WCBS Customer Centre
User Guide

Contents

1 About the WCBS Customer Centre

Welcome to the WCBS Customer Centre User Guide. The Customer Centre is our dedicated client website, where you can:

- Find information about using our software, including user guides and answers to FAQs.

- Log support issues.

- Download software updates and related notes and guides.

- View our Product Road Map and request specific software enhancements.

- Vote on proposed software enhancements, helping us identify the improvements that you want the most.

- Sign up for training and other events.

- Request quotes for bespoke services, such as training sessions, report design and pre-printed stationery.

You can access our Customer Centre via our website, www.wcbs.co.uk, or directly from passFINANCE / schoolADMIN (PASS) or 3sysACADEMIC. If you do not currently have a login, you can create one via these links.

This user guide explains how to get the most out of the Customer Centre. For more information, see:

- *Your Customer Centre Account on p.4.*

- *Accessing the Customer Centre on p.9.*

- *Finding Information and Resources on p.10.*

- *Managing Support Issues – 'My Support' on p.16.*

- *Downloading the Latest Software Information on p.20*

- *Requesting Enhancements on p.22.*

- *Registering for Training Courses on p.25.*

- *Exploring Bespoke Services on p.26.*

- *Contacting Us via the Customer Centre on p.27.*

ⓘ   If you have any queries about the WCBS Customer Centre or any of the information provided in this guide, please email CustomerCentre@wcbs.co.uk.

2 Your Customer Centre Account

To access the Customer Centre, you need an account and log in details. Your username is your email address. You define a suitable password when you create your account.

If you know your username and password, please go to *Accessing the Customer Centre on p.9*.

2.1 If you already have a Customer Centre Account

If you think you may already have a Customer Centre account, try logging in via passFINANCE / schoolADMIN (PASS) or 3sysACADEMIC. The site automatically checks whether an account exists for the email address in your user profile. If it does, the 'Customer Centre Login' screen appears with the 'Username' field completed. If not, you will be asked to provide more information. See *Creating a Customer Centre Account via the Software on p.5* for details.

2.1.1 Can't remember your password?

If you have forgotten your password, go to the 'Customer Centre Login' page and click 'Forgot Password?'. Follow the instructions on screen to reset it. See *Accessing the Customer Centre on p.9* for more about how you find this page.

2.2 If you don't have a Customer Centre Account

If you do not already have a Customer Centre account, the easiest way to create one is via the software. This is because it enables the site to validate your request using your passFINANCE / schoolADMIN (PASS) or 3sysACADEMIC user record.

> You can create an account via our website, but this takes longer as validation is manual. You will be asked to provide your details, which are passed to your school's SuperUser. He or she will then need to authorise your account application. For details, see *Creating a Customer Centre Account via the Website on p.7*.

> The site uses the email address logged against your user record to validate requests for new accounts. As such, you need to check with your System Administrator that the relevant field contains an email address that is unique to you. In passFINANCE / schoolADMIN (PASS), the System Administrator should check the 'Email Address' field on your 'User Login Maintenance' screen. This is accessed via **Database > Security > User Configuration > Users**. This applies to both passFINANCE / schoolADMIN (PASS) and 3sysACADEMIC.

> If it is impractical for this field to contain an email address unique to you, you can create an account via the website using your personalised, work email address. For details, see *Creating a Customer Centre Account via the Website on p.7*.
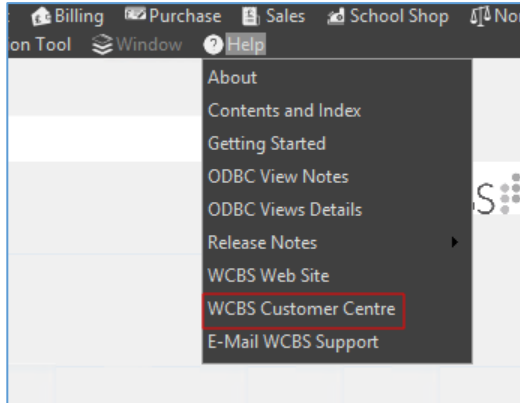
2.2.1 Creating a Customer Centre Account via the Software

How to Create a Customer Centre Account via the Software:

Do ONE of the following:

- In passFINANCE / schoolADMIN (PASS), in the header menu, go to **Help > WCBS Customer Centre**.
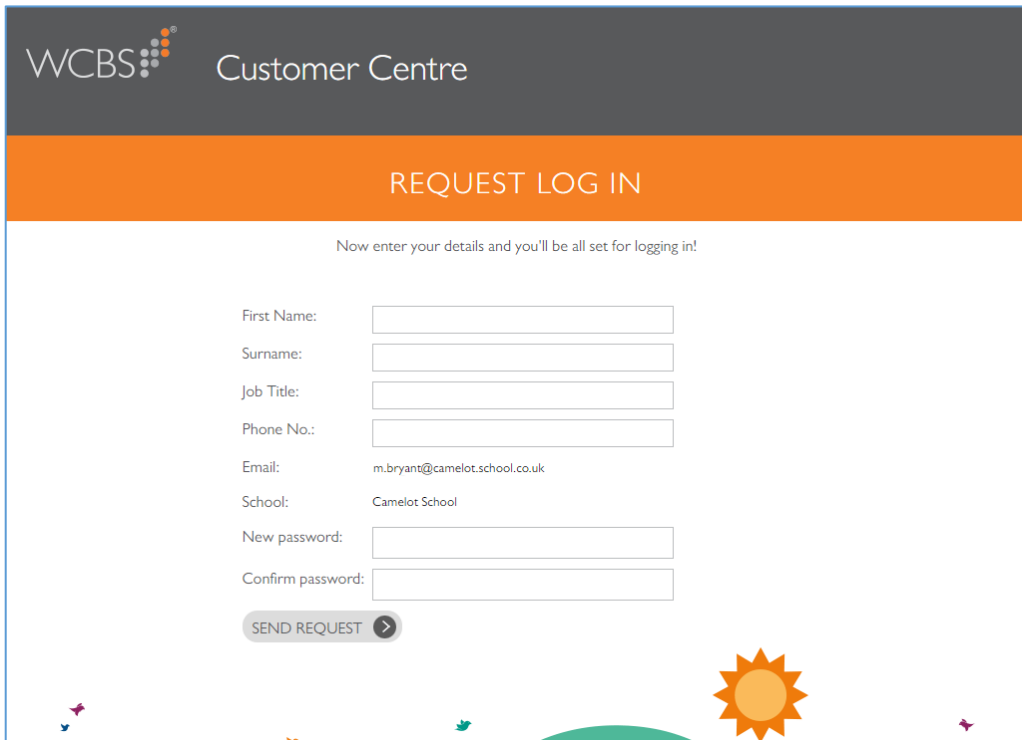

- In 3sysACADEMIC, in the header row, click 🚀 .

