

Overview

Total Recall Envision Web application is a faster, smarter client web interface for customers to use when viewing their Destruction Bin inventory and requesting tip or swap services for the existing bin inventory.

Requesting Bin Services

After logging into the Total Recall Envision Web application, customers can access the **Bin Tip** menu option or **<Bin Tip>** button right on the Home page (Fig. 1).

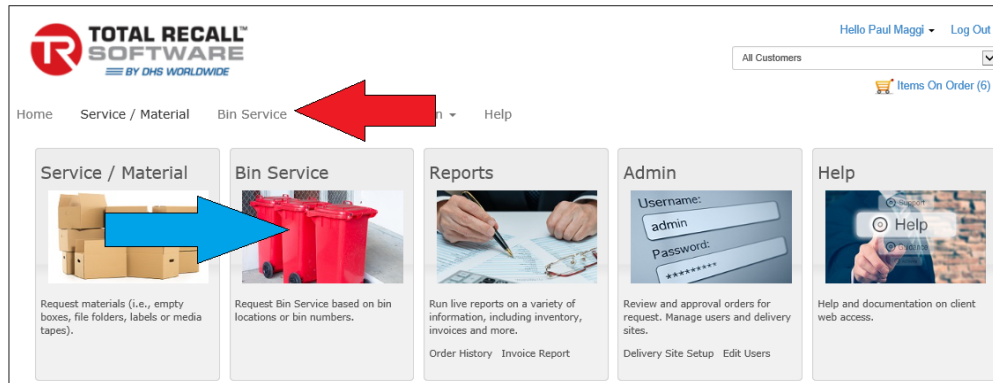


Fig. 1

PLEASE NOTE: Images, verbiage, format and layout of images, buttons, menu options and overall look and feel of the Envision Web Client interface may differ from the images contained in this manual.

The Bins Service screen is displayed (Fig. 2).

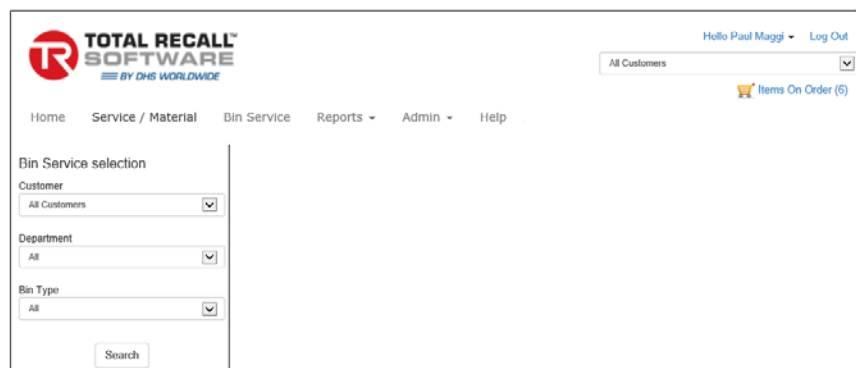


Fig. 2

Use the Search criteria at the left to indicate for which account bin service will be requested, for which department (if applicable) and for which type of bin will service be requested.

After entering the parameters in the Bin Service selection, press the **<Search>** button (Fig. 3).

Bin Service selection

Customer
Hardcopy.ABC Insurance Co. [v]

Department
All [v]

Bin Type
95 Gallon Tote [v]

Search

Fig. 3

The search results are displayed in the section at the right (Fig. 4).

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BY DHS WORLDWIDE

Hello Paul Maggi | Log Out

All Customers [v] | Items On Order (6)

Home | Service / Material | Bin Service | Reports | Admin | Help

Showing 1 - 20 of 24 | Sort by Bin Code: Ascending [v] | Service All







	 Service Bin	Bin code: 95GLT00001 Customer: Hardcopy.ABC Insurance Co. Department: HOME HOMEOWNERS INSURANCE Placement / Description: CBAD 00054 Bin type: 95 Gallon Tote
	 Service Bin	Bin code: 95GLT00005 Customer: Hardcopy.ABC Insurance Co. Placement / Description: Outside Bin type: 95 Gallon Tote
	 Service Bin	Bin code: 95GLT00006 Customer: Hardcopy.ABC Insurance Co. Placement / Description: AD HOC 004 Bin type: 95 Gallon Tote

Fig. 4

Use the Sort By selection to sort the bin results by bin barcode number or placement/description in either ascending or descending order.

