# KALIWEB SYSTEM

Field Service & Ticketing System

## CCTV & Security Companies

Business guide — step by step, with screenshots
How your team works with KALIWEB SYSTEM every day

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# 1. KALIWEB SYSTEM for CCTV & security companies

For CCTV, alarms, access control and electric fences: site surveys, designs and quotations, installations, the equipment register your customers expect, and service contracts whose visits are never missed.

This guide walks you through how a CCTV & security company runs its day on KALIWEB SYSTEM: from the first call of a customer to the money in your account. Every step is shown with the screens your team will use. Kaliweb Systems sets the system up with you, trains your team and stays on WhatsApp and phone for support.

## 1.1 Before and after

| Today | With KALIWEB SYSTEM |
|---|---|
| Service visits are missed until the customer calls to complain | Visits are raised automatically on schedule, with a checklist |
| Nobody knows which cameras and NVRs, with which serial numbers, are at which site | Every unit is recorded per site with serial number and warranty |
| Storage and PoE sizing done by hand for every quotation | The CCTV calculator works out disks, NVR channels, PoE and cable, then the quotation |
| It is hard to prove to a customer what was serviced | Photos, checklist and the customer's signature on every visit |
| Quotations take days | Quotations go out as a link the same day and are accepted with a signature |

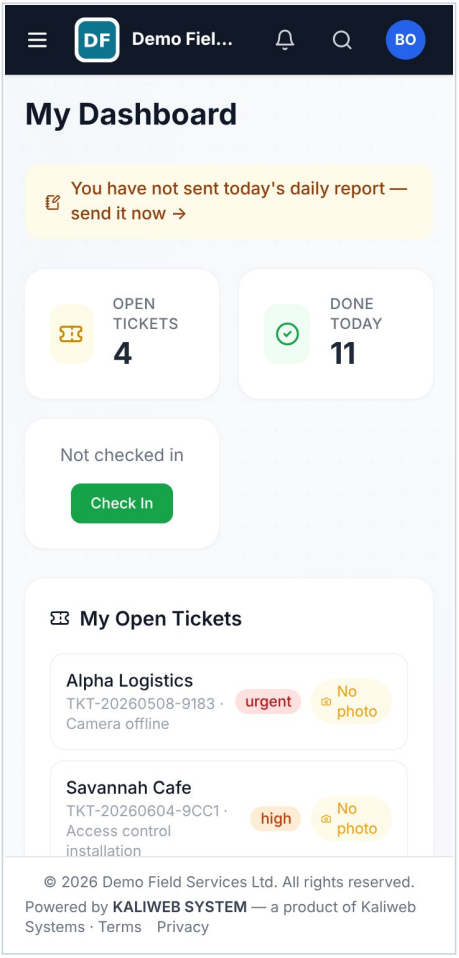
## 1.2 Who uses it in your company

Everyone signs in with their own username and only sees what their job needs. You can add your own roles (for example *store keeper* or *cashier*).

| Person | What they do in the system |
|---|---|
| Customer care | Logs requests and faults, books surveys |
| Technicians | Surveys, installations, service visits with checklists, photos and sign-off |
| Designer / supervisor | CCTV designs and approvals, reviews reports |
| Store | Cameras, NVRs, disks and cable issued and returned |
| Accounts | Quotations, invoices, contract billing, payments |
| Manager | Contracts, renewals, reports |

## 1.3 Works on any phone, even without internet

Technicians open the system in the phone's browser and press *Add to Home screen*: it works like an app, with nothing to install from a store. Job reports, photos, signatures and materials used are kept on the phone when there is no network and are sent by themselves when the phone is back online.




*The technician's dashboard on a phone.*

# 2. Your first week

Kaliweb Systems prepares the system with you. This is what happens in the first days, so you know what to have ready.

1. **Company details and logo.** Your name, logo, address, phone and tax PIN go on every invoice, quotation, receipt and report.
2. **Branches and staff.** Add each branch and every staff member with their role. Technicians receive their login by SMS.
3. **Your services and job types.** Typical job types: *site survey*, *installation*, *service visit*, *fault*, *upgrade*, *alarm response*.
4. **Customers.** Your customers and their sites (homes, shops, offices, schools) are imported from Excel, with location and contact person.
5. **Stock.** Cameras, NVRs, DVRs, hard disks, alarm panels and energizers are set with serial numbers; Cat6 and coaxial cable in metres (box of 305 m).
6. **Payments.** Your own M-Pesa paybill or till (or MTN / Airtel) and your bank account are connected, so customer payments are matched by themselves. The money goes straight to your account; Kaliweb never holds it.

**TIP** Start with one branch and a few technicians for the first week, then bring in everyone. Most teams are comfortable within two weeks.

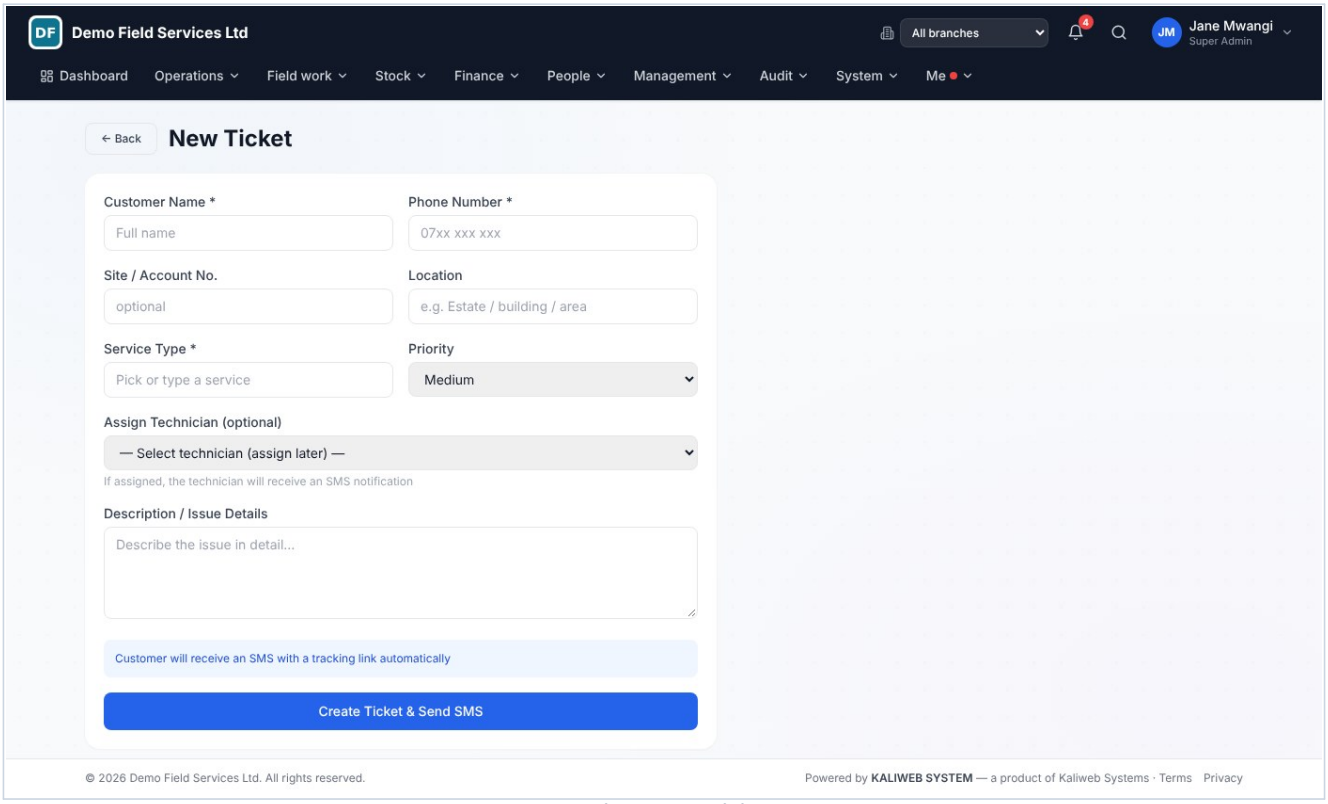
# 3. Every request is a ticket

A **ticket** is one customer request: a survey, an installation, a service visit, a fault. It gets a number such as `TKT-20261001-B101` and the customer receives an SMS with a private **tracking link**.