- The site checks whether a Customer Centre account already exists for the email details held against your current login.

The site uses the email address logged against your user record to validate requests for new accounts. As such, the email address in the relevant field must be unique to you. In passFINANCE / schoolADMIN (PASS), your System Administrator can check the 'Email Address' field on your 'User Login Maintenance' screen. This is accessed via **Database > Security > User Configuration > Users**. This applies to both passFINANCE / schoolADMIN (PASS) and 3sysACADEMIC.

If it is impractical for this field to contain an email address unique to you, you can create an account via the website using your personalised, work email address. For details, see *Creating a Customer Centre Account via the Website on p.7.*

● If no matching Customer Centre account is found, the 'Request Log In – Send Request' page appears.

ⓘ If the site finds a Customer Centre account for your email address, the 'Customer Centre Login' page appears. If you do not know your password, click 'Forgot Password?' and follow the instructions on screen.

END Complete the form (remembering to make a secure note of your password) and click 'Send Request'.

Your Customer Centre account is created and you are logged in to the Customer Centre automatically.

2.2.2 Creating a Customer Centre Account via the Website

How to Create a Customer Centre Account via the Website:
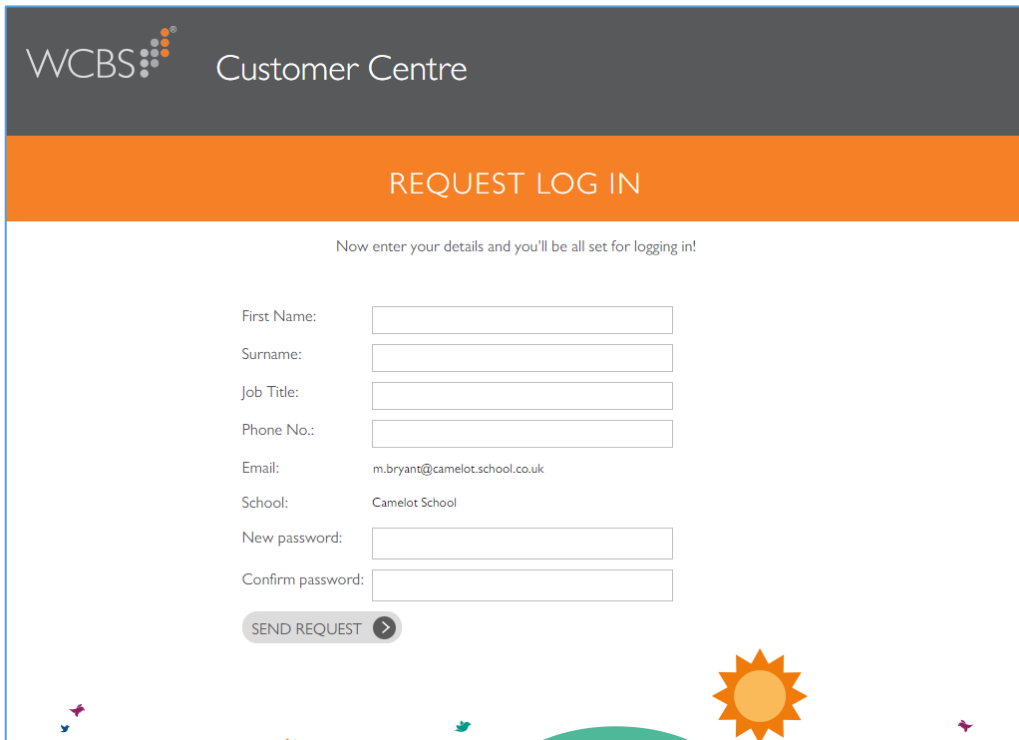
Go to www.wcbs.co.uk and click 'Sign In' in the top, right-hand corner of the page.

The 'Customer Centre Log In' page appears.
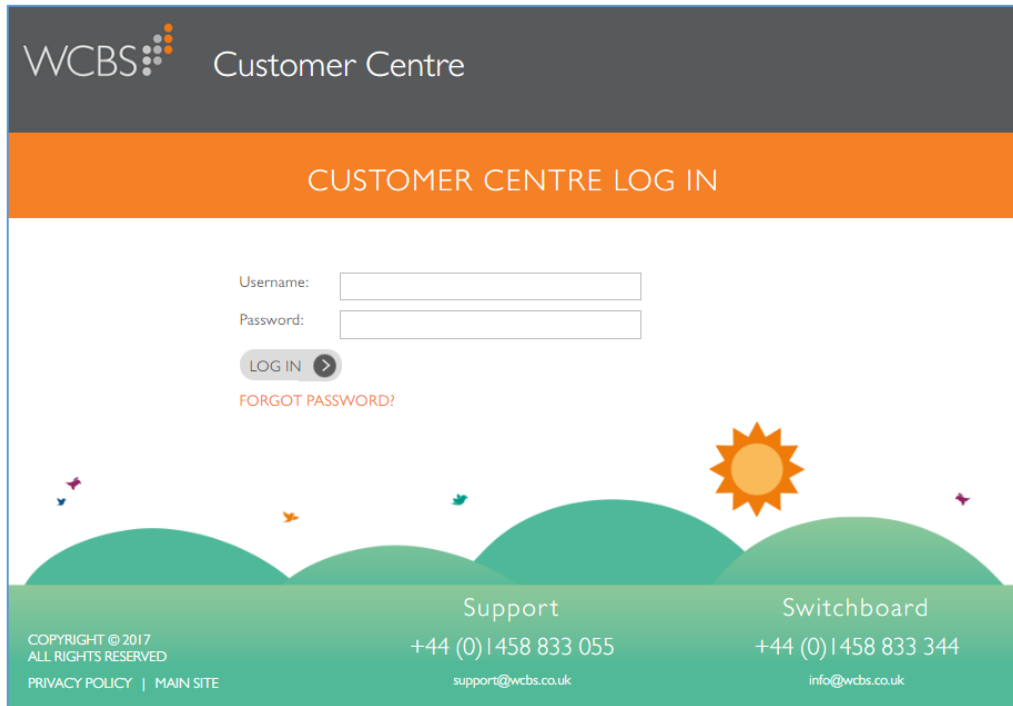
- Click 'Forgot Password?'.