The action menu contains the Service Bin option (Fig. 5).



Fig. 5

Service Bin – Click on this option to add the bin service to the shopping cart as a request for either *Tip* or *Swap* service, depending on the destruction bin type settings.

Miscellaneous Service / Material Requests

Use the *Service / Material* menu option to easily request miscellaneous services and/or material sales from the destruction operation. The Service / Material screen will appear (Fig. 6).

Fig. 6

Select the type of service/ material requested and the billing department, if applicable. Enter the quantity for each service/ material requested. Use the Comment's field to enter any relevant notes for this request, if needed.

Press the <Save> button to add a new service / material request line to the web order.

Press the <Close> button to exit the Service / Material screen and return to the shopping cart.

Submitting the Web Order

After all bin service requests have been added to the web order, view the shopping cart by clicking the *Items on Order* option at the top of the screen, under the logged in user name at the right (Fig. 7).

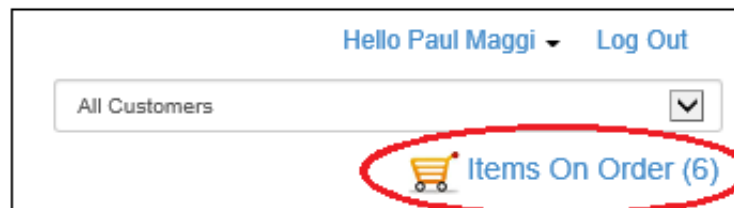


Fig. 7

PLEASE NOTE: The shopping cart will also be made visible after exiting the Service / Materials screen.

The shopping cart will display all web order line items that have not been submitted to the destruction operation at this time, including all previous bin service requests and any other miscellaneous services or material sales requests (Fig. 8).

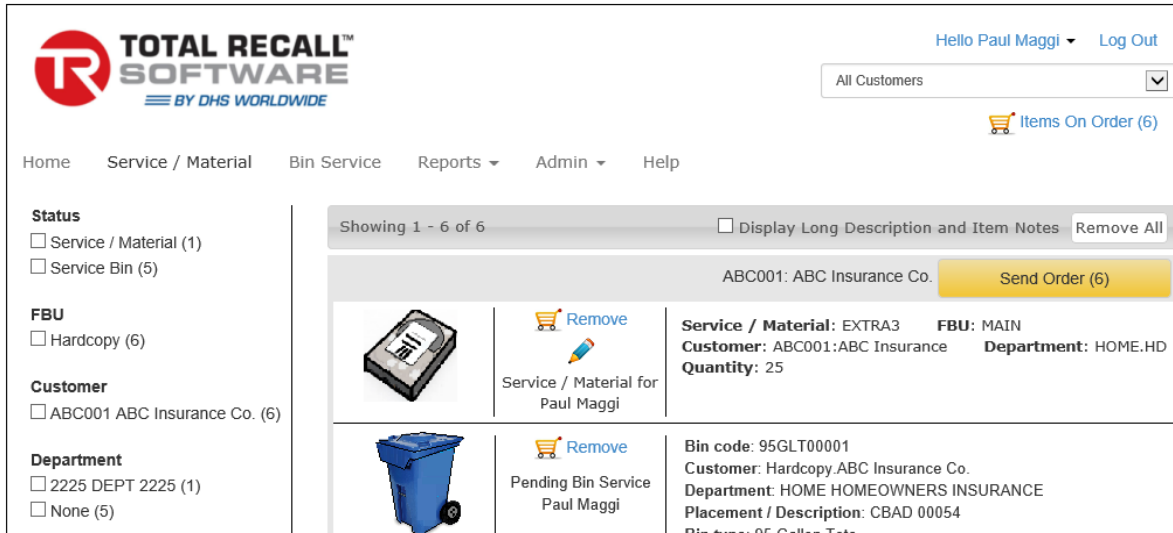


Fig. 8

The menu at the left of the shopping cart can be used to apply filters to the shopping cart for further processing web order lines using a combination of line status (Service Bin, Service / Materials, etc.), customers or departments, if applicable. (Fig. 9).

