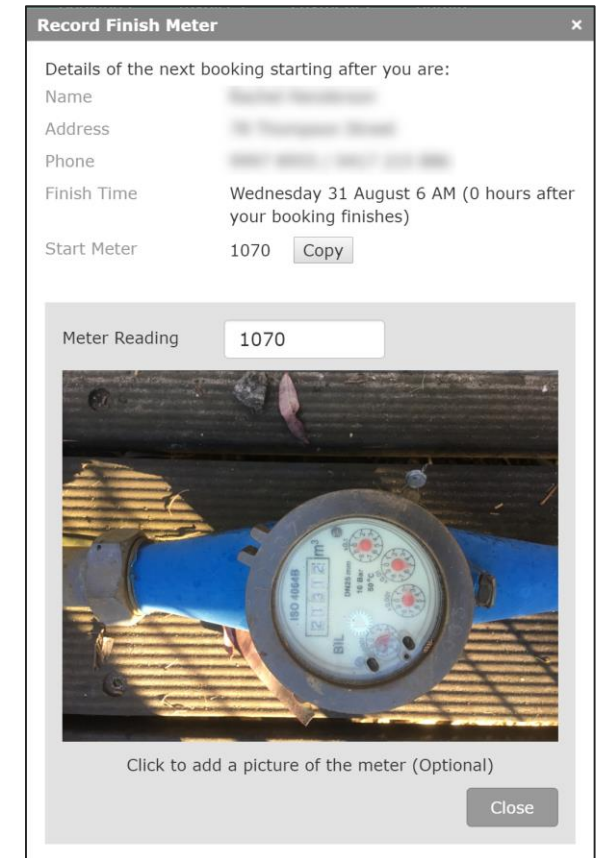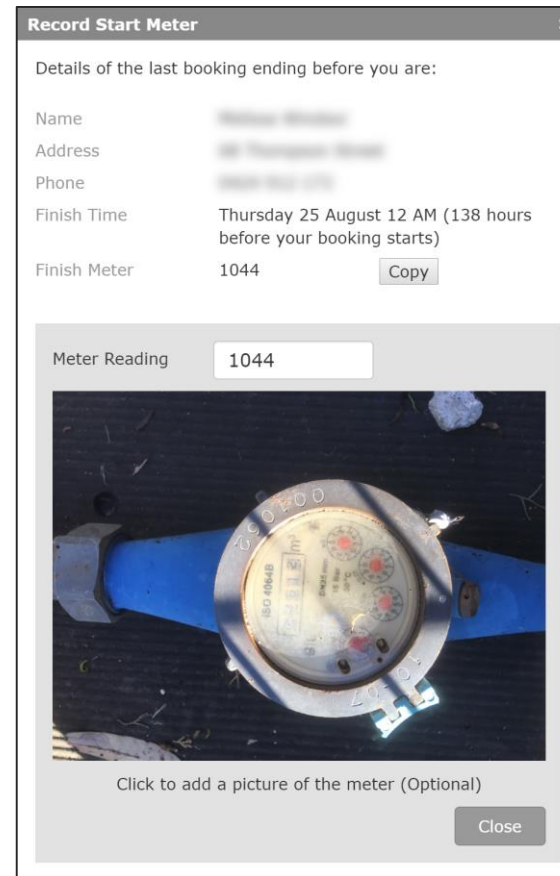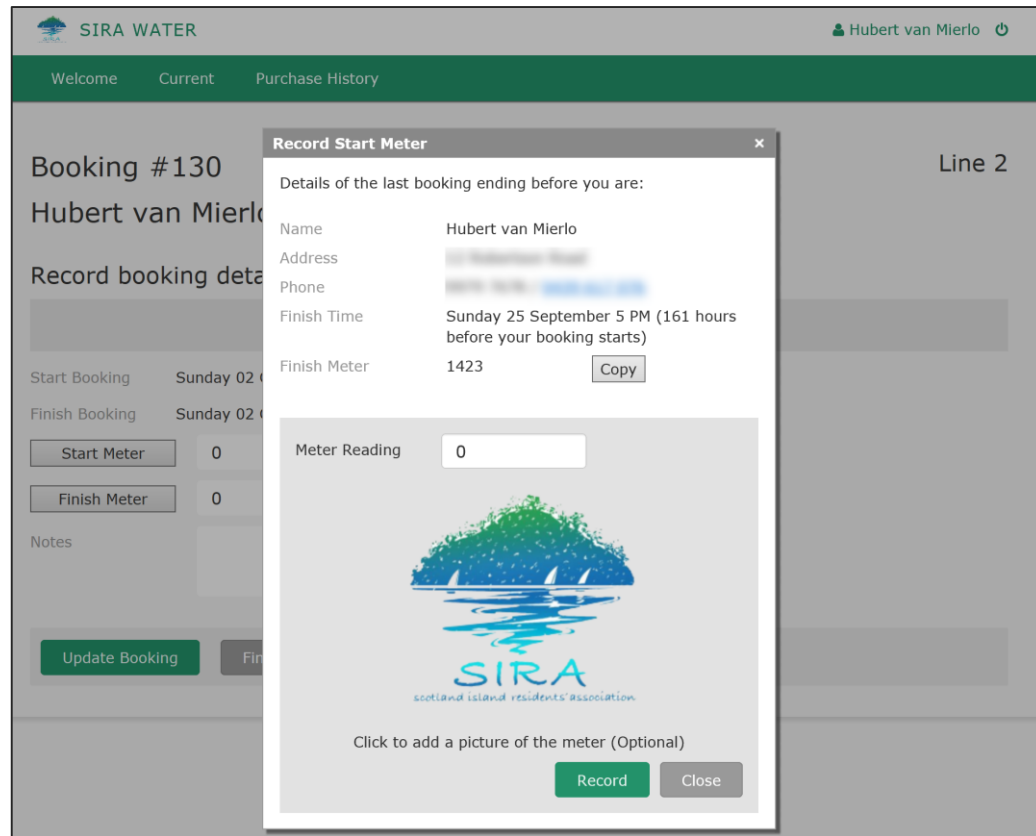
View Invoices