The 'Reset Password – Send Request' page appears.
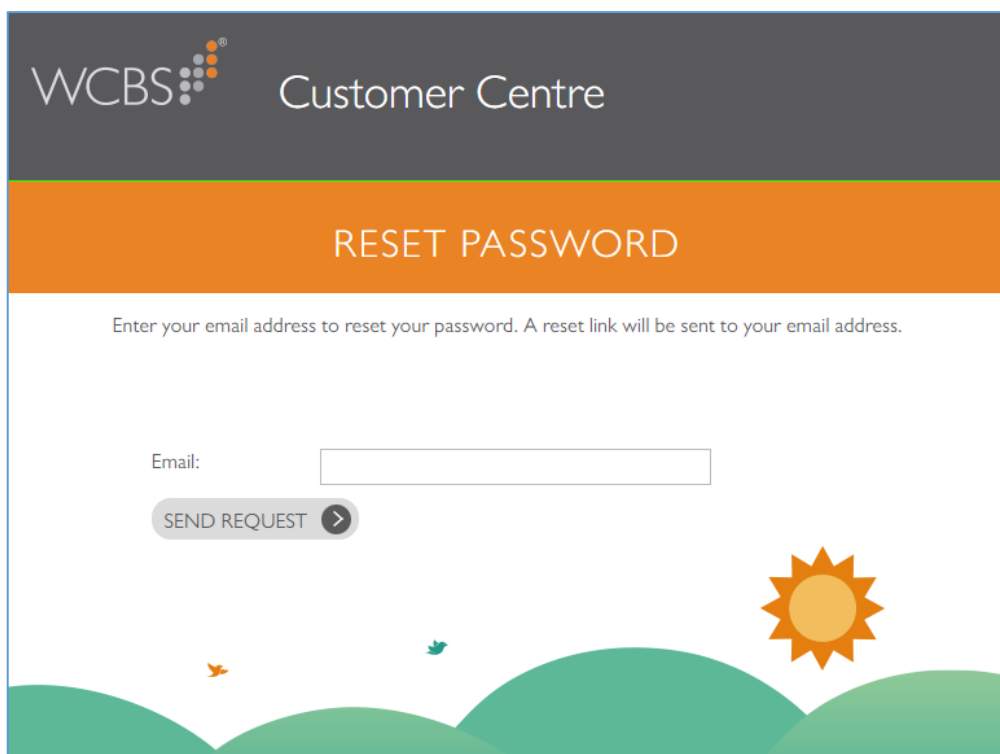
- Enter your email in the 'Email' field and click 'Send Request'.
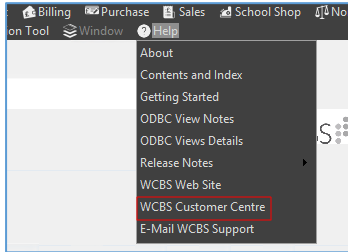
The 'Request Log In' page appears.

- Complete the form and click 'Send Request'.

END   The request is sent to your school's Customer Centre SuperUser for validation. If approved, you will be emailed a link so that you can create a password and complete the account creation process.

3 Accessing the Customer Centre

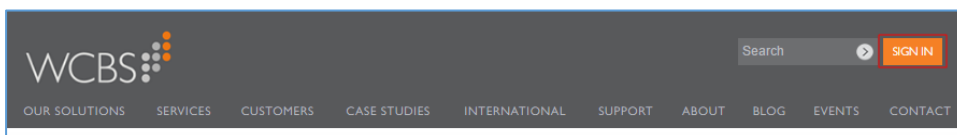There are three ways to access the Customer Centre's 'Login' page:

- In passFINANCE / schoolADMIN (PASS), in the header menu, go to **Help > WCBS Customer Centre**.
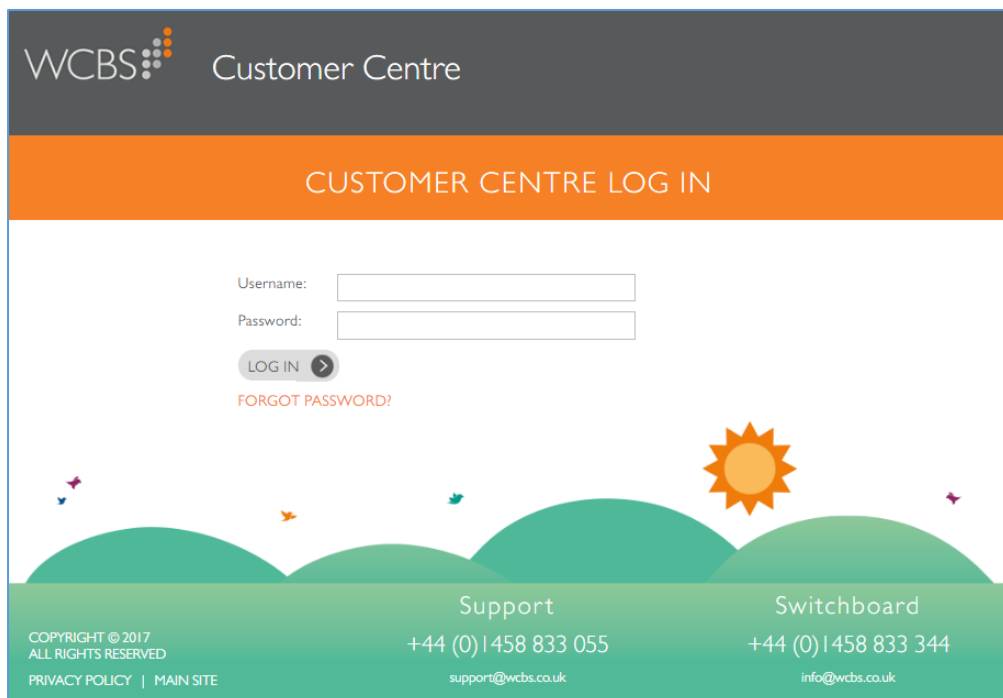

- In 3sysACADEMIC, in the header row, click .

- Go to www.wcbs.co.uk and click 'Sign In' in the top, right-hand corner of the page.

The 'Customer Centre Login' page appears. If you already have an account, log in with your username and password.

ⓘ If you access the Customer Centre from the software, the site can check whether the email associated with your user profile has been used to create an account already. If so, your email will appear in the 'Username' field and you only need to provide your password to log in.

4 Finding Information and Resources

A range of useful information and resources are available on the Customer Centre, including:

- Release bulletins, which provide information about our products, including new releases, legislative changes and product issues relevant to customers.

- Answers to FAQs. These are added by our Support team to share answers to the queries they receive most.

- Archive release documentation, including release notes detailing changes made in previous versions of the software and how to use the added features.

- User guides, available as PDFs and explaining how to use the software.

- Training notes, which support the courses provided by our expert Consultants.

- Report Builder templates.

- Technical documents, such as technical requirements and software compatibility information.

- User group handouts and presentations.

> **TIP** Information about the most recently released software is available from the 'Downloads' page. For details, see *Downloading the Latest Software Information on p.20*.

4.1 Searching for Information and Resources

There are two ways to search for information and resources on the Customer Centre:

- A simple, key word, site-wide search via the header 'Search' field. For details, see *Undertaking Key Word Searches on p.11*.

