

WashConnect®

User Manual—

June 17, 2015
Software Version 1.3.2



ics
Innovative Control Systems®

Innovative Control Systems is an industry leading provider of innovative business solutions in the car wash industry. It is our mission to help car wash operators build successful businesses through advanced control products and management solutions.

Corporate Office: 1349 Jacobsburg Road, Wind Gap, PA 18091 | Production Facility: 3370 Fox Hill Road, Easton, PA 18045
Sales: 800.642.9396 | Email: sales@icscarwashsystems.com | icscarwashsystems.com

Copyright © 2015 Innovative Control Systems, Inc. Portions of this document may contain information that is ICS proprietary.

Information in this manual is subject to change without notice. Companies, names and data used in examples within the manual are fictitious unless otherwise noted. No part of this manual may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose without the express written permission of Innovative Control Systems, Inc.

© 2015 Innovative Control Systems, Inc. All rights reserved.

Innovative Control Systems, Inc.
1349 Jacobsburg Road
Wind Gap, PA 18091
(610) 881-8000

Table of Contents

Chapter 1:
Getting Started 37

- Version Considerations**39
- What’s New**40
- Supports Single-site and Multi-site**41
- System Requirements**.....42
- Software/Hardware Validation**43
- About the Interface**44
- System Overview**45
- About the Menu Bar**50
 - Search for a Menu Item 50
 - Scroll for a Menu Item 52
- About Scroll Buttons**53
- About the Menu Tab**55
- About Workspace Tabs**.....56
- About the Status Bar**57
- About Data Replication**58
- About Users**59
- About Clubs**60
- About Reports**.....61
- About Report Toolbar**.....64
 - About Report Headers 65
 - Scrolling a Multi-Page Report 65
 - Printing a Report 66
 - Export a Report..... 67
 - Zoom In and Zoom Out on a Report..... 68
 - Searching a Report 69
- Starting WashConnect®**.....70
- Logging In**71
 - Changing Default User Login 72

Chapter 2: Report Default Date 73

- Default Date Range**74

Set a Default Date Range	74
Report Default Date preset buttons	76
Select a different date range for an open report	77
Chapter 3:	
Customers	79
About the Manage Menu	80
Add a Customer	81
Add Vehicle	84
Add Recurring Credit Card for Club Memberships	86
Edit Club Member's Billing Date	88
Sort the Columns for the Customer List	89
Edit Vehicle Information	91
Search for a Club Member	91
Terminate a Customer	93
Terminate/Suspend a Customer	94
View Vehicle Transaction History	96
View Membership History	97
Customer Notes or Vehicle Notes	97
Edit a Customer	99
Print a Customer List	100
Export a Customer Membership List	101
Create Customer Mailing Labels using Export to Excel	101
About the Group menu	102
Add a Customer Group	103
Add a Schedule for a Customer Group Profile	104
Edit a Customer Group	105
Delete a Customer Group	106
Chapter 4:	
Clubs	109
About Club Membership	110
About the Reports Menu	112
About the Profitability Report	113
View Profitability Report	113
About the Club Usage Report	115
View the Club Usage Report	116
Expand Club Usage Report	119
About the Vehicle History Report	121
View the Vehicle History Report	122
Vehicle History Report Descriptions	124
About the Club Summary Report	125
View the Club Summary Report	126
Club Summary Report Descriptions	128

- About the Declined Payment Report 129**
 - Search for a Customer from the Declined Payment Report 130
 - Edit Customer Notes in the Declined Payment Report..... 131
 - Edit a Customer in the Declined Payment Report 133
 - Mark Bill in Declined Payment Club Report 133
 - Print the Declined Payment Report..... 134
 - Declined Payment Report Descriptions..... 135
- About the Club Revenue Distribution Report 136**
 - View the Club Revenue Distribution Report..... 136
 - Club Revenue Distribution Report Field Descriptions 138
- About Autobill Revenue Report..... 139**
 - View the Autobill Revenue Distribution Report 140
 - Autobill Revenue Report Descriptions..... 141
- About the Credit Card Expiration Report 142**
 - View Credit Card Expiration Report..... 142
 - Credit Card Expiration Report Descriptions 143
- About the Renewal and Termination Report 144**
 - View the Renewal & Termination Report..... 144
 - Renewal & Termination Report Descriptions..... 145
- About Advance Expiration 146**
 - Advance Expiration for Club Members 146
- Chapter 5:
Fleet 147**
 - About the Fleet Accounts 148**
 - Add a Fleet Account 149
 - Add Member(s) to a Fleet Account 151
 - Add a Vehicle to a Fleet Account 154
 - Edit a Fleet Account 156
 - Edit a Fleet Customer and Edit a Vehicle in a Fleet 156
 - Terminate or Suspend a Fleet Account 157
 - About Fleet Rules 158**
 - Add Fleet Rules..... 159
 - Edit Fleet Rules 160
 - Close Fleet Account Rules..... 160
 - Fleet Rules Examples 161
 - About Fleet Invoice 162**
 - Search for an Invoice 163
 - Fleet Search Field Descriptions..... 164
 - Generate Invoice 164
 - Print an Invoice..... 166
 - Fleet Invoice Field Descriptions 168
 - Export Invoice..... 169

Terminate Fleet Invoice.....	170
Email Invoice.....	170
About Fleet Manage	171
View Invoices with Open Balances	171
Chapter 6: Financial	173
Frequently Asked Questions	176
About the Financial Overview Report	178
View the Financial Overview Report	179
Open a Report from the Financial Overview Report	180
Export Data from the Financial Overview Report.....	181
About the Shift Detail Report	186
View a Shift Detail Report	187
Shift Detail Report Sections	189
Shift Detail Report Example	190
Unverified Journal Entries.....	193
Unverified Shifts.....	194
Shift Detail Report Field Descriptions.....	195
.....	196
About the Credit Card Summary	200
About the Credit Cards Report.....	202
View the Credit Cards Report.....	202
Credit Cards Report Example.....	204
Credit Cards Report Descriptions.....	204
About Credit Cards Reconciliation	205
About the Gift Cards Report	209
View the Gift Cards Report	209
Gift Card Report Example	211
Gift Cards Report Descriptions	212
About the Checks Report.....	213
View the Checks Report.....	213
Checks Report Example.....	215
Checks Report Field Descriptions.....	215
About the Fleet Activity Report	217
View the Fleet Activity Report.....	217
Fleet Activity Report Example	219
Fleet Activity Report Descriptions	220
About the Deposits Report	221
View the Deposits Report	221
Deposits Report Example	222
Deposits Report Descriptions	223

About the Free Wash Report 224
 View the Free Wash Report 224
 Free Wash Report Example 226
 Free Wash Report Descriptions 226

About the Re-Wash Report 228
 View the Re-Wash Report 228
 Rewash Report Example 230
 Rewash Report Descriptions 231

About the Payouts Report 232
 View the Payouts Report 232
 Payouts Report Example 234
 Payouts Report Descriptions 234

About the ROA (Received on Account) Report 235
 View the ROA (Received on Account) Report 236
 Received on Account Report Example 237
 Received on Account Report Descriptions 238

About the Voids Report 239
 View the Voids Report 239
 Voids Report Example 240
 Voids Report Descriptions 241

About the Refunds Report 242

About the Fund Raiser Report 243
 View the Fund Raiser Report 244
 Fund Raiser Example 244

About View Register 245
 Set previous days privilege on View Register Report 245
 Reprint a Customer’s Receipt 246
 View Register Transactions 247

About Book Report 249

Introduction to the Audit Controls menu 249

About the Wash to Register Comparison Report 251
 View the Wash To Register Comparison Report 251
 Wash to Register Comparison Report Example 252
 Wash to Register Comparison Report Descriptions 253

About the Ticket Comparison Report 254
 View the Ticket Comparison Report 254
 Identifying Potential Theft 255
 Ticket Comparison Report Example 256
 Ticket Comparison Field Descriptions 257

About Transactional Detail 258

View Transaction Detail Report.....	258
Transaction Detail Field Descriptions.....	260
About Terminal Balance Report.....	261
View Terminal Balance Report.....	261
Terminal Balance Field Descriptions.....	263
About Sales Commission.....	263
View Sales Commission.....	264
About View Site Tickets.....	265
View Site Tickets.....	265
About the Services Washed Report.....	267
About the Controller Services Report.....	269
View Controller Services Report.....	269
About the Audit Trail Log.....	270
About Cash Management.....	271
About Journals.....	272
Search for a Journal Entry.....	273
View the Journal Entry History.....	274
About Journal History Actions.....	276
Verify or Edit a Journal Entry.....	277
Edit a Verified Journal Entry.....	279
Journal Safe Actions.....	280
Add from Bank.....	281
Add from Other Source.....	282
Convert Currency.....	283
Deposit to Bank.....	285
Remove to Other Source.....	286
Verify Safe.....	287
Print Journal Detail Receipt.....	288
About Terminal Balances.....	289
View Terminal Balances.....	289
About the Operations Report.....	294
View Operations Report.....	294
Operations Report Field Descriptions.....	296
About Ticket Redeemed.....	296
About Ticket Redeemed Summary.....	297
View, Print or Export the Ticket Redeemed Summary.....	297
Ticket Redeemed Summary Field Descriptions.....	299
About Ticket Redeemed Detail.....	299
View Ticket Redeemed Detail.....	300
Ticket Redeemed Detail Field Descriptions.....	302

	Search for a Fuel Ticket Number.....	302
Chapter 7:		
Performance		305
	Performance Reports Menu FAQs	306
	Performance Reports Menu Descriptions	307
	About the Performance Menu.....	308
	About the Dashboard Report	310
	View Dashboard Reports.....	310
	Change Dashboard Cards	312
	View Historical Data	313
	Access to Dashboard Directly through Web Browser	314
	About the Vehicle Statistical Performance Report (VSPR)	315
	View the Vehicle Statistical Performance Report (VSPR)	315
	Vehicle Statistical Performance Report Example	319
	Vehicle Statistical Performance Report Descriptions	320
	Site Selection Search Tools for Vehicle Statistical Performance Report.....	321
	View Daily VSPR	322
	View Annual VSPR	324
	View Weekly VSPR	325
	Empty Sites Selection Tree	325
	About the Performance Gauge Report	327
	View the Performance Gauge report	327
	Performance Gauge Report Example	328
	Performance Gauge Report Descriptions	330
	About the Sales Distribution Report	332
	View the Sales Distribution Report	332
	Sales Distribution Example.....	333
	Sales Distribution Report Descriptions.....	334
	About the Touch 'N Clean Usage Report	335
	View TouchNClean Usage Report	335
	336
	Touch 'N Clean Services Report Descriptions	336
	About RFID Statistics.....	337
	View RFID Transactions Reads.....	338
	RFID Statistics Report	339
	RFID Statistics Report Color Descriptions	340
	RFID Statistics Report Admin Swipes Only	341
	RFID Statistics Report Multiple RFID Reads Only Example	342
	RFID Statistics Report Descriptions.....	343
	About Statistical Comparison Report.....	344
	View Statistical Comparison.....	344
	Statistical Comparison Report Descriptions	346

	About the Projection Report	346
	View the Projection Analysis	346
Chapter 8:	Monitoring System	349
	Monitoring System Menu FAQ	350
	About the Monitoring System	352
	View an Error Code	352
	About Status	354
	View Status	355
	About the Status of Entities, Devices and Components	356
	Site Device Key	358
	Status and Error Message Descriptions	358
	Wash Status	359
	About Event History	361
	View Event History Log	361
	Search for an Event Code	362
	About Device Statistics	365
	View Device Statistics	366
	Device Statistics Descriptions	367
	About Version History	368
	View Version History	369
	Version History Descriptions	370
Chapter 9:	Configuration	371
	Configuration Menu FAQs	373
	Managing Clubs	374
	Managing Fleets	374
	Goods and Services	374
	About Club Services	375
	Add a Club Service	376
	Edit a Club Service	382
	Terminate a Club Service	383
	Reorder Club Service Columns in Ascending/Descending Order	384
	Filter the Club Service List	385
	Club Rules Examples	388
	Wash Club Customer Experience	390
	About Sales Items	392
	Add Sales Item	393
	Set Up Gift Card	401
	About Audio Visual Specifications	403

About Variable Pricing	405
Apply Variable Pricing to Sales Item	405
About Custom Advertise Video	406
About Extra Advertise Video	407
Sort Sales Item List	407
Sales Item Search	407
Edit Sales Item	408
Delete Sales Item	409
About Sales Item PLUs and Profiles	410
Flex / Retail Standard Screen	411
Sensing a High Vehicle Profile	413
Sales Item Descriptions	414
About Packages	417
Packages	418
Create a Package	418
Delete a Package	421
Edit a Package	421
Create an Upsell Package	422
About Frequency Promotion Packages	423
About Wash Books	424
Add Base Wash Sales Item for Wash Book offering	425
Add Wash Book as a Sales Item	426
Purchase Wash Books at the Auto Sentry	428
Recharge Wash Book at Auto Sentry	429
Redeem Wash Book at Auto Sentry	430
View Wash Books in Shift Detail Report	431
Email Wash Book Receipt	432
Sell Wash Books at Convenience Stores	433
About Profiles	434
Add a Profile with a Base Wash and Extra Service	435
Enable Profile	438
Add Extra Services to a Profile	438
Edit a Profile	440
About Schedules	441
Profile and Schedule Descriptions	442
Add Profile Schedule	444
Edit Schedule	445
Delete Schedule	446
Add a Wash Book Profile with Base Washes and Extra Services	447
Schedule a Wash Book Profile	449
About POS Profiles	451
Add a POS Profile	452
Add a POS Profile Schedule	452
About Promotions	454

