

KALIWEB SYSTEM

Field Service & Ticketing System

User Guide

For everyone who uses the system

All everyday screens, step by step, with screenshots

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1. Welcome to KALIWEB SYSTEM

KALIWEB SYSTEM is a complete system for companies that send technicians to customers: internet providers (ISP), solar installers, CCTV and security, electrical contractors, telecom tower contractors and other field-service businesses in Kenya, Uganda and Tanzania.

It brings everything into one place: customer requests (tickets), technicians and their work, stock and materials, quotations, invoices and payments, mobile money and the bank, designs and projects, staff, payroll, leave and attendance, reports and audit.

This guide explains how to use every part of the system. Chapters 2 to 10 are for daily users; chapter 11 is for the company administrator.

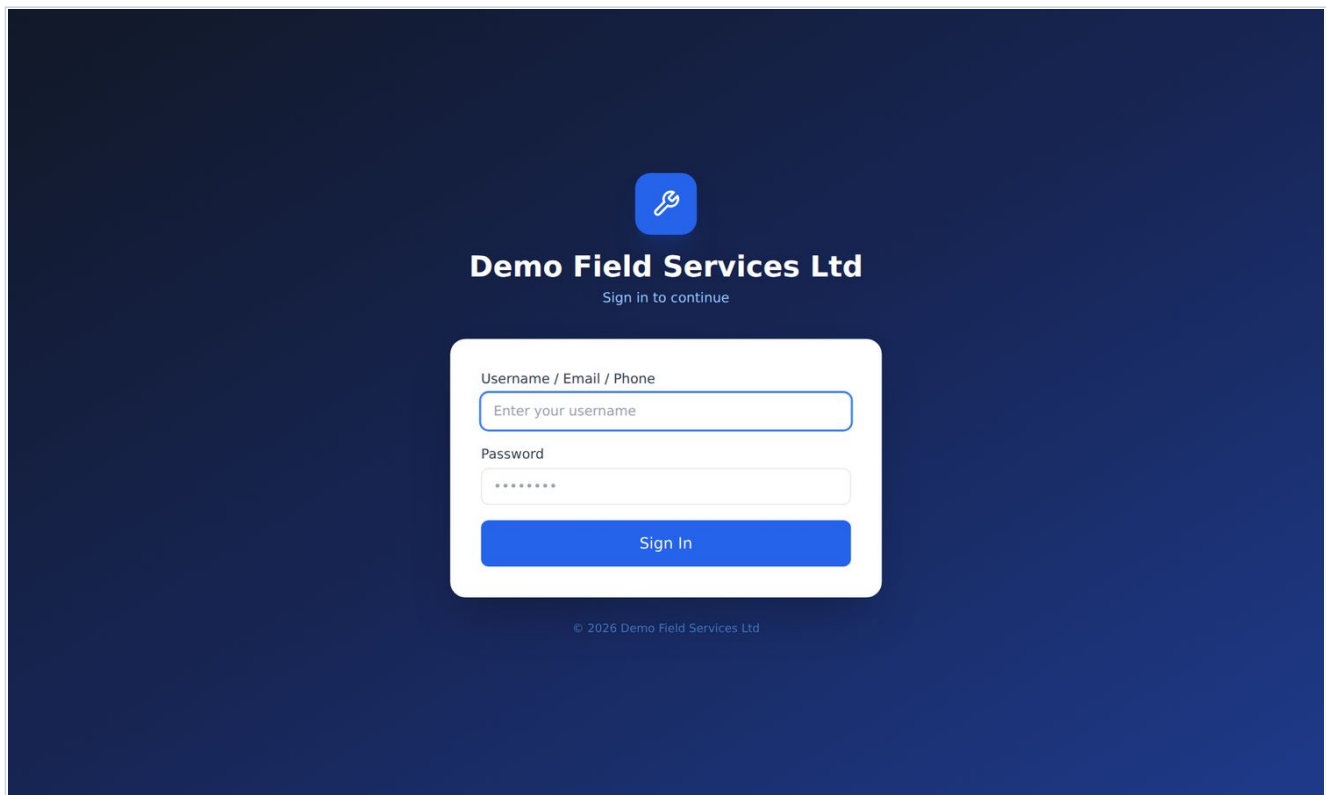
1.1 Who does what (roles)

Every person has a **role**. The role decides which menu items they see and what they may do. Your administrator can also create your company's own roles (for example *Store keeper* or *Cashier*), see chapter 11.

Role	Typical person	Main work in the system
Administrator / Super admin	Owner, IT person	Everything, including settings, users, roles, backups and security
Manager	Branch or general manager	Approvals, performance, branch reports, projects, payroll approval, bank payment approval
Accounts	Accountant, cashier	Invoices, quotations, payments, receipts, cheques, expenses, mobile money, bank, payroll payment
Supervisor	Field supervisor, store	Tickets and technicians, stock and accessories, reviews of designs and work reports
Customer care	Front office, call centre	New tickets, customers, follow-up, attendance
Technician	Field staff	Own tickets, materials, attendance, work reports, designs (on a phone)
HR	Human resources	Employees, leave, attendance report, payroll preparation, certificates
Audit	Internal auditor	Read-only finance and stock checks, audit logs

1.2 Signing in

1. Open the address your company uses, for example `https://support.yourcompany.co.ke/app/login`.
2. Enter your **username, email or phone number** and your **password**, then press **Sign in**.
3. If two-step login is switched on for you, type the 6-digit code from your authenticator app.



The sign-in page shows your company's name.

TIP

After several wrong passwords your account is locked for a while. An administrator can unlock it.

1.3 The screen

- **Menu (left):** shows only what your role may use, grouped in sections (Operations, Finance, Field work, Stock, People, System, Me). On a phone it opens with the menu button at the top left.
- **Branch picker (top):** head-office staff can narrow every page to one branch, or see *All branches*. Staff who belong to a branch always see only their branch.
- **Notifications bell:** new assignments, approvals waiting, payments received, expiring certificates and customer replies.
- **Search (magnifying glass):** find tickets, customers, invoices and more from anywhere.
- **Me section:** your leave requests, payslips, certificates, notice board and company assets given to you.

Admin Dashboard

5 work reports to review →

Metric	Value
TOTAL TICKETS	10
OPEN TICKETS	4
ACTIVE USERS	8
REVENUE	KES 0
EXPENSES	KES 0
PENDING APPROVALS	0

Recent Tickets [View all →](#)

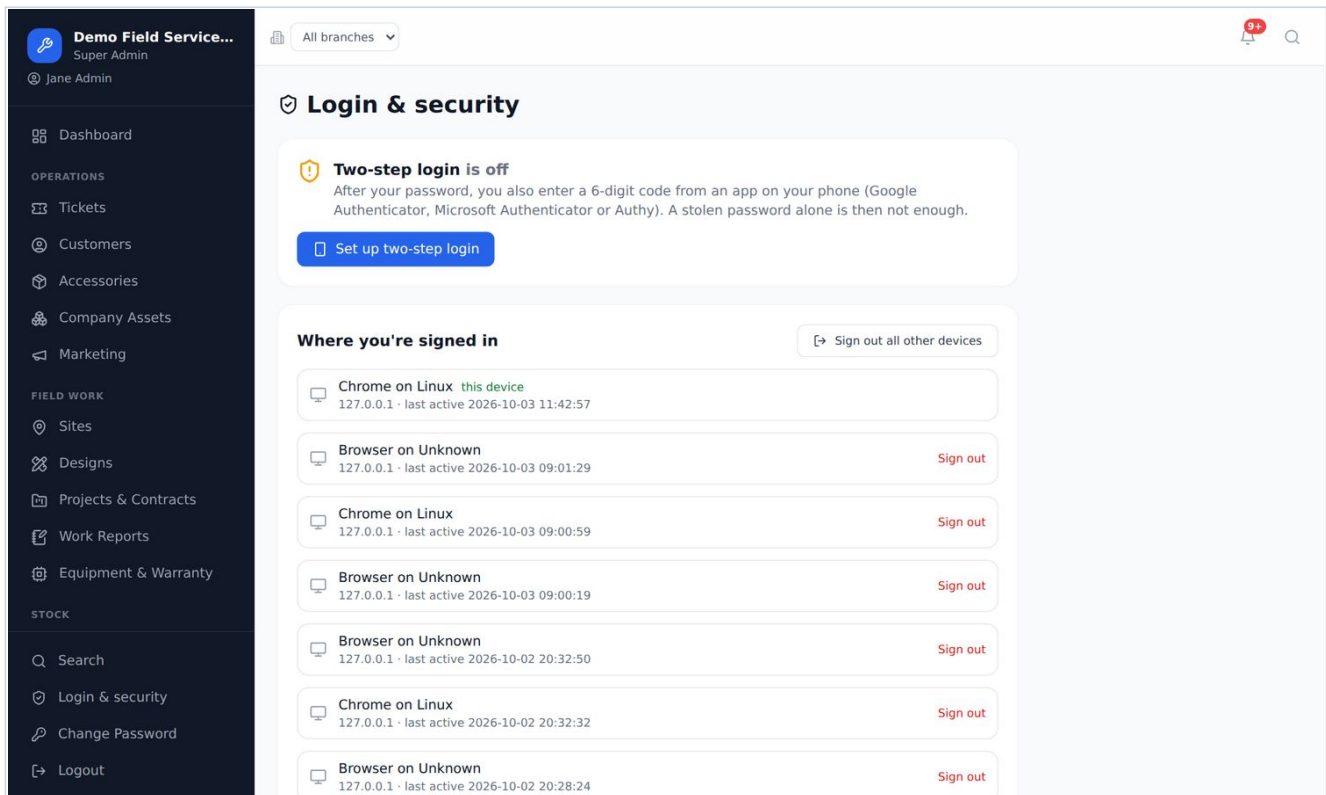
TICKET #	CUSTOMER	TECHNICIAN	PRIORITY	STATUS	DATE
TKT-20261003-B105	Otieno Farm	—	medium	open	10/3/2026
TKT-20261002-C50C	Line Test	—	medium	open	10/2/2026
TKT-20261002-295F	John Mwangi	—	medium	open	10/2/2026
TKT-20261002-5872	Peter Otieno	Tom Tech	medium	completed	10/2/2026
TKT-20261002-B104	Bahari Hotel	—	urgent	open	10/2/2026
TKT-20261002-7400	Naivas Thika	Tom Tech	medium	in_progress	10/2/2026
TKT-20261001-B101	Grace Wanjiku	Tom Tech	high	assigned	10/1/2026
TKT-20261001-B102	Kamau Hardware Ltd	Mo Tech	medium	in_progress	9/30/2026

The administrator dashboard: today's work, money and anything that needs attention.

1.4 Your account and login security

Open **Login & security** at the bottom of the menu.

- **Two-step login:** press *Set up two-step login*, scan the QR code with Google Authenticator, Microsoft Authenticator or Authy, and type the code to confirm. Keep the **recovery codes** in a safe place — they let you in if you lose your phone.
- **Where you're signed in:** a list of your devices. Sign out any device you don't recognise.
- **Change password:** at least 8 characters with letters and numbers. Changing it signs out your other devices.



Login & security: two-step login and the devices you are signed in on.

1.5 Using a phone and working offline

Technicians can install the system like an app:

1. Open the system in Chrome on the phone.
2. Choose **Add to Home screen** from the browser menu.
3. Open it from the new icon.

Open jobs are kept on the phone. Without network a technician can still open jobs, change the status, take photos and write job or daily reports with the customer's signature. A bar at the top shows what is waiting; everything is sent by itself, in the right order and never twice, when the network returns.

NOTE

The app version needs the system to run on **https://**. Your administrator or provider sets this up.

2. Tickets and customers

A **ticket** is one customer request: a new installation, a fault, a maintenance visit, a survey. Every ticket gets a number such as TKT-20261001-B101 and a private tracking link that is sent to the customer by SMS.

2.1 Logging a new ticket

Customer care, accounts, supervisors and administrators open **New Ticket**.

1. Enter the **customer name** and **phone number** (the system recognises returning customers).
2. Enter the **account / meter / site number** if the customer has one, and the **location**.
3. If your company offers more than one service (for example Solar and Electrical), choose the **service line** first; the job types then follow it.
4. Choose or type the **service type**, set the **priority** and describe the issue.
5. If your company uses the Sites register, pick the **site**; its location and access notes come with the ticket.
6. Optionally **assign a technician** right away. Technicians with an expired safety certificate are marked with a warning.
7. Press **Create Ticket & Send SMS**. The customer receives the ticket number and tracking link.

The screenshot shows the 'New Ticket' form in the KALIWEB SYSTEM interface. The form is titled 'New Ticket' and includes a 'Back' button. The form fields are as follows:

- Customer Name ***: Full name
- Phone Number ***: 07xx xxx xxx
- Customer / Meter No.**: optional
- Site (optional)**: Search site ID or name...
- Location**: e.g. Estate / building / area
- Service Type ***: Pick or type a service
- Priority**: Medium (dropdown menu)
- Assign Technician (optional)**: — Select technician (assign later) — (dropdown menu)
- Description / Issue Details**: Describe the issue in detail...

A blue banner at the bottom of the form states: 'Customer will receive an SMS with a tracking link automatically'.