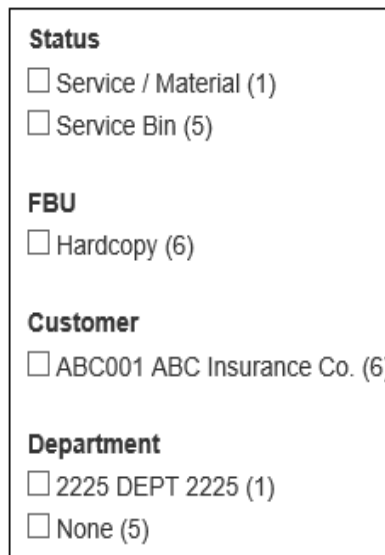


Fig. 9

Use the action menu to select the appropriate action for the appropriate record in the search results (Fig. 10).

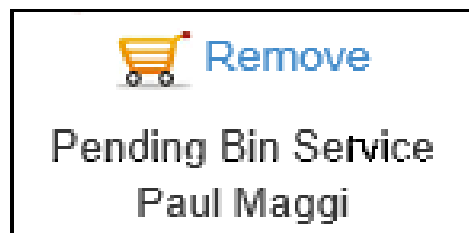


Fig. 10

PLEASE NOTE: Permissions granted to the web user, the settings for the item type in inventory and the inventory status will determine which actions are available in the action menu for any record in the search results.

Remove – Click on this option to remove the single item from the shopping cart at this time.

Press the **<Save>** button to update the miscellaneous service / material sales line item. The Service / Material screen will be closed after saving. Press the **<Close>** button at any time to discard any changes made to the web order line item and return to the shopping cart without changing any information.

Use the **<Remove All>** button to remove all listed items from the shopping cart, if needed (Fig. 11).



Fig. 11

Once the shopping cart has been reviewed and all line items are confirmed for action, use the Submit Order button at the right to submit the web order to the records center (Fig. 12).



Fig. 12

The Send Order screen will appear (Fig. 13).

Complete Send Order Total Items:2

ABC001 ABC Insurance

Delivery Address

Default Delivery Address Address"000000001"

Select Delivery Address Address

Address<000000002> DELIVER&CITY

Address City

F'L ABC 00008

State Zip

Order Information

Standard Service

Customer Order Reference Select Delivery Priority

11/03/2016 ADMIN.ADMINISTRATION DEPT

Delivery Date Charge to Department

Comments

Fig. 13

Select or set the appropriate service address, additional order information, the delivery priority to determine the service date and any comments relevant for this order that the destruction operation should be made aware.

Press the <Send> button to submit the web order at this time.

If necessary to send the web order at a later date, press the <Cancel> button instead to cancel the send order request and return to the shopping cart. No order will be sent at this time.

The web order confirmation screen will be displayed with the summary of the submitted order, which can be printed or exported to PDF, Image, Word, Excel or HTML format (Fig. 14).

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Hello Paul Maggi | Log Out
 All Customers | Items On Order (0)

Home | Service / Material | Bin Service | Reports | Admin | Help

PDF | Report

DHS Worldwide Records Management Center | Work Order: 6999218

Due Date: 30/03/2015 5:00PM

Customer: ABC Insurance Co.
Address: SOUTHSIDE OFFICE
 2810 U S 301 HWY N
 SUITE 1
 Jacksonville, FL 32234

Requested By: Paul Maggi

Priority: Next Day Service

Notes: Submitted on the web... CUST NOTES BEGIN:
 Closed from 12:00-1:00 daily.
 All deliveries are to be made to the South entrance by 5:00 PM.
 -- CUST NOTES END

Requested For: Paul Maggi

Quantity	Description	Dept	Action
25.00	EXTRA3 - Extra Material - Hard Drive hard drive destruction requested on the web....	HOME	Miscellaneous

Bin Bar Code	Bin Location	Dept	Item Type / Action
95GLT00001		HOME	95 Gallon Tote - Bin Service
95GLT00005			95 Gallon Tote - Bin Service
95GLT00008			95 Gallon Tote - Bin Service
95GLT00007			95 Gallon Tote - Bin Service

Fig. 14

Printing and Previewing Reports

Use the **Reports** menu option to print or preview Work Order or Invoice reports from the web (Fig. 15).