About Bonus Points	455
Add Bonus Point Promotion	456
Enable Promotion	458
Disable Promotion	459
Terminate Promotion	459
Bonus Points Specific to PLU	460
View Bonus Points	462
Edit Bonus Point Counts	462
View History of Bonus Points Edits	464
Cascade Pricing	465
Cascade Pricing Example	466
Configure Cascade Pricing	467
Apply Cascade Pricing Sales Item	467
About Punch Card	469
Add a Punch Card Promotion	470
View Punch Card Statistics	471
Edit Punch Card Counts	472
View History of Punch Card Edits	474
Customer Date	475
Calendar Date	478
Frequent Car	479
Frequent Customer	480
Discount Price List Promotion	481
About Promo Setup	482
Setup a Frequency Promotion	483
Disable a Frequency Promotion	484
Frequency Promotion Package	485
Disable a Frequency Promotion	490
Frequency Promotion Package	491
About Promo Receipt Text	492
Add Promo Receipt Text	492
Edit Promo Receipt Text	494
Delete a Frequency Promotion Receipt Text	495
About Alerts	496
Subscribe to Email Alerts	497
Test Alerts	498
Send a Test Alert	499
Alert Configuration Example	499
Alert Configuration Dialog Box field descriptions	500
About Export System Data	501
About the Accounting Interface	503

About Manage Accounts	504
Add an Account	504
Terminate an Account	505
Reactivate an Account	506
About Import Accounts	507
Import Chart of Accounts	507
About Payment Account	509
Edit Payment Account	509
About System Items	511
Search for a System Service	512
Edit System Service Items	512
About Commissions	513
About Commissions Positions	514
Add Commission Position	514
Straight Commission	516
About Commissions Eligibility Rules	516
Add Eligibility Rules for a Commission	516
Remove Eligibility Rules	519
Advanced Eligibility Rules	519
About Commissions Schedules	520
Add a Sales Commission Schedule	520
Edit a Sales Commission Schedule	522
Delete a Sales Commission Schedule	523
Sales Commission Example	524
Chapter 10:	
Users	525
Manage Users Example	526
About Security Roles	528
Security Roles	529
Add User Security Role	531
Edit Security Role	532
Delete Security Role	534
Example for Users and Roles	534
About Manage Users	541
Manage Users	541
Add User	543
Search for Users	545
Manage User Field Descriptions	546
Add or Edit Wages for a User	547
Edit User	549
Delete User	551

Add User’s Fingerprints 552
 Delete a Fingerprint 554
 555

Chapter 11: TOUCH POS 557

Open Shift 559
About Add / Remove from POS 562
Close Shift..... 564
PreSell Terminal 566
Point of Sale with PreSell and without RFID. 568
 Purchase new club membership (for the first vehicle) 568
 Renew Club Membership 569
 Add Customer Information 571
 Purchase Club Membership for a 2nd Vehicle (for an Existing Customer) 571
 Terminate or Suspend Vehicles but NOT Customer 572
 Terminate or Suspend Customer and All Vehicles 573
 RFID is Not Working 574
 Available Promotions 575
 Recharge Wash Books 576
About Touch POS Sales Entry 579
About POS and Presell Service Buttons 580
 Enter a New Sales Transaction at Touch POS..... 582
 Paying with a credit card (3rd party credit card provider)..... 586
 Remove Sales Items 586
 Clear Sales Items 587
 Purchase a Club Membership at the Auto Sentry terminal..... 588
 Purchase a Club Membership with a Gift Card at Touch POS. 589
 Split Payments 590
 590
 Search for a Sales Transaction in Touch POS 590
About Voids 591
Void Sales Transaction 592
About Refunds 594
Refund with a Receipt..... 594
Refund without a Receipt 595
Free Wash or ReWash 596
 Free Wash / ReWash 596
 Tracking Rewash or Free Washes 598
ROA (Received on Account)..... 598
Payout 601

- About Ticket Generation 602**
 - Ticket Generation for 5-digit Wash Codes..... 602
 - Setup your Auto Sentry to Redeem Wash Codes 604
 - Ticket Generation for 6-digit Wash Codes..... 605
 - Ticket Generation for 6-digit Wash Code Example 607
- About Stack 607**
- About Generated Books..... 609**
- Chapter 12:
System Setup 611**
 - System Setup FAQs..... 613
 - About the System Setup Menu..... 615
 - Devices 616
 - Profit Centers..... 617
 - About Sales Tax 617**
 - Add Sales Tax 618
 - Edit a Sales Tax 619
 - Assign Inventory to Item Tax Only..... 620
 - About Define Payment Types..... 621**
 - About Report Subscriptions 621**
 - Schedule Report to be sent via Email 621
 - Edit a Report Email Subscription 623
 - Delete a Report Email Subscription..... 624
 - About the Organizational Layout 625**
 - Organizational Layout Advanced Concepts..... 627**
 - Organizational Layout Details..... 627
 - Organizational Layout Diagram with Four Assigned Sites 628
 - About Create Levels 631**
 - Add a Level..... 632
 - Edit a Level..... 633
 - Delete a Level 633
 - About Manage Sites 634**
 - Manage Sites Field Descriptions..... 635
 - Add Site..... 636
 - Edit Site 636
 - Assign Sites 638**
 - Add a Level to the Organizational Layout..... 639
 - Edit a Level in the Organizational Layout 641
 - Delete a Level in the Organizational Layout 642
 - About Define Tokens 644**
 - Add a Token..... 644

Edit Token.....	645
Delete Token.....	646
About Device Groups	647
Add A Device Group.....	648
Assign Devices to a Device Group.....	648
Edit Device Group	649
Delete Device Group	650
Refresh Device Group Configuration	651
Assign Settings for a Device Group.....	652
About Settings	654
Search for Device Settings	654
Settings Description Tables	654
Auto Sentry > Backup.....	657
Auto Sentry > Books.....	657
Auto Sentry > Clubs	657
Auto Sentry > Clubs	658
Sell Both Gift Cards and Clubs at Auto Sentry	659
Renew Membership for existing clubs only Settings	660
Renew Membership with the Option to Select a Different Club Settings.....	661
Auto Sentry > Coin Acceptor.....	663
Auto Sentry > TouchConfiguration > Control	663
Auto Sentry > TouchConfiguration > CreditCard.....	665
Auto Sentry Gift Card	665
Auto Sentry > Gift Card Settings.....	667
Selling Style for Gift Cards at the Auto Sentry	668
Auto Sentry > InBay Wash	669
Auto Sentry > InBay Wash	670
Auto Sentry > TouchConfiguration > Language	670
Auto Sentry Main Options Buttons	670
Auto Sentry > Main Options	673
Set up purchase buttons for the Main Options menu	674
Auto Sentry > TouchConfiguration Pay Cash	676
Auto Sentry > Receipt	677
Auto Sentry > Receipt Footer	678
Auto Sentry > Receipt Header.....	679
Auto Sentry > Service FontColor	679
Auto Sentry > Shift	679
Auto Sentry > StackNControl Communication	679
Auto Sentry > Tickets.....	681
Auto Sentry > TouchDebug.....	681
Auto Sentry > TouchService.....	681
Auto Sentry > Vandalism Deterrent	682
Auto Sentry > VideoQueue Communication.....	683
Auto Sentry > WBC Connection	683
Global > GlobalConfiguration > CentralLogServer	683

Global > GlobalConfiguration > Clubs	684
Global > GlobalConfiguration > Email Server Setup	686
Global > GlobalConfiguration > Global	686
Global > GlobalConfiguration > Hand Services > HandService_AutoStartCarToBay	687
Global > GlobalConfiguration > InvoiceFleet	688
Global > GlobalConfiguration > Reporting	688
Global > GlobalConfiguration > Surcharge Config	688
Global > GlobalConfiguration > Weather	688
Create a Weather API Key	689
Setup Weather Settings for the Vehicle Performance Report	691
Lube > LubeServiceConfiguration	693
POS > TouchPOSConfiguration > Cage Configuration	693
POS > TouchPOSConfiguration > Clubs	693
POS > TouchPOSConfiguration > Credit Card Settings	694
POS > TouchPOSConfiguration > General	694
POS > TouchPOSConfiguration > Hide POS Buttons	696
POS > TouchPOSConfiguration > ProfitCenterDescriptionColor	698
POS > TouchPOSConfiguration > Prompt Settings	700
POS > TouchPOSConfiguration > Quick Money Configuration	701
POS > TouchPOSConfiguration > ReceiptFooter	701
POS > TouchPOSConfiguration > ReceiptHeader	702
POS > TouchPOSConfiguration > ReceiptToPrint	702
POS > TouchPOSConfiguration > Refunds Using Credit Card	703
POS > TouchPOSConfiguration > Report Server	703
POS > TouchPOSConfiguration > SoundSettings	703
POS > TouchPOSConfiguration > Stack Management	704
POS > TouchPOSConfiguration > Stacking	704
POS > TouchPOSConfiguration > Tickets	706
POS > TouchPOSConfiguration > Wash Book POS > WashConnectConfiguration > Menu	706
Touch ES	706
POS > TouchESConfiguration > Config	707
POS > TouchESConfiguration > Configuration	707
POS > TouchESConfiguration > Display	707
POS > TouchESConfiguration > Roller	707
POS > ETLConfiguration > Logging	708
TNC > Component Port > UpCounter	708
About Controller Services	708
Assign an Output or Controller Service	708
About TouchNClean Outputs	710
Add a TouchNClean Service with Output	711
Edit a TouchNClean Output	712
Delete a TouchNClean Output	713
Sorting TouchNClean Outputs	714

TouchNClean Dependency	715
About My Devices	717
Rename a Device	717
Assign Denominations	719
Add Currency Value for the Coin Acceptor	719
About Manage Profit Centers	721
Add Profit Center and Description	721
Edit a Profit Center and Description	723
Delete a Profit Center and Description	725
Disable a Profit Center and Description	726
Assign Devices to a Profit Center	727
Profit Center Order	728
Reorder your list of Profit Centers	729
Performance Indicator	730
Add a Performance Indicator	730
About Performance Indicator	731
About Req Man Hours	732
Set Req. Man Hours	732
Required Man Hours Descriptions	733
Chapter 13: StackNControl	735
About Stack Management	735
Edit the Order of the Stack	736
Edit a Ticket for a car in Stack or Pending Queue	737
Fire Roller	738
Controller Service Buttons	739
Retract Controller Services	739
Move from Stack to Pending	740
Move Vehicle in Pending back to the Stack	741
Stack Color Key	741
About Gate Management	742
Remove Vehicle from Gate Queue	742
Reset the Gate Queue	744
Raise Gate Manually	745
No Wash Purchased	745
Wash Purchased but Gate Doesn't Open	745
Hand Service Management	746
View Vehicles in Hand Services	747
Complete Service for Vehicle in Hand Services	748
Camera for Hand Finished Services Management ..	749
Standard Hand Services Management Graphics	750

Chapter 14:
Time Clock **753**

- Log In and Log Out** **753**
 - Change Labor 755
 - Time Clock Report 756
- Edit Time Clock** **758**
- About the Time Clock Reports** **759**
- Employee Time Clock Summary** **760**
 - View the Employee Time Clock Summary 760
- Employee Time Clock Detail** **762**
 - View the Employee Time Clock Detail Report 762
- Employees Working Today** **764**
 - View the Employee Working Today Report 764
- Employees Not Working Today** **765**
 - View the Employees Not Working Today Report 766

Chapter 15:
What’s New Archive **767**

- VERSION 1.3.2.213** **767**
- VERSION 1.3.1** **774**
- VERSION 1.3.0** **777**
- VERSION 1.2.3** **779**

Chapter 16:
Marketing - Quick Starts **783**

- Coupon Codes - Quick Start** **783**
- Create a Barcode - QuickStart** **785**
- Wash Club Offerings - Quick Start** **786**
- Frequency Promotions - Quick Start** **789**
- Gift Cards Promotional Selling - Quick Start** **790**
- Fund Raiser - Quick Start** **791**
- Sell a discounted Gift Card at Touch POS - Quick Start** **793**
- Sales Commission - Quick Start** **793**
- Fundraiser - If tracking Individual Volunteer Sales - Quick Start** **794**
- FAQs** **795**
- Change History** **809**