## 3.1 Logging a request

Customer care opens **New Ticket**:

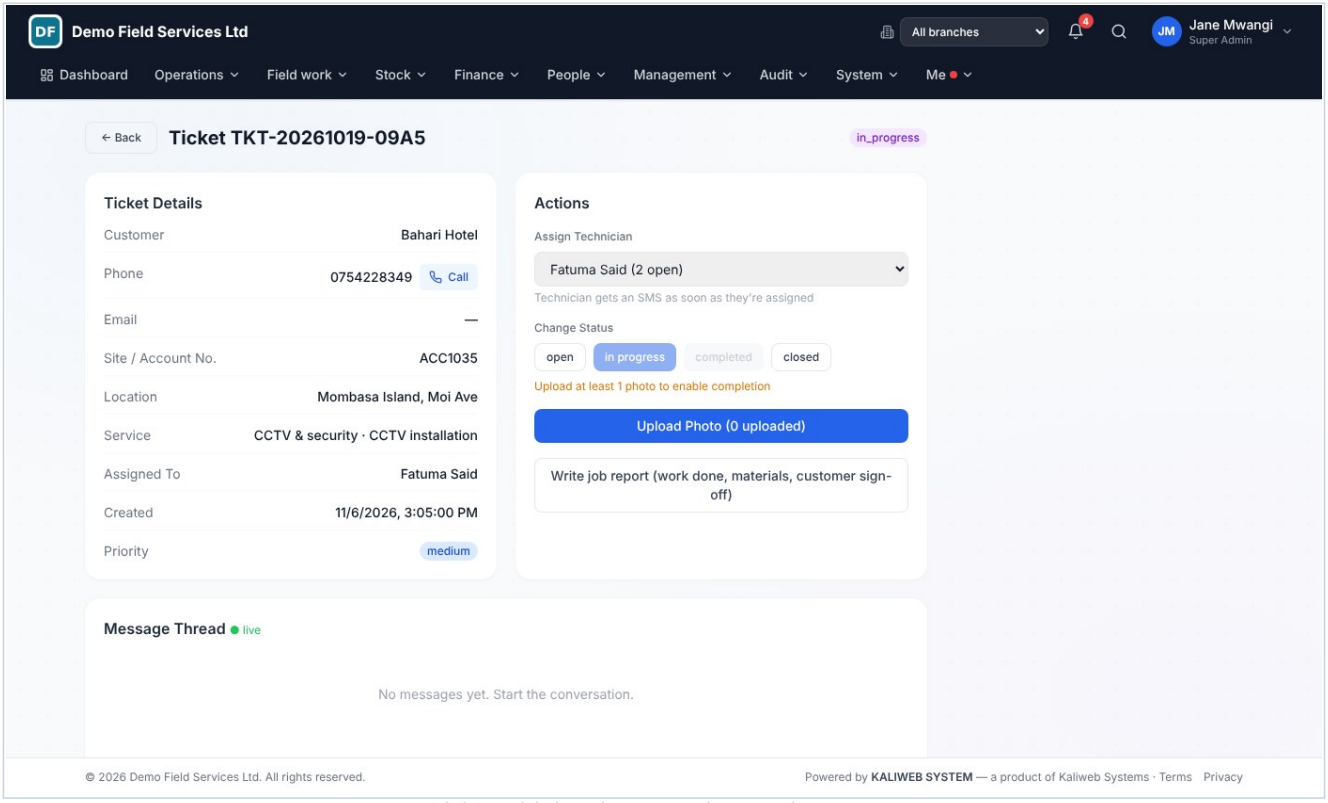
1. Type the customer's **phone number** — returning customers are recognised and their details filled in.
2. Add the **account number** or site and the **location**.
3. Choose the **job type** (survey, installation, service visit, fault…), the **priority** and describe the problem.
4. Assign a **technician** now or later. A technician with an expired certificate is marked with a warning.
5. Press **Create Ticket & Send SMS**.




*Logging a new ticket.*

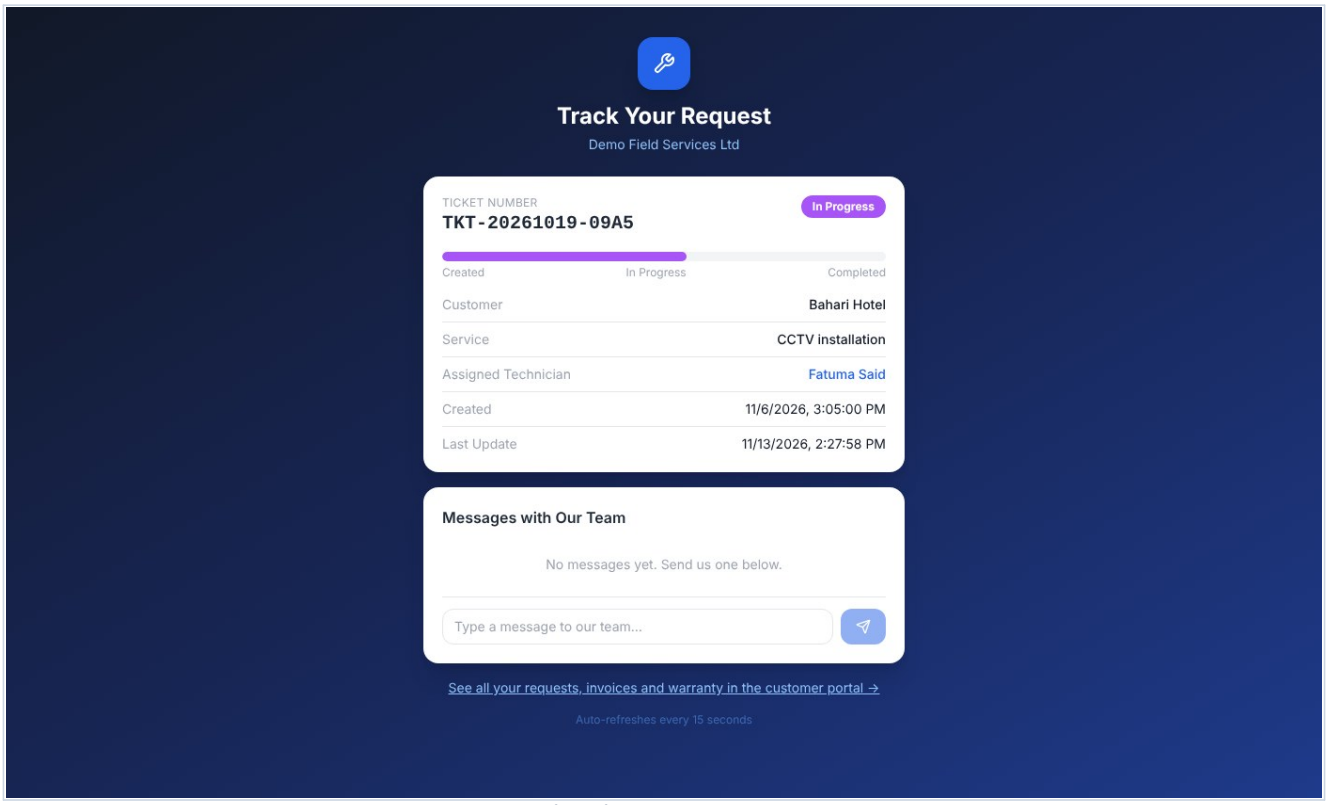
## 3.2 Following the work

The ticket list shows every request with its status — *open, assigned, in progress, completed, closed* — the technician and how long it has been waiting. Open a ticket to see everything about it: the customer, photos before and after, the message thread with your team and the customer, and the job report.




*A ticket with its photos, actions and messages.*

The customer follows the same job on their tracking page and can send a message to your team without calling.