Customers can view unpaid invoices from the 'Current Screen', or the Booking details Screen.

Paid invoices can be viewed from the 'Booking Details' opened via the 'Purchase History Screen'.

The plan is to build in the possibility to pay directly from the system using the PayPal payment gateway.

WATER MONITOR TASKS

Administering water sales with ease

Screens available to the Water Monitors

<u>Dashboard</u>
- Monthly summary of sales
- Lists with action items, such as bookings to be invoiced.

<u>Customers</u>
- Customer database and the starting point to create bookings for customers

<u>Bookings</u>
- Database of all bookings past and present
- Manage bookings from here

<u>Invoices</u>
- Gives access to all invoices

<u>Payments</u>
- All Payments made with totals per month or any chosen time period

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SIRA WATER ADMIN   👤 SIRA Treasurer ⏻

| Dashboard | Customers | Bookings | Invoices | Payments |

Dashboard

[Prev] Aug 2016 [Next] Dates are **start date of booking**

Water Line	Total Invoiced	Water Sold (Kilolitre)	Payments Received
Line 1	$ 8,606.98	667	$ 1,769.33
Line 2	$ 360.00	68	$ 180.00
Line 3	$ 250.00	46	$ 125.00

Water Line	Water Booked (Kilolitre)
Line 1	190
Line 2	2,951
Line 3	79

Dashboard

Upcoming Bookings
- List of bookings in the next 7 days

Bookings to be recorded
- Bookings that should have their meter readings recorded in relation to their finish times

Bookings to be invoiced

Overdue Invoices

Other Outstanding Invoices

All lists can be filtered for a single waterline by selecting the waterline in the drop down box at the top.

All lists can be searched for a customer name or email address.

Actionable Items

| All Lines ▼ | Name or Email | Search | Reset |

Upcoming Bookings

Booking	Start Time	Finish Time	Duration	Water Line	Date
130 - Hubert van Mierlo 02 October	10:00:00	17:00:00	7	Line 2	02 October
120 - Hubert van Mierlo 03 October	01:00:00	09:00:00	8	Line 2	03 October
122 - 03 October					
129 - Boyd Attewell 04 October					
128 - Hubert van Mierlo 09 October					

Bookings to be recorded

Booking
10 - 7 August
12 - 17 August

Bookings to be Invoiced

Booking	Start Time	Finish Time	Duration	Water Line	Date
12 - 17 August	11:00:00	15:00:00	4	Line 1	17 August
23 - 26 August	01:00:00	03:00:00	2	Line 2	26 August
56 - 26 August	10:00:00	22:00:00	12	Line 1	26 August
75 - 30 August	18:00:00	06:00:00	12	Line 3	30 August
113 - Hubert van Mierlo 25 September	10:00:00	17:00:00	7	Line 2	25 September
129 - Boyd Attewell 04 October	19:00:00	01:00:00	6	Line 3	04 October