New ticket form.

2.2 The ticket list

Tickets (or *All Tickets*) lists every request with its status and technician. Use the search box, status filter and dates to find tickets. Statuses are:

Status	Meaning
Open	Logged, not yet assigned
Assigned	A technician has been given the job

Status	Meaning
In progress	The technician has started
Completed	Work finished (photo uploaded)
Closed	Checked and closed by the office

Jane Admin

Dashboard

OPERATIONS

Tickets

Customers

Accessories

Company Assets

Marketing

FIELD WORK

Sites

Designs

Projects & Contracts

Work Reports

Equipment & Warranty

STOCK

Search

Login & security

Change Password

Logout

All branches

All Tickets

Search... All Statuses From mm/dd/yyyy To mm/dd/yyyy

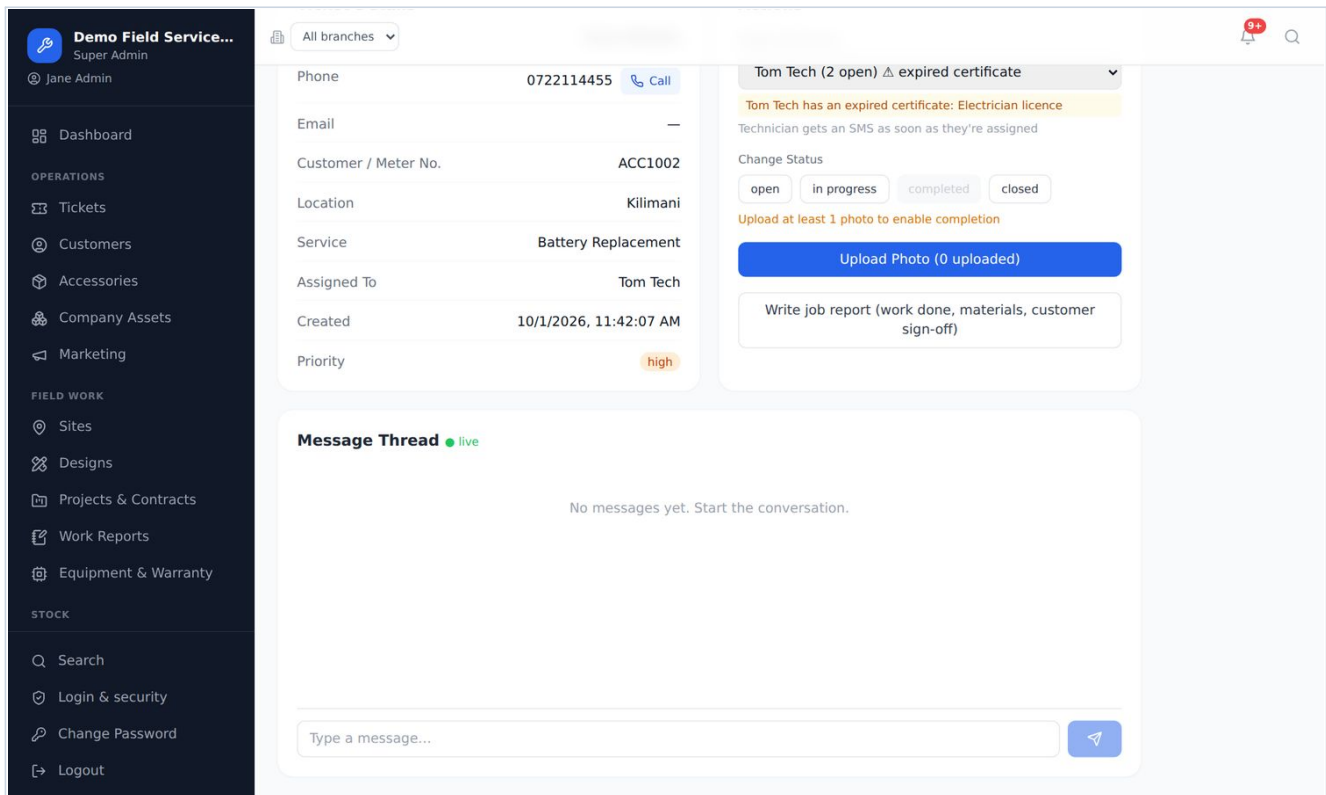
TICKET #	CUSTOMER	PHONE	SERVICE	TECHNICIAN	PRIORITY	STATUS	DATE	
TKT-20261003-B105	Otieno Farm	0799123456	Site Survey	—	medium	open	10/3/2026	Assign
TKT-20261002-C50C	Line Test	0712000111	New Wiring	—	medium	open	10/2/2026	Assign
TKT-20261002-295F	John Mwangi	0722000111	Maintenance	—	medium	open	10/2/2026	Assign
TKT-20261002-5872	Peter Otieno	0711222333	Maintenance	Tom Tech	medium	completed	10/2/2026	Assign
TKT-20261002-B104	Bahari Hotel	0700998877	Inverter Repair	—	urgent	open	10/2/2026	Assign
TKT-20261002-7400	Naivas Thika		maintenance	Tom Tech	medium	in_progress	10/2/2026	Assign
TKT-20261001-B101	Grace Wanjiku	0722114455	Battery Replacement	Tom Tech	high	assigned	10/1/2026	Assign
TKT-20261001-B102	Kamau Hardware Ltd	0733889900	New Installation	Mo Tech	medium	in_progress	9/30/2026	Assign
TKT-20261002-B103	St. Mary's School	0711556677	Maintenance	Tom Tech	low	completed	9/28/2026	Assign

All tickets with status, priority and technician.

2.3 Working on a ticket

Open a ticket to see all its details.

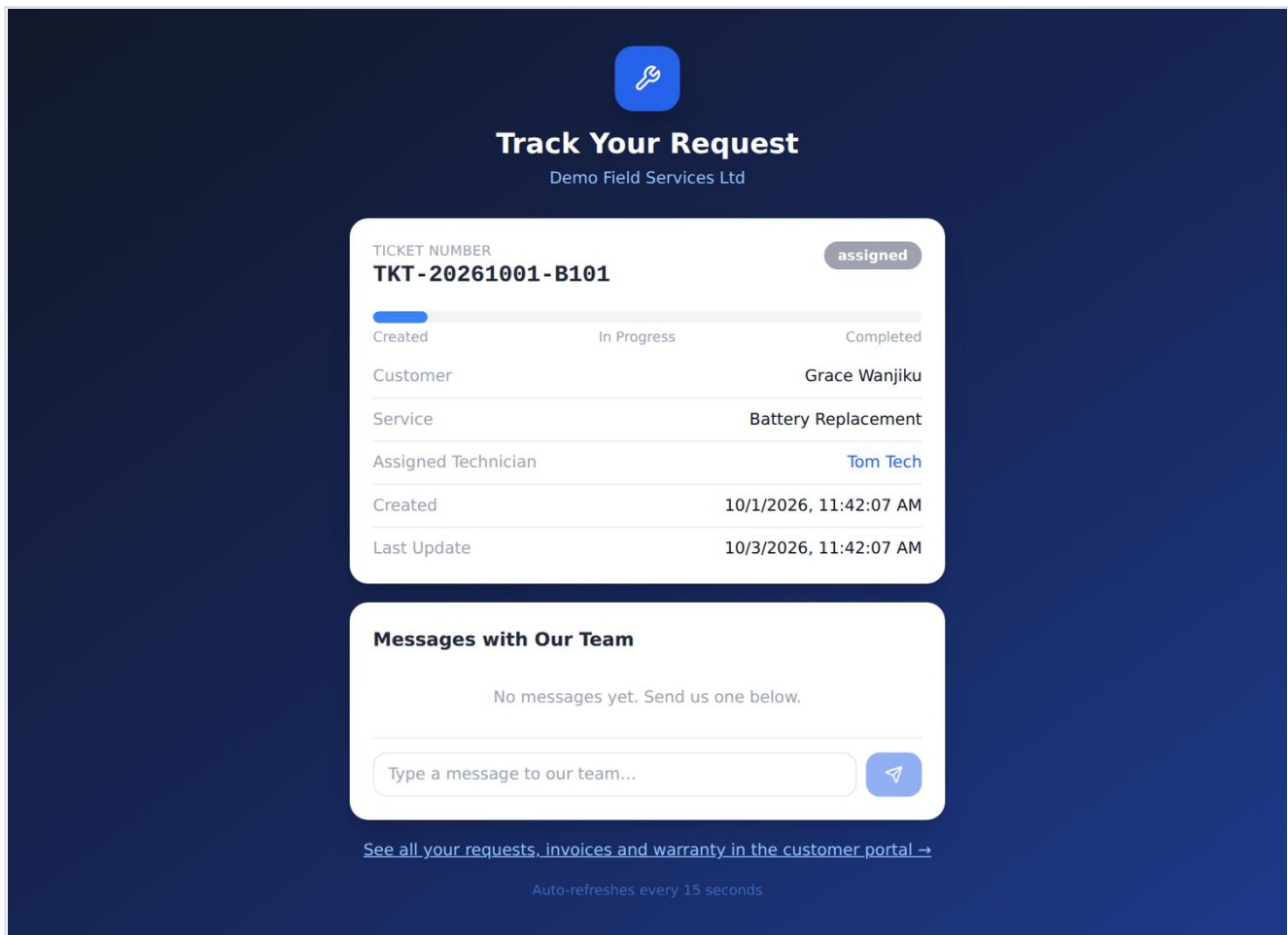
- **Assign technician:** choose a technician; they get an SMS and a notification. A warning shows if their certificate has expired.
- **Change status** as work progresses. *Completed* needs at least one photo.
- **Upload photo:** before/after photos from the phone camera (shrunk automatically to save data).
- **Message thread:** a conversation with the team and, through the tracking page, with the customer.
- **Call** the customer straight from the browser (if voice calling is set up).
- **Site:** if the ticket belongs to a site, its map, directions and access notes are shown.
- **Write job report:** opens the job report with this ticket already filled in (see chapter 3).



A ticket: details, actions, photos and messages.

2.4 What the customer sees

The customer's SMS contains a link to a **tracking page**. It shows the progress, the assigned technician and lets the customer send a message to your team. It also links to the customer portal (chapter 10).



Track Your Request
Demo Field Services Ltd

TICKET NUMBER
TKT-20261001-B101 assigned

Created In Progress Completed

Customer Grace Wanjiku

Service Battery Replacement

Assigned Technician Tom Tech

Created 10/1/2026, 11:42:07 AM

Last Update 10/3/2026, 11:42:07 AM

Messages with Our Team

No messages yet. Send us one below.

Type a message to our team...

[See all your requests, invoices and warranty in the customer portal →](#)

Auto-refreshes every 15 seconds

The customer's tracking page.

2.5 Customers

Customers lists everyone who has logged a request, with phone, account number, number of tickets and last visit. Customers are created automatically from tickets; you can also edit their details. Payments by mobile money or bank are matched to customers by their **account number**.

 Demo Field Service...

Super Admin

Jane Admin

Dashboard

OPERATIONS

Tickets

Customers

Accessories

Company Assets

Marketing

FIELD WORK

Sites

Designs

Projects & Contracts

Work Reports

Equipment & Warranty

STOCK

Search

Login & security

Change Password

Logout

All branches

9+

Customers

A customer is created automatically the first time they book a ticket — see how many times each one has come back.

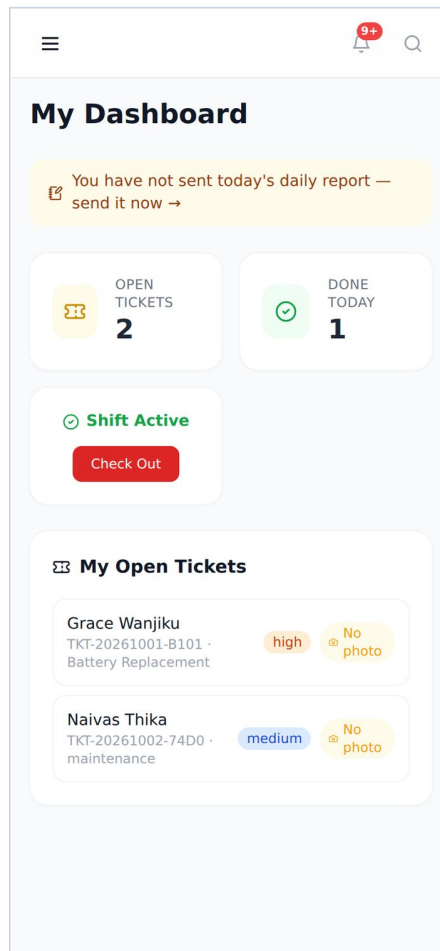
NAME	PHONE	ACCOUNT #	TIMES BOOKED	LAST TICKET
Line Test	0712000111		1	10/2/2026
Peter Otieno	0711222333		1	10/2/2026
Jane Wanjiku	0712345678	ACC1001	0	—
Grace Wanjiku	0722114455	ACC1002	0	—
Kamau Hardware Ltd	0733889900	ACC1003	0	—
St. Mary's School	0711556677	ACC1004	0	—
Otieno Farm	0799123456	ACC1005	0	—
Bahari Hotel	0700998877	ACC1006	0	—

Customers.