*What the customer sees.*

# 4. From survey to installation

## 4.1 The CCTV design calculator

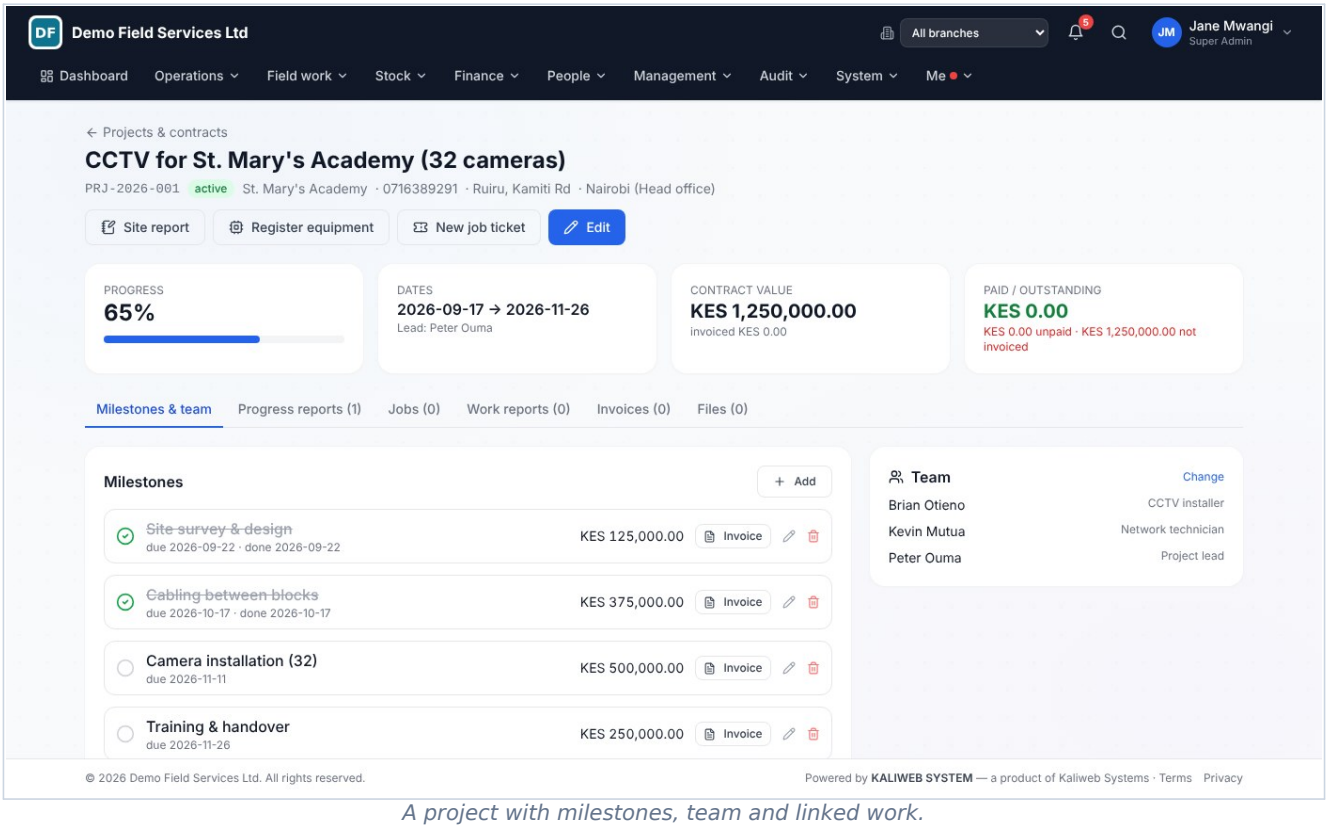
After the survey, open **Field work → Designs → CCTV**. Enter the cameras (how many, resolution), the recording days and hours, and the cable runs. The calculator works out:

- the **storage** needed in TB and the number of hard disks;
- the **NVR channels** and **PoE ports**, and the PoE power budget;
- the **boxes of cable** needed.

Press **Fill materials list from results**, add labour and your prices (stock items take their cost plus your markup), and send it for approval. A supervisor approves it — never the designer.

## 4.2 Quotation and project

From the approved design, **Create quotation** in one click and send it as a link: the customer accepts it on the phone with their **name and signature**. For a bigger installation, **start a project** with milestones (for example *50% deposit*, *cameras installed*, *handover*), each invoiced in one click.




*A project with milestones, team and linked work.*

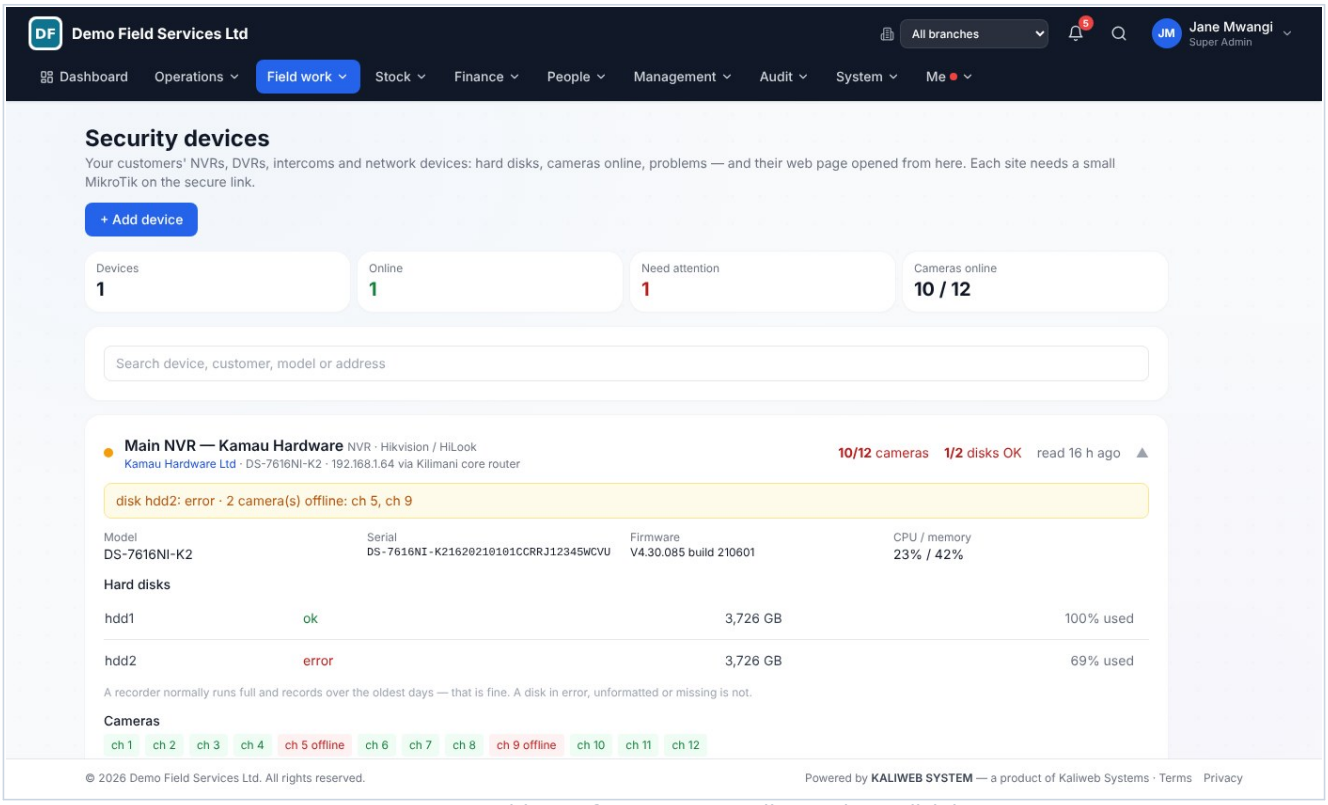
## 4.3 Handover

At handover the technician records every camera, NVR and disk by **scanning its serial number** — it is registered at that site with the installation date and warranty — then takes photos and gets the customer's signature. You print the completion certificate on your letterhead.