Overdue Invoices

Invoice	Booking	Status	Water Line	Date Due	Total Amount
9 -	56	Partial	Line 1	2 Sep (4 weeks ago)	$ 170.00
23 -	56	Sent	Line 1	10 Sep (3 weeks ago)	$ 10.00
27 -	63	Sent	Line 3	11 Sep (3 weeks ago)	$ 115.00
35 -	27	Sent	Line 2	28 Sep (4 days ago)	$ 50.00
40 - Hubert van Mierlo	110	Sent	Line 2	30 Sep (2 days ago)	$ 10.00

Other Outstanding Invoices

Invoice	Booking	Status	Water Line	Date Due	Total Amount
41 -	110	Sent	Line 1	4 Oct (in 2 days)	$ 160.00
44 - Boyd Attewell	110	Sent	Line 3	8 Oct (in 6 days)	$ 60.00

Customers

This screen contains a list with all the customers. Can be filtered by water line, or searched by name.

Customers with the 'Book' button visible are eligible for purchasing waters, others are not. Pressing this button will open the 'New Booking' screen.

The list can be downloaded into an Microsoft Excel Spreadsheet.

The Customer Details screen is similar to the Current screen for customer users, there is a message that shows eligibility and lists current water bookings and invoices.

Bookings

This screen contains a list with all the bookings. Can be filtered by water line, booking status, or searched by name. By default the current month is shown, but different months can be selected, or any time period.

The list can be downloaded into a MS Excel Spreadsheet

Cancelled bookings can be deleted from this screen.

Bookings can be opened from this screen, note the related invoices listed.

Create and Send Invoice

In the booking screen of a booking with Status 'Finished' the Water Monitor clicks the 'Create Invoice' button. A draft invoice is created automatically and displayed on-screen.

Optionally (expect it to be rarely needed):
- Additional invoice lines can be created
- Existing invoice lines can be edited.

The 'Send' button can be pressed and the invoice is emailed automatically to the customer (optional copy to the water monitor).

Invoice can be 'Voided' as well, which means it will be discarded.

Charge Late Payment Fee

When an invoice is overdue, the Water Monitor can create a
late payment invoice by clicking 'Charge Late Fee'.

A new draft invoice is created and can be sent to the customer
by clicking 'Send'.

Register Payments

The Water Monitor receives payments in cash or by cheque or checks the bank account for EFT payments. After this he/she can register the payment. This can be a partial payment. In most cases, selecting the payment method and clicking 'Paid in Full' will suffice. The system will automatically send a receipt to the customer and optionally to the Water Monitor.

Payment methods that can be selected are: EFT, Cheque via water Monitor, Cheque via P.O. Box and Cash.

Payments (also Partial)

If a payment is Partial, the invoice status will not be 'Paid' but 'Partial'. The screen indicates the outstanding amount. Note that payments are listed at the bottom of the invoice screen. For an example of the invoice email, in this case a partial receipt, see the screenshot on the left.

Invoices

This screen contains a list with all the invoices. Can be filtered by water line, invoice status, or searched by name or email. By default the current month is shown, but different months can be selected, or any time period.

The list can be downloaded into a MS Excel Spreadsheet

Invoices and bookings can be opened from this screen.

Payments

This screen contains a list with all the payments. Can be filtered by water line or searched by name or email. By default the current month is shown, but different months can be selected, or any time period.

The list can be downloaded into a MS Excel Spreadsheet

Invoices, bookings and customer details can be opened from this screen.

At the top of the screen a summary of payments by payment method is shown to make it easier to check the reconciliation of the various payment methods,

Implementation Proposal

The proposal is to implement the system in a few steps to ensure a smooth transition. The steps are:

- User Test period. A number of users participate in testing all scenarios. The scenarios are given to the users who act as both customers and water monitor. They can also make up their own scenarios. The system is adjusted where needed.

- Limited trial. One water monitor starts using the system as if the system is live. No customers access the system at this point. Any issues are resolved before the next phase.

- Extended trial. One or two water monitor use the system and a number of customers participate. Any issues are resolved before the next phase.

- Go live. All water monitors use the system for all bookings. Customers are invited to start using the system. Not all will but we hope that over time more and more customers will start using the self-service functions.