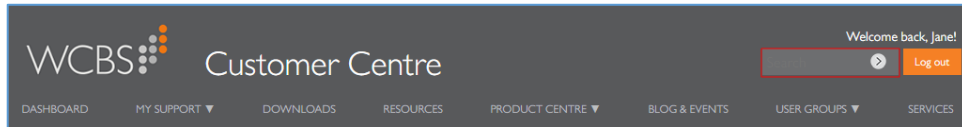- A tailored search of the Resources Library. *Undertaking Tailored Searches on p.12*.

In addition, you can save your searches, if required. For details, see *Saving Search Criteria on p.14*.

4.1.1 Undertaking Key Word Searches

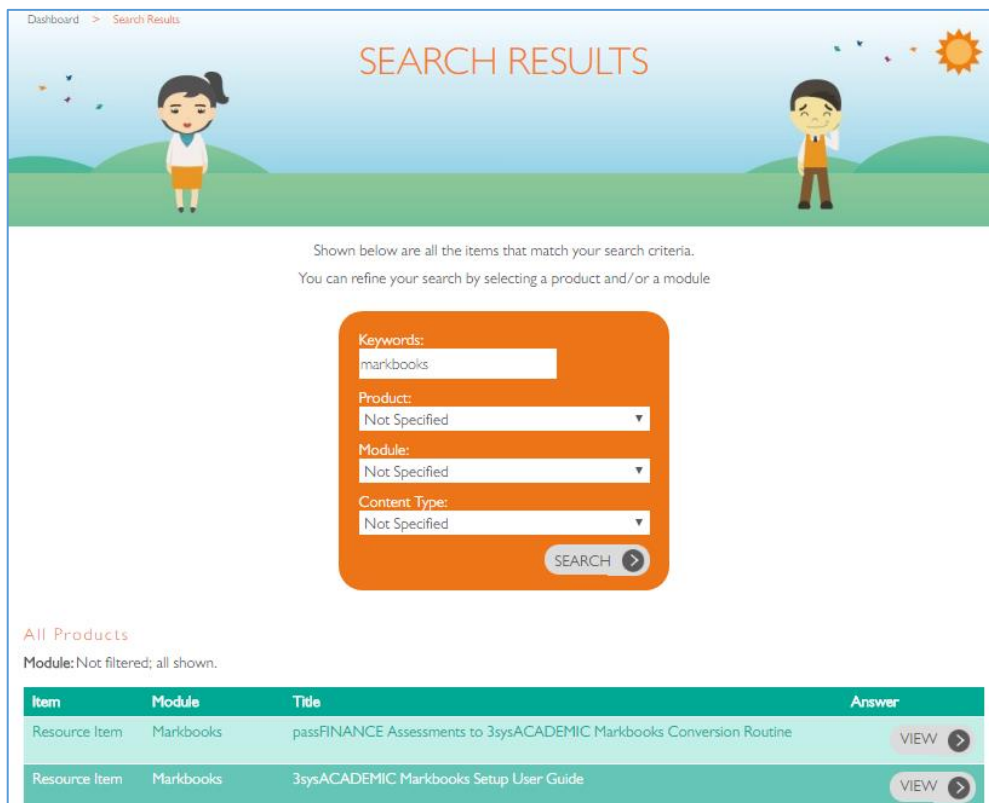**How to Undertake a Key Word Search:**

Type your search criteria in the 'Search' field in the top, right-hand corner of any Customer Centre page.

Click ⊙ OR press ENTER on your keyboard to run the search.

A 'Search Results' page appears, showing a list of resources which match your search criteria.

(Optional) To filter the results, make selections using the 'Product', 'Module' or 'Content Type' drop lists and click 'Search'.

To look at a resource in more detail, click VIEW ⊙ in the relevant row.

Another page opens, providing a summary of the resource and additional options. These options vary depending upon the type of resources selected, but may include being able to download a PDF.
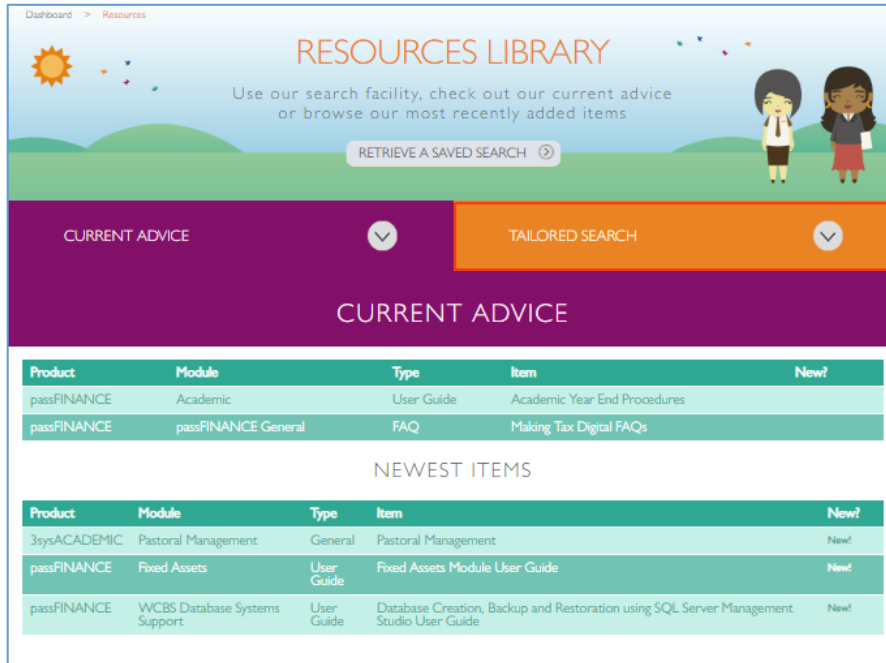
4.1.2 Undertaking Tailored Searches

How to Undertake a Tailored Search:

📍 Log in to the Customer Centre and click 'Resources' in the header menu.

The 'Resources Library' page appears, showing current advice and newly added articles.

- Click 'Tailored Search'.

  The 'Tailored Search' options rise to the top of the page.

- Enter your search criteria in one or more of the fields on the left-hand side of the page. You can search by product type, resource type, keyword or a combination of these.

ⓘ To view a product's sub-categories, topics and modules, click the adjacent ⊘ .

- Click 'Search'.

  Your results appear on the right-hand side or the page.

You can save these search criteria for future use. For details, see *Saving Search* Criteria *on p.14*.

If a resource has recently been added to the Customer Centre, it is highlighted.

You can re-order the search results alphabetically by clicking on the heading.

In the 'Item' column, click on the name of the resource you would like to see in more detail.

4.2 Saving Search Criteria

You are able to save your searches to use later.