# 5. Customers' recorders and equipment

## 5.1 Security devices: your customers' NVRs from the office

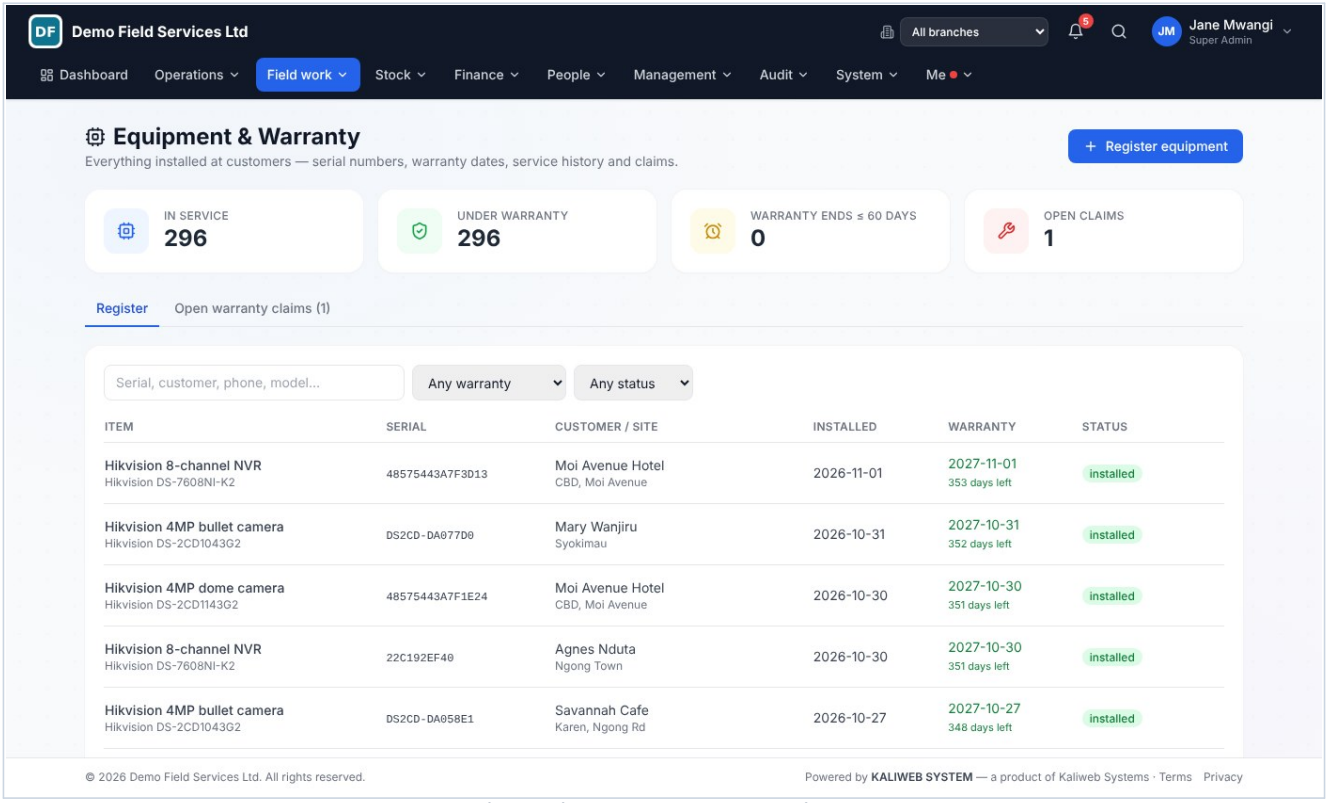
**Field work → Security devices** lists every NVR / DVR you look after, per customer. Every few minutes the system reads each one through a small router at the site: the **hard disks** (OK, error, missing) and **which cameras are online**. A disk fault or cameras going offline is sent to your supervisors at once, so you fix it before the customer finds out — a strong reason for customers to sign a maintenance contract.




*A customer's NVR with 10 of 12 cameras online and one disk in error.*

## 5.2 Equipment & warranty

**Field work → Equipment & Warranty** lists every installed unit with serial number, site, installation date and warranty end. Search a serial number to see its full history. Warranties ending in the next 60 days are listed so you can offer an extension or a service contract.



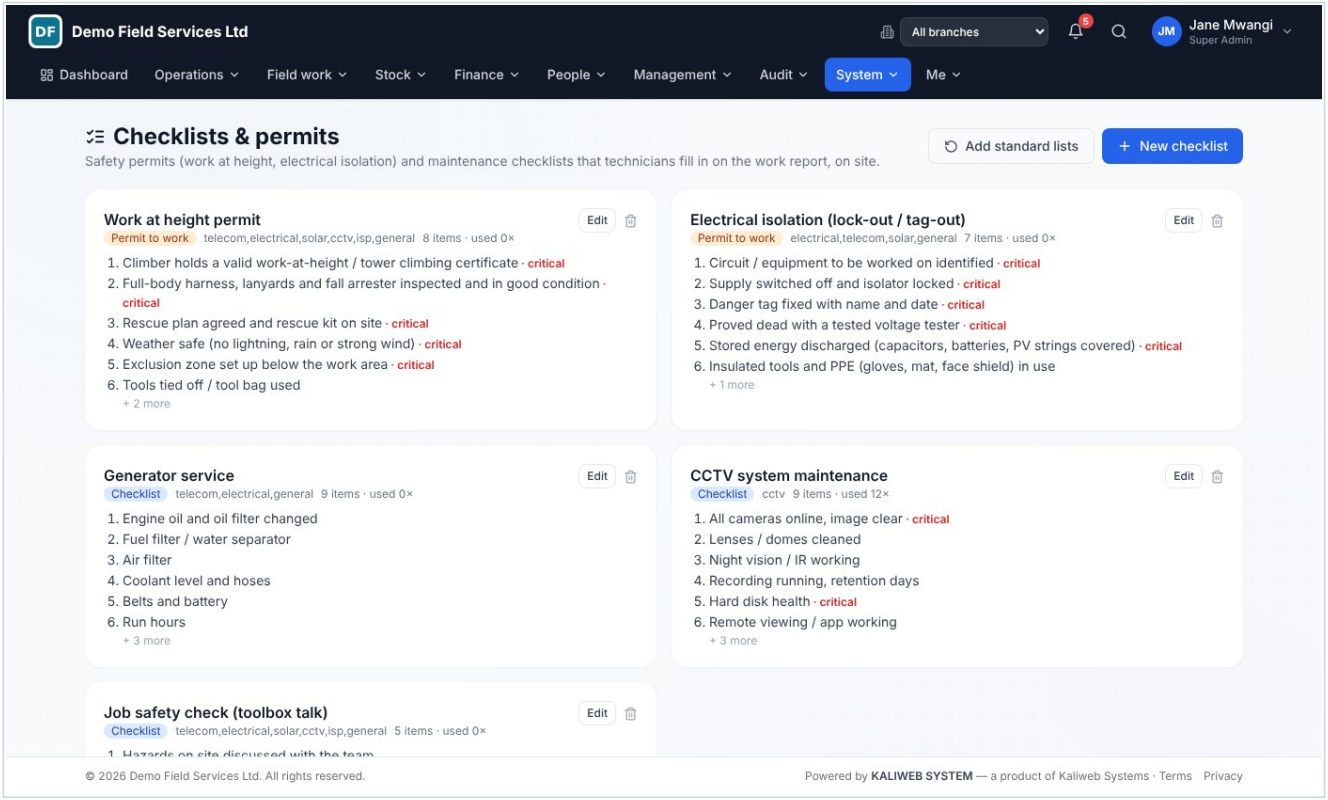

*The equipment & warranty register.*

**Warranty claims** go from *open → sent to supplier → repaired, replaced or rejected*; a replacement unit is registered at the site by itself.

# 6. Service contracts that run themselves

Create a **maintenance contract** for the customer: visit schedule (monthly, quarterly…), contract value and the visit technician.

1. **Three days before each visit** a ticket is raised by itself and assigned.
2. The technician does the visit with the **CCTV maintenance checklist**: every camera's view, focus and night vision, recording, storage and power — Pass / Fail / N/A.
3. A failed item is written up; a **critical** failure alerts the supervisor at once.
4. The customer signs on the phone; the report is the proof of service.
5. Managers and accounts are reminded before the contract ends; **Renew** extends it.