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Home | Service / Material | Bin Service | Reports | Admin | Help

Order History
 Invoice Report

Fig. 15

Work Orders

Select the **Reports > Order History** menu option to search for work orders and/or delivery receipt reports to be printed or previewed. The Order History Search screen will appear (Fig. 16).

The screenshot displays the Total Recall Software web interface. At the top left is the logo for Total Recall Software, with the tagline "BY DHS WORLDWIDE". A navigation menu includes links for Home, Service / Material, Bin Service, Reports, Admin, and Help. The main content area is titled "Order History Search" and contains several input fields: a Customer dropdown menu (currently showing "MAIN.ABC001.ABC Insurance"), a Department dropdown menu, two text input fields for "Begin WO Code" and "End WO Code", and two date input fields for "Begin Due Date" and "End Due Date". A "Search" button is located at the bottom center of the form.

Fig. 16

Customer – If needed, select the appropriate customer for printing or previewing work order or delivery receipt reports. Use the <All Customers> option to search across all customers to which the web user has access.

Department – If the Customer selected is departmentalized, use the Department dropdown menu to select the appropriate department.

WO Code Range – Use the Begin and End fields to define the work order range for which to search. Leave the End WO Code field blank to search for only the work order entered in the Begin WO Code field. Leave the Begin WO Code field blank to search for all work orders up to and including the End WO Code value provided.

Due Date Range – Use the calendars in the Begin and End date fields to define the date range range for which to search work orders. Leave the End Due Date field blank to search for all work orders due on the Begin Due Date entered. Leave the Begin Due Date field blank to search for all work orders up to and including the End Due Date value provided.

When searching for work orders, use any combination of WO Code range and/or Due Date range as needed. Leaving all WO code range and Due Date range fields blank will return all work orders for the selected customer(s) throughout history.

Search – Press the <Search> button after setting the search parameters to return all appropriate work orders that meet the search criteria (Fig. 17).