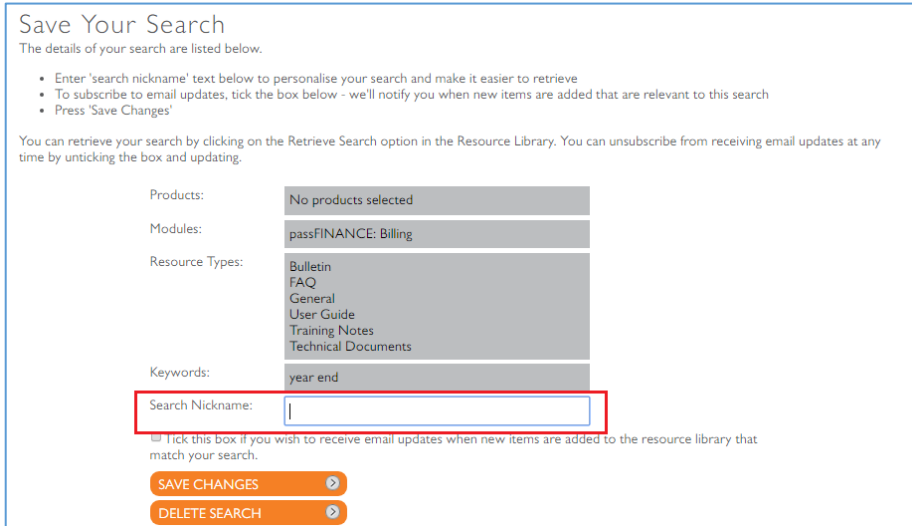## 4.2.1 Saving Searches

How to Save a Search:

Set up a tailored search, as described under *Undertaking Tailored Searches on p.12*.

Click 'Save Search'.

The 'Save Your Search' page appears, showing a summary of your search criteria.

Save Your Search
The details of your search are listed below.

- Enter 'search nickname' text below to personalise your search and make it easier to retrieve
- To subscribe to email updates, tick the box below - we'll notify you when new items are added that are relevant to this search
- Press 'Save Changes'

You can retrieve your search by clicking on the Retrieve Search option in the Resource Library. You can unsubscribe from receiving email updates at any time by unticking the box and updating.

Products:	No products selected
Modules:	passFINANCE: Billing
Resource Types:	Bulletin FAQ General User Guide Training Notes Technical Documents
Keywords:	year end
Search Nickname:	

☐ Tick this box if you wish to receive email updates when new items are added to the resource library that match your search.

SAVE CHANGES

DELETE SEARCH

In the 'Search Nickname' field, enter a name for your search.

(Optional) If you would like to receive email updates when new resources are published that match your search criteria, tick the check box.

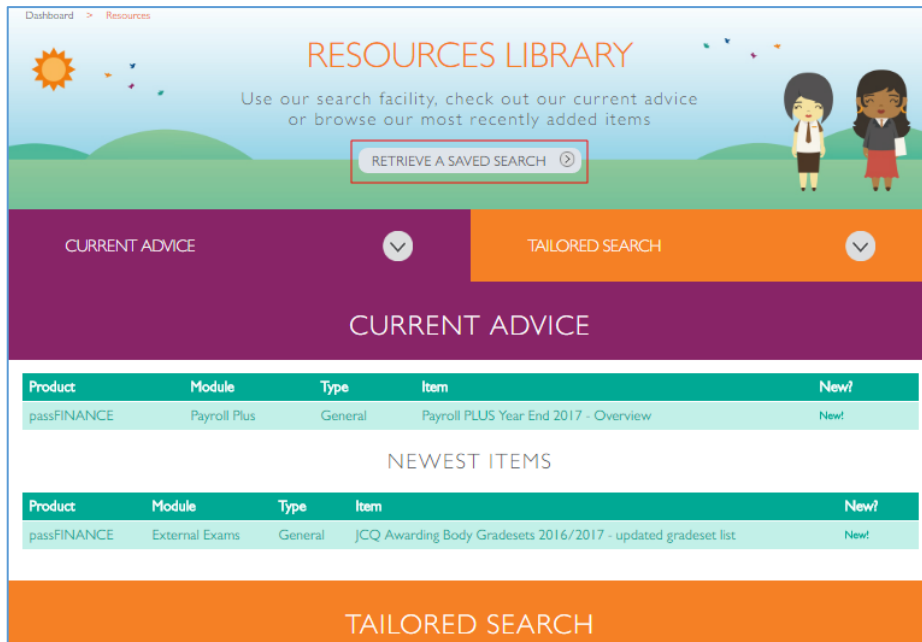END Click 'Save Changes'.

WCBS

4.2.2 Retrieving Saved Searches
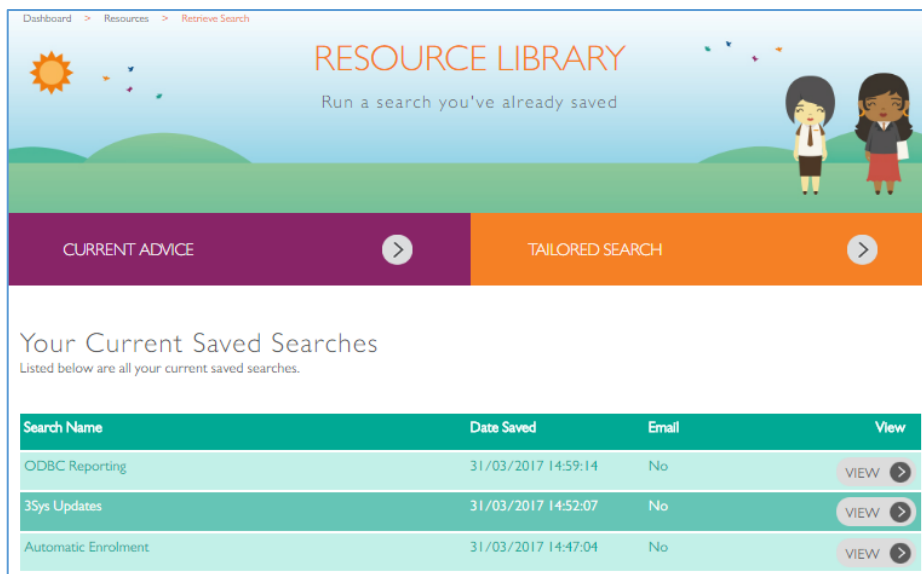
How to Retrieve a Saved Search:

Go to 'Resources' and click 'Retrieve a Saved Search'.

The page refreshes to show a list of saved searches.

- Click VIEW alongside the search you would like to view.

  The 'Retrieve Your Search' page appears, listing the saved search criteria.

- (Optional) Do ONE of the following:
  - To rerun the search and retrieve the results, click 'Retrieve'.
  - To return to the previous page, click 'Cancel'.
  - To remove the search from the site, click 'Delete Search'.

5 Managing Support Issues – 'My Support'

The Customer Centre enables you to:

- Access Support Bulletins. Support Bulletins keep you up-to-date with the latest information about our products and legislation that may affect you.