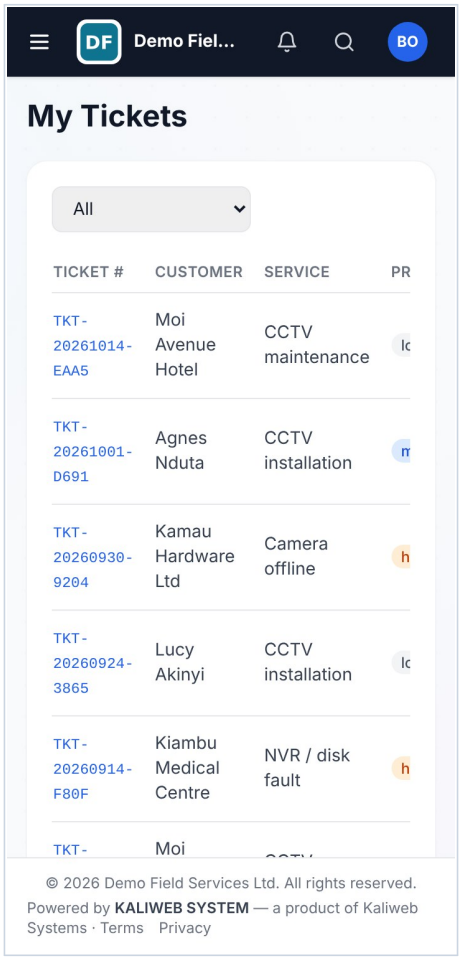

*Checklists and permits.*

**TIP** Send the customer the service report after each visit. Customers who see the proof renew their contract.

# 7. The technician's day

## 7.1 Jobs and attendance

On arrival the technician presses **Check in**; **My Tickets** shows only their jobs for the day, with the customer's phone, location and directions.

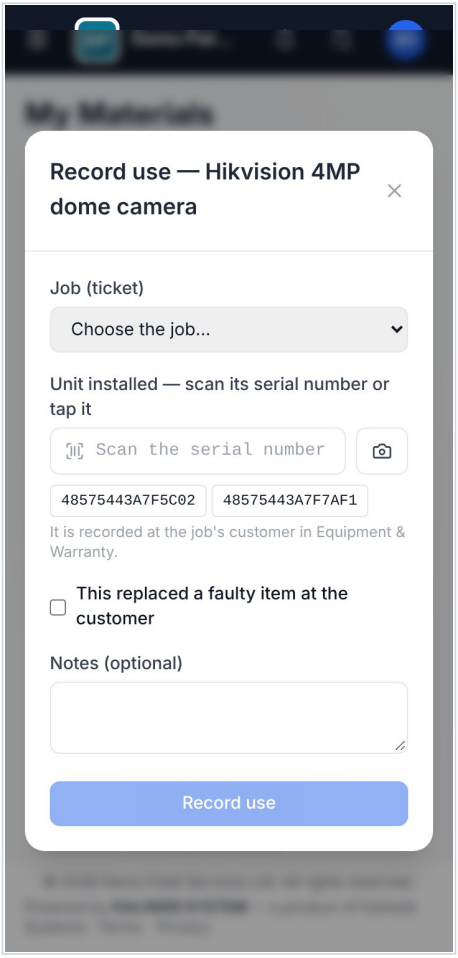



*My tickets on a phone.*

## 7.2 Materials

The store issues items to the technician; **My Materials** shows what they hold. After each job they press **Record use**:

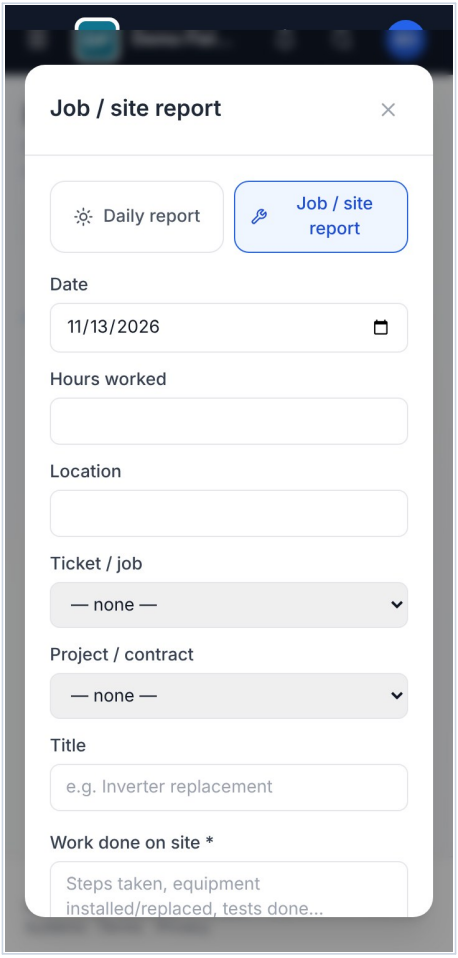
- Cable is recorded in metres: from a 305 m box of Cat6, the technician enters the metres used on the job.
- Items with serial numbers (cameras, NVRs, hard disks, alarm panels) are scanned with the phone camera and recorded at that customer, with the installation date and warranty.
- A faulty item replaced at the customer is ticked as *replaced a faulty item* and must be handed in at the store.




*Recording what was used on a job.*

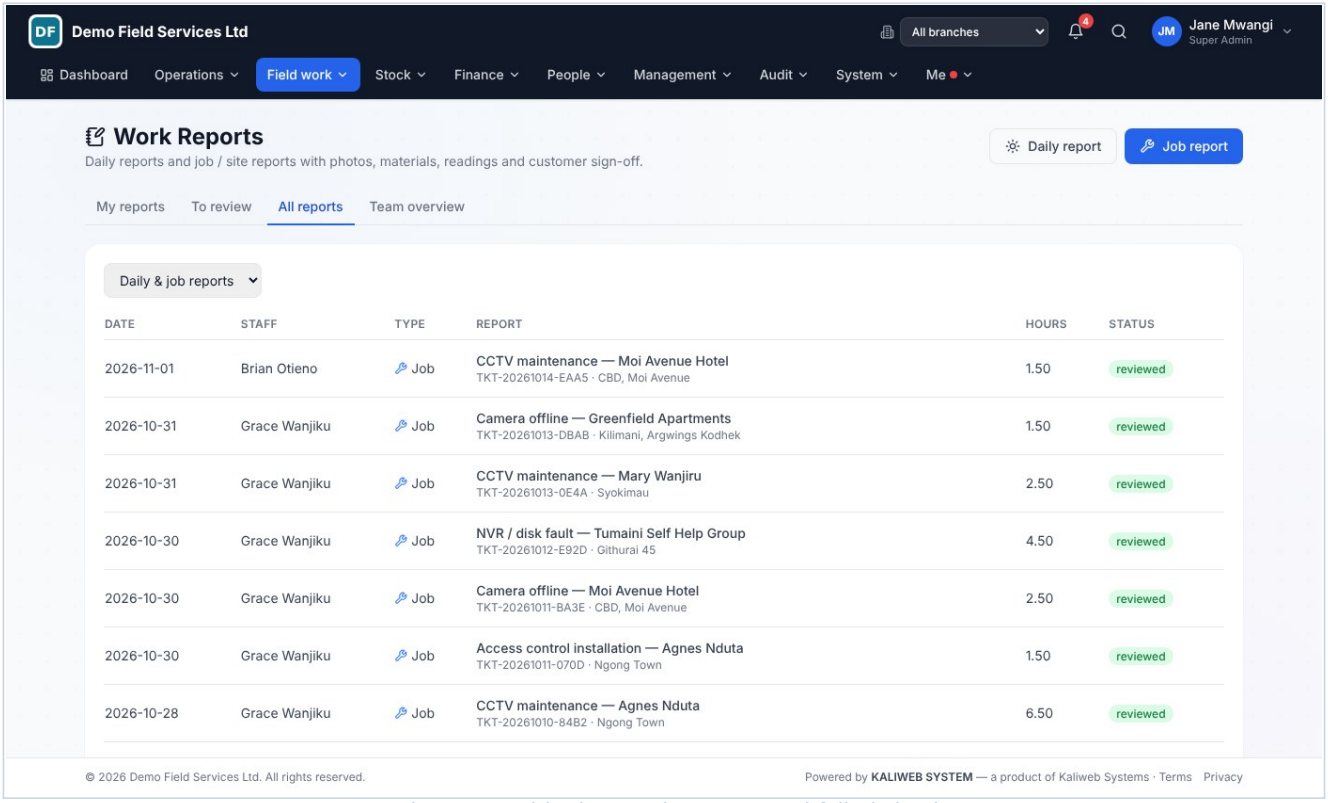
## 7.3 The job report

At the end of every visit the technician fills in the **job report** on the phone: work done, materials used, **checks on each camera, recording days and the NVR health**, photos and the **customer's name and signature** on the screen. The **CCTV maintenance checklist** (camera view, focus, night vision, recording, storage, power) is ticked on every service visit.