List of Figures

Figure 1. Version Considerations for WashConnect 39

Figure 2. Workspace and Menu Bar 44

Figure 3. Menu Search box 51

Figure 4. Menu Search box example 51

Figure 5. Menu Selection Process 52

Figure 6. Scroll Down and Scroll Up..... 53

Figure 7. POS menu item scroll arrow buttons..... 54

Figure 8. Menu Bar Expanded and Collapsed 55

Figure 9. Tabs in the Workspace 56

Figure 10. Status Bar 57

Figure 11. Example Shift Detail Report 61

Figure 12. Gift Cards Report Toolbar (Example)..... 64

Figure 13. Report Header example..... 65

Figure 14. Report Navigator Scroll Buttons 66

Figure 15. Print Button on Report Toolbar..... 66

Figure 16. Export Button on Report Toolbar 67

Figure 17. Export Format Options..... 67

Figure 18. Search Report 69

Figure 19. WashConnect® Icon on Desktop 70

Figure 20. Login Screen 71

Figure 21. Log in Button..... 71

Figure 22. Set Date Range tab 75

Figure 23. Default Date in Status Bar 76

Figure 24. Report Default Date Preset Range buttons..... 76

Figure 25. Year to Date in Status Bar 77

Figure 26. Manage tab 82

Figure 27. Customer Information tab 83

Figure 28. Add Vehicle 84

Figure 29. Credit Card Information on File..... 86

Figure 30. Manage tab - Customer List 89

Figure 31. Select Columns Dialog Box for Customer Membership List 90

Figure 32. Customer Record Selected 93

Figure 33. Customer Information Screen with Sale Promotions Example	100
Figure 34. Customer - Add a Customer to a Group.....	104
Figure 35. Customer - Saved Groups	104
Figure 36. Schedule Dialog Box.....	105
Figure 37. Customer - Edit Group	106
Figure 38. Customer - Group Closed	106
Figure 39. Profitability Report with Total Base Wash popup.....	114
Figure 40. Club Usage Report.....	117
Figure 41. Club Usage Report.....	119
Figure 42. Club Usage Report 91-100% expanded for source detail	119
Figure 43. Vehicle History Date Range	122
Figure 44. Vehicle History Report	123
Figure 45. Club Summary Report	127
Figure 46. Declined Payment Report.....	131
Figure 47. Selected Customer in Declined Payment Report	132
Figure 48. Notes Dialog Box	132
Figure 49. Club Revenue Distribution Report	137
Figure 50. Autobilling Revenue Distribution Report	141
Figure 51. Fleet Account Dialog Box	150
Figure 52. Fleet Accounts.....	152
Figure 53. Fleet Accounts Customer Information tab	153
Figure 54. Fleet Account Scroll Buttons	154
Figure 55. Fleet Rules Dialog Box	159
Figure 56. Fleet Invoice Search Example	164
Figure 57. Invoice example	166
Figure 58. Fleet Invoice Page 1 Example	167
Figure 59. Fleet Invoice Page 2 Example	167
Figure 60. Manage Fleet Unpaid Invoice example	172
Figure 61. Financial Overview Tab	179
Figure 62. Financial Overview Preferences	179
Figure 63. Financial Overview Report	180
Figure 64. Financial Overview Report with Underlined Total	181
Figure 65. Financial Overview Report Export tools.....	182
Figure 66. Financial Overview Report	183

Figure 67. Shift Detail Report Tab 187

Figure 68. Export button located on Shift Detail Report toolbar 188

Figure 69. Shift Detail Report, Page 1 190

Figure 70. Shift Detail Report, Page 2 191

Figure 71. Shift Detail Report page 3 192

Figure 72. Shift Detail Report with Edited Customer Promotions at bottom of report 193

Figure 73. Unverified Journal Entries at the bottom of the Shift Detail Report. 193

Figure 74. Shift Detail Report with Shift(s) not verified hyperlink 194

Figure 75. Credit Cards tab 201

Figure 76. Credit Cards Summary Example 201

Figure 77. Credit Cards tab 203

Figure 78. Credit Cards Report Example 203

Figure 79. Shift Detail Report with Total Credit Cards amount shown 206

Figure 80. Credit Card Processor on-line login screen - translink example 207

Figure 81. Translink Credit Card Processor’s Report Detail page example 207

Figure 82. Credit Cards Report 208

Figure 83. Gift Cards tab 210

Figure 84. Gift Card Report Toolbar 210

Figure 85. Gift Card Report 211

Figure 86. Checks tab 214

Figure 87. Checks Report 215

Figure 88. Fleet Activity tab 217

Figure 89. Fleet Activity - Customer(s) dialog box 218

Figure 90. Fleet Activity Report Example 219

Figure 91. Deposits Report 222

Figure 92. Free Wash Report 226

Figure 93. Rewash Report Example 230

Figure 94. Payouts Report Example 234

Figure 95. Received on Account Register Report 237

Figure 96. Voids Register Report 240

Figure 97. Refunds Report 243

Figure 98. Fund Raiser Register Report 244

Figure 99. View Register tab 246

Figure 100. View Register Unlimited Club Transaction Example 247

Figure 101. View Register Transaction Details example	248
Figure 102. Book Report Example.....	249
Figure 103. Wash to Register Comparison Report.....	252
Figure 104. Ticket Comparison Example	256
Figure 105. Transactional Detail tab and toolbar	258
Figure 106. Transaction Detail	259
Figure 107. Terminal Balance Report.....	262
Figure 108. Salesman Commission Report	264
Figure 109. View Site Tickets Example.....	266
Figure 110. Services Washed Report	268
Figure 111. Controller Services	270
Figure 112. Audit Trail Example.....	271
Figure 113. Journal Entry Cash Detail Popup	274
Figure 114. Select Journal Entry.....	275
Figure 115. View Journal History example.....	275
Figure 116. Journal History with a cash detail pop-up.....	276
Figure 117. Verify Journals Dialog Box	278
Figure 118. Journals Verified Time and Date Stamp.....	279
Figure 119. Verified Journal.....	280
Figure 120. Safe Actions Buttons.....	281
Figure 121. Safe Action - Add from Bank	282
Figure 122. Safe Action - Add from Other Source	283
Figure 123. Convert Currency Journal Entry dialog box	284
Figure 124. Convert Journal Entry.....	284
Figure 125. Safe Action - Convert Currency.....	285
Figure 126. Safe Action - Deposit to Bank	286
Figure 127. Safe Action - Remove to Other Source.....	287
Figure 128. Safe Action - Verify Safe.....	288
Figure 129. Terminal Balances example of Touch 'N Clean (TNC).....	290
Figure 130. Terminal Balances AS - Flex Far Lane	291
Figure 131. Terminal Balances Lobby POS.....	292
Figure 132. Terminal Balances Safe	292
Figure 133. Terminal Balances Cash On Hand	293
Figure 134. Operations Report.....	295

Figure 135. Ticket Redeemed Summary 298

Figure 136. Ticket Redeemed Detail. 301

Figure 137. Dashboard - real time example. 311

Figure 138. Dashboard tab banner with Total Cars Washed per site 312

Figure 139. Settings dialog box 312

Figure 140. Dashboard Settings 313

Figure 141. Vehicle Performance tab. 316

Figure 142. Vehicle Performance tab with Preferences. 317

Figure 143. Vehicle Statistical Performance with Day Resolution and Weather icons 318

Figure 144. Vehicle Statistical Performance Report Example 319

Figure 145. Example Organizational Layout 322

Figure 146. Site Selection Tree with Day Resolution 323

Figure 147. Site Selection Tree with Annual Resolution 324

Figure 148. Empty Site Selection Tree 326

Figure 149. Performance Gauge Tab 327

Figure 150. Performance Gauge Report 329

Figure 151. Sales Distribution tab 332

Figure 152. Sales Distribution Report 334

Figure 153. TouchNClean Usage Tab. 335

Figure 154. Touch 'N Clean Services Report. 336

Figure 155. RFID Statistics tab 338

Figure 156. RFID Statistics Report 339

Figure 157. **RFID Statistics** Report Admin Swipes Only 341

Figure 158. **RFID Statistics** Report Multiple RFID Reads Only 342

Figure 159. Statistical Comparison tab 344

Figure 160. Statistical Comparison Report Example. 345

Figure 161. Projection Analysis 347

Figure 162. Projection Analysis Chart 348

Figure 163. Monitoring System Site Device. 352

Figure 164. Site Status component error message. 353

Figure 165. Event Code for Error Message Coin Acceptor example 353

Figure 166. Component Error Message. 355

Figure 167. Site Status. 356

Figure 168. Devices and Components. 357

Figure 169. Entity, Device and Component Status Icons	358
Figure 170. Wash Status tab	360
Figure 171. Event History Tab.....	361
Figure 172. Event History Tab.....	363
Figure 173. Event History.....	364
Figure 174. Device Statistics	366
Figure 175. Site Device Statistics Example.....	367
Figure 176. Version History	369
Figure 177. Version History	370
Figure 178. Club Services Tab.....	377
Figure 179. Add Club Service Dialog Box.....	378
Figure 180. Multi-Rule Clubs.....	381
Figure 181. Warning Message	383
Figure 182. Club Services Columns.....	384
Figure 183. Sales Items tab	394
Figure 184. Sales Item Dialog Box.....	396
Figure 185. Custom Buttons with Videos Enabled from Auto Sentry flex.....	399
Figure 186. Sales Items List	401
Figure 187. Sales Items tab	402
Figure 188. Gift Card Dialog Box.....	402
Figure 189. Variable Pricing on Auto Sentry screen example.....	405
Figure 190. Sales Items tab	405
Figure 191. Sales Items Variable Price	406
Figure 192. Sales Items & Profile for Retail menu Wash Options Example	410
Figure 193. Additional Standard Screen Flex / Retail Buttons.....	411
Figure 194. Packages Tab.....	418
Figure 195. Package setup.....	420
Figure 196. Wash Book tab	426
Figure 197. Add new Wash Book.....	427
Figure 198. Profile Tab	436
Figure 199. Profile Dialog Box	436
Figure 200. Base Dialog Box	437
Figure 201. Extra Dialog Box.....	439
Figure 202. Profile with Base Washes and Extra Services	439

Figure 203. Schedule Dialog Box..... 444

Figure 204. Profile Tab 447

Figure 205. Profile Dialog Box 448

Figure 206. Base Dialog Box 448

Figure 207. Schedule Dialog Box..... 450

Figure 208. POS Profiles 451

Figure 209. Schedule POS Profile 453

Figure 210. Available Promotions Example..... 455

Figure 211. Promotions list 456

Figure 212. Promotion - Bonus Point..... 457

Figure 213. Sales Item Bonus Points Example..... 461

Figure 214. Vehicle History 463

Figure 215. Update Customer Information Bonus Points..... 463

Figure 216. Customer Notes for Customer’s Bonus Points Edits 465

Figure 217. Cascade Pricing Discount Visual Diagram..... 466

Figure 218. Cascade Price for Express Basic Wash example..... 468

Figure 219. Available Promotions screen with Cascade Pricing example..... 469

Figure 220. Promotions - Punch Card 470

Figure 221. Available Promotions at POS..... 471

Figure 222. Customers Manage Punch Card Counter 472

Figure 223. Vehicle History 473

Figure 224. Update Customer Information Punch Card 473

Figure 225. Customer Notes for Customer’s Punch Card Edits..... 475

Figure 226. Promotions Customer Date 476

Figure 227. Customer Information, Promotions, Birthday Example 477

Figure 228. Promotions Calendar Date..... 478

Figure 229. Promotions Frequent Car 479

Figure 230. Frequent Customer Promotion..... 481

Figure 231. Discount Price List example of discount Types..... 482

Figure 232. Sales Items Cascading Pricing Promo example..... 486

Figure 233. Package tab for Frequency Promotion Discount 487

Figure 234. Frequency Promotion Receipt Text example..... 488

Figure 235. Promo Setup for cascading price promo example..... 489

Figure 236. Settings to allow cascading pricing discount wash codes 489

Figure 237. Promo Receipt Text New Receipt Example.....	493
Figure 238. Alerts tab	497
Figure 239. Alert Email Test.....	498
Figure 240. Alert Configuration Dialog Box at Corporate Login.....	500
Figure 241. Export System Data tab.....	502
Figure 242. Accounting Interface Payment Account	510
Figure 243. System Services List	512
Figure 244. Accounts (System Service)	513
Figure 245. Commission Positions	514
Figure 246. Commission Position	515
Figure 247. Commission Eligibility Rules	517
Figure 248. Eligibility Rule	518
Figure 249. Advanced Eligibility Rules.....	520
Figure 250. Commission Schedule Example	521
Figure 251. Commission Schedule Example	522
Figure 252. Commission Schedule Delete Example	523
Figure 253. Manage Users Example	527
Figure 254. Roles Dialog Box.....	530
Figure 255. Regional Manager Role	531
Figure 256. Regional Manager Role Example	533
Figure 257. Example Levels and Organizational Layout	535
Figure 258. Security Roles	535
Figure 259. Privileges for Two Security Roles	536
Figure 260. Two Users with Different Security Roles	537
Figure 261. Regional VP User	538
Figure 262. List of Users	538
Figure 263. Invalid and Valid Login Locations	539
Figure 264. Two Differently configured User Menus	540
Figure 265. Manage Users	542
Figure 266. Add User	544
Figure 267. Manage Users employee list	548
Figure 268. User Wages screen	548
Figure 269. Edit User	550
Figure 270. User Fingerprints.....	552