- Check a list of existing issues and ask to be updated when a specific issue is fixed.

- Report an issue that you would like our team to investigate or help with.

You can do all this via the 'My Support' menu at the top of any page.
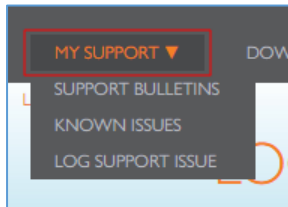
For more information, see:

- *Accessing Support Bulletins, below.*

- *Checking the Known Issues List on p.17.*

- *Logging a Support Issue on p.18 .*

5.1 Accessing Support Bulletins

Support Bulletins provide timely updates about our software and legislative changes that may affect you. They are essential reading for all customers. Designated users are notified when a new Support Bulletin is issued and you can search and access previous editions via the Customer Centre.

How to Access Support Bulletins:

Go to **My Support > Support Bulletins**.

The 'Support Bulletin' page appears.

Use the search options to find bulletins by keyword, product and / or module.

Click 'Search'.

A list of Support Bulletins appears.

Click 'View' alongside the Support Bulletin that you would like to view.

When you have finished viewing the content, click 'Back' in your browser to return to the list of search results.

5.2 Checking the Known Issues List

You can search the list of reported issues by SRF number, product affected, version affected or module.

ⓘ SRF numbers are five digit tracking numbers. They are assigned to an issue when it is reported and make it possible to track who reported the issue and how it is dealt with.

How to Check the Known Issues List:
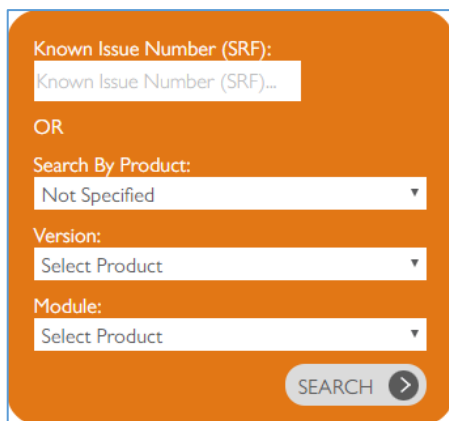
📍 Do ONE of the following:

- Go to **Dashboard** and, in the 'Known Issues' section, use the drop list to select the product you are interested in.

- Go to **My Support > Known Issues**.

The 'Known Issues' page appears.

● Do ONE of the following:

- To search for a specific issue, type the relevant SRF number into the 'Known Issue Number (SRF)' field.

- Select the affected product, version and module using the 'Search By Product', 'Version' and 'Module' drop lists.

● Click 'Search'.

A list of unfixed, known issues matching your search criteria appears.

END (Optional) If you would like to be contacted when a known issue is fixed, click 'Tell Me When There's a Solution'. This sets a notification request, meaning you will be contacted when the issue has been resolved in the latest release.

5.3 Logging a Support Issue

If you find something that is not working as expected in our software, you can let us know by logging a support issue. You can do this by telephone on +44 (0)1458 833 055, by emailing support@wcbs.co.uk or using the Customer Centre's online form.
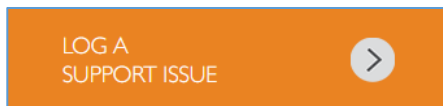
The more information that you provide, the easier it is for our Support team to analyse, reproduce and investigate the issue. Please ensure that you provide as much information as possible.

How to Log a Support Issue:

Do ONE of the following:

- Go to **Dashboard** and click 'Log a Support Issue'.

LOG A
SUPPORT ISSUE

- Go to **My Support > Log a Support Issue**.

The 'Log Support Issue' page appears.

Your contact details populate the fields automatically.

- (Optional) Update the 'Your Details' fields, if required.

- Complete the 'Issue Details' section with as much detail as possible, including:

  - The name of the affected software / program, its version number and the module.

  - A brief summary of your issue.

  - Details of your issue.

Issue Details

Product:	Not Specified ▾
Version:	Not Specified ▾
Module:	Not Specified ▾
Summary of request:	
Details:	

The more information that you provide, the easier it is for our Support team to analyse, reproduce and investigate the issue. This means that it can be resolved more quickly. Please ensure that you provide as much information as possible.

- To attach screenshots and any other supporting files:

  - Click 'Upload'.

  - Click 'Choose File'.

  - Find and select the relevant file.

  - Click 'Upload'.

  - Repeat this sequence until you have attached all your files.

- To remove files attached in error:

  - Click 'Clear Files'.

  - Click on the file that you would like to remove in the list.

Click 'Submit Request'.

The information is sent to our Support team, who will review the issue so it can be addressed appropriately.

6 Downloading the Latest Software Information

The latest versions of WCBS software are downloaded from the Customer Centre, usually by your school's technical staff. Release-specific guides are also available from this page.

To find out more about the latest version of a particular product, click on the relevant tab at the top of the page. A tab is shown for each product that your school has purchased.
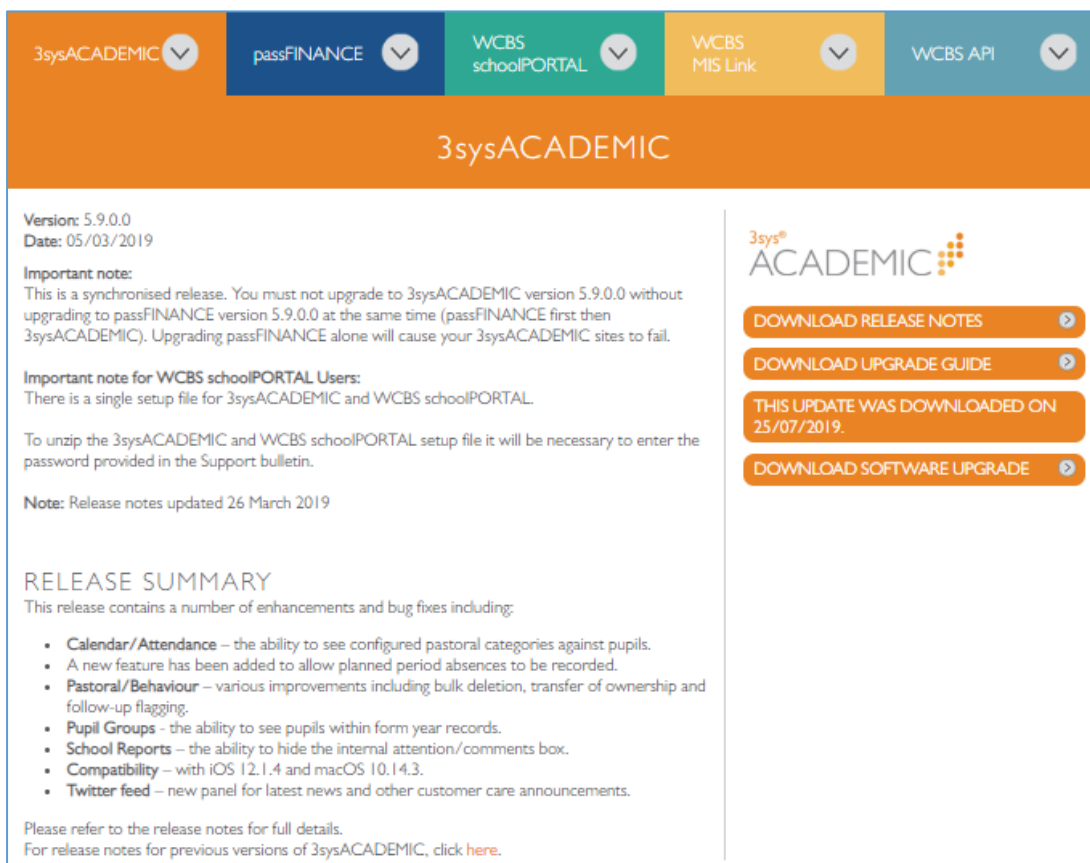
The following example shows the download tab for 3sysACADEMIC version 5.9.