*A job report on a phone.*

Supervisors review the report or return it with a comment. From an approved report you print a **completion / test certificate** on your letterhead with the readings, checklist results and signatures.



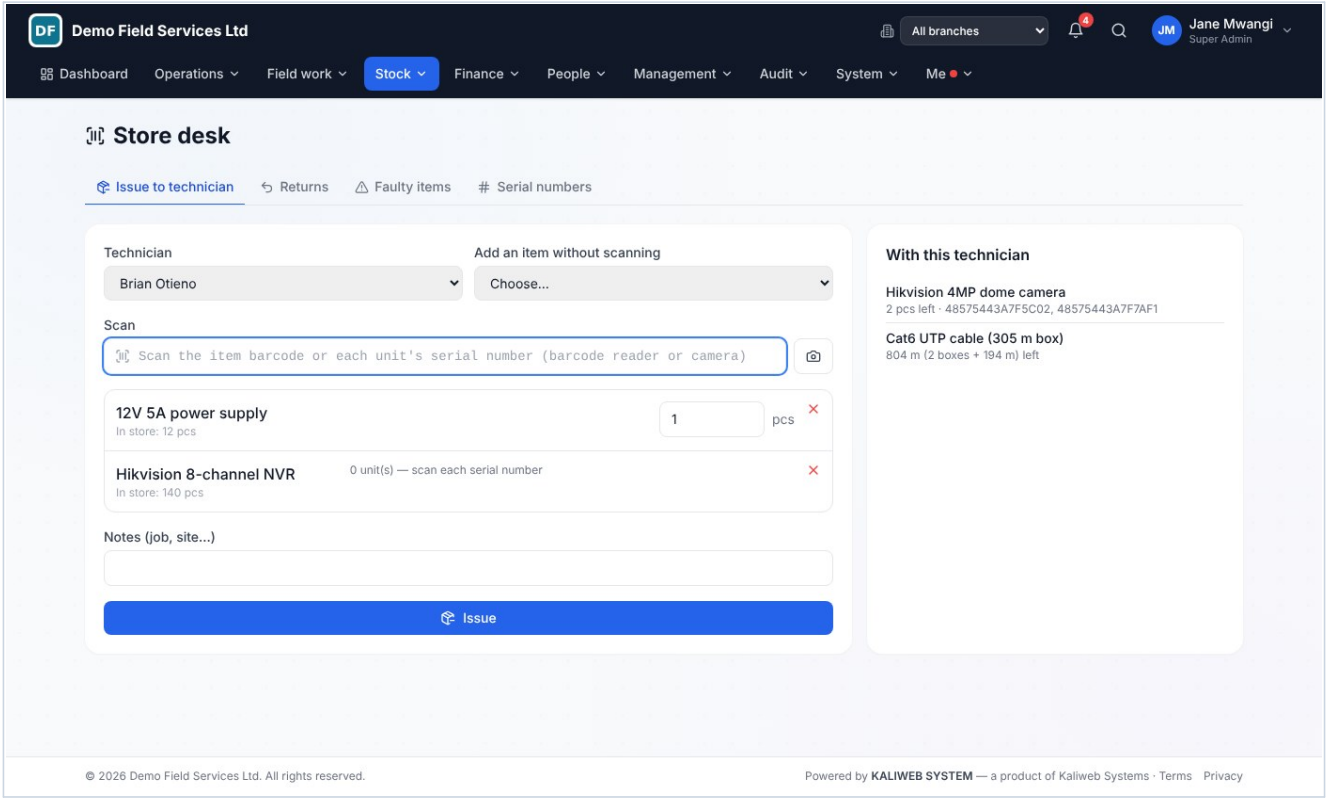

*Work reports with photos, signatures and failed checks.*

# 8. Stock: from the store to the customer

## 8.1 Items and the store desk

**Stock → Accessories** lists every item per branch with quantity and reorder level. Typical items: cameras, NVRs / DVRs, hard disks, PoE switches, power supplies, Cat6 and coaxial cable, connectors, alarm panels and sensors.

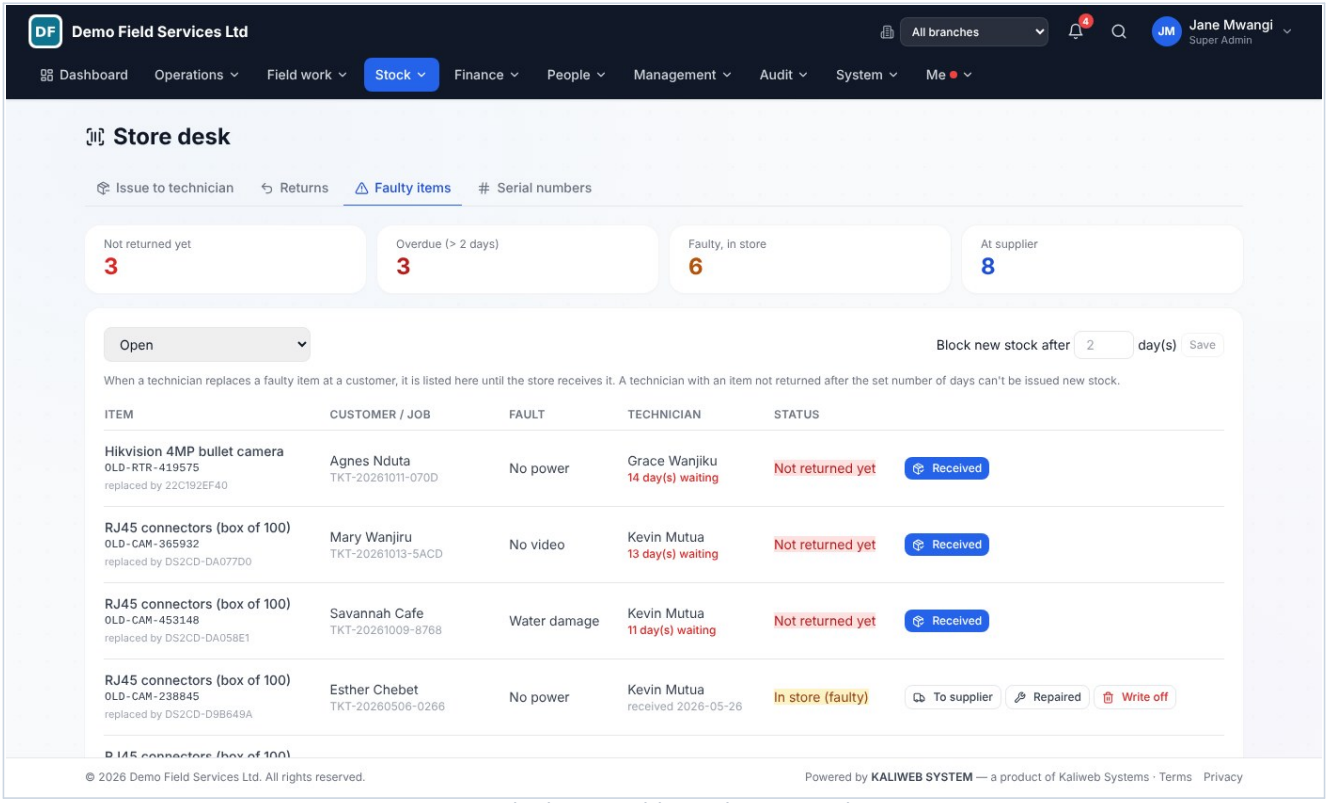
- **Cable** is kept in metres and issued by the roll or box; the technician records the metres used.
- **Serial-numbered items** are received, issued and returned by scanning, so you always know which unit is in the store, with which technician or at which customer.
- At the **store desk** the store keeper issues items to a technician by scanning; the screen shows what that technician already holds and any faulty item they still owe.




*Issuing a roll of cable and a unit scanned by its serial number.*

## 8.2 Buying and faulty items

- **Purchasing:** one click adds every low-stock item to a purchase order; a manager approves it (never the person who raised it); goods received are added at the average cost.
- **Faulty items:** every unit replaced at a customer is tracked until it is returned, sent to the supplier, repaired or written off. A technician who keeps a faulty unit too long can't take new stock.