Figure 271. Fingerprint Captured Print message. 553

Figure 272. Capture Print successfully registered message. 553

Figure 273. User - Capture Fingerprints 554

Figure 274. Delete User Fingerprints 555

Figure 275. Touch POS Screen 558

Figure 276. Open Shift tab. 560

Figure 277. Add / Remove tab 563

Figure 278. Close Shift tab. 565

Figure 279. Touch PreSell Sales Screen. 568

Figure 280. Club Expired Dialog box 569

Figure 281. Renew Club Credit Card Renewal Options 570

Figure 282. Available Promotions screen example. 576

Figure 283. Open Shift - Recharge My Wash Books button 577

Figure 284. Available Recharge Washes screen 578

Figure 285. Touch POS Service Color grouped buttons 581

Figure 286. Touch POS Sales entry screen 583

Figure 287. Inventory Search 583

Figure 288. Payment(s) Touch POS screen. 584

Figure 289. 3rd Party Credit Card - Select Card screen 586

Figure 290. Void Transaction screen 593

Figure 291. ROA dialog box. 599

Figure 292. ROA Payment Screen without an invoice number. 600

Figure 293. ROA Payment(s) screen check example. 600

Figure 294. PayOuts screen 601

Figure 295. Ticket Generation screen 603

Figure 296. Ticket Generation screen 606

Figure 297. Open Shift Stack button 608

Figure 298. Sales Tax 618

Figure 299. Sales Tax Dialog Box. 618

Figure 300. Sales Tax Accounts Dialog box example 619

Figure 301. Sales Tax Dialog Box. 620

Figure 302. Report Subscription tab 622

Figure 303. Report Subscriptions tab. 622

Figure 304. Organizational Layout Concept Diagram 626

Figure 305. Organizational Layout with Four Assigned Sites	628
Figure 306. Organizational Layout with Eight Assigned Sites.	629
Figure 307. Four Sites with NJ as a Parent	629
Figure 308. Login Screen and Site Selection Tree Examples	630
Figure 309. Level and Site Icons.	630
Figure 310. Create Levels Tab.	632
Figure 311. Create Levels Tab.	633
Figure 312. Create Levels Tab.	633
Figure 313. Delete Level Warning.	634
Figure 314. Cannot Delete Level Warning Message	634
Figure 315. Site Selected to Edit	636
Figure 316. Site Contact Dialog Box.	637
Figure 317. Assign Sites	639
Figure 318. Assigning Sparkle Car Wash to Sparkle Site	639
Figure 319. Organization Layout / Assign Site	640
Figure 320. Site Selected to Edit	641
Figure 321. Organization Layout / Assign Site	641
Figure 322. Level Selected to Delete	642
Figure 323. Delete Site Warning	643
Figure 324. Cannot Delete Group Warning Message.	643
Figure 325. Define Tokens	644
Figure 326. Token Dialog Box.	645
Figure 327. Token Dialog Box.	645
Figure 328. Device Groups example	648
Figure 329. Device Group	648
Figure 330. Assign Devices to Device Group.	649
Figure 331. Edit Device Group	650
Figure 332. Refresh Device Configuration	652
Figure 333. Device Group Settings example.	653
Figure 334. Passive Sell Style for Clubs and Gift Cards.	659
Figure 335. Active Sell Style for Club Membership	660
Figure 336. Settings Renew Membership with Option to Select a Different Club	661
Figure 337. Auto Sentry Main Menu, Gift Card Passive Sell Style.	668
Figure 338. Auto Sentry Main Menu, Gift Card Active Sell Style.	669

Figure 339. Hierarchy of buttons on Main Options screen. 671

Figure 340. Settings for Main Options. 675

Figure 341. Auto Sentry Main Menu Options 675

Figure 342. Global Settings for Prorate Clubs. 685

Figure 343. Weather Underground API Key form 690

Figure 344. Weather Underground API Key example 691

Figure 345. Controller Services 709

Figure 346. Controller Service Add or Edit dialog box. 709

Figure 347. Add TNC Service. 711

Figure 348. Add TouchNClean Output Dialog Box 711

Figure 349. Edit TouchNClean Output. 712

Figure 350. Edit TNC Outputs Dialog Box. 713

Figure 351. TouchNClean Output Termination Warning Message 714

Figure 352. TNC Service 714

Figure 353. TouchNClean Wash Service Dependency. 716

Figure 354. Site Device List 718

Figure 355. Assign Denominations Tab 719

Figure 356. Assign Denominations Dialog Box 720

Figure 357. Profit Center Descriptions. 722

Figure 358. Profit Center Description Dialog Box 722

Figure 359. Profit Center Description 724

Figure 360. Edit a Profit Center Description 724

Figure 361. Profit Center Description 725

Figure 362. Manage Profit Center Description 726

Figure 363. Profit Center Dialog Assign Device Dialog Box 727

Figure 364. Profit Center Order tab example 729

Figure 365. Performance Indicator Add Example 731

Figure 366. Req. Man Hours 733

Figure 367. Ticket ID and Details for the Selected car in the Stack 738

Figure 368. Controller Services example 739

Figure 369. Gate queue area example of 3 lanes. 743

Figure 370. Gate Management from the POS. 743

Figure 371. Gate Management tab with Double Tunnels on Touch ES. 744

Figure 372. Hand Service Mgmt tab. 747

Figure 373. Hand Service Mgmt displaying Wash Ticket 748

Figure 374. Hand Service Mgmt Tab (camera) Example 749

Figure 375. Hand Service Mgmt with close up and wash Ticket example 750

Figure 376. Hand Service Mgmt standard icons 752

Figure 377. Log In / Log Out Employee ID 755

Figure 378. Edit Time Clock Employee Search Results List..... 758

Figure 379. Employee Time Clock Summary Report sample..... 761

Figure 380. Employee Time Clock Details Report sample..... 763

Figure 381. Employees Working Today sample report 765

Figure 382. Employees Not Working Today Report sample 766

Figure 383. Auto Sentry Main Options Coupon Code button..... 785

Figure 384. Add Fundraiser Sales Item 791

Figure 385. Main Options Screen on Auto Sentry Touch Screen 793

List of Tables

Table 1. Date Range FAQs	77
Table 2. Profitability Report Descriptions	114
Table 3. Club Usage Report Field Descriptions	120
Table 4. Vehicle History Report Descriptions	124
Table 5. Club Summary Report Field Descriptions	128
Table 6. Declined Payment Description	135
Table 7. Club Revenue Distribution Report	138
Table 8. Autobill Revenue Report	141
Table 9. Credit card Expiration Report	143
Table 10. Renewal & Termination Report	145
Table 11. Fleet Invoice Find Account Search Field Descriptions	164
Table 12. Fleet Invoice Field Descriptions	168
Table 13. Financial Menu FAQs	176
Table 14. Register Reports Descriptions	177
Table 15. Financial Overview Report Descriptions	184
Table 16. Shift Detail Report Field Descriptions	196
Table 17. Credit Cards Report Descriptions	204
Table 18. Checks Report Field Descriptions	216
Table 19. Fleet Activity Report	220
Table 20. Deposits Report Field Descriptions	223
Table 21. Free Wash Report Field Descriptions	227
Table 22. Rewash Report Descriptions	231
Table 23. Payouts Report Descriptions	234
Table 24. Received on Account Report Descriptions	238
Table 25. Voids Report Descriptions	241
Table 26. Wash to Register Comparison Descriptions	253
Table 27. Ticket Comparison Field Descriptions	257
Table 28. Transaction Detail Field Descriptions	260
Table 29. Terminal Balance Report Descriptions	263
Table 30. View Journal History and Verify Journal Action Descriptions	276
Table 31. Operations Report field descriptions	296
Table 32. Ticket Redeemed Summary field descriptions	299
Table 33. Ticket Redeemed Summary Field Descriptions	302
Table 34. Performance Menu FAQs	306

Table 35. Performance Menu Report Descriptions 307

Table 36. Vehicle Statistical Performance Report Descriptions 320

Table 37. Sales Distribution Report Descriptions. 334

Table 38. TouchNClean Services Report Descriptions 336

Table 39. RFID Statistics Color Code Key. 340

Table 40. **RFID Statistics** Report Descriptions 343

Table 41. **RFID Statistics** Report Descriptions 346

Table 42. Monitoring System Menu FAQs 350

Table 43. Status and Error Message Descriptions 359

Table 44. Event History Descriptions 364

Table 45. Device Statistics Descriptions 367

Table 46. Version History 370

Table 47. Configuration Menu FAQs 373

Table 48. Club Service Descriptions 386

Table 49. Sales Item Descriptions 414

Table 50. Profiles and Schedule Descriptions 442

Table 1. Alert Configuration Dialog Box 500

Table 2. Payment Account Field Descriptions 511

Table 3. Users Menu FAQs 526

Table 4. User Field Descriptions. 546

Table 5. System Setup FAQs 613

Table 6. Manage Sites Field Descriptions 635

Table 7. Auto Sentry Backup 657

Table 8. Auto Sentry Books 657

Table 9. Auto Sentry Clubs. 658

Table 10. Auto Sentry Coin Acceptor. 663

Table 11. Auto Sentry TouchConfiguration Control 663

Table 12. Auto Sentry TouchConfiguration Credit Card 665

Table 13. Auto Sentry Credit Card. 665

Table 14. Auto Sentry Gift Card Settings. 667

Table 15. Auto Sentry InBay Wash 670

Table 16. Auto Sentry TouchConfiguration Language 670

Table 17. Auto Sentry Main Options 673

Table 18. Auto Sentry TouchConfiguration Pay Cash 676

Table 19. Auto Sentry Receipt 677

Table 20. Auto Sentry Receipt Footer 678

Table 21. Auto Sentry Receipt Header 679

Table 22. Auto Sentry Service FontColor 679

Table 23. Auto Sentry Shift 679

Table 24. Auto Sentry StackNControl Communication 679

Table 25. Auto Sentry Tickets 681

Table 26. Auto Sentry TouchDebug 681

Table 27. Auto Sentry TouchService. 681

Table 28. Auto Sentry Vandalism Deterrent 682

Table 29. 683

Table 30. Auto Sentry WBC Connection 683

Table 31. Global Configuration CentralLogServer. 683

Table 32. 684

Table 33. Global EmailServer Setup 686

Table 34. Global Global. 686

Table 35. Global Hand Services HandService_AutoStart CarToBay. 687

Table 36. Global Invoice Fleet. 688

Table 37. Reporting 688

Table 38. Global Surcharge Config 688

Table 39. Weather. 688

Table 40. Lube Lube Service Configuration. 693

Table 41. POS TouchPOSConfiguration Cage Configuration. 693

Table 42. POS TouchPOSConfiguration Clubs 693

Table 43. POS TouchPOSConfiguration Credit Card Settings 694

Table 44. POS TouchPOSConfiguration General 694

Table 45. POS TouchPOSConfiguration Hide POS Buttons 696

Table 46. POS TouchConfiguration LayoutDirection 696

Table 47. ProfitCenterDescriptionColor 698

Table 48. Prompt Settings 700

Table 49. Quick Money Configuration. 701

Table 50. ReceiptFooter 701

Table 51. ReceiptHeader 702

Table 52. ReceiptToPrint 702

Table 53. Refunds Using Credit Card 703

Table 54. POS TouchPOSConfiguration Report Server 703

Table 55. POS TouchPOSConfiguration SoundSettings 703

Table 56. Stack Management 704

Table 57. Stacking.....704

Table 58. Tickets706

Table 59. Wash Book706

Table 60. Menu706

Table 61. Config.....707

Table 62. Configuration707

Table 63. Display707

Table 64. Roller707

Table 65. Logging.....708

Table 66. UpCounter708

Table 67. Req. Man Hours Descriptions.....734

Table 68. Req. Man Hours Descriptions.....734

Table 69. Stack Management736

Table 70. Stack Management Example of a Popup Bubble740

Table 71. Document Change History.....809

CHAPTER 1:


GETTING STARTED

Welcome to Innovative Control Systems (ICS), and the industry leading car wash management system, *WashConnect*®. Utilizing the latest internet technology, *WashConnect*® connects you to the information you need most no matter where you are in the world as long as you have an internet connection. Our powerful, scalable system helps operators manage the critical day to day processes like reporting, workflow, scheduling, and device management.


Anticipating the most essential activities a site manager performs to administer clubs, fleets and other membership programs, *WashConnect*® provides highly detailed analysis of your membership programs with all of the different reports. Maintaining flexible relationships, auto billing for club customers, tracking usage, analyzing membership programs, real-time replication and error checking are just to name a few of the benefits of *WashConnect*®. For wash clubs, you can edit club rules and configure club settings. For your unattended, in-bay wash terminals, you can set up sales items, profiles and fleets. For your Touch 'N Clean bays, you can configure Touch 'N Clean services.


 See "Version Considerations" on page 39.

 See "Wash clubs" on page 40.

 See "What's New" on page 40.

 See "System Requirements" on page 42.

 See "System Overview" on page 45.

 See "About the Menu Bar" on page 50.



See “About Scroll Buttons” on page 53.



See “About the Menu Tab” on page 55.



See “About Workspace Tabs” on page 56.



See “About the Status Bar” on page 57.



See “About Data Replication” on page 58.



See “About Users” on page 59.



See “About Clubs” on page 60.



See “About Reports” on page 61.



See “Starting WashConnect®” on page 70.



See “Logging In” on page 71.

Version Considerations

The contents of this document are based on version 1.3.2.

You can view the software versions at any time while working in *WashConnect*®.

- Click the **Version** text link to view the current Versions.