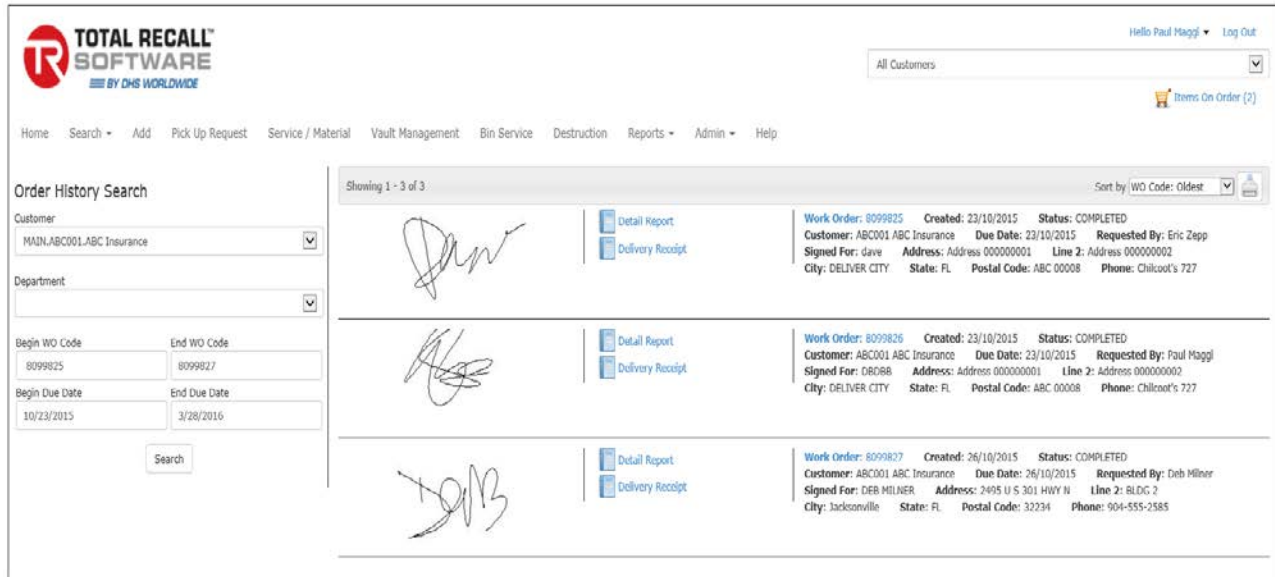


Fig. 17

If the work order has been serviced on site and signed for, the signature will appear at the left.

Work Order detail appears at the right

Detail Report

Click in the **Detail Report** option to view the work order detail report. This is similar to the work order report that is previewed after submitting a work order on the web. Select the format with which to preview the work order detail report (Fig. 18).

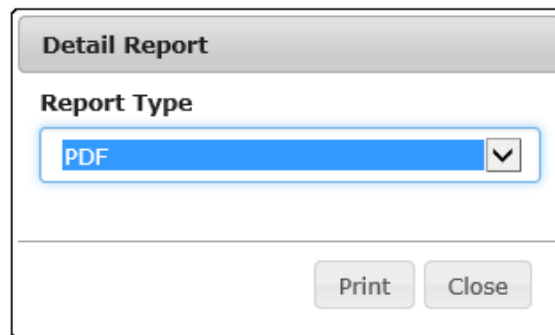


Fig. 18

The default format is PDF. Select either PDF, Image, Word, Excel or HTML formats. Press **<Print>** to preview the work order detail report in the selected format (Fig. 19).

DHS Worldwide Records Management Center
Work Order: 8099826
Due Date: 2015/10/23 18:16

Customer: ABC Insurance Requested By: Paul Maggi
Address: Address 00000001 Phone: Chilcoot's 727
 Address 00000002 Route: Downtown - AM 2
 DELIVER CITY, FL ABC 00008
Priority: Standard Service

Notes: Thank you for your business. CUST NOTES BEGIN:
 Closed from 12:00-1:00 daily.
 All deliveries are to be made to the South entrance by 5:00 PM.
 -- CUST NOTES END

Bin Bar Code	Bin Location	Dept	Item Type / Action
LG0000103			Bin Dump Seal Barcode:
LG0000103			Bin Dump




Requested For: Paul Maggi

Quantity	Description	Dept	Action
2.00	SHRED-TM - Shredding By Time Collection time: 2 minutes.		Miscellaneous

Bin Bar Code	Bin Location	Dept	Item Type / Action
LG0000103	BACK ROOM		Large Destruction Bin Storage - Bin Service
1.00	BINVOL - Bin Volume Serviced		Miscellaneous

Summary of Activity
Bin Service Large Destruction Bin Storage
1

DHS Worldwide Records Management Center hereby certifies that the materials received on the above date have been confidentially handled and destroyed and that the shredded material will be recycled.

	2015/10/23 17:20		2015/10/23 17:20		2015/10/29 15:26
Driver Signature	Date / Time	Customer Signature	Date / Time	Manager Signature	Date / Time

Page: 1 www.workorder_2_038_20151023

Fig. 19

The work order detail report includes details for service address and date, relevant service notes entered, services performed, extra material collected, seal barcodes scanned, dump bin processes performed, and calculated bin or work order weight, when applicable. Driver, customer and/or manager signatures and the date/time that the signature was collected as well as any appropriate Certificate of Destruction verbiage are all printed on the report, when available.

Delivery Receipt

Click in the **Delivery Receipt** option to view a copy of the delivery receipt, after service has been performed and the scan data has been uploaded. Select the format with which to preview the delivery receipt (Fig. 20).

Delivery Receipt

Report Type

PDF ▼

Print Close

Fig. 20

The default format is PDF. Select either PDF, Image, Word, Excel or HTML formats. Press <Print> to preview the delivery receipt in the selected format (Fig. 21).