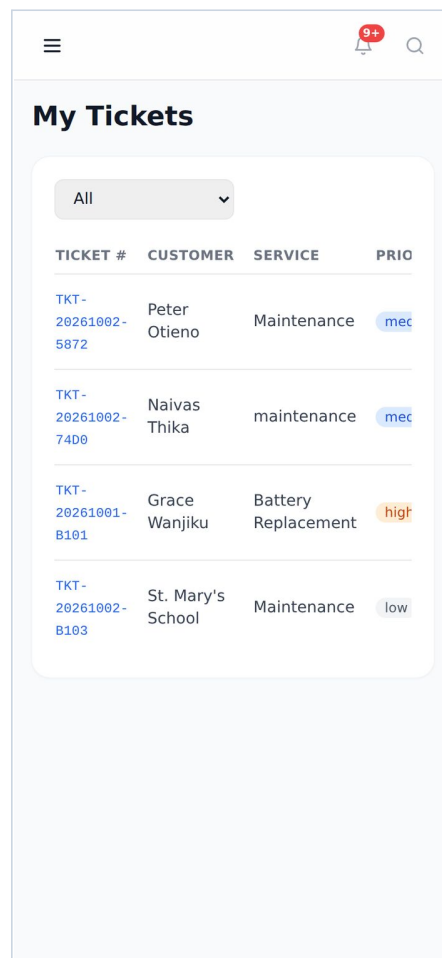
3. Technicians in the field

3.1 Dashboard and my tickets

A technician's dashboard shows today's jobs, check-in status and a reminder if today's daily report has not been sent. **My Tickets** lists only their own jobs.



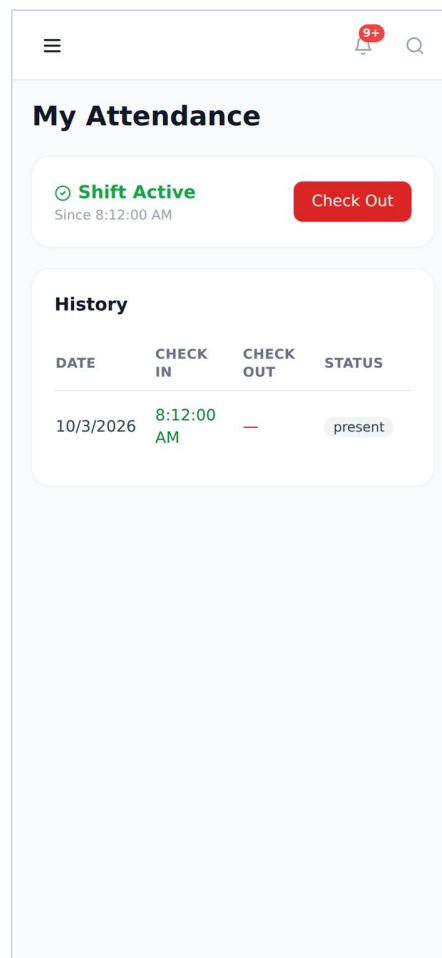
Technician dashboard on a phone.



My tickets on a phone.

3.2 Attendance

Under **Attendance**, press **Check in** on arrival and **Check out** when leaving. Late arrivals (after the start time set by the company) and missed check-outs appear in the HR attendance report.



Check in / check out.

3.3 Materials and accessories

My Materials shows what the store has issued to you, what you have used on jobs and what you still hold. Record the items you use on each job; returns go back to the store. Supervisors and audit can see any difference between issued, used and returned.

3.4 Work reports

Open **Work Reports** and choose:

- **Daily report** — once a day: what I did, hours, problems, plan for tomorrow.
- **Job / site report** — for each visit: ticket or project, site, work done, materials used, **readings / test results** (ready-made lists for solar, CCTV, ISP, electrical and telecom), photos and the **customer's name and signature** on the screen.

A job report on a phone.

Checklists and safety permits

At the bottom of a job report, choose **+ Add checklist / permit** (for example *Work at height permit* or *Electrical isolation (LOTO)*). Tick **Pass / Fail / N/A** or **Yes / No** for every item; on a failed item write what is wrong. Every item on a **permit** must be answered before the report can be sent. If a **critical** item fails, supervisors and managers are alerted immediately — stop work and wait for instructions.

Job / site report with a work-at-height permit.

After sending

Supervisors and managers **review** the report or **return** it with a comment. From a job report anyone allowed can print the report or a branded **completion / test certificate** that includes readings, checklist results and signatures.

DATE	STAFF	TYPE	REPORT	HOURS	STATUS
2026-10-02	Tom Tech	Job	Climbed tower, swapped RRU on sector 2	1 fail	submitted
2026-10-02	Tom Tech	Job	PM visit NRB-0012	1 fail	submitted
2026-10-02	Tom Tech	Job	Offline: replaced breaker at the site	1	submitted
2026-10-02	Tom Tech	Job	Naivas Thika - TKT-20261002-74D0 TKT-20261002-74D0 - AMC-261002-1F59	1 signed	submitted
2026-10-02	Tom Tech	Daily	Mwangi rails 5h, Naivas 3h	8.00	submitted

Work reports list with review status, photos, signatures and failed checks.

4. Stock, purchasing and transfers

4.1 Accessories and stock

Accessories (store) shows every stock item per branch: quantity, unit, reorder level and buying cost (only for roles allowed to see costs). From here the store:

- **adds stock** (purchases) and **issues** items to technicians;
- sees **low stock** (at or below the reorder level);
- opens the **history** of every item (issued, returned, used, adjusted).

Accessories

Search...

NAME	CATEGORY	UNIT	QTY	UNIT COST	REORDER AT	
Growatt 5kW inverter	Inverter	pcs	1 ▲	KES 85,000.00	1	Edit Issue History
Growatt 5kW inverter	Inverter	pcs	1 ▲	KES 85,000.00	1	Edit Issue History
Hikvision 4MP Dome	CCTV	pcs	30	KES 4,200.00	1	Edit Issue History
Jinko 550W Panel	Solar	pcs	24	KES 14,333.33	1	Edit Issue History
Jinko 550W Panel	Solar	pcs	5	KES 14,333.33	1	Edit Issue History

Recent Issuances

Nothing issued yet.

Accessories / stock list.

4.2 Suppliers and purchase orders

Under **Stock → Purchasing**:

1. Add your **suppliers**, including where to pay them (bank, bank code, account number or mobile money number).
2. Create a **purchase order** (draft). One click adds every low-stock item.
3. A manager or administrator **approves** it — never the person who raised it.
4. Mark it **sent to supplier** and print a PDF copy for the supplier.
5. **Receive** the goods (part or all). Stock is added to the branch at the average cost.
6. Accounts records the payment in Expenses with one click, or pays the supplier through the bank (chapter 5.9).

Purchasing
Order from suppliers, get approval, and receive deliveries straight into stock.

+ New purchase order

Purchase orders Suppliers

Open

No purchase orders.

Purchasing: orders and suppliers.

4.3 Branch transfers

Stock → Branch Transfers moves stock between branches. The sending branch sends (stock leaves it); the receiving branch confirms what actually arrived. Any shortage is recorded and head-office managers and audit are notified.

Branch Transfers
Move stock between branches. It leaves the sending branch when sent, and is added when the other branch confirms it arrived.

+ New transfer

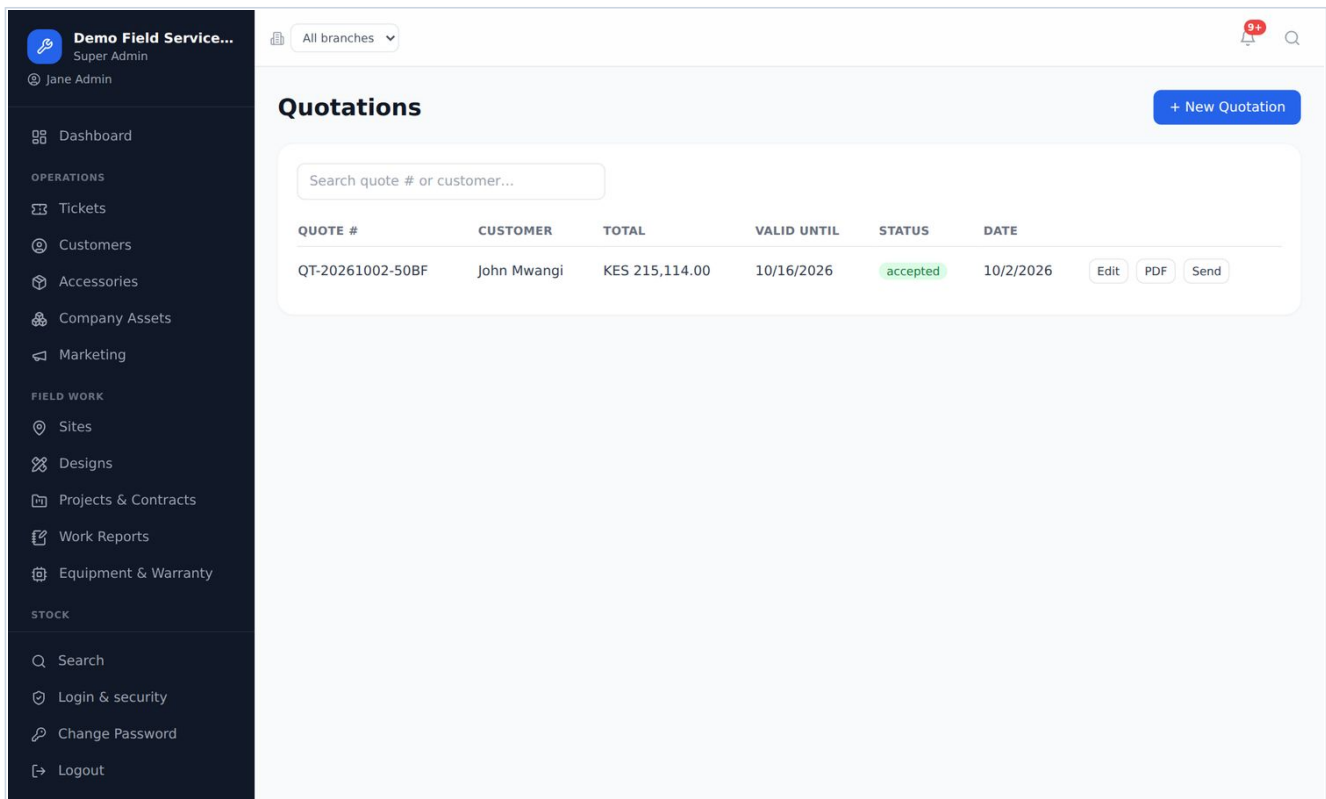
NO.	FROM → TO	ITEMS	VALUE	SENT	STATUS
TR-261002-BA4B	Main Branch → Mombasa	2	KES 170,999.98	2026-10-02 13:45	received

Branch transfers.

5. Sales and money

5.1 Quotations

Accounts → Quotations: create a quotation with items, quantities, prices, VAT and discount. Quotations can also be created from an approved design with one click. Press **Send** to text the customer a private link where they can **accept with their name and signature** or decline with a reason. You are notified when they open it and when they answer, and the quotation's status changes to accepted or declined.



The screenshot displays the 'Quotations' management interface. On the left is a dark sidebar with a navigation menu. The top header shows the user 'Jane Admin' and a branch selector set to 'All branches'. The main content area is titled 'Quotations' and includes a '+ New Quotation' button and a search bar. Below the search bar is a table with the following data:

QUOTE #	CUSTOMER	TOTAL	VALID UNTIL	STATUS	DATE	
QT-20261002-50BF	John Mwangi	KES 215,114.00	10/16/2026	accepted	10/2/2026	Edit PDF Send

Quotations.


Demo Field Services Ltd

QUOTATION
QT-20261002-50BF
 2026-10-02 · valid until 2026-10-16

For
John Mwangi
ACCEPTED

ITEM	QTY	PRICE	TOTAL
Jinko 550W Panel	8	KES 18,850.00	KES 150,800.00
Earthing kit	1	KES 6,500.00	KES 6,500.00
Installation, testing & commissioning Labour	1	KES 25,000.00	KES 25,000.00
Subtotal			KES 182,300.00
Tax			KES 32,814.00
Total			KES 215,114.00

Design DSN-261002-DA21: 5kW hybrid - Mwangi

Terms
 Payment Structure: 50% deposit to order materials, balance on completion and commissioning.
 Validity: This quotation is valid until the date shown above.
 Scope: Work outside the items listed is quoted separately.

 Print / save as PDF

 Accepted by John Mwangi on 2026-10-02. Thank you — Demo Field Services Ltd will be in touch.

What the customer sees: accepting a quotation with a signature.

5.2 Invoices

Accounts → Invoices: create invoices (or invoice a project milestone with one click from the project). Each invoice shows its status — draft, sent, partially paid, paid, overdue or cancelled.

- **Record payment** for cash, bank, cheque or mobile money received at the office.
- **Request via phone** sends an M-Pesa (STK push), MTN or Airtel payment request to the customer's phone; the invoice is marked paid when they enter their PIN.
- **Send** texts the customer a link to view and pay the invoice.
- **Print / PDF** for a paper copy.