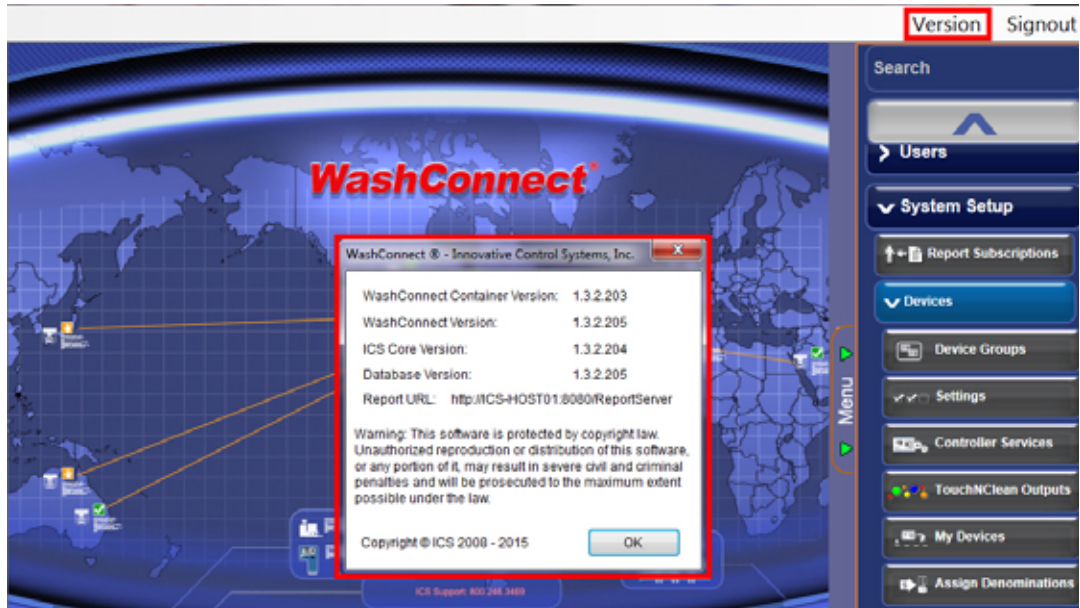


Figure 1. Version Considerations for WashConnect

Current Version

- *WashConnect*® Container Version 1.3.2.203
- *WashConnect*® Version 1.3.2.205
- ICS Core Version 1.3.2.204
- Database Version 1.3.2.205

ICS will attempt to inform *WashConnect*® customers of software updates and new documentation as the contents are subject to change. If you are unsure about whether you have the latest version, we encourage you to contact ICS Support at 1-800-246-3469.



See "Getting Started" on page 37.

What's New

At ICS, we are making it easier than ever to manage your facility and grow your bottom line with *WashConnect*®.

You can view the archived What's New documents including our new features and enhancements.

"What's New Archive"

If you are having trouble with your Adobe pdf file,
see <http://get.adobe.com/reader/>



See "Getting Started" on page 37.

Wash clubs

In-bay automatic devices

Touch 'N Clean

Supports Single-site and Multi-site

The *WashConnect*® system supports both single-site and multi-site car washes.

Multi-site installation is used when various locations and layers in the organization exist. For example: corporate headquarters, regional offices, district headquarters and multiple sites below that level.

WashConnect® can also be used for a single site without a corporate location. In this case, data is kept locally and not backed up to corporate location.

NOTE: Contact Inside Sales for the ICS Technical Support Contract to have auto backups configured. The contract is optional and additional fees apply.



See “Getting Started” on page 37.

System Requirements

This version of *WashConnect*® TouchPOS requires:

- Microsoft® Internet Explorer 9, 10, or 11
- Set Default Browser to Microsoft Internet Explorer in order to view *WashConnect*® Online Help.
- In Internet Explorer settings > Internet Options > Privacy tab, Turn off Pop-up Blocker.



See *"Getting Started"* on page 37.

Software/Hardware Validation

When starting up Innovative Control applications, ICS will check if the hardware has been validated. This is a new requirement to run ICS software and must be completed. There will be only a handful of employees, for security purposes, that will have the ability to complete this operation. WashConnect will need to be validated. If WashConnect is not validated, the system will count down a trial period of 30 days. If not validated, WashConnect will refuse to launch. Those who can complete the Hardware validation process, can also validate WashConnect.

About the Interface

The WashConnect® interface includes two main areas:

- The **menu bar**
- The **workspace**

The menu bar changes according to login level and User privileges.

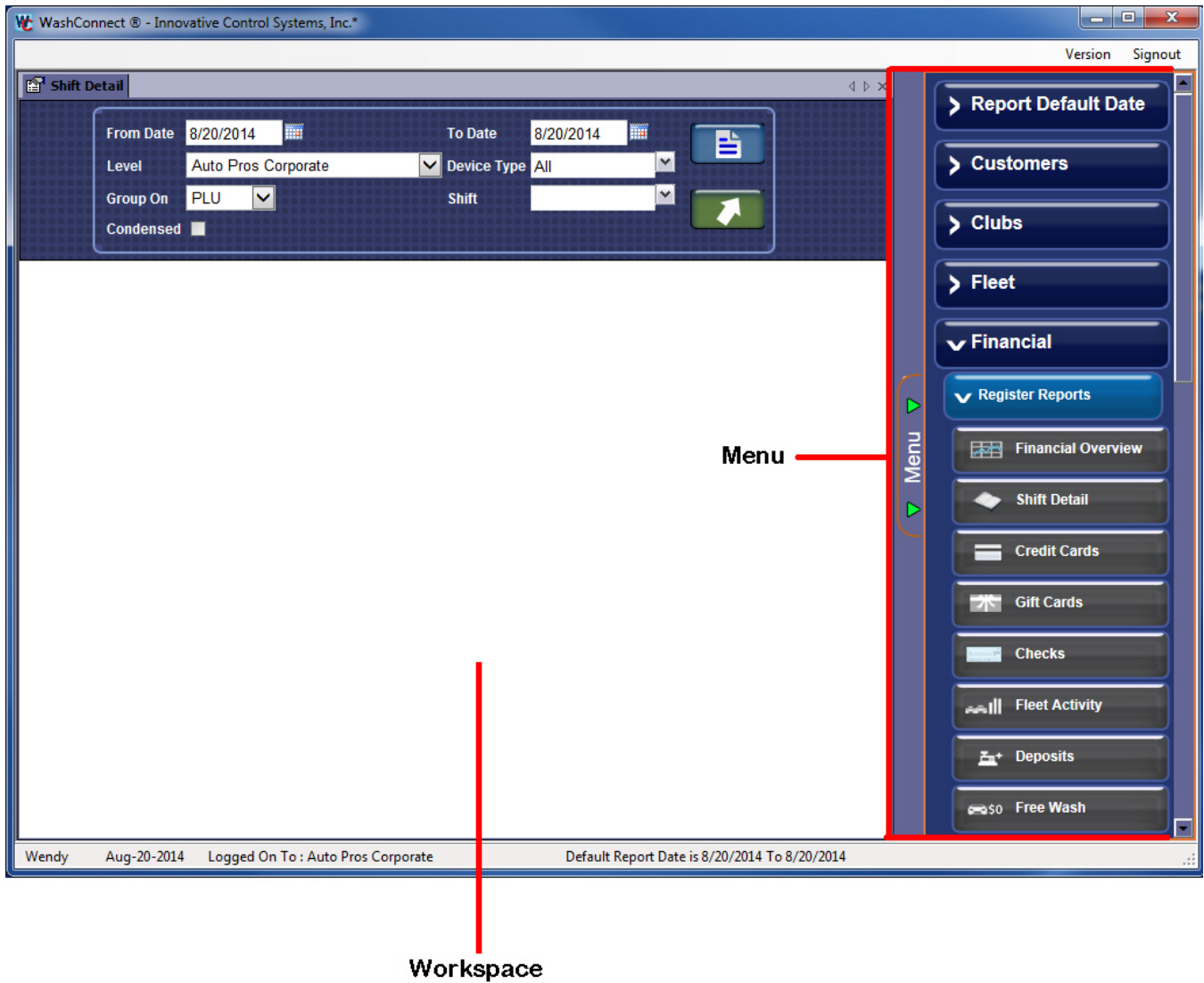


Figure 2. Workspace and Menu Bar



See "Getting Started" on page 37.

System Overview

WashConnect® includes the following menus and commands:

■ Report Default Date

- Set Date Range
- Today
- Yesterday
- Current Pay Period
- Last Pay Period
- Month to Date
- Last Month
- Year to Date
- Last Year

■ Customers

- Manage
- Group

■ Clubs

- Reports
 - Profitability
 - Club Usage
 - Vehicle History
 - Club Summary
 - Declined Payment
 - Club Revenue
 - Autobill Revenue
 - Credit Card Expiration
 - Renewal & Termination

■ Fleet

- Accounts
- Rules
- Invoice (Available at Corporate)

- Manage (Available at Corporate)
- **Financial**
 - Register Reports
 - Financial Overview
 - Shift
 - Credit Cards Summary
 - Credit Cards
 - Gift Cards
 - Checks
 - Fleet Activity
 - Deposits
 - Free Wash
 - Re-Wash
 - Payouts
 - ROA
 - Voids
 - Fund Raiser
 - View Register
 - Audit Controls
 - Wash to Register
 - Ticket Comparison
 - Journal Verify
 - Transactional Details
 - Terminal Balance
 - Sales Commission
 - View Site Tickets
 - Cash Management
 - Terminal Balances
 - Operations Report
- **Performance**
 - Vehicle Performance

- Performance Gauge
- Sales Distribution
- TouchNClean Usage
- RFID Statistics
- **Monitoring System**
 - Status
 - Event History
 - Device Statistics
 - Version History
- **Configuration**
 - Goods and Services
 - Club Services (Available at Corporate Only)
 - Sales Items
 - Packages
 - Wash Book (Available at Corporate Only)
 - Profiles
 - POS Profiles
 - Promotions (Available at Corporate Only)
 - System Items (Available at Corporate Only)
 - Frequency Promotions
 - Promo Setup
 - Promo Receipt Text
 - Alerts
 - Export System Data
 - Accounting Interface
 - Manage
 - Payment Account
 - System Items
- **Commissions**
 - Positions
 - Eligibility Rules

- Schedules
- Users
 - Security Roles (Available at Corporate Only)
 - Manage Users
- System Setup
 - Sales Tax
 - Report Subscriptions
 - Organizational Layout
 - Create Levels
 - Manage Sites
 - Assign Sites
 - Devices
 - Define Tokens (Available at Corporate)
 - Device Groups
 - Settings
 - Controller Services
 - TouchNClean Outputs
 - My Devices
 - Assign Denominations
 - Profit Centers
 - Manage Profit Centers
 - Profit Center Ordinal
 - Performance Indicator
 - Req. Man Hours
- Touch POS
 - Open Shift (Available at POS site Log In)
 - Close Shift (Available at POS site Log In)
 - Add / Remove (Available with open POS Shift)
 - Ticket Generation (Available with Corporate Log In)
 - Generated Books
- StackNControl

- Stack Management
- Gate Management
- Time Clock
 - Log In / Log Out
 - Edit Time Clock
 - Time Clock Reports
 - Employee Time Clock Summary
 - Employee Time Clock Detail
 - Employees Working Today
 - Employees Not Working Today



See "Getting Started" on page 37.

About the Menu Bar


The menu bar was designed to have the menu items in order of popularity from the top down so that the most frequently used menu items appear closer to the top of the menu, and the items used infrequently towards the bottom. The menu bar adjusts automatically based on the commands available for the logon level and security roles that are set up for the user who is currently logged in. Also, some menu items may or may not appear based on the type of devices for the site.

You can select different menus and commands from the menu bar. When you select a menu, it becomes active and if submenus are available they expand. When selecting the menu button again, it contracts the submenu. When selecting a command button, the action is performed (i.e., a dialog box appears, the date changes, a report opens, etc.).

If you know the name of the menu item, you can quickly and easily locate the menu item by performing a search from the main WashConnect menu Search box.

Search for a Menu Item

If you know the name of the menu item, you can use the menu search box located at the top of the main menu.

- 1 In **Search** box, type the menu item you would like to search.
The item(s) appear on the right-side.
- 2 In the Search box, if you would like to clear the search, click the clear **Search**  button.

You can locate the **Menu Search** box in the following figure.



Figure 3. Menu Search box

In the following figure, **Settings** was typed in the Search box.



Figure 4. Menu Search box example

Scroll for a Menu Item



Figure 5. Menu Selection Process

- Click the **Users** menu. (See Figure 5, “Menu Selection Process.”)
- The **Users** menu expands, and then becomes the active menu, allowing you to select its commands: **Security Roles** and **Manage Users**.



See “Getting Started” on page 37.

About Scroll Buttons

You can use the **scroll buttons or scroll bar** to view more menu items.

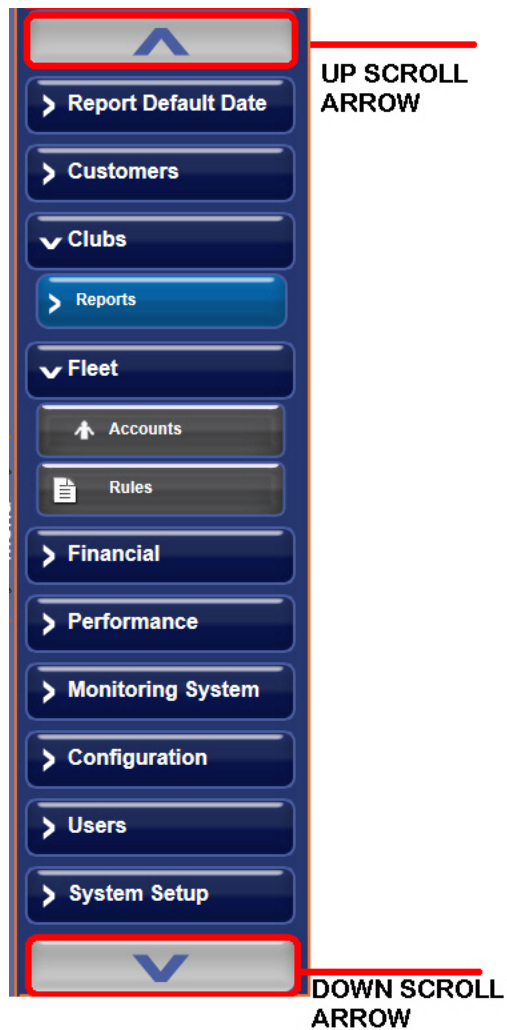


Figure 6. Scroll Down and Scroll Up

You can use the **scroll buttons** on the POS screen to view more menu items and PLU items.