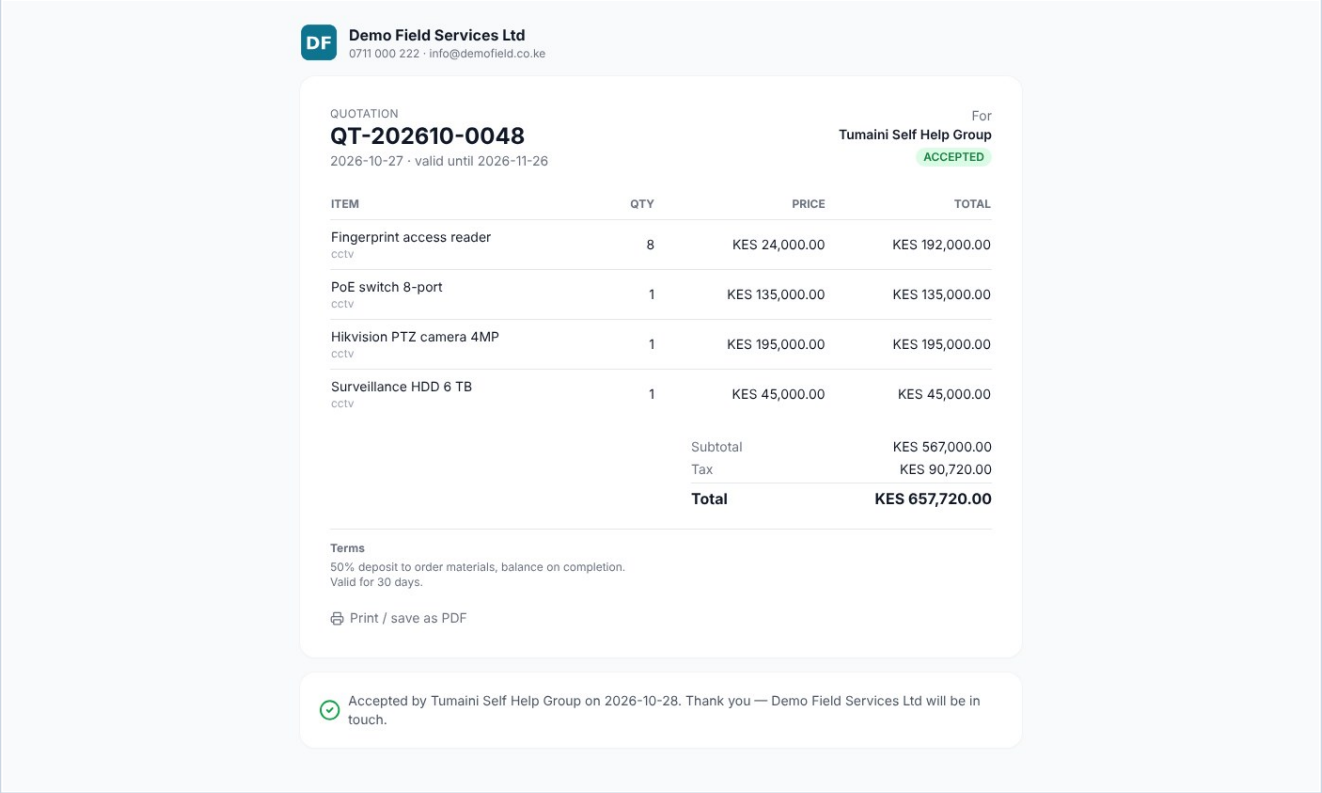



*Faulty items waiting to be returned.*

# 9. Getting paid

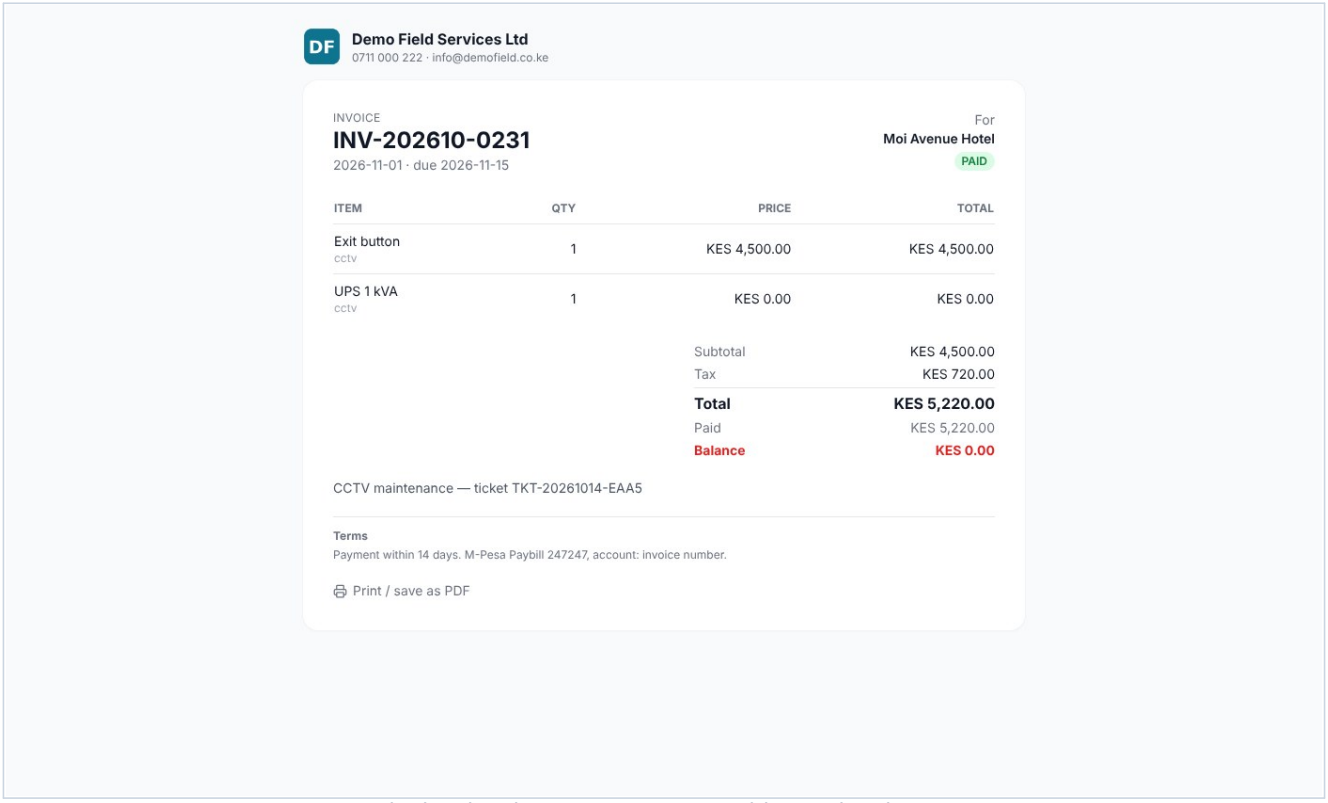
## 9.1 Quotations and invoices

Quotations and invoices are sent to the customer as an **SMS link**. A quotation can be made straight from an approved CCTV design. The customer opens the quotation on their phone and **accepts it with their name and signature**; you are told when they open it and when they answer.