Invoices

Search invoice # or customer... All statuses

INVOICE #	CUSTOMER	TOTAL	PAID	BALANCE	STATUS	DATE	
INV-20261002-A5ED	John Mwangi	KES 107,557.00	KES 61,057.00	KES 46,500.00	partially_paid	10/2/2026	Edit Record Payment Request via phone PDF Send History
INV-20261001-B7C3	Bahari Hotel	KES 139,200.00	KES 0.00	KES 139,200.00	sent	10/1/2026	Edit Record Payment Request via phone PDF Send History
INV-20260925-S9F1	St. Mary's School	KES 52,200.00	KES 52,200.00	KES 0.00	paid	9/26/2026	Edit Record Payment Request via phone PDF Send History
INV-20260920-K1A2	Kamau Hardware Ltd	KES 649,600.00	KES 300,000.00	KES 349,600.00	partially_paid	9/21/2026	Edit Record Payment Request via phone PDF Send History
INV-20260901-O2D4	Otieno Farm	KES 44,080.00	KES 0.00	KES 44,080.00	overdue	8/24/2026	Edit Record Payment Request via phone PDF Send History

Invoices with balances and actions.

New Invoice

Customer Name Customer Phone

Due Date Tax Rate (%)

Line Items 1 0 KES 0.00 [Remove](#)

Discount (KES) Subtotal KES 0.00

Tax KES 0.00

Total KES 0.00

Notes

Terms

[Save Invoice](#)

Creating an invoice.

 **Demo Field Services Ltd**

INVOICE

INV-20261001-B7C3

2026-10-01 · due 2026-10-31

For

Bahari Hotel

ITEM	QTY	PRICE	TOTAL
		Subtotal	KES 120,000.00
		Tax	KES 19,200.00
		Total	KES 139,200.00
		Paid	KES 0.00
		Balance	KES 139,200.00

Print / save as PDF

 **Pay by phone**

Your mobile number

07XX XXX XXX

Amount

139200.00

Pay with M-Pesa

Or pay with M-Pesa: Paybill **600980**, account **INV-20261001-B7C3**.

What the customer sees: the invoice with "Pay by phone".

5.3 Payments, receipts and cheques

- **Payments** lists all money received for customer accounts (subscriptions, services, installations), by method.
- **Receipts** prints official receipts.
- **Cheques** records cheques received and issued, with their status (received, issued, deposited, cleared, bounced, returned, cancelled).

Payments

Search...

REF	CUSTOMER	AMOUNT	STATUS	BY	DATE
IMP-ccc63206fc8aa82dc494	Jane Wanjiku	KES 5,000	received	—	10/2/2026
KCB-555	Jane Wanjiku	KES 3,000	received	—	10/2/2026
STB-1	Jane Wanjiku	KES 750	received	—	10/2/2026
TJK1CSV004	Jane Wanjiku	KES 1,500	received	—	10/2/2026
TJK1AAA002	Jane Wanjiku	KES 2,500	received	—	10/2/2026

Payments.

5.4 Expenses and approvals

Anyone allowed records an **expense** (category, amount, paid to, method, reference). Expenses wait for approval:

- Managers approve up to the limit set in Settings; above it an administrator must approve.
- Nobody approves their own expense.
- The monthly expense budget per category is shown at the top.

Expenses + New Expense

Monthly Expense Budget 2026-10 Set Budget

No monthly budget set yet — click "Set Budget" to set one aside (e.g. KES 50,000). It stays in effect every month until changed.

PENDING
0
KES 0.00

APPROVED
2
KES 359,750.00

REJECTED
0
KES 0.00

Search description or category... All statuses

DESCRIPTION	CATEGORY	AMOUNT	PAID TO	METHOD	STOCK ITEM	SUBMITTED BY	STATUS	DATE
Bank charges	Office	KES 150.00	—	Bank	—	Ann Accounts	approved	10/2/2026
PO-261002-7C7C - stock from SolarMax Distributors	Accessories	KES 359,600.00	SolarMax Distributors	Bank	—	Sue Super	approved	10/2/2026

Expenses with the monthly budget.

5.5 Mobile money and bank

The system can be connected to your own M-Pesa, MTN MoMo or Airtel Money account and to your bank. Kaliweb Systems sets this up with you, and you receive the full instructions as a customer.

6. Field work: designs, projects, sites and equipment

6.1 Designs and calculators

Field work → **Designs** sizes a job and builds its materials list before you quote. Choose the type:

Calculator	What it works out
Solar	Daily energy from the appliances, number of panels, battery bank (series × parallel), inverter size, MPPT current
CCTV	Storage in TB, hard disks, NVR channels, PoE ports and power budget, cable boxes
Internet / network survey	Wireless path loss, expected signal, fade margin, Fresnel clearance — or fibre loss budget; plus readings taken on site
Electrical installation	Load schedule, maximum demand, main breaker, sub-main cable with voltage drop, MCB and cable per circuit, DB ways, earth size
Telecom site power	-48 V load, battery bank, rectifier modules (N+1), generator size, diesel per month, solar for a hybrid site
Other	Materials list only

1. Enter the customer, site and the inputs; the results update as you type.
2. Press **Fill materials list from results**, then adjust prices, labour and notes. Picking a stock item uses its cost plus the company's markup.
3. **Save & send for approval**. A supervisor, manager or administrator (not the designer) approves or returns it.
4. **Create quotation** from the approved design with one click, or **start a project**.

Demo Field Service...
 Super Admin
 Jane Admin

All branches

9+

← Designs

New solar system design

Design title *
 e.g. 5 kW hybrid system - Mwangi residence

Customer
 Phone

Registered site
 Search site ID or name...

Site / location

Design type
 Solar system

Calculator

Loads (appliances) + Add appliance...

APPLIANCE	WATTS	QTY	HOURS/DAY	WH/DAY
LED bulb	10	10	5	500

Results

DAILY ENERGY 2.5 kWh	PEAK LOAD 330 W
SYSTEM VOLTAGE 48 V	PANELS 2 pcs

Save draft
 Save & send for approval

Solar design calculator.

Demo Field Service...
 Super Admin
 Jane Admin

All branches

9+

← Designs

New electrical installation (load, breaker & cable sizing) design

Design title *
 e.g. 5 kW hybrid system - Mwangi residence

Customer
 Phone

Registered site
 Search site ID or name...

Site / location

Design type
 Electrical installation (load, breaker & cable sizing)

Calculator

Load schedule + Add load...

LOAD	TYPE	W EACH	QTY / POINTS	CIRCUITS → MCB / CABLE
Lighting	Lighting poin	20	20	2 × 10 A · 1.5 mm ²

Results

SUPPLY Single phase	CONNECTED LOAD 6.6 kW
MAXIMUM DEMAND	DEMAND

Save draft
 Save & send for approval

Electrical installation calculator.

NOTE

Calculator results are a guide for a qualified person. Confirm cable sizes and protection with the maker's tables and the local wiring rules.

6.2 Projects and maintenance contracts

Field work → Projects & Contracts has two kinds:

- **Project / installation:** contract value, **milestones** (each with an amount that can be invoiced in one click), team, progress updates, linked tickets, reports, files, and paid / outstanding amounts.
- **Maintenance contract:** visit schedule (weekly to yearly) and visit technician. A ticket is raised automatically 3 days before each visit. Managers and accounts are reminded before the contract ends, and **Renew** extends it.

Demo Field Service...
Super Admin
Jane Admin

All branches

Projects & Contracts

Installations with milestones and payments, and maintenance contracts with scheduled visits.

New contract + New project

OPEN PROJECTS
2

ACTIVE CONTRACTS
1

VISITS IN 7 DAYS
0

UNPAID INVOICES
KES 46,500.00

Search... Projects & contracts Open

NO.	PROJECT / CONTRACT	PROGRESS	VALUE / PAID	ENDS	OPEN JOBS	STATUS
AMC-261002-1F59	Quarterly CCTV AMC - Naivas Naivas Thika	Next visit 2027-01-01	KES 120,000.00 paid KES 0.00	2026-10-22	1	active
PRJ-261002-0061	Mwangi 5kW install John Mwangi	40%	KES 215,114.00 paid KES 61,057.00	—	0	active
PRJ-261002-6050	UI test 3kW - Otieno	0%	KES 0.00 paid KES 0.00	—	0	planned

Projects and contracts.

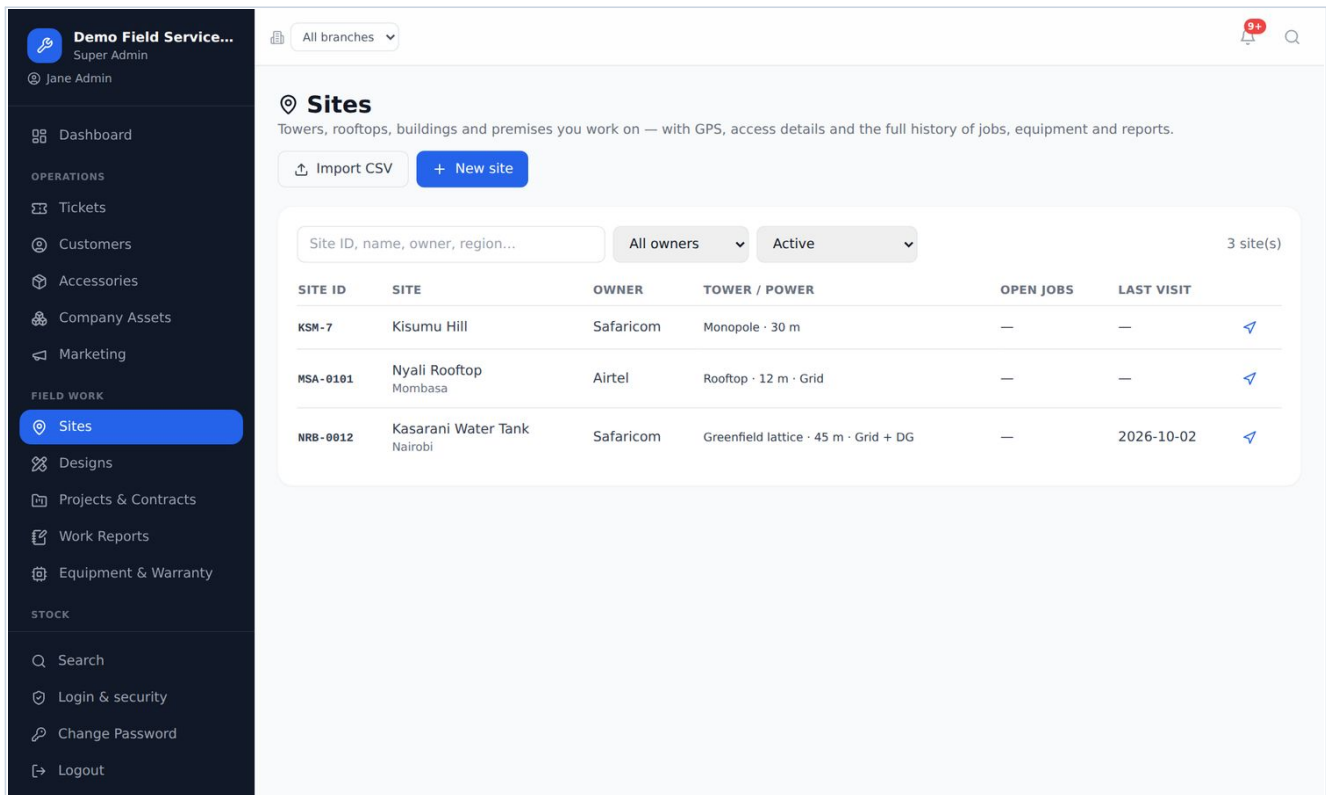
The screenshot displays the 'Demo Field Service...' interface. On the left is a dark sidebar with navigation links: Dashboard, OPERATIONS (Tickets, Customers, Accessories, Company Assets, Marketing), FIELD WORK (Sites, Designs, Projects & Contracts, Work Reports, Equipment & Warranty), and STOCK (Search, Login & security, Change Password, Logout). The main content area shows the 'Projects & contracts' section for 'UI test 3kW - Otieno' (PRJ-261002-6050, planned, Main Branch). It includes a progress bar at 0%, dates from 2026-10-02 to —, a contract value of KES 0.00, and a paid/outstanding status of KES 0.00. Below this are tabs for Milestones & team, Progress reports (0), Jobs (0), Work reports (0), Invoices (0), and Files (0). The 'Milestones' section has an '+ Add' button and a description. The 'Team' section shows 'Tom Tech' as a technician. The 'Designs' section shows 'DSN-261002-BB78 - UI test 3kW - Otieno' with an 'approved' status. A 'Delete project' link is visible at the bottom right.

A project with milestones, team and linked work.

6.3 Sites and maps

Field work → Sites is the register of towers, rooftops, buildings and customer premises: site ID, owner or operator, GPS, tower type and height, power source, landlord and access instructions. Sites can be imported from Excel/CSV.

Each site page shows a **Google map** (map or satellite), **Directions**, and the history of jobs, reports (with failed checks), equipment, projects and photos. Use **Use my location** while standing at the site to capture its GPS.