Figure 7. POS menu item scroll arrow buttons

NOTE: If you are using TouchPOS, and can not view the scroll buttons on the TouchPOS screen, you need to configure the general settings in System Configuration. In TouchPOSConfiguration, set **TouchCompatible** to True.



See "POS > TouchPOSConfiguration > General" on page 694.



See "Getting Started" on page 37.

About the Menu Tab

You can open and close the menu bar. The menu bar is open by default. You can close the menu to provide more workspace on your screen.

- Click the **Menu** tab to collapse or expand the menu bar.

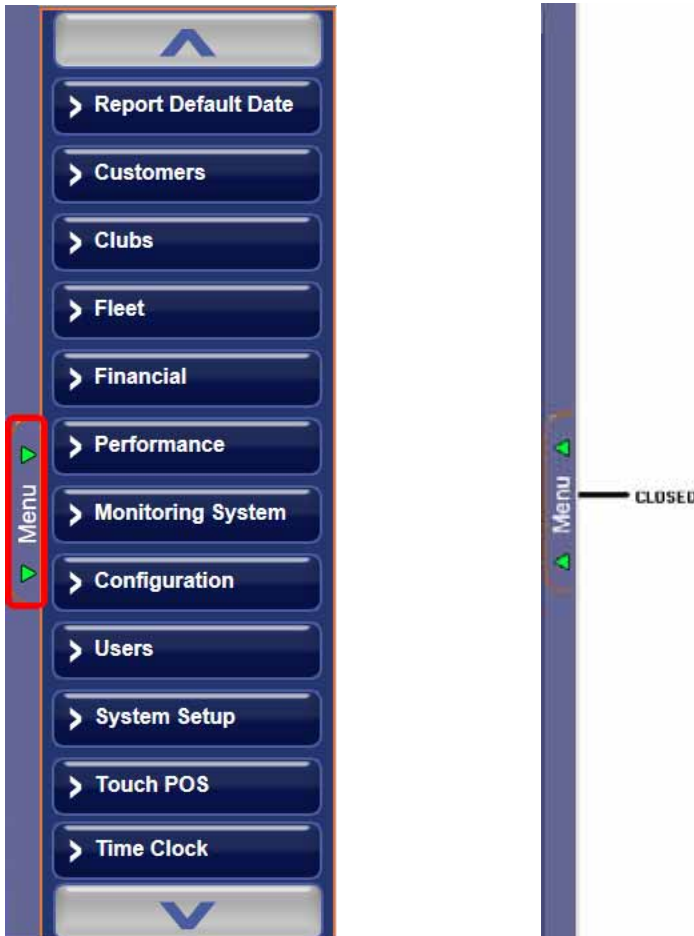


Figure 8. Menu Bar Expanded and Collapsed



See "Getting Started" on page 37.

About Workspace Tabs

When you choose a command from a menu, a new tab will appear in the workspace bar.

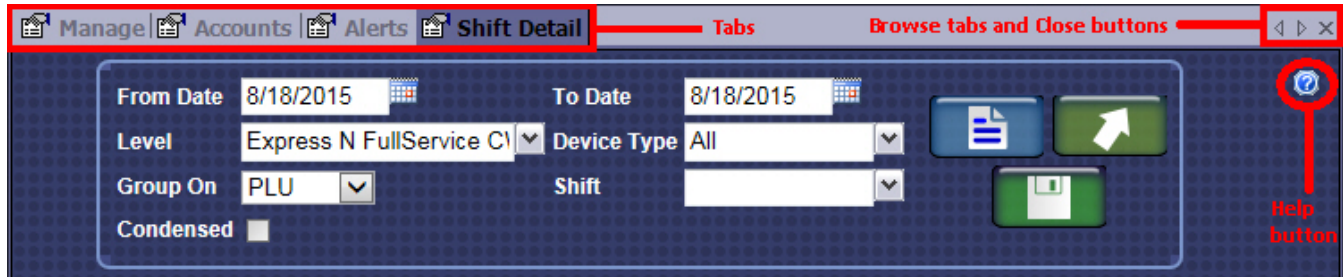


Figure 9. Tabs in the Workspace

- The name of the active tab appears in the workspace bar with a darker background color (e.g., **Shift Detail**).
- Click a tab from the workspace bar to make it active.
- When the number of open tabs displayed on the workspace bar exceed the horizontal space available, the right or left browse buttons are enabled. You can use the browse buttons when they become shaded . Click the left or right shaded browse buttons to locate more tabs. When you can no longer go any further to the right or left, the browse button becomes dim again.
- From the workspace tab bar, you can click the Close button to close the active tab.
- If you select a menu command, and a tab is already open for that command, then that tab becomes the active tab. You cannot create duplicate tabs for the same command. For example, if you select the Profitability command from the Clubs Reports menu, a Profitability tab is created. Then if you select the Profitability command again, the same tab becomes the active tab, a new tab is not created.
- Click the Help (question mark) icon. The help file topic associated with the corresponding tab opens. You can view help topics from a Table of Contents or Index. You can also find help topics by performing a Search.



See "Getting Started" on page 37.

About the Status Bar

The status bar shows the user name, today's date, region or hierarchy level selected upon log in, and selected default report date.



STATUS BAR

Figure 10. Status Bar



See "Getting Started" on page 37.

About Data Replication

Car wash data at a site is shared up the organization's hierarchy to the corporate level. This enables aggregated reporting and data management. The following types of data are replicated within seconds:

- Transactions
- Vehicle
- Customers
- Clubs



See "Getting Started" on page 37.

About Users

An administrative user and password for the manager or owner are created by the ICS technician who installed *WashConnect*®. A user with the appropriate rights can set other users' passwords. The technician will explain user rights and assist with creating additional users.

User ID example:

■ USERNAME

Password example:

■ Password123



See "Getting Started" on page 37.



See "Manage Users" on page 541.



See "Add User" on page 543.

Optional Fingerprint Reader:



See "Add User's Fingerprints" on page 552.

About Clubs

Unlimited / Limited Wash Clubs work like a membership to your local gym.

- 1 Customers join a wash at the terminal, for example, \$15 or \$25 a month.
- 2 Club members credit card on file can automatically be charged the monthly flat fee until the membership is terminated.
- 3 Customer receives an RFID tag. An RFID tag, with an electronic chip inside, is adhered to the windshield which can be read at the RFID tag reader placed by the Auto Sentry. The RFID card prefix symbol pound (#) sign will indicate a club customer to *WashConnect*. This tag is tamper proof and inoperable if removed. Club cards with magnetic-stripes are also available to distinguish customer as a club member who will receive club benefits. If a club membership is detected, the Auto Sentry adjusts the screens accordingly.

NOTE: Magnetic-Stripe Club Cards are not recommended because the card's mobility makes it easy to be used from car to car when the club membership is designed for one vehicle only. These RFID tags (stickers) have an electronic chip inside to identify the vehicle and are attached the windshield of the vehicle. The RFID tags are disabled automatically if tampered or removed.

- 4 The club member's vehicle can receive as many washes as allowed through the club specified limits for that vehicle and it will be honored at all of your car wash locations.

Once establishing a base of monthly members, you can expect their credit card revenue every month, providing a steady source of monthly income before a single car is washed.

Club	Members	Price	Totals
Deluxe	500	\$ 15.00	\$ 7,500.00
Supreme	300	\$ 25.00	\$ 7,500.00
Total			\$ 15,000.00



See "Getting Started" on page 37.



See "Managing Clubs" on page 374.



See "Add a Club Service" on page 376.

About Reports

Reports are a great way to view activity at your car wash for any date range. These reports can help you make management decisions and plan marketing strategies. In each respective report section, you will find the benefits of each individual report.

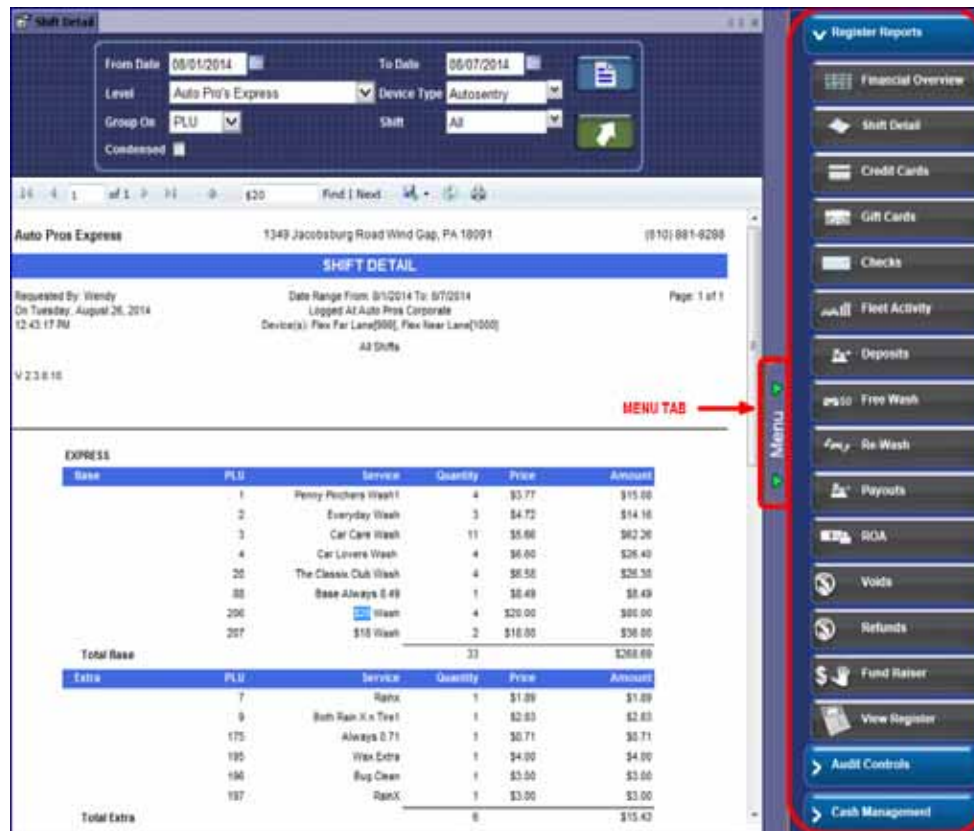


Figure 11. Example Shift Detail Report

Extra screen width is available if you click the **Menu** tab to hide the menu bar.

View data for all locations, select Corporate location from the WashConnect® log in. Report data is dependent upon the WashConnect® logon location.

Reports include the following:

- Clubs
 - Reports
 - Profitability
 - Club Usage
 - Vehicle History
 - Club Summary
 - Declined Payment

- Club Revenue
- Autobill Revenue
- Credit Card Expiration
- Renewal & Termination
- Advance Expiration (Corporate Only)
- Fleet
 - Accounts
 - Rules
 - Invoice (Corporate Only)
 - Manage (Corporate Only)
- Financial
 - Register Reports
 - Financial Overview
 - Shift Detail
 - Credit Cards Summary
 - Credit Cards
 - Gift Cards
 - Checks
 - Fleet Activity
 - Deposits
 - Free Wash
 - Re-Wash
 - Payouts
 - ROA
 - Voids
 - Refunds
 - Fund Raiser
 - View Register
 - Book Report
 - Audit Controls
 - Wash to Register

- Ticket Comparison
- Transactional Detail
- Terminal Balance
- Sales Commission
- View Site Tickets
- Services Washed
- Controller Services
- Audit Trail
- Cash Management
 - Journals
 - Terminal Balances
 - Operations Report
- Ticket Redeemed
 - Summary
 - Detail
- Performance
 - Dashboard
 - Vehicle Performance
 - Performance Gauge
 - Sales Distribution
 - RFID Statistics
 - Statistical Comparison
 - Projection
- Time Clock
 - Time Clock Reports
 - Employee Time Clock Summary
 - Employee Time Clock Detail
 - Employees Working Today
 - Employees Not Working Today



See "Getting Started" on page 37.

About Report Toolbar

After you set your parameters for just about every report in WashConnect, you can view the report on-screen. The report toolbar will appear above the header of the Report.

You can perform the following functions with the report toolbar: scroll through the pages, export, refresh, and print.

For most reports, you can select a Date Range, Level, Device Type, Group On, and Shift.

See Figure 12, “Gift Cards Report Toolbar (Example).”