*The customer accepts the quotation with a signature.*

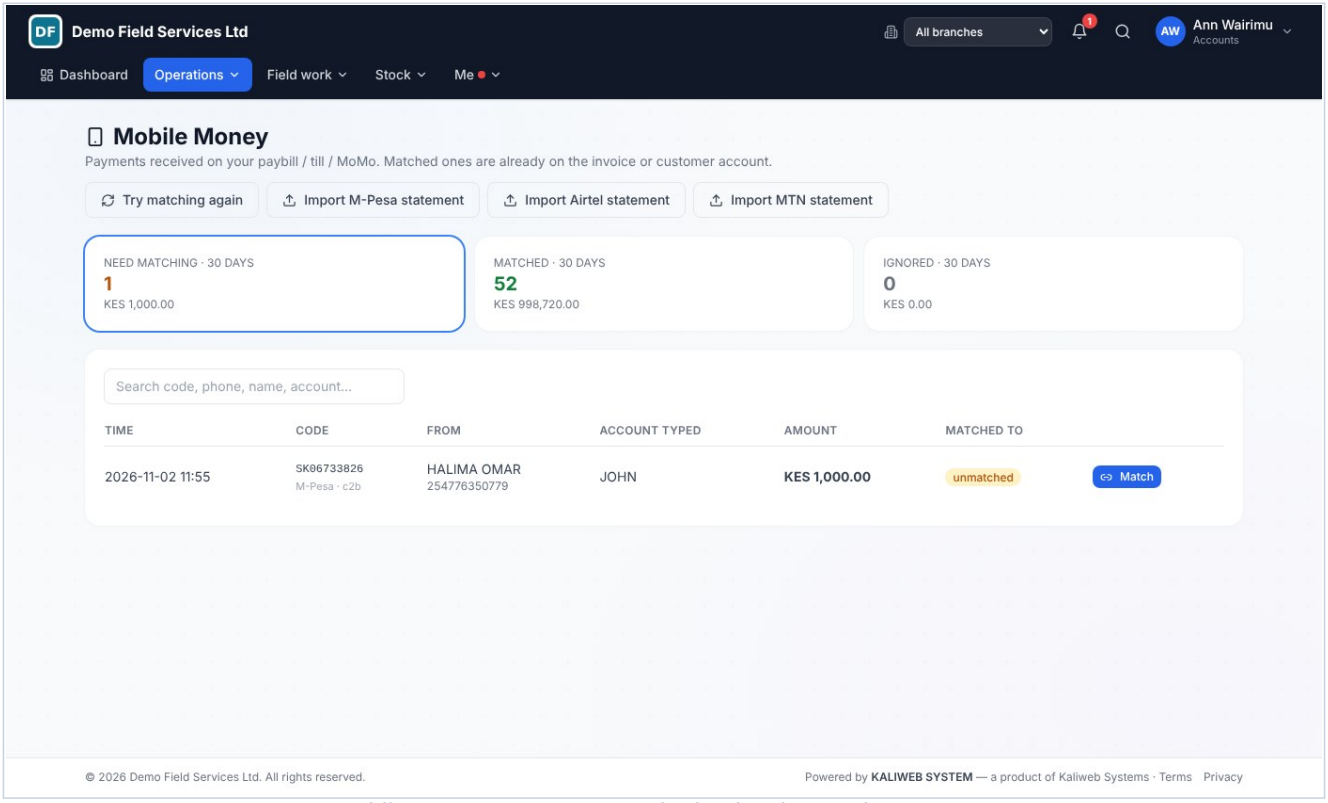
Invoices show *sent, partly paid, paid* or *overdue*. **Request via phone** sends an M-Pesa, MTN or Airtel request to the customer's phone: they enter their PIN and the invoice is marked paid.




*The invoice the customer opens, with "Pay by phone".*

## 9.2 Payments that match themselves

Customers pay to your paybill or till with the invoice number or their account number. Payments to your paybill or till, and deposits in your bank, are matched to the right invoice or customer by themselves, and the customer receives a thank-you SMS. Anything the system can't match waits for one click under **Accounts → Mobile Money**.

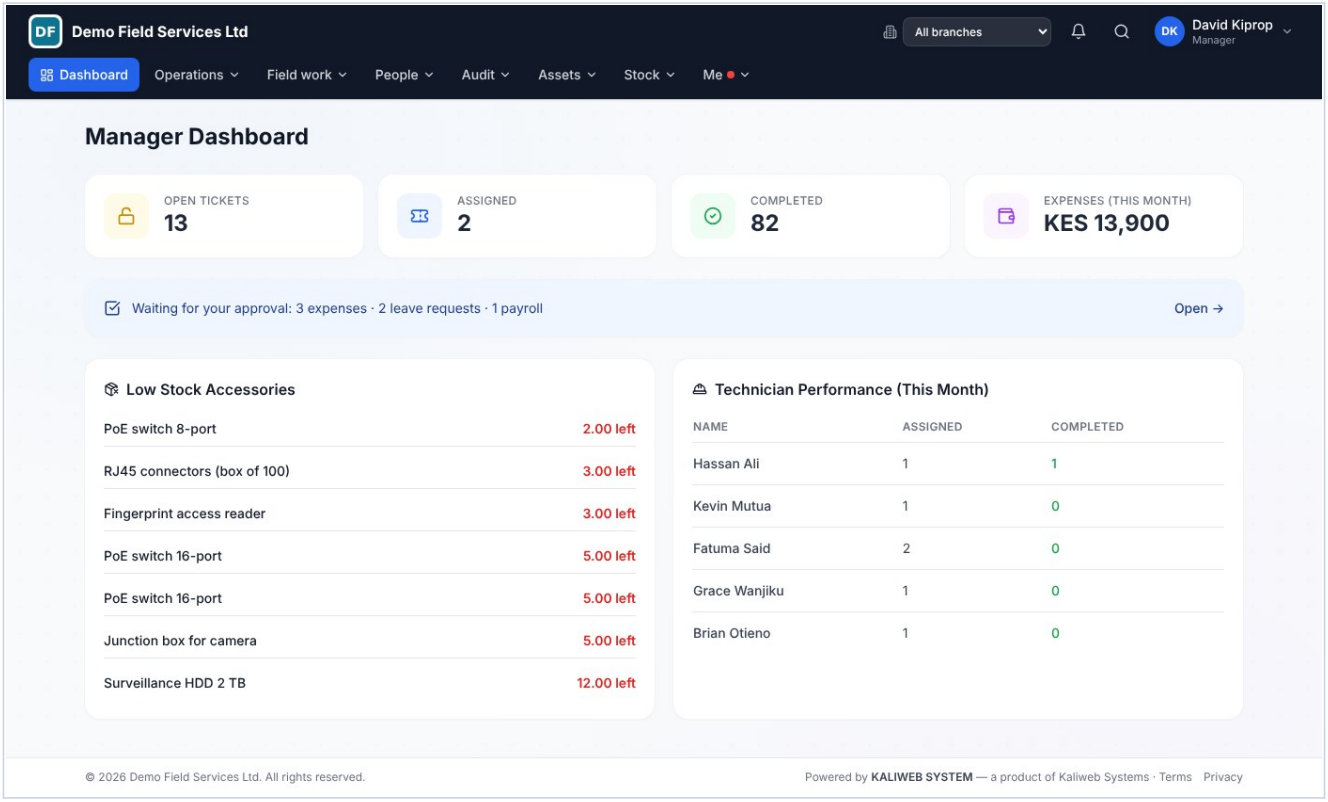



*Mobile money payments matched to invoices and customers.*

Every payment gets an official **receipt** on your letterhead, and expenses, salaries and supplier payments go through approval, so you always see what came in and what went out.

# 10. Knowing how the business is doing

- **Dashboards** for the manager, supervisor and accounts: open jobs, jobs waiting too long, today's money in, overdue invoices.
- **Reports:** revenue, expenses and profit, jobs per technician, time to complete, materials used per job, branch results — exported to Excel.
- **Performance and targets** per technician and team.
- **HR and payroll:** attendance, leave, certificates with reminders before they expire, and the monthly payroll with your country's taxes.




*The manager's dashboard.*

# 11. Questions CCTV & security companys ask

| Question | Answer |
|---|---|
| Can the customer see their equipment and warranty? | Yes. The customer portal shows their jobs and invoices, and you can print the equipment list of a site. |
| Can we bill service contracts? | Yes. Contracts have a value and visit schedule; invoices are made from them and reminders come before renewal. |
| Do technicians need a special phone? | No. Any smartphone with a browser. Reports work even without network. |
| Does the money go through Kaliweb? | No. Customers pay your own paybill, till and bank account. Kaliweb never holds your money. |
| Can we have it on our own server? | Yes. We host it for you (with nightly backups and updates done for you) or install it on your own server. |
| Is it in Kenya only? | It works in Kenya, Uganda and Tanzania, with the currency, phone numbers, taxes and mobile money of your country. |

# Next step: see it with your own jobs

Book a free demo: we show you the system with your kind of work, on your phone and laptop, in about 20 minutes.

- **Phone / WhatsApp:** 0111 052 189
- **Email:** info@kaliwebsystem.com
- **Website:** kaliwebsystem.com