Demo Field Service...
Super Admin
Jane Admin

All branches

Sites

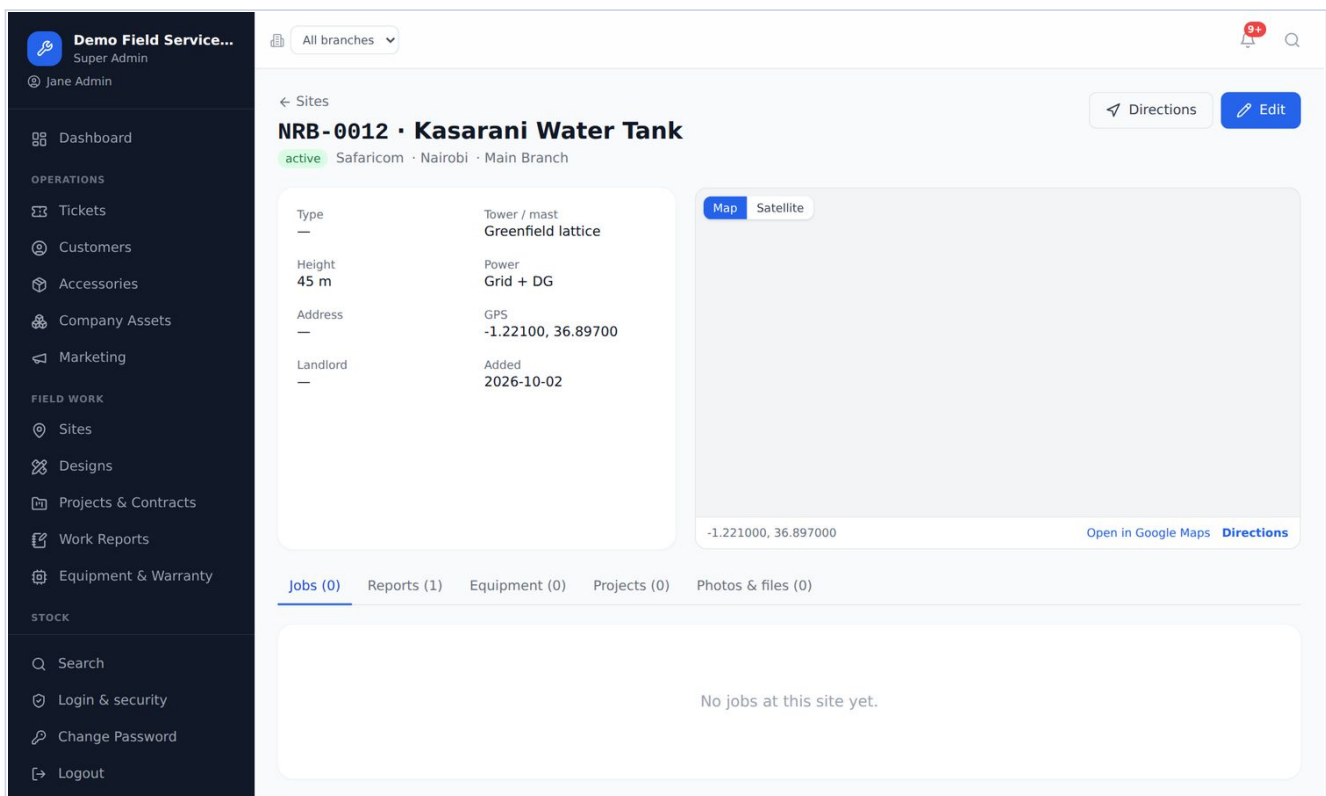
Towers, rooftops, buildings and premises you work on — with GPS, access details and the full history of jobs, equipment and reports.

Import CSV + New site

Site ID, name, owner, region... All owners Active 3 site(s)

SITE ID	SITE	OWNER	TOWER / POWER	OPEN JOBS	LAST VISIT
KSM-7	Kisumu Hill	Safaricom	Monopole · 30 m	—	—
MSA-0101	Nyali Rooftop Mombasa	Airtel	Rooftop · 12 m · Grid	—	—
NRB-0012	Kasarani Water Tank Nairobi	Safaricom	Greenfield lattice · 45 m · Grid + DG	—	2026-10-02

Sites register.



Demo Field Service...
Super Admin
Jane Admin

All branches

← Sites

NRB-0012 · Kasarani Water Tank

active Safaricom · Nairobi · Main Branch

Directions Edit

Type	Tower / mast
—	Greenfield lattice
Height	Power
45 m	Grid + DG
Address	GPS
—	-1.22100, 36.89700
Landlord	Added
—	2026-10-02

Map Satellite

-1.221000, 36.897000 Open in Google Maps Directions

Jobs (0) Reports (1) Equipment (0) Projects (0) Photos & files (0)

No jobs at this site yet.

A site with its map and history.

6.4 Equipment and warranty

Field work → Equipment & Warranty records every installed unit: serial number, customer, site, install date and warranty. Search any serial number to see its full history. **Warranty claims** go from open → sent to supplier → repaired, replaced or rejected; a replacement registers the new serial number automatically. Warranties ending within 60 days are listed.

Demo Field Service...
Super Admin
Jane Admin

All branches ▼

Equipment & Warranty

Every inverter, battery, panel, NVR, camera or router installed — serial numbers, warranty dates, service history and claims.

+ Register equipment

IN SERVICE
3

UNDER WARRANTY
4

WARRANTY ENDS ≤ 60 DAYS
0

OPEN CLAIMS
0

Register Open warranty claims (0)

ITEM	SERIAL	CUSTOMER / SITE	INSTALLED	WARRANTY	STATUS
5kW hybrid inverter Growatt	GW5K-999	John Mwangi Thika · PRJ-261002-D061	2026-10-02	2028-10-02 730 days left	installed
Inverter	GW5K-001	Other	2026-10-02	2027-10-02 364 days left	installed
Lithium battery 51.2V	BAT-77	John Mwangi Thika · PRJ-261002-D061	2026-10-01	2031-10-01 1824 days left	installed
5kW hybrid inverter Growatt	GW5K-001	John Mwangi Thika · PRJ-261002-D061	2026-10-01	2028-10-01 729 days left	replaced

Tip: search a serial number to see where a unit is and everything done to it.

Equipment & warranty register.

7. People: HR, leave, attendance and payroll

7.1 Employees

HR → Employees holds the employee file: job, department, contract dates, ID, tax PIN, NSSF and health numbers, bank (with bank code) or mobile money details, salary and allowances, next of kin, documents (stored privately), disciplinary records and leave balance.

Demo Field Service...
Super Admin
Jane Admin

Dashboard

OPERATIONS

- Tickets
- Customers
- Accessories
- Company Assets
- Marketing

FIELD WORK

- Sites
- Designs
- Projects & Contracts
- Work Reports
- Equipment & Warranty

STOCK

- Search
- Login & security
- Change Password
- Logout

All branches

Employees

Departments Export + Add Employee

Search name, number, phone... All departments Active

NAME	DEPARTMENT	BRANCH	ROLE	PHONE	JOINED	BASIC	CONTRACT END
Ann Accounts	—	All	accounts	0711000004	—	not set	—
Audrey Audit	—	All	audit	0711000006	—	not set	—
Jane Admin	—	All	super_admin	—	—	not set	—
Mike Manager	—	All	manager	0711000003	—	not set	—
Mo Super	—	Mombasa	supervisor	—	—	not set	—
Mo Tech	—	Mombasa	technician	0711000005	—	KES 30,000	—
Sue Super	—	Main Branch	supervisor	0711000002	—	KES 50,000	—
Tom Tech	—	Main Branch	technician	0711000001	—	KES 40,000	—

Click a person to open their file. Salaries entered here are used by Payroll.

Employees.

7.2 Leave

Everyone requests leave under **Me → Leave Requests**. Managers approve or reject it (nobody approves their own). Annual leave can't exceed the days left. **HR → Leave Balances** shows entitlement, taken, pending and remaining for each person.



Demo Field Service...

Super Admin

Jane Admin

Dashboard

OPERATIONS

Tickets

Customers

Accessories

Company Assets

Marketing

FIELD WORK

Sites

Designs

Projects & Contracts

Work Reports

Equipment & Warranty

STOCK

Search

Login & security

Change Password

Logout

All branches

9+

Leave Requests

My Requests

All Staff Requests

Annual leave left

21

Taken this year

0

Waiting approval

0

Request Leave

Type

Annual

Start Date

mm/dd/yyyy

End Date

mm/dd/yyyy

Reason

Brief reason for the request...

Submit Request

My Requests

You haven't requested any leave yet.

Requesting leave.



Demo Field Service...

Super Admin

Jane Admin

Dashboard

OPERATIONS

Tickets

Customers

Accessories

Company Assets

Marketing

FIELD WORK

Sites

Designs

Projects & Contracts

Work Reports

Equipment & Warranty

STOCK

Search

Login & security

Change Password

Logout

All branches

9+

Leave Balances

2026

Export

Annual leave counts working days (Mon-Fri). Entitlement is set per person in their employee file (pro-rated in the year they join). Staff can't request more annual leave than they have left.

EMPLOYEE	ENTITLED	TAKEN	PENDING	REMAINING	OTHER LEAVE TAKEN
Ann Accounts	21	0	0	21	
Audrey Audit	21	0	0	21	
Jane Admin	21	0	0	21	
Mike Manager	21	0	0	21	
Mo Super Mombasa	21	0	0	21	
Mo Tech Mombasa	21	0	4	21	
Sue Super Main Branch	21	0	0	21	
Tom Tech Main Branch	21	0	0	21	sick: 1

Leave balances.

Kaliweb Systems · v8.1

33

7.3 Attendance report

HR → Attendance Report shows days present, late arrivals, absences, hours and missed check-outs for any period, and exports to Excel/CSV.

Attendance Report 2026-10 Export

2 working days so far this month. "Late" = checked in after 08:30 (change in Settings).

EMPLOYEE	DAYS PRESENT	LATE	ON LEAVE	ABSENT	HOURS	NO CHECK-OUT
Ann Accounts	1	0	0	1	0.0	—
Audrey Audit	0	0	0	2	0.0	—
Jane Admin	0	0	0	2	0.0	—
Mike Manager	0	0	0	2	0.0	—
Mo Super Mombasa	0	0	0	2	0.0	—
Mo Tech Mombasa	1	1	0	1	0.0	—
Sue Super Main Branch	1	0	0	1	0.0	—
Tom Tech Main Branch	1	0	0	1	0.0	—

Attendance report.

7.4 Payroll

1. **HR prepares** the month: everyone on payroll is included with their allowances and that month's overtime, bonus or deductions.
2. PAYE and statutory deductions are calculated for your country (Kenya: PAYE, NSSF, SHIF, Housing Levy; Uganda: PAYE, NSSF; Tanzania: PAYE, NSSF, SDL, WCF). The rates can be updated under *Statutory rates* when the law changes.
3. A **manager or administrator approves** it (not the person who prepared it).
4. Staff see their **payslips** under **Me → My Payslips** and can print them.
5. **Accounts pays** the salaries — through the bank in one batch (chapter 5.9) or outside the system — and marks the payroll **paid**. The cost is posted to expenses per branch.

Payroll

Payroll runs | Overtime, bonuses & deductions | Statutory rates

Month: 2026-10 Prepare payroll

Uses each employee's salary in HR → Employees plus this month's adjustments. Pick a branch in the top bar first to run payroll for one branch only.

Steps: HR prepares → a manager approves (staff can then see payslips) → accounts marks it paid (posted to expenses as salaries).

MONTH	BRANCH	STAFF	GROSS	NET	STATUS	PREPARED BY
September 2026	Whole company	3	KES 0.00	KES 100,000.00	approved	—

Payroll.

7.5 Certificates and licences

Me → Certificates (HR manages everyone's) records certificates such as work at height, tower climbing, rigging, first aid and electrician licences, with expiry dates and a scan. HR and the staff member are reminded 30 days before expiry and on the expiry day; technicians with an expired certificate are flagged when jobs are assigned.

Certificates & licences
Work at height, tower climbing, electrician licences, first aid... The system reminds HR and the staff member 30 days before expiry and warns when an expired person is assigned to a job.

+ Add certificate

Expired **1** Expiring in 30 days **1** All **2**

STAFF	CERTIFICATE	EXPIRES	STATUS
Tom Tech technician	Electrician licence	2026-09-01	Expired 32 day(s) ago
Tom Tech technician	Work at height WAH-1	2026-10-20	Expires in 17 day(s)

Certificates and licences.

7.6 Notices and company assets

The **Notice Board** shares announcements with everyone or with one role. **My Assets** lists company property given to you (laptop, phone, tools). Managers and administrators manage assets under **Company Assets**.

Notice Board

Post a Notice

Title: e.g. Office closed Friday Visible To: Everyone

Message: Details...

Post Notice

No notices yet.

Notice board.

8. Management and audit

8.1 Manager dashboard and approvals

The manager's dashboard shows the period's tickets, revenue, expenses and items waiting.

Approvals is one inbox for expenses, leave, payroll and work waiting for review.