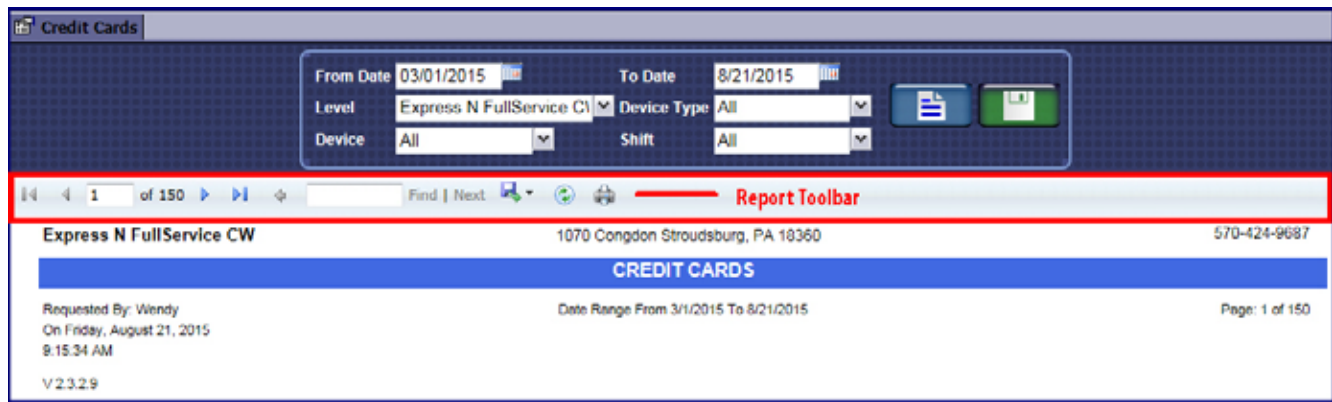








Figure 12. Gift Cards Report Toolbar (Example)

-  See “About Report Headers” on page 65.
-  See “Scrolling a Multi-Page Report” on page 65.
-  See “Printing a Report” on page 66.
-  See “Export a Report” on page 67.
-  See “Zoom In and Zoom Out on a Report” on page 68.
-  See “Searching a Report” on page 69.

About Report Headers

Report headers include details about who requested the report, time requested, and report date range.

Express N FullService CW	1070 Congdon Stroudsburg, PA 18360	570-424-9687
CREDIT CARDS		
Requested By: Wendy On Thursday, August 20, 2015 11:17:42 AM V 2.3.2.9	Date Range From 3/1/2015 To 7/1/2015	Page: 1 of 150

Figure 13. Report Header example

- Your Car Wash name and address appear above the Title Bar.
- The report title is **CREDIT CARDS**.
- The report was requested by **Wendy** on **Thursday, August 20, 2015** at **11:17:42 AM**.
- **V 2.3.2.9** is the current *WashConnect®* Report Version.
- The **Date Range From 3/1/2015 to 7/1/2015** shows the range of dates the user selected for the report.
- Shows number of pages generated by the report. This report example includes 150 pages, and is currently displaying page 1 of 150.



See "About Report Toolbar" on page 64.



See "Scrolling a Multi-Page Report" on page 65.



See "Printing a Report" on page 66.



See "Export a Report" on page 67.



See "Zoom In and Zoom Out on a Report" on page 68.









See "Searching a Report" on page 69.

Scrolling a Multi-Page Report

You can scroll through pages of a multi-page report.



Figure 14. Report Navigator Scroll Buttons

-  See "About Report Headers" on page 65.
-  See "About Report Toolbar" on page 64.
-  See "Printing a Report" on page 66.
-  See "Export a Report" on page 67.
-  See "Zoom In and Zoom Out on a Report" on page 68.
-  See "Searching a Report" on page 69.

Printing a Report

You can print a report from the report toolbar for most reports.





- 1 Click the **Print**  button.
The print dialog box appears.
- 2 Click **OK**.



Figure 15. Print Button on Report Toolbar

-  See "About Report Headers" on page 65.
-  See "Scrolling a Multi-Page Report" on page 65.
-  See "About Report Toolbar" on page 64.

 See "Export a Report" on page 67.

 See "Zoom In and Zoom Out on a Report" on page 68.

 See "Searching a Report" on page 69.

Export a Report

You can export a report.

- 1 After selecting a report in WashConnect, you can export the report.



Figure 16. Export Button on Report Toolbar

- 2 From the report toolbar, select the **Export**  button.

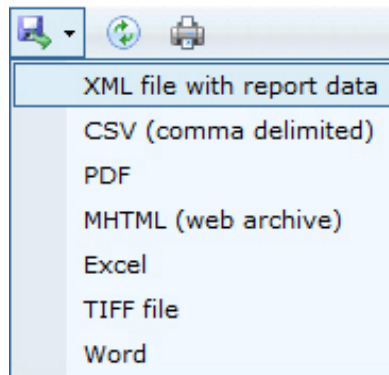


Figure 17. Export Format Options

- 3 Select an Export format option from the Export list:

- XML file with report data
- CSV (comma delimited)
- PDF
- MHTML (web archive)
- Excel
- TIFF file
- Word

The file download dialog box appears.

- 4 Click **Open**. The file opens in the related application.
-or-
Click **Save**. The Save As dialog box appears.
-or-
Click **Cancel**.



See "About Report Headers" on page 65.



See "Scrolling a Multi-Page Report" on page 65.



See "Printing a Report" on page 66.



See "About Report Toolbar" on page 64.



See "Zoom In and Zoom Out on a Report" on page 68.



See "Searching a Report" on page 69.

Zoom In and Zoom Out on a Report

You can zoom in and zoom out on a report.

- 1 On the keyboard, hold down the Ctrl key and press the plus (+) key if necessary to zoom in on the report.
The report will not print bigger, this is just for viewing on the screen.
- 2 On the keyboard, hold down the Ctrl key and press the minus (-) key if necessary to zoom out on the report.
The report will not print bigger, this is just for viewing on the screen.



See "About Report Headers" on page 65.



See "Scrolling a Multi-Page Report" on page 65.



See "Printing a Report" on page 66.



See "Export a Report" on page 67.

 See "About Report Toolbar" on page 64.

 See "Searching a Report" on page 69.

Searching a Report

You can search for text or numbers in a report. Searches will find matches on all pages of a multi-page report one by one. Follow these steps to search in a report:

NOTE: Collapsed data in the report is not searchable.

- 1 In **Search** box, type the characters you are searching.



Figure 18. Search Report

- 2 Click **Find**.
The search result is highlighted on the report.
- 3 Click **Next** to continue searching the document for more results.

For example, from a multi-page **Checks** report, you can type a specific check number and click **Find**.

If duplicate matches are found, click **Next** to view each result.

 See "About Report Toolbar" on page 64.

 See "About Report Headers" on page 65.

 See "Scrolling a Multi-Page Report" on page 65.

 See "Printing a Report" on page 66.

 See "Export a Report" on page 67.

 See "Zoom In and Zoom Out on a Report" on page 68.

 See "Getting Started" on page 37.

Starting WashConnect®

To start WashConnect®, double-click the icon on the Desktop.



Figure 19. WashConnect® Icon on Desktop

The login screen appears.



See "Getting Started" on page 37.

Logging In



Figure 20. Login Screen

Follow these steps to log in:

- 1 Select a login region on the corporate hierarchy. The location you select is highlighted. In the Figure 20, "Login Screen.", **Corporate** is selected.
- 2 In the **User ID** box, type your user name.
- 3 In the **Password** box, type your password.

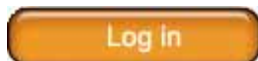


Figure 21. Log in Button

- 4 Click the **Log in** button. The workspace and menu appears.



See "Getting Started" on page 37.

Optional: Fingerprint Reader can be used to login to *WashConnect®*.



See “Add User’s Fingerprints” on page 552.

Logging In to the Corporate Server

If you log in to WashConnect® at the **Corporate** location in the hierarchy, then you can access the corporate server to view reports and data for all sites in the organization.

This is true even if you are not physically at the corporate location. For example, you can be at a site-level location and log in to the WashConnect® corporate server and be able to view replicated data and reports for every site, provided the user has privileges to do so.



To edit a user name and password, see “Edit User” on page 549.



To learn more about the hierarchy, see “Example for Users and Roles”.



See “Getting Started” on page 37.



See “Logging In” on page 71.

Changing Default User Login

Set Global Configuration to enable or disable the Default user from automatically populating the User ID and Password fields within the WashConnect login page.



See “Global > GlobalConfiguration > Global” on page 686.

CHAPTER 2:REPORT DEFAULT DATE

The Report Default Date menu is a time saving feature allowing the user to change the report default date with the following standard settings: Today, Yesterday, Current Pay Period, Last Pay Period, Month to Date, Last Month, Year to Date, and Last Year. You can also set up your own date range from the Set Date Range command button.

Sometimes you can only identify business trends with information from longer periods of time-- a week, month, etc. The Set Date Range function allows you to set date time frame to print all the reports.



See "Default Date Range" on page 74.



See "Default Date Range" on page 74.



See "Report Default Date preset buttons" on page 76.



See "Select a different date range for an open report" on page 77.

Default Date Range

Set Date Range

HELP - What can I do here?

Managers and Owners:

- Quickly set date default date range to use for all reports.
- Date range remains selected for all reports until you change it.
- No need to re-enter dates.
- Save key strokes.
- Easily look back over your reports to find trends and patterns.

Setting a default date range applies to any new report you open in the workspace. Reports that were opened before you set the default date will not be effected. Consequently, if you change a date on an open report, it will not effect the default date range.



See "Set a Default Date Range" on page 74.



See "Select a different date range for an open report" on page 77.



See "Report Default Date preset buttons" on page 76.

Set a Default Date Range

Follow these steps to set a default date range for all reports. This date remains until you set a different default range.

- 1 From the **Report Default Date** menu, select the **Set Date Range** button.

The Set Date Range tab appears.

Figure 22. Set Date Range tab

- 2 In the **From Date** and **To Date** boxes, select a date range. Either type a date or select it from the drop-down calendar by clicking on the exact date in the calendar.
-or-
Click one of the following preset buttons:
 - Today
 - Yesterday
 - Current Pay Period
 - Last Pay Period
 - Month to Date
 - Last Month
 - Year to Date
 - Last Year
- 3 Click the **Save** button.
The **Report date range is set** message appears.
- 4 Click **OK**.
This range will remain until another date range is selected from the Report Default Date menu.

NOTE: If you change a date on an open report, it will only effect that report and not effect the default date range.
The default report date appears in the status bar.

Default Report Date is 8/1/2013 to 8/31/2013

Figure 23. Default Date in Status Bar



See "Report Default Date preset buttons" on page 76.



See "Select a different date range for an open report" on page 77.

Report Default Date preset buttons

You can quickly change the default date for reports with a submenu of preset dates.

NOTE: This menu can be hidden. From Security Roles at Corporate login, select the Report Default Date privilege check box.

- 1 Click the **Report Default Date** menu button.

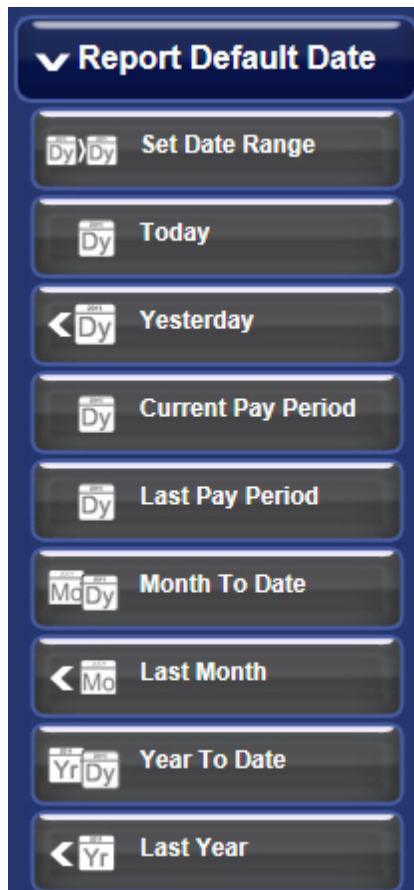


Figure 24. Report Default Date Preset Range buttons

- 2 Click a preset date range button.
A message **Report date range is set** box appears.
- 3 If the date is correct, select **OK**.
The new default date range appears in the status bar. This date will be used for every report you open until you change the Report Default Date again.

Note: The new date range will not affect any open reports on your current workspace. If you want to view the new date range in one of the open reports on your workspace, you need to close the report tab, and then click the report again to open it with the new date range.




See "Default Date Range" on page 74.



See "Select a different date range for an open report" on page 77.

Select a different date range for an open report

- 1 From the open report, select a different date range for the report from the drop-down **From Date** and **To Date** boxes.
- 2 Click the **View Report**  button.
This date will be used for this report only and any newly selected reports will use the current Default Report Date.

Logged On To : Corporate Default Report Date is 9/26/2013 to 9/26/2013

Figure 25. Year to Date in Status Bar

Table 1: Date Range FAQs

Question	Answer
Why should I set a custom date range?	In the car wash business, there is a need to look back over your numbers to find trends and patterns. For example, if you ran more than one marketing campaign throughout the year, you will have the ability to go back and set a specific date range to see the results on sales performance. Or if you changed management at a site, you could compare the labor percentages from before and after the change.