Each product tab includes a useful summary of the release, e.g. key features, prerequisites, etc, as well as links down the right-hand side of the page which you use to download:

- **Release Notes**, which provide users with more detail about enhancements and ODBC views included in the release, instructions on how to use new features, and a list of known issues fixed in this version. Release notes should be circulated to everyone in your school who uses the software.

- **Upgrade Guides**, detailing essential information for technical staff undertaking upgrades. They must be read carefully prior to each upgrade.

- **Supporting User Guides**, which offer more detailed instructions about how to use more complex new features.

- **The latest software**. Only the Customer Centre SuperUser and nominated Download Contact for your school can access new software via this page. All users have access to the related documents however.

Information about features added in previous releases is included in the relevant user guide(s). For more about how to find the appropriate user guides, see *Finding Information and Resources on p.10*.

7 Requesting Enhancements

You can suggest changes and improvements to our products via the Customer Centre. Other customers can vote on these Enhancement Requests, just as you can vote on submissions from other users. You can vote positively or negatively for a proposed change or indicate that it is not relevant to you. Your votes provide a valuable insight into what new features you would find most useful.

Enhancement Requests are reviewed by our Product Managers, who decide which will go into development for a future release. You can see a summary of what has been prioritised for future releases in the latest Product Road Map.

You can download the latest Product Road Map via **Product Centre > Product Road Map**.

Enhancement requests that have been added to the software have **INCLUDED IN LATEST RELEASE** alongside them. To view the release details, click on 'Included in Latest Release' to go to the 'Downloads' page.

For more information, see:

- *Submitting an Enhancement Request, below*.
- *Voting on Enhancement Requests on p.24*.

7.1 Submitting an Enhancement Request

How to Submit an Enhancement Request:

Do ONE of the following:

- On the **Dashboard**, click 'Request Enhancement'.

REQUEST ENHANCEMENT ⊙

- Go to **Product Centre > Enhancement Requests**.

The 'Enhancement Requests' page appears.

- Before submitting an Enhancement Request, please check that it has not already been suggested:

  - Enter search criteria so that you can find any requests similar to yours.
  - Click 'Search'.
  - Scroll down to check the list of results.

Product:
Not Specified ▼
Module:
Select Product ▼
Type:
All Enhancements ▼
SEARCH ⊙

If your enhancement has already been suggested, please ensure that you vote for it. For more information, see *Voting on Enhancement Requests on p.24*.

- If the enhancement does NOT appear in the list already, do ONE of the following:

  - Scroll to the top of the page and click 'Log New Enhancement Request'.

  - Above the enhancement request filter options, select 'Click here to log a new enhancement request'.

  The 'Log Enhancement Request' page appears.

ⓘ Your contact details populate the fields automatically.

- (Optional) Update the 'Your Details' fields, if required.

- Complete the 'Request Details' section with as much detail as possible about your suggested enhancement.

Issue Details

Product:	Not Specified ▾
Version:	Not Specified ▾
Module:	Not Specified ▾
Summary of request:	
Details:	

- (Optional) To attach screenshots and any other supporting files to help us understand your request:

  - Click 'Upload'.

  - Click 'Choose File'.

  - Find and select the relevant file.

  - Click 'Upload'.

  - Repeat this sequence until you have attached all your files.

- To remove files attached in error:

  - Click 'Clear Files'.

  - Click on the file that you would like to remove in the list.

END Click 'Submit Request'.

ⓘ Enhancement requests are reviewed by our Product team on a regular basis to decide which changes should be included in future releases. If an enhancement request is accepted, it will be added to the Customer Centre list for other users to vote on. For more information about voting, see *Voting on Enhancement Requests on p.24.*.
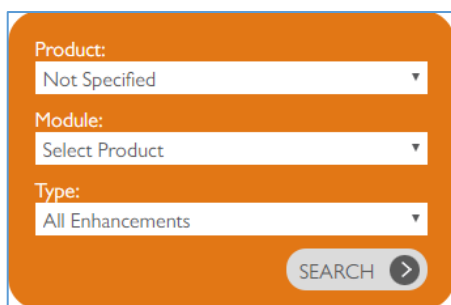
7.2 Voting on Enhancement Requests

Users can vote for proposed software enhancements via the 'Product Centre' section of the Customer Centre, enabling us to find out which improvements our users would like to see most.

How to Vote for Proposed Software Enhancements:

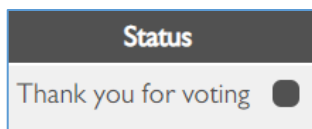Go to **Product Centre > Enhancement Requests**.

The 'Enhancement Requests' page appears.

- (Optional) Use the search options to filter the list of live Enhancement Requests:
    - Enter your search criteria.
    - Click 'Search'.
    - Scroll down to check the list of results.

- For each enhancement, click the relevant voting button.

    - Click [thumbs up] to indicate that you like an enhancement and think that it would benefit your school.

    - Click [thumbs down] to indicate that you do not like an enhancement and think that it would not benefit / would be detrimental to your school.

    - Click NOT RELEVANT if the enhancement is not relevant to you.

The enhancement's status changes to show your vote.

Your feedback is sent to WCBS and our Product Managers use the information to plan future releases.

8 Registering for Training Courses

WCBS runs regular training courses on a wide range of topics to help users learn all they need to know about how to use our software successfully. When you log in to the Customer Centre, you can view details of our recent and forthcoming training courses, including topic, venue and price. You can also register for it online.

To find out more about bespoke training, go to **Services > Book a Training Session**.

How to Register for a WCBS Training Course:

Go to **Blog & Events**.