Manager Dashboard

OPEN TICKETS **4**

ASSIGNED **1**

COMPLETED **2**

EXPENSES (THIS MONTH) **KES 359,750**

Waiting for your approval: 0 expenses · 1 leave requests · 0 payroll [Open →](#)

Low Stock Accessories

Growatt 5kW inverter	1 left
Growatt 5kW inverter	1 left

Technician Performance (This Month)

NAME	ASSIGNED	COMPLETED
Tom Tech	3	1

Manager dashboard.

Approvals

5 work report(s) to review
Open Work Reports → To review

Leave (1)

Mo Tech — annual leave
2026-10-13 → 2026-10-17 · 4 working days · Mombasa · Family visit
21 annual days left

Note (optional) Approve Reject

Approvals inbox.

8.2 Performance and targets

Performance compares branches (tickets in and completed, open, average hours to close, new customers, revenue, expenses, profit) and technicians (assigned, completed, time to close, closed within target). Set monthly **targets** per branch or person and follow progress.

Performance

10/01/2026 to 10/03/2026

Branches

BRANCH	TICKETS IN	COMPLETED	OPEN NOW	AVG HRS TO CLOSE	NEW CUSTOMERS	REVENUE	EXPENSES	PROFIT
Main Branch	5	3	5	0.0	6	KES 12,750.00	KES 359,750.00	KES -347,000.00
Mombasa	2	0	2	—	2	KES 0.00	KES 0.00	KES 0.00

Technicians

TECHNICIAN	ASSIGNED	COMPLETED	STILL OPEN	AVG HOURS TO CLOSE	CLOSED WITHIN 48H
Tom Tech Main Branch	3	1	2	0.0	100%

Time to close is measured from ticket creation to completion. The 48-hour target can be changed in Settings.

Targets for October 2026

Measure: Tickets completed Target: Branch: All branches Person (optional): Whole team Set target

No targets for this month yet.

Performance and targets.

8.3 Reports and branch reports

Reports gives finance, technical and customer-care reports for any period. **Branch Reports** shows profit and loss per branch, money owed by customers, stock value, the 12-month trend and expenses by category, with print and export.

Reports

From: 09/30/2026 To: 10/03/2026 Report Type: All Reports [Generate](#) [Export CSV](#)

\$ Finance Report

REVENUE: **KES 12,750** EXPENSES: **KES 359,750** NET: **KES -347,000**

Technical Report

Technician Performance

TECHNICIAN	ASSIGNED	COMPLETED	AVG HOURS
Tom Tech	—	1	0.0
Mo Tech	—	0	—

Customer Care Report

Tickets Created

Reports.

Branch Reports

10/01/2026 to 10/03/2026 [Print / PDF](#)

REVENUE: **KES 12,750.00** EXPENSES: **KES 359,750.00** SALARIES: **KES 0.00** PROFIT: **KES -347,000.00**

Profit & loss by branch

BRANCH	REVENUE	EXPENSES	SALARIES	PROFIT	OWED BY CUSTOMERS	STOCK VALUE	TICKETS
Main Branch	KES 12,750.00	KES 359,750.00	KES 0.00	KES -347,000.00	KES 396,100.00	KES 554,999.92	5
Mombasa	KES 0.00	KES 0.00	KES 0.00	KES 0.00	KES 183,280.00	KES 156,666.65	2
Total	KES 12,750.00	KES 359,750.00	KES 0.00	KES -347,000.00	KES 579,380.00	KES 711,666.57	7

Revenue = payments received. Expenses and salaries = approved expenses. Owed by customers and stock value are as of today.

Last 12 months

■ Revenue ■ Expenses [Show table](#)

Expenses by category

Accessories: **KES 359,600.00**
Office: **KES 150.00**

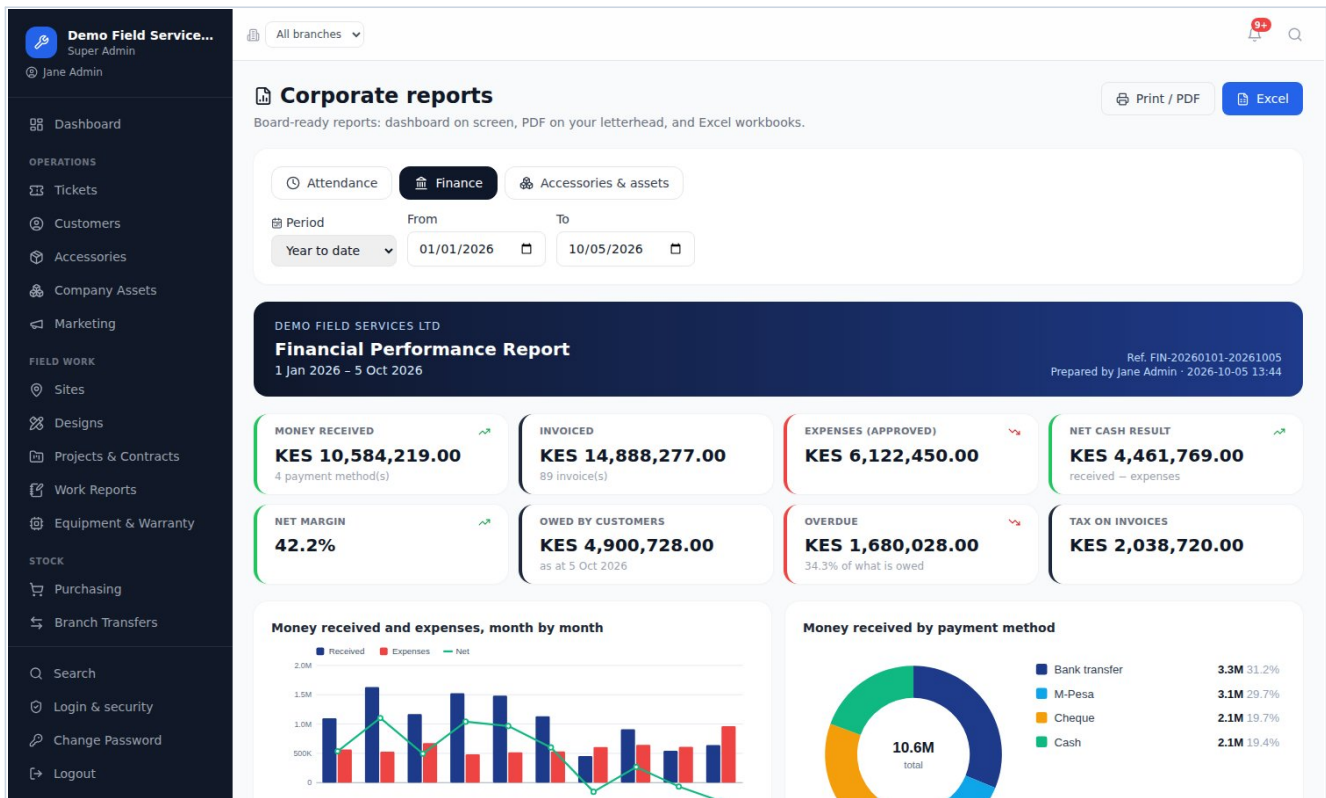
Branch reports.

8.4 Corporate reports

Reports → Corporate reports produces board-ready reports for any period: **Attendance**, **Finance** and **Accessories & assets**. Pick the report and the period (this month, last month, this quarter, year to date, last year or your own dates). Each report comes three ways:

- **On screen:** a dashboard with the key figures, charts and numbered tables.
- **Print / PDF:** an A4 report on your company letterhead (logo, address, phone, PIN), with a reference number, executive summary, charts, tables (wide tables on landscape pages), notes and a sign-off block for *Prepared by*, *Reviewed by* and *Approved by*. Every page carries the company name and "Page x of y". Choose **Save as PDF** in the print window to keep or email it.
- **Excel:** a workbook with a Summary sheet and one sheet per table, each headed with the company, report title, period and who prepared it. Figures are real numbers with filters, ready for pivot tables.

Report	What it contains	Who can open it
Attendance	Attendance rate, punctuality, hours, late arrivals, absences, leave and overtime; summary by department; each employee; a day-by-day register (P on time, L late, LV leave, A absent); late arrivals and days without check-out	HR, managers, auditors, administrators
Finance	Money received, invoiced, expenses, net result and margin; statement of money received and spent; month-by-month table; expenses by category; amounts owed by customers by age (not yet due, 1-30, 31-60, 61-90, over 90 days); invoices issued	Accounts, managers, auditors, administrators
Accessories & assets	Stock on hand and its value, items to reorder with a suggested quantity, stock movements, what was issued to each staff member and what they still hold, and the company assets register	Supervisors, accounts, managers, auditors, administrators



Corporate reports: the Finance dashboard.

Demo Field Service...

Super Admin

Jane Admin

Dashboard

OPERATIONS

Tickets

Customers

Accessories

Company Assets

Marketing

FIELD WORK

Sites

Designs

Projects & Contracts

Work Reports

Equipment & Warranty

STOCK

Purchasing

Branch Transfers

Search

Login & security

Change Password

Logout

All branches

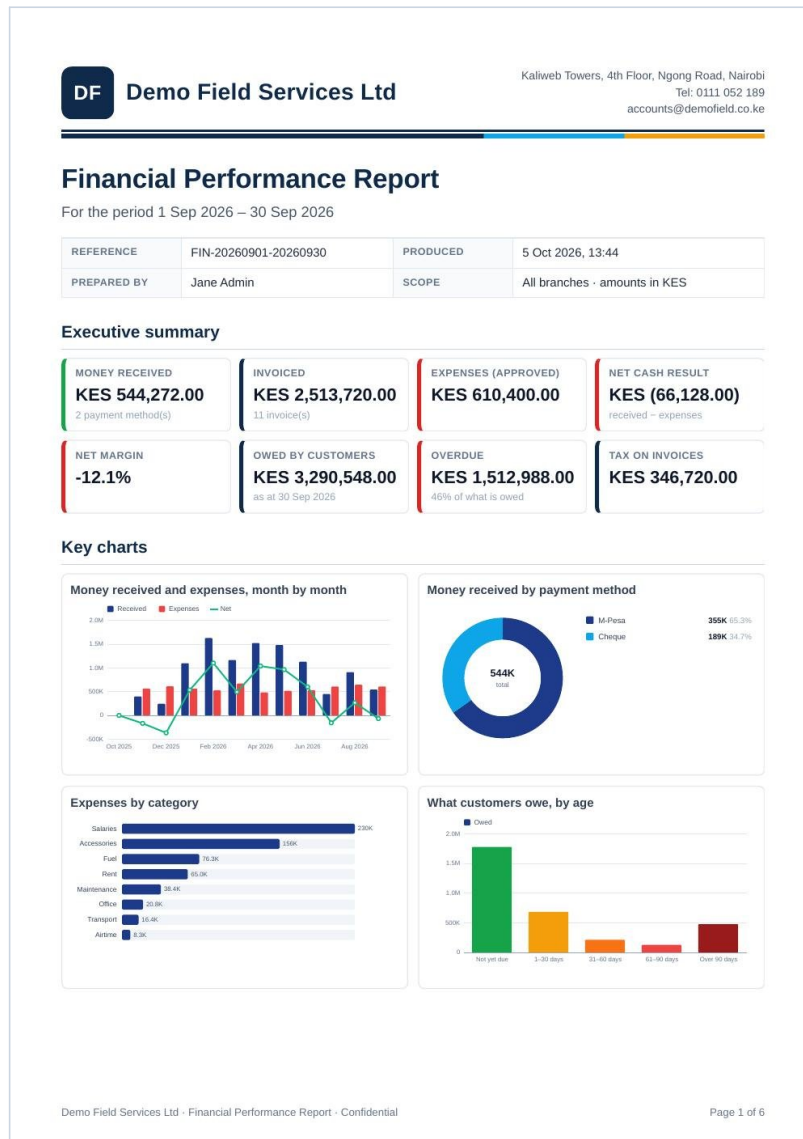
EMP ID	NAME	ROLE	22	21	2	0	1	95.5%	90.5%	08:17	172.2	13.7
KW-006	Mo Tech	Field Operations	22	21	2	0	1	95.5%	90.5%	08:17	172.2	13.7
EMP142	Peter Otieno	Field Operations	21	17	2	1	5	76.2%	88.2%	08:17	146	11.5
KW-003	Sue Super	Field Operations	22	19	1	0	3	86.4%	94.7%	08:10	162.5	12.3
KW-008	Sue Supervisor	Field Operations	22	21	1	0	1	95.5%	95.2%	08:16	188.9	21.2
KW-002	Tom Tech	Field Operations	22	22	0	0	0	100%	100%	08:07	182.3	15.8
KW-005	Ann Accounts	Finance & Admin	22	20	1	0	5	77.3%	95%	08:11	176.4	17.7
KW-007	Audrey Audit	Finance & Admin	20	17	1	2	4	80%	94.1%	08:09	150.8	15.5
EMP435	Mary Njeri	Finance & Admin	22	17	6	0	5	77.3%	64.7%	08:30	145.9	11.3
KW-001	Jane Admin	Management	22	19	0	0	3	86.4%	100%	08:08	163.4	13.2
KW-004	Mike Manager	Management	22	21	3	0	1	95.5%	85.7%	08:16	167.9	16.6

3. Attendance register

P present on time - L late (after 08:30) - LV approved leave - A absent - W weekend