Table 1: Date Range FAQs

Question	Answer
Why should I set a preset date range?	The preset date range selections are there for your convenience. When you look at reports, you will typically run more than one report at a time. You can quickly select a preset date range such as last week or last month. After that, every report that you run is going to start with the current Default Date Range selected.
How do I know what date range I have selected?	You can see the current Default Report Date range in the status bar area at the bottom left of your screen. You can also see the Default Report Date range on the top of a report.
What happens to the date range if I select a report resolution such as annual, or month?	In most reports, such as the Shift Detail Report , you are looking at daily transaction data where you are not as interested in seeing trends. But other reports, such as the Vehicle Performance report, will help you discover trends across a larger date range. Reports that show trends also allow you to select a Resolution . The Resolution works with the date range to help you see the data, however it makes the most sense to you. For example, you can load six months worth of data, and then roll up the data to see monthly, weekly, or daily totals.



See “Default Date Range” on page 74.



See “Report Default Date preset buttons” on page 76.

CHAPTER 3: CUSTOMERS

Wash clubs, fleets and other membership programs have become a very successful component of the overall value proposition at many of the nation's top car washes. Because of their great popularity, membership programs also require diligent management activity. Programs can grow to include hundreds or even thousands of customers over time. The goals of the **Customers** and **Clubs** menus are to put customer management activities and reporting at your fingertips.

The main focus of your activity from the **Customers > Manage** menu is to enter customer data for you customers. Fleet customer data can be viewed and edited from the Manage menu, but must be set up from the Fleet Accounts Menu. Customers can sign up for a club at the Auto Sentry flex; however, the pay station only collects the credit card information, and it is still necessary for a car wash employee to complete the club sign up process with the customer by the customer agreeing and signing the Wash Club Contract, employee adhering an RFID tag and adding the following important customer data in *WashConnect* from the Customers Manage menu:

- Adhere the RFID tag to the customers windshield
- Enter RFID tag number or club card number

Required:

- License plate number

Optional:

- Email address
- Additional vehicle information
- Mailing address

You can link customers and their vehicles to membership programs, and can also print or export customer data. Exporting customer data to a Microsoft® Excel spreadsheet is helpful for mailings.

The **Manage** menu can help you perform the most common tasks.

NOTE: The **Manage** menu is used to manage the customers who have already signed up for a club or fleet program.



See "About the Manage Menu" on page 80.



See "About the Group menu" on page 102.

About the Manage Menu

Customers

Manage

HELP - What can I do here?

Operators and Managers:

- Add additional member information to complete membership:
 - RFID #
 - License Plate
 - Phone, Address, etc.
 - Add Multiple Vehicles
- Easily locate club member.
- Print or Export Customer data lists.
- Change a Customer's billing date.

Keeping your customer information up-to-date has never been easier.



See "Search for a Club Member" on page 91.












See "Add a Club Customer" on page 86.



See "Add a Customer" on page 81.





See "Add Member(s) to a Fleet Account" on page 151.

-  See *"Edit Club Member's Billing Date"* on page 88.
-  See *"Add Recurring Credit Card for Club Memberships"* on page 86.
-  See *"Retire a Customer"* on page 93.
-  See *"View Vehicle Transaction History"* on page 96.
-  See *"Customer Notes or Vehicle Notes"* on page 97.
-  See *"Print a Customer List"* on page 100.
-  See *"Export a Customer Membership List"* on page 101.
-  See *"Edit Club Member's Billing Date"* on page 88.
-  See *"About the Group menu"* on page 102.

Add a Customer

You can add a new customer including club customers from the Customers Manage menu with an exception of a fleet customer. While you cannot add a fleet customer from this menu, you can manage the fleet customers that have already been added.

-  See *"Add Member(s) to a Fleet Account"* on page 151.
-  See *"Add a Club Customer"* on page 86.

- 1** From the **Customers** menu, select **Manage**.

The **Manage** tab appears.

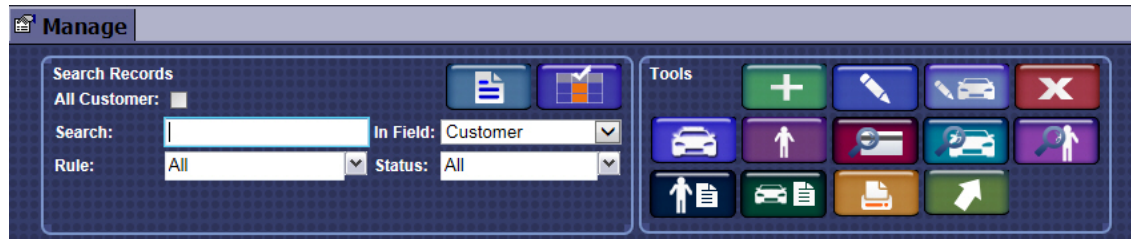



Figure 26. Manage tab

- 2 From the Manage tab, click the **Add Customer**  button. The Manage tab opens. The **Customer Information**, **Vehicle Information**, and **Customer Group(s)** tabs appear with the essential tools needed to setup the Customer.

Manage

Customer Information
Vehicle Information
Customer Group(s):

Customer			
Customer		Statistics	
*First:	<input type="text"/>	First Visit:	<input type="text"/>
Middle:	<input type="text"/>	Last Visit:	<input type="text"/>
*Last:	<input type="text"/>	Visit Counter:	<input type="text"/>
Business Name:	<input type="text"/>	Average Sales / Car:	<input type="text"/>
<input type="checkbox"/> Tax Exempt		Punch Card Counter:	<input type="text"/>
Status:	Active <input type="button" value="v"/>	Bonus Points Total:	<input type="text"/>
Card #:	<input type="text"/>		
Card on file:	<input type="text"/>		
Billing Zip:	<input type="text"/>		
Site:	Auto Pros Express <input type="button" value="v"/>		
Promotions			
	<input type="text"/>	Birthday	<input type="text"/>
Anniversary	<input type="text"/>	Family and Friends	<input type="text"/>
Anniversary	<input type="text"/>		<input type="text"/>
Address			
Address1:	<input type="text"/>	City:	<input type="text"/>
Address2:	<input type="text"/>	State:	PA <input type="button" value="v"/>
Address3:	<input type="text"/>	Zip:	<input type="text"/>
Contact Information			
Home Phone:	<input type="text"/>	Alternate Phone:	<input type="text"/>
Business Phone:	<input type="text"/>	Mobile Phone:	<input type="text"/>
Fax Number:	<input type="text"/>		
Primary Email:	<input type="text"/>	Secondary Email:	<input type="text"/>
<input checked="" type="checkbox"/> Receive email receipts			

Figure 27. Customer Information tab

- 3 Required Entries*:** In the Customer Information section, type the following:
 - ***First.** Customer’s first name.
 - ***Last.** Customer’s last name.
- 4 Optional:** Type available information in the remaining fields.
- 5** If Promotions are available for the customer, set specific dates for the customer.



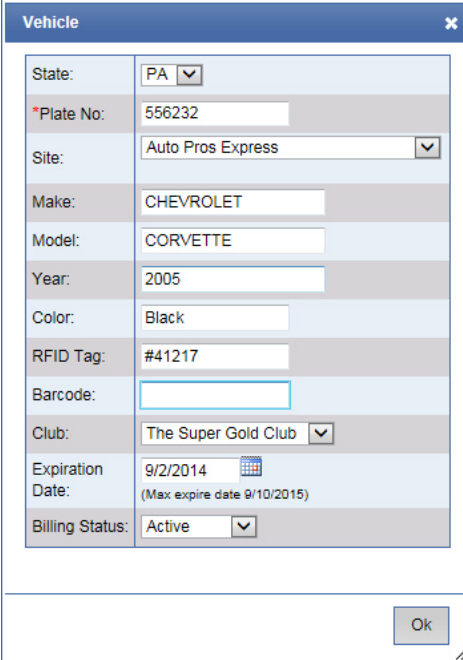
See "About Promotions" on page 454.

- 6 Click the **Save** button.

Add Vehicle

After adding a customer including name and license plate number, you can attach a vehicle to the customer. This is an important step for club members, as the club membership is per vehicle. One Customer can have many vehicles each with their own club membership.

- 1 Click the **Add Vehicle**  button.
The **Customer Vehicle** dialog box appears.



State:	PA
*Plate No:	556232
Site:	Auto Pros Express
Make:	CHEVROLET
Model:	CORVETTE
Year:	2005
Color:	Black
RFID Tag:	#41217
Barcode:	
Club:	The Super Gold Club
Expiration Date:	9/2/2014 (Max expire date 9/10/2015)
Billing Status:	Active

Figure 28. Add Vehicle

The required field is Plate No.

- 2 In **State**, select a state where the car is licensed.
- 3 In **Plate No:** box, type the customer license plate number.
- 4 In **Site**, select a site.

NOTE: Must have security role with permission to change the Site ID for customer and vehicle.

- 5 In **Make**, **Model** and **Year** boxes, select the appropriate vehicle.

- 6 In **Color** box, type color of vehicle.

Vehicle	
State:	PA
*Plate No:	556232
Site:	Auto Pros Express
Make:	CHEVROLET
Model:	CORVETTE
Year:	2005
Color:	Black
RFID Tag:	#41217
Barcode:	
Club:	The Super Gold Club
Expiration Date:	9/2/2014 (Max expire date 9/10/2015)
Billing Status:	Active

Ok

- 7 In RFID Tag box, type the corresponding **RFID tag number**.

NOTE: RFID Tag is necessary for auto billing (additional equipment may be needed). Also, technical support can drop the leading zeros of the RFID Tag number before the entry is saved if necessary.

- 8 (Fleet Account only) In **PIN** box, type the **customer's PIN**.
- 9 In **Barcode** box, type a barcode number (This is not the ICS RFID tag number. You can search vehicle by barcode).
- 10 In **Status**, select **Active**.
- 11 Click the **OK** button.
The customer vehicle information is saved.
- 12 From the Customer Group(s) tab, click to select the check box for the group(s).



See "Add a Customer Group" on page 103.

- 13 Click the **Save** button.
All of the customer information is now saved.




See "Add a Club Customer" on page 86.



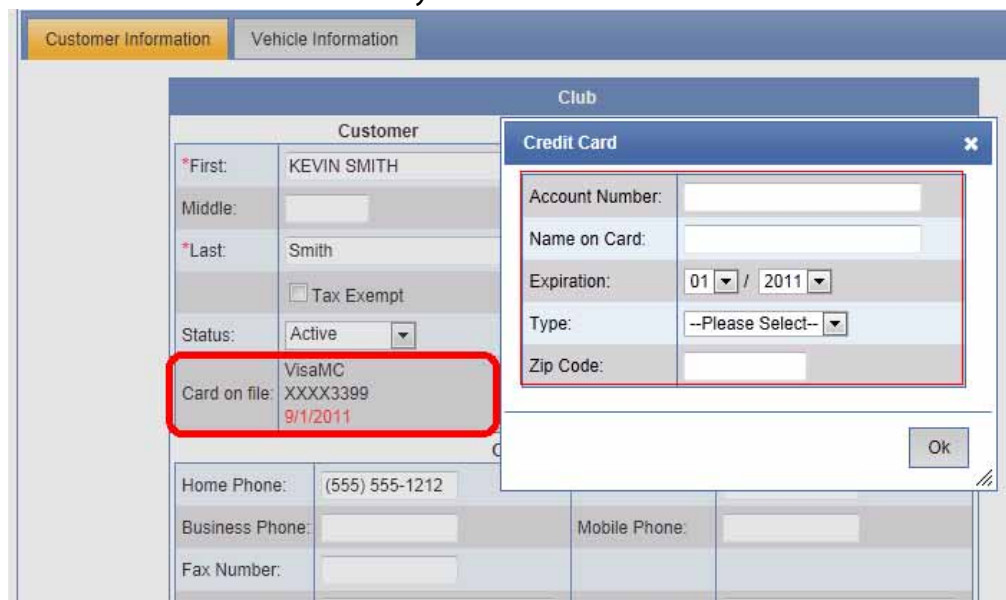
See "Add Member(s) to a Fleet Account" on page 151.

Add Recurring Credit Card for Club Memberships

Credit Cards are the only way to pay for the monthly recurring charges of a club membership. In this instance, you need to enter a customer's credit card to be charged monthly.

- 1 From the **Customers** menu, select **Manage**.
The **Manage** tab appears.
- 2 From the **Manage** tab, click the **Add Customer** button.
The **Customer Information**, **Vehicle Information**, and **Customer Group(s)** tabs appear.
- 3 If adding a credit card for recurring monthly club billing, click the **Recurring ID**  button.
The message **Is credit card present** appears.
- 4 If you can swipe the credit card, click **Yes**, and then swipe the credit card.
–or–
If you cannot swipe the credit card for any reason, click **No**.

NOTE: If system is able to connect with Cage-PADSS, you will be asked to enter your Username and password. To manually enter a credit card, Cage-PADSS needs to be logged in for authorization and to confirm you have authorization to manually enter the credit card.



The screenshot shows a software interface with two tabs: "Customer Information" and "Vehicle Information". The "Customer Information" tab is active. Below the tabs, there are two main sections: "Customer" and "Club".

The "Customer" section contains the following fields:

- *First: KEVIN SMITH
- Middle: [Empty]
- *Last: Smith
- Tax Exempt
- Status: Active (dropdown)
- Card on file: VisaMC, XXXX3399, 9/1/2011 (highlighted with a red box)
- Home Phone: (555) 555-1212
- Business Phone: [