The 'Blog and Events' page appears.

- (Optional) Click 'Events' to expand this content to fill the page.

- Beneath the training course that you are interested in, click 'Read More'.

 The relevant event overview page appears.

- Read the information and, if you would like to register for the event, complete the 'Your Details' form.

If multiple time slots are available, select your preferred event using the 'Session Time' drop list.

Ensure that you have read and accepted the terms and conditions.

Click 'Submit Registration'.

9 Exploring Bespoke Services

WCBS provides a number of additional services which support your use of our software. These include:

- Bespoke training courses.
- Report design.
- Stationery, including pre-printed and personalised paperwork compatible with our software's standard templates and specially designed email bills.
- Technical services.
- Guidance on third party links.

Bespoke services incur additional costs.

To find out more, click **Services** on any Customer Centre page. Click on the name of the service you want to know more about.
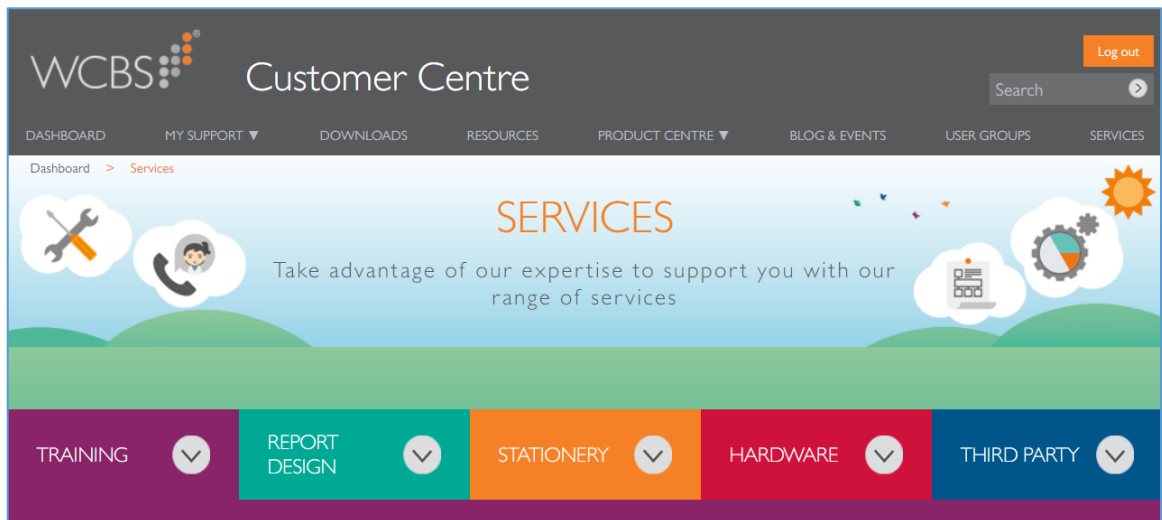
10 Contacting Us via the Customer Centre

If you have any queries, you can contact our friendly and knowledgeable Support team.

10.1 Online Chat

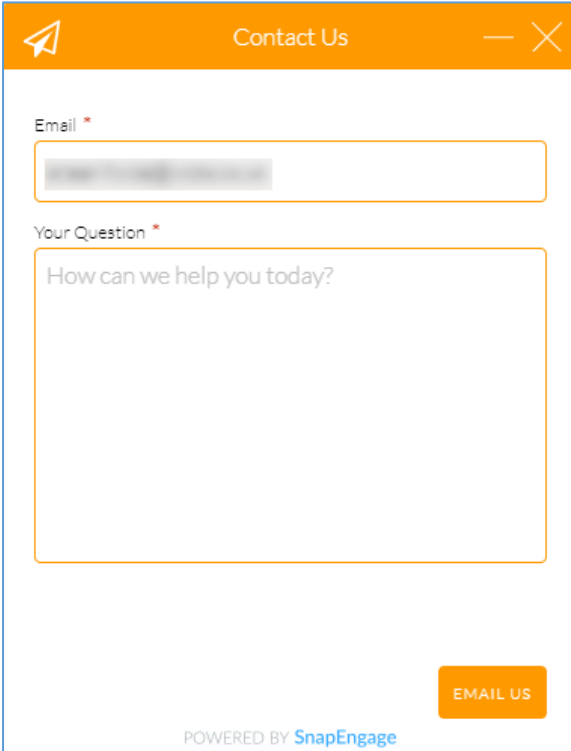You can chat with our Support team via the Customer Centre.

Click on any page to open a new chat window.
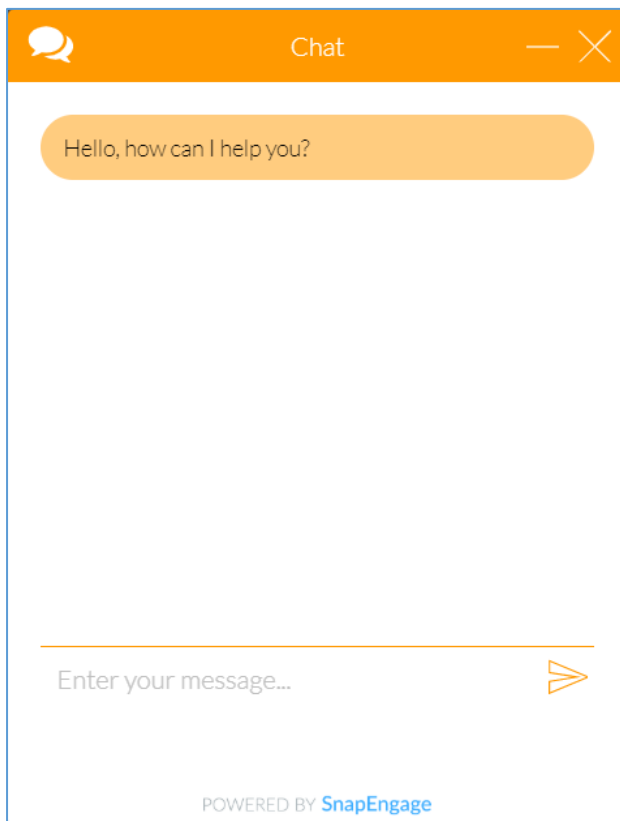
> ⚠️ When online chat is unavailable, you can email our Support team directly from the Customer Centre. For details, see *Email on p.28*.

10.2 Email

You can email our Support team directly from the Customer Centre. Click on any page to open the 'Contact Us' dialog.

ℹ   This option is only available when online chat is unavailable.

For help with the Customer Centre, please email customercentre@wcbs.co.uk.

For support queries, please email support@wcbs.co.uk.

10.3 Telephone

Call +44 (0)1458 833 055. For information about line opening times, click 'My Support' in the Customer Centre.

11 Contacting Us

Helpline	●	+ 44 (0)1458 833055	WCBS
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