Employee	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	P	L	A	LV
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30									
Lucy Achieng	P	L	P	A			P	P	P	P	P			P	P	P	P	P			L	P	P	P	P			P	P	P			19	2	1	0		
Brian Kiptoo	P	P	P	P			P	P	L	P	P			P	P	P	P	P			P	P	P	P	P			A	P	P			20	1	1	0		
Grace Wanjiku	P	P	P	P			P	P	P	P	P			P	P	P	P	P			P	P	P	P	P			P	P	P			23	0	0	0		
Hassan Ali	P	L	P	A			P	P	A	P	P			P	A	A	P	P	P			P	P	P	P	P			P	P	P			19	1	4	0	
Mo Tech	P	P	P	P			L	P	P	P	P			P	P	P	P	L			P	P	P	P	P			P	P	A			19	2	1	0		
Peter Otieno	P	P	L	P	P		P	A	P	A	P			P	A	P	P	L			A	P	P	LV	P			P	P	P			A	15	2	5	1	
Sue Super	P	P	P	P			A	P	P	P	A			P	P	A	P	L			P	P	P	P	P			P	P	P			18	1	3	0		
Sue Supervisor	P	P	A	L			P	P	P	P	P			P	P	P	P	P			P	P	P	P	P			P	P	P			20	1	1	0		
Tom Tech	P	P	P	P			P	P	P	P	P			P	P	P	P	P			P	P	P	P	P			P	P	P			22	0	0	0		
Ann Accounts	A	P	A	P	P		P	P	P	L	P	P		A	P	P	P	A			P	P	P	P	P	P			A	P			19	1	5	0		
Audrey Audit	P	P	P	A			A	P	P	P	P			P	LV	LV	P	L			P	P	P	P	A	P			P	P	A			16	1	4	2	
Mary Njeri	P	A	P	P			A	P	L	L	A			A	L	P	L	P			L	P	P	P	L			A	P	P			11	6	5	0		
Jane Admin	A	P	A	P			P	P	P	P	P			P	P	P	P	P			P	P	A	P	P			P	P	P			19	0	3	0		
Mike Manager	P	P	P	P			P	P	P	P	P			P	P	P	A	L			P	P	P	L			P	L	P			18	3	1	0			

The day-by-day attendance register.



The printed report on the company letterhead (first page).

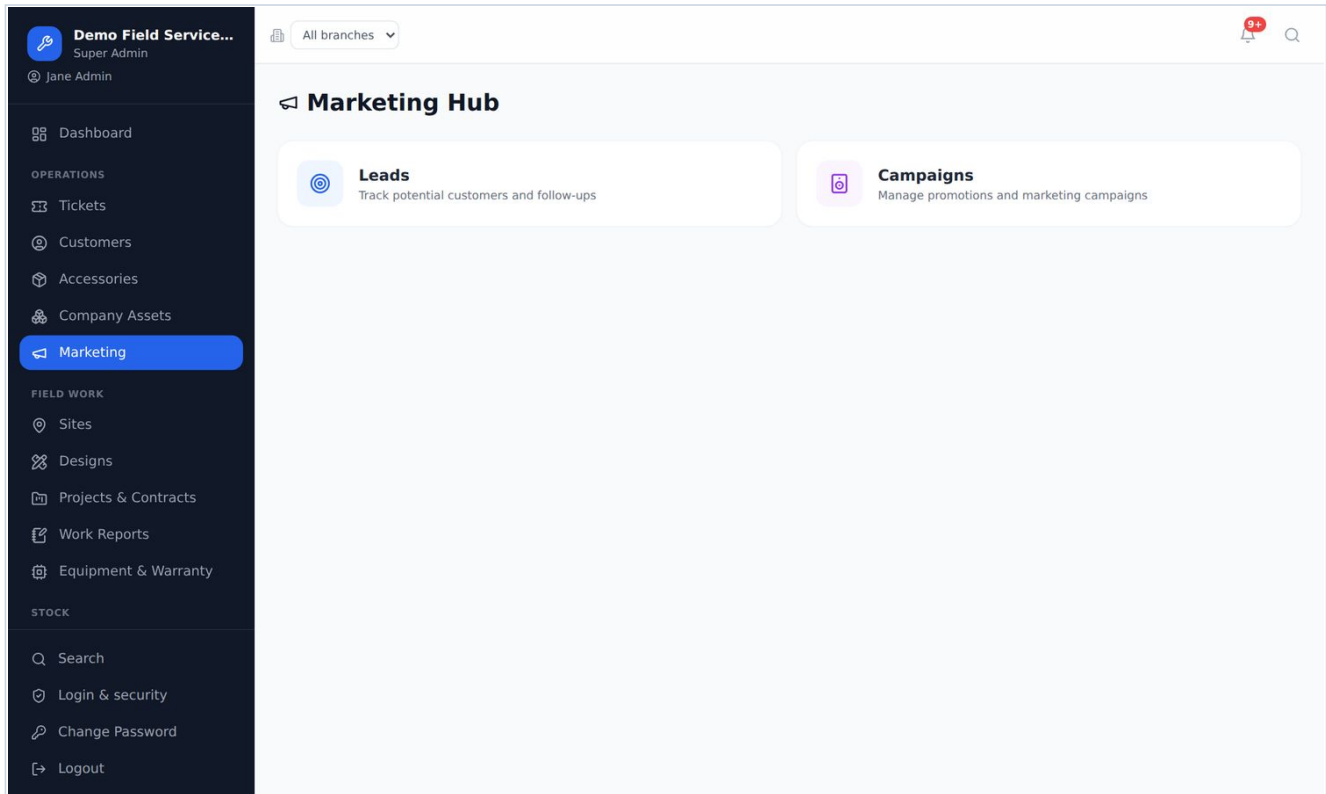
NOTE

Roles that may not see buying prices and profit (Roles & Permissions → "See costs") get the reports without stock values, costs, net result and margin. Late means checked in after the work start time set in Settings.

9. Marketing

Marketing (if included in your package) has two parts:

- **Leads:** potential customers with their source, interest, status and follow-up notes, until they become customers.
- **Campaigns:** plan promotions and other campaigns with their type, dates, budget and status.

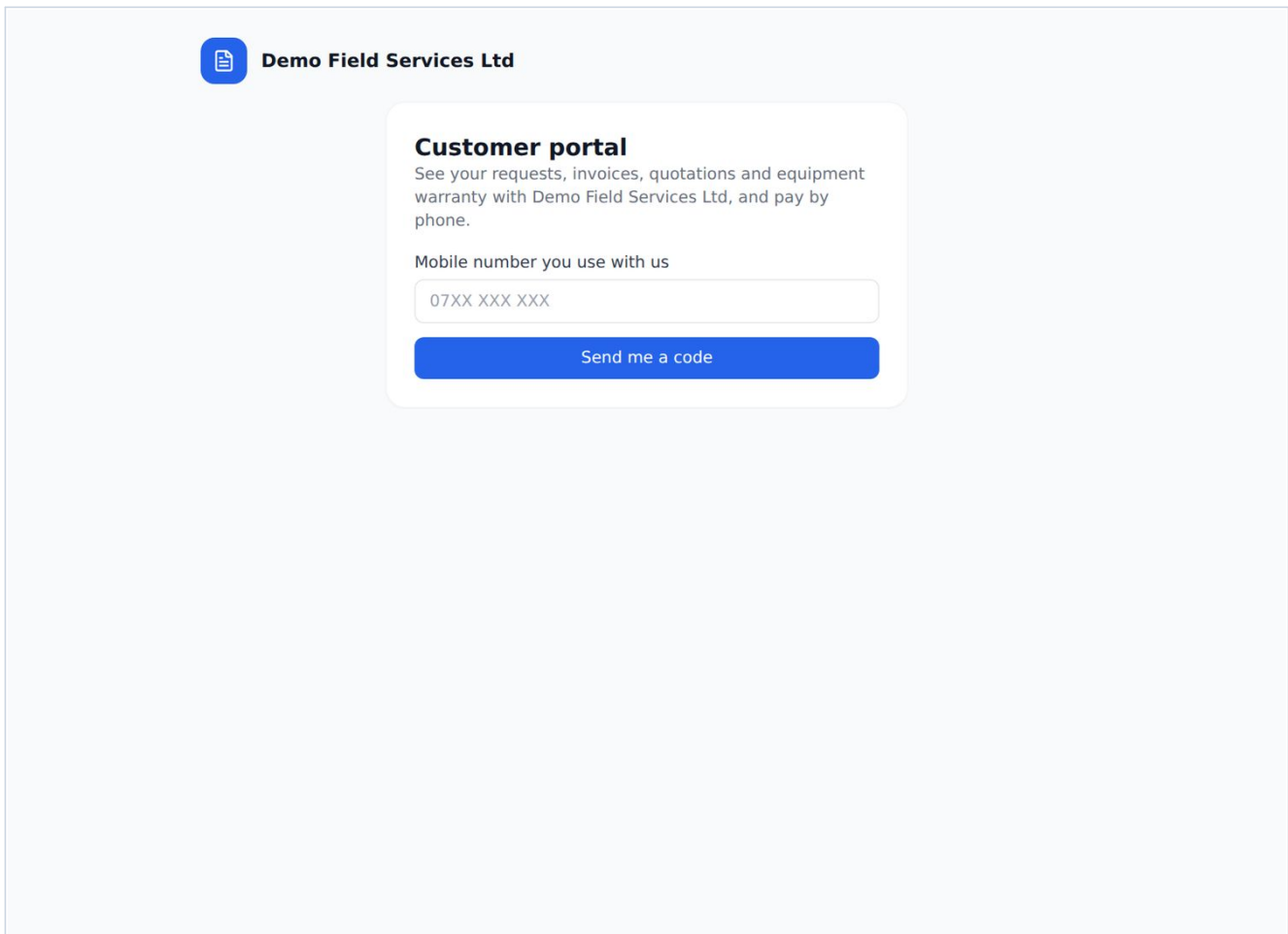


Marketing hub.

10. The customer portal

Give customers the portal address (<https://your-domain/app/portal>), for example on receipts and your website. The customer signs in with their **phone number and a 6-digit code** sent by SMS — no password. They can see:

- their requests and status, and log a new request;
- invoices (and pay them by phone), quotations and payments;
- projects and service contracts, installed equipment and warranty dates;
- job reports.

The screenshot shows a web interface for 'Demo Field Services Ltd'. At the top left is a blue square icon with a white document symbol. To its right is the company name 'Demo Field Services Ltd' in bold. Below this, centered, is a white box with rounded corners. Inside this box, the heading 'Customer portal' is in bold. Below the heading is a paragraph: 'See your requests, invoices, quotations and equipment warranty with Demo Field Services Ltd, and pay by phone.' Underneath this is the text 'Mobile number you use with us' followed by a text input field containing the placeholder '07XX XXX XXX'. At the bottom of the white box is a blue button with the text 'Send me a code' in white.

Customer portal sign-in.

11. Administration

This chapter is for the company's administrator.

11.1 Settings

System → Settings contains:

- **Company details:** name, email, phone and address, and your **logo**: press **Upload logo** and choose a PNG, JPG or WEBP picture (a PNG with a transparent background looks best; big pictures are reduced automatically). The logo appears on the sign-in page, at the top of the menu, and on invoices, quotations, payslips and reports.
- **Uploads:** the **largest file allowed** for photos and documents (10 to 500 MB, 50 MB to start), and how **photos taken on phones** are sent: *Standard* (quick on mobile data), *High* (sharp, good for zooming in) or *Original* (exactly as taken). If the server accepts less than the size chosen, the screen says so; your system provider or web host can raise it.
- **Country & Business:** country (currency, phone codes, VAT), main type of business and your own list of job types. If your system provider fixed the country or your package, this section shows it.
- **Approvals & working rules:** the manager's expense approval limit, target hours to close a ticket, work start time (for late arrivals) and design markup.
- **SMS:** TextSMS (Kenya) or Africa's Talking (Kenya, Uganda, Tanzania) details.
- **Mail (SMTP)** and **Voice calling (Twilio)**.

Settings

License
Development copy on localhost — no license needed here.

Company Details

Logo



[Change logo](#) [Remove](#)

PNG, JPG or WEBP. A PNG with a transparent background looks best. Large pictures are reduced automatically.

Company Name
Demo Field Services Ltd

Company Email
accounts@demofield.co.ke

Phone
0111 052 189

Address
Kaliweb Towers, 4th Floor, Ngong Road, Nairobi

Uploads

Settings: the company logo.

Demo Field Services Ltd
Super Admin
Jane Admin

All branches

Logo



[Change logo](#) [Remove](#)

PNG, JPG or WEBP. A PNG with a transparent background looks best. Large pictures are reduced automatically.

Company Name
Demo Field Services Ltd

Company Email
accounts@demofield.co.ke

Phone
0111 052 189

Address
Kaliweb Towers, 4th Floor, Ngong Road, Nairobi

Uploads
Photos and documents attached to tickets, work reports, staff files and other records.

Largest file allowed
50 MB

Photos taken on phones
High — sharp, good for zooming in (2)

Country & Business
Sets the currency, phone number format and the job types offered on new tickets.

Country
Kenya

Type of Business
Solar Installer

Settings: upload sizes and photo quality.

Demo Field Services Ltd
Sign in to continue

Username / Email / Phone
Enter your username

Password
.....

Sign In

Location not shared — your sign-in is recorded without it.

© 2026 Demo Field Services Ltd

The logo on the sign-in page.

11.2 Users

System → Users (also HR): add staff with name, username, email, phone, role, branch and password. Choose **All branches** for head-office staff. Set a user *inactive* when they leave — their history stays. The number of active users is limited by your plan.

The screenshot displays the 'Users' management page. On the left is a dark sidebar with navigation links: Dashboard, Tickets, Customers, Accessories, Company Assets, Marketing, Sites, Designs, Projects & Contracts, Work Reports, Equipment & Warranty, Search, Login & security, Change Password, and Logout. The main content area has a top bar with 'Demo Field Service...' and 'Super Admin'. Below this is a 'Users' section with a search bar and a dropdown for 'All Roles'. A table lists users with columns: NAME, USERNAME, EMAIL, ROLE, PHONE, BRANCH, and STATUS. Each row includes an 'Edit' button. The roles are color-coded: Accounts (blue), Audit (blue), Super Admin (red), Manager (blue), Store keeper (grey), Technician (orange), and Supervisor (purple). The status is 'active' for all users, indicated by a green dot.

NAME	USERNAME	EMAIL	ROLE	PHONE	BRANCH	STATUS
Ann Accounts	acc1	—	Accounts	0711000004	All branches	active
Audrey Audit	aud1	—	Audit	0711000006	All branches	active
Jane Admin	boss	—	Super Admin	—	All branches	active
Mike Manager	mgr1	—	Manager	0711000003	All branches	active
Mo Super	sup2	—	Store keeper	—	Mombasa	active
Mo Tech	tech2	—	Technician	0711000005	Mombasa	active
Sue Super	sup1	—	Supervisor	0711000002	Main Branch	active
Tom Tech	tech1	—	Technician	0711000001	Main Branch	active

Users with their roles and branches.

11.3 Roles and permissions

System → Roles & Permissions decides what each role can do.

- **Built-in roles** can be renamed and have screens or actions switched off for everyone in that role.
- **Your own roles** (for example *Store keeper*, *Cashier*, *Site engineer*) are **based on a built-in role** and get its screens, minus what you switch off. Give them to staff under Users.
- **Screens:** tick the menu items the role keeps. A screen switched off disappears from the menu and its data is refused by the server.
- **Actions** (ticked = allowed): **approve/reject**, **delete/cancel**, **see costs** (buying prices, stock value, margins, profit) and **export** (Excel/CSV downloads and printing reports).
- Changes apply immediately. Administrators can never be restricted.

Roles & permissions

Choose which screens each role sees and whether it may approve, delete, see costs or export. Create your own roles (e.g. Store keeper, Cashier) based on a built-in one, then give them to staff under [Users](#).

[+ New role](#)

Role	Built-in role	Staff	Permissions
Administrator	Built-in role	0 staff	Full system access — cannot be restricted. Full access — administrators can't be restricted.
Super Admin	Built-in role	1 staff	Super administrator Full access — administrators can't be restricted.
Manager	Built-in role	1 staff	View only — tickets, expenses, stock All screens of the role
Accounts	Built-in role	1 staff	Finance, payments, cheques, approvals All screens of the role
Supervisor	Built-in role	1 staff	Tickets, accessories, stock, reports All screens of the role
Customer Care	Built-in role	0 staff	Tickets, customers, attendance, payments All screens of the role
Technician	Built-in role	2 staff	Own tickets, materials, attendance All screens of the role
HR	Built-in role	0 staff	Users, attendance, reports All screens of the role
Audit	Built-in role	1 staff	Read-only finance and audit logs All screens of the role
Store keeper	Based on Supervisor	1 staff	Stock only 4 screen(s) switched off - not allowed: see costs, delete, export, approve

Roles & permissions.

Role: Store keeper

Name * Based on * Description

Colour

Store keeper Store keeper Store keeper Store keeper Store keeper Store keeper Store keeper Store keeper

A role of your own has the screens and rules of the built-in role it is based on. Switch off what it should not use.

Screens (the dashboard is always available)

Category	Screens
MAIN	☐ Tickets ☒ Customers ☒ Accessories ☐ Performance ☒ Stock Reconciliation ☐ Reports ☐ Marketing
FIELD WORK	☒ Sites ☒ Designs ☒ Projects & Contracts ☒ Work Reports ☒ Equipment & Warranty
STOCK	☒ Purchasing ☒ Branch Transfers
ME	☒ Leave Requests ☒ My Payslips ☒ Certificates ☒ Notice Board ☒ My Assets

Editing a role: screens and actions.

11.4 Branches

System → Branches: add branches with a code, location and manager. Records are tagged with their branch automatically; staff in a branch only see their branch. Stock is kept per branch.

The screenshot displays the 'Branches' management interface. On the left is a dark sidebar with a navigation menu. The main area has a header with a dropdown for 'All branches' and a '+ Add Branch' button. Below this is a table of existing branches.

BRANCH	LOCATION	PHONE	BRANCH MANAGER	STAFF	OPEN TICKETS	STATUS
Main Branch MAIN	—	—	—	2	5	active
Mombasa MSA	—	—	—	2	2	active

Branches.

11.5 Backups

System → Backups: every night the database and all uploaded files are saved **encrypted**, the last 7 copies are kept, and a copy is sent to your system provider's server. Choose the time and whether to include photos and documents, press **Back up now** for an extra copy, and download any copy. The dashboard shows a red warning if the last good backup is older than 2 days.

Demo Field Service...
Super Admin
Jane Admin

All branches

Backups
Every night the whole system (database and uploaded photos/documents) is saved, encrypted, kept here and copied to the Conexial server.

Backed up
Last good backup: **2026-10-02 11:37:21**
65 tables, 171 records, 9 files · 8.6 MB · 0.5s · by command line
Copy stored safely on the Conexial server

[Back up now](#)

Schedule
Run every night at: 02:00
Copies kept on this server: 7
☒ Include photos & documents
[Save schedule](#)

Recommended: add one cron job in cPanel (Cron Jobs → Once per hour):
php /var/www/html/conexial/api/system/cron.php
Without it, the backup still runs at night when staff are using the system (on most hosts).
This is a development copy (localhost), so backups stay on this computer.

Backups on this server
None yet.
The download contains **database.sql** (import it in phpMyAdmin) and the **uploads** folder. Keep downloaded copies somewhere safe — they contain all your company data.

Backups.

11.6 System updates

New versions of the system come from Kaliweb Systems. You don't need to download or upload anything:

- The system checks for a new version by itself every few hours. When one is available, administrators see a blue bar at the top of every screen and get a notification.
- **System → Updates** shows your version, the latest version and **what's new** in it. **Check for updates** checks straight away.
- Press **Update now**, confirm with your password, and wait about a minute. A backup is made first, the new version is installed, and the page reloads by itself. Your data, settings and uploaded files are kept.
- **Install updates automatically at night** (optional): the update is installed between 1 and 5 a.m., when nobody is working.
- **Update history** lists every update, who installed it and the result. If an update can't finish, the previous version is put back automatically and nothing changes for your staff.

All branches

9+

Version 8.0.3 of the system is available (you have 8.0.2). See what's new & update

Admin Dashboard

5 work reports to review →

TOTAL TICKETS
10

OPEN TICKETS
4

ACTIVE USERS
14

REVENUE
KES 0

EXPENSES
KES 0

PENDING APPROVALS
0

A new version is available: the bar shown to administrators.

System updates

Check for updates

THIS SYSTEM

v8.0.2

Last checked just now

LATEST FROM KALIWEB

v8.0.3

Released 5 Oct 2026 · 1.8 MB

Update available

What's new in v8.0.3

Corporate reports: faster PDF export
Sign-in log: filter by branch
Fixes for the attendance register

Update now to v8.0.3

A backup is made first. Takes about a minute; staff may see a short pause.

Install updates automatically at night

Between 1 and 5 a.m., when nobody is working. Administrators are told about every new version either way.

Off — I press Update

Update history

WHEN	FROM	TO	BY	RESULT
2026-10-05 15:40:13	v8.0.1	v8.0.2	Jane Admin	Updated to version 8.0.2
2026-10-05 15:40:05	v8.0.1	v8.0.2	Jane Admin	Update stopped: Cannot write api/reports/corporate.php. The previous version was put back (326 files).

System → Updates.

NOTE

Updates need an active licence. If the screen says the server doesn't allow the system to change its own files, ask your web host to give PHP write access to the system's folder, or ask Kaliweb Systems to update it for you.

11.7 Customer messages

System → Customer messages decides which SMS / WhatsApp messages customers receive automatically — request logged (with tracking link), technician assigned, job completed, visit scheduled, invoice or quotation sent, payment received — and lets you edit the wording. The **message log** shows every message and can retry failed ones.

Customer messages

Automatic SMS and WhatsApp messages to customers when a request is logged, a technician is assigned, a job is done, an invoice or quotation is sent and a payment arrives.

[Settings](#) [Message log](#)

⚠ No SMS provider is set up yet (Settings → SMS). Messages wait in the log until it is.

When to send, and what to say

Request logged SMS

Hi {name}, your request {ticket_no} has been received by {company}. Track it here: {link}

You can use: {name} {ticket_no} {link} {company} · 89 characters (1 SMS = 160)

Technician assigned SMS

Hi {name}, {tech} ({tech_phone}) from {company} will handle your request {ticket_no}.

You can use: {name} {ticket_no} {tech} {tech_phone} {company} · 85 characters (1 SMS = 160)

Job completed SMS

Hi {name}, your request {ticket_no} has been completed. Thank you for choosing {company}. Details: {link}

Customer messages.

11.8 Checklists and permits

System → Checklists & Permits: ready-made safety permits and maintenance checklists for your services. Edit the items, mark items **critical** (a failure alerts supervisors at once), add your own lists or switch lists off. *Add standard lists* restores any missing ready-made ones.

Checklists & permits
Safety permits (work at height, electrical isolation) and maintenance checklists that technicians fill in on the work report, on site.

[Add standard lists](#)
[+ New checklist](#)

Work at height permit
Permit to work telecom,electrical,solar,cctv,isp,general
 8 items · used 2x · 2 fail(s) in 30 days
 1. Climber holds a valid work-at-height / tower climbing certificate · **critical**
 2. Full-body harness, lanyards and fall arrester inspected and in good condition · **critical**
 3. Rescue plan agreed and rescue kit on site · **critical**
 4. Weather safe (no lightning, rain or strong wind) · **critical**
 5. Exclusion zone set up below the work area · **critical**
 6. Tools tied off / tool bag used
 + 2 more

Electrical isolation (lock-out / tag-out)
Permit to work electrical,telecom,solar,general
 7 items · used 0x
 1. Circuit / equipment to be worked on identified · **critical**
 2. Supply switched off and isolator locked · **critical**
 3. Danger tag fixed with name and date · **critical**
 4. Proved dead with a tested voltage tester · **critical**
 5. Stored energy discharged (capacitors, batteries, PV strings covered) · **critical**
 6. Insulated tools and PPE (gloves, mat, face shield) in use
 + 1 more

Telecom site preventive maintenance
Checklist telecom 18 items · used 0x
 1. Site access, fence, gate and lock
 2. Shelter / outdoor cabinets clean, doors and seals OK
 3. Air-conditioning / fans working, temperature normal
 4. Rectifier alarms clear, modules working · **critical**
 5. Rectifier output voltage (V DC)
 6. Battery bank: terminals tight, no leaks or swelling · **critical**
 + 12 more

Generator service
Checklist telecom,electrical,general 9 items · used 0x
 1. Engine oil and oil filter changed
 2. Fuel filter / water separator
 3. Air filter
 4. Coolant level and hoses
 5. Belts and battery
 6. Run hours
 + 3 more

Electrical inspection & test
 Edit

Solar system maintenance
 Edit

Checklists & permits.

11.9 Security, bank and mobile money settings

These settings are explained in the complete guide that customers receive at hand-over.

12. Help and answers

12.1 Common questions

Question	Answer
How do I get a report as PDF or Excel?	Reports → Corporate reports → Print / PDF (choose Save as PDF) or Excel .
I can't see a menu item a colleague has.	Menus depend on your role, your branch and your company's package. Ask your administrator.
"This screen is switched off for your role."	Your administrator switched it off under Roles & Permissions.
My account is locked.	Wait a while or ask an administrator to unlock it.
I lost my phone with the authenticator.	Use a recovery code, or ask an administrator to reset your two-step login.
A customer paid but the invoice is still unpaid.	Check Accounts → Mobile Money or Bank → Money in & out, and match the payment to the invoice.
Photos are not uploading in the field.	They are kept on the phone and sent automatically when the network returns (see the bar at the top).
The customer didn't get an SMS.	Check System → Customer messages → Message log; the SMS account may be out of credit.
A page is blank or shows an error.	Refresh the page. If it continues, note what you clicked and contact your administrator or provider.

12.2 Support

Kaliweb Systems — info@kaliwebsystem.com — 0111 052 189 — kaliwebsystem.com