Bin Dump		
LG0000103		2015/10/23 17:20
LG0000103	SEAL00123	2015/10/23 17:20

Fig. 21

The delivery receipt report will provide a summary of services provided. Customer signature is printed on the report, when available.

Invoice Report

Select the **Reports > Invoice Reports** menu option to search for invoices, re-print/print reports that have PDF images attached. Credit card payments can be applied to an invoice, when applicable (Fig. 22).

Fig. 22

Customer – If needed, select the appropriate customer for printing or previewing invoice reports. Use the <All Customers> option to search across all customers to which the web user has access.

Department – If the Customer selected is departmentalized, use the Department dropdown menu to select the appropriate department.

Invoice Date Range – Use the calendars in the Begin and End date fields to define the date range for which to search invoices. Leave the End Date field blank to search for all invoices due on the Begin Due Date entered. Leave the Begin Due Date field blank to search for all work orders up to and including the End Due Date value provided.

Invoice Range – Use the Begin and End fields to define the invoice range for which to search. Leave the End Invoice field blank to search for the only the invoice entered in the Begin Invoice field. Leave the Begin Invoice field blank to search for all invoices up to and including the End Invoice value provided.

Search – Press the <Search> button after setting the search parameters to return all appropriate invoices that meet the search criteria (Fig. 23).

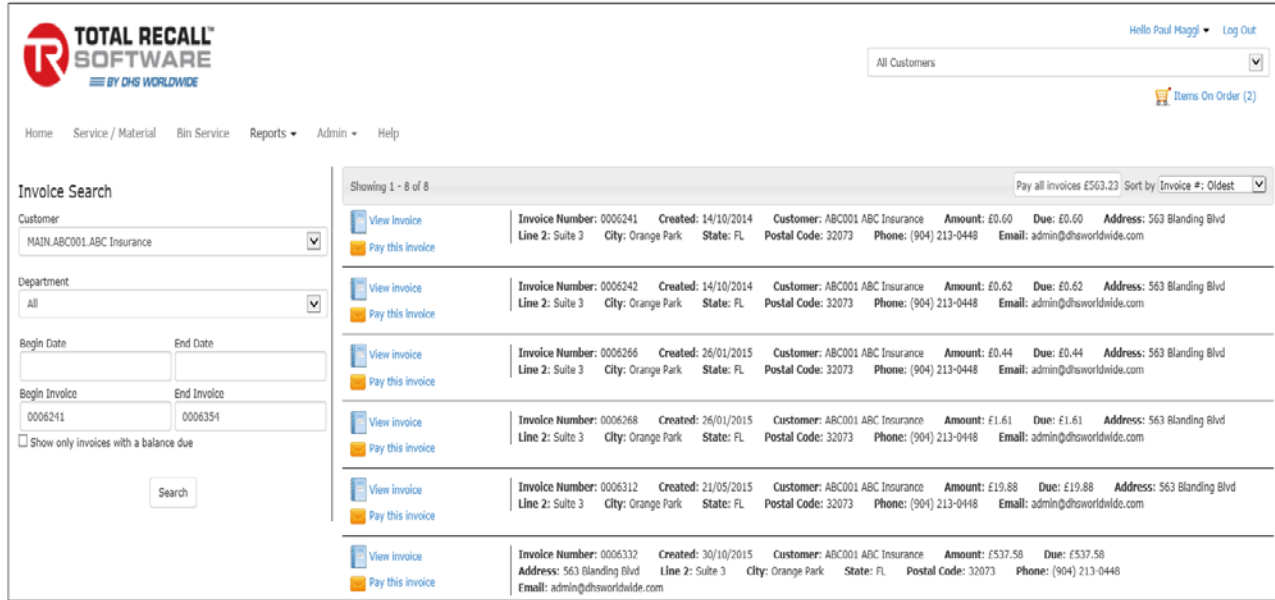


Fig. 23

If credit card payments are possible, the **Pay This Invoice** option is available at the left, as well as the **<Pay All Invoices>** button at the top. For more information on processing credit card payments, please refer to the *Processing Credit Card Payments Quick Reference Guide*