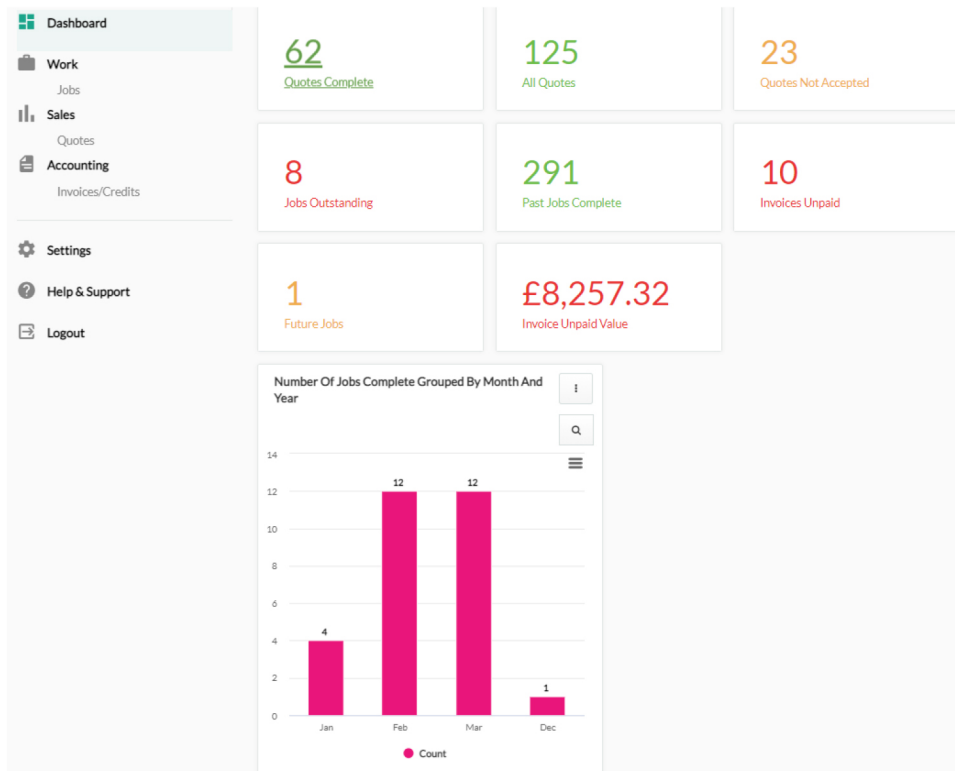# CLIK REMOTE

PORTAL

FOR BDS

CUSTOMERS

Dashboard

The dashboard will show an overview of what your account looks like. It will display live graphs and charts with all relevant information to jobs, invoicing, and quotes. You will be able to see how many invoices are outstanding for payment, how many jobs have been logged and how many quotes have been raised. You can navigate around the portal using the left-hand side tabs or click directly on the charts/totals.

Quotes

You can keep track of all quotations BDS have ever issued, see their status, and even accept or reject quotes through the portal. Quotes will show description and costs as well as providing links for any job sheets or invoices related to that quote.

Jobsheets

Jobs

Add...

Actions | Customise | Filter

🔍 Filter Jobs ✕

Filter on: 01/03/2021 - 31/03/2021 > Status: All > Category: All

Job No	Date	Title	Category	Status	Job Ref	Responsible
8214	04/03/2021	Cray house Panic button syste...	Small Works	To Be Invoiced	Q5290	Tom Bannister
8222	03/03/2021	West Ham Lane - Investigatio...		Invoiced	Q5400	Jack Davey
8223	03/03/2021	Cray House - Battery Replace...		Invoiced	Q5284	Jack Davey
8298	09/03/2021	Fire Extinguisher Maintenanc...		Closed		
8340	09/03/2021	West Ham Lane - FA Activation		Invoiced		
8343	11/03/2021	Cray House - Call out		Invoiced		
8386	15/03/2021	Access Fault with front door	Call Out	Invoiced		
8420	19/03/2021	Cray house extra panic lights	Small Works	To Be Invoiced	Q5764	Tom Bannister
8427	22/03/2021	Fire Extinguisher Maintenanc...		Closed		
8437	23/03/2021	Fire Extinguisher Maintenanc...		Closed		

The portal makes it very easy to view the status of jobs, whether they are closed, assigned to engineer or invoiced. You can also download work reports directly from the portal.

Invoices

Invoice & Credits

New Invoice

Actions | Customise | Filter

🔍 Filter Invoices & Credits ✕

Filter on: 25/10/2020 - 31/03/2021

Number	Type	Date	Paid	Order Ref	Customer Ref	Category	Posted	Printed	Account Manager
16438	Invoice	31/10/2020	☑	CJ7164	email		☑	☐	
16439	Invoice	31/10/2020	☑	CJ7215/Q5079	2162		☑	☐	
16440	Invoice	31/10/2020	☑	CJ7337			☑	☐	
16670	Invoice	30/11/2020	☑	CJ7413			☑	☐	
16671	Invoice	30/11/2020	☑	CJ7542/Q4723	2163		☑	☐	
16927	Invoice	31/12/2020	☑	CJ7751	phone call		☑	☐	
16928	Invoice	31/12/2020	☑	CJ7788			☑	☐	
17130	Invoice	22/01/2021	☑	CJ7811	2175		☑	☐	
17131	Invoice	22/01/2021	☑	CJ7817/Q4293	2170		☑	☐	
17179	Invoice	27/01/2021	☑	CJ7849/Q4952	2173		☑	☐	

Full invoice breakdowns can be found under the invoice tab on the portal. You can view total amount invoiced and what is outstanding for payment. You will also be able to export the list of invoices to excel.
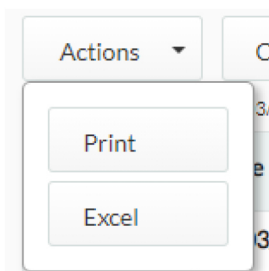
Downloads

Actions ▾ | C

Print

Excel

All information, lists, charts & graphs can be printed directly from the portal or exported to Excel to use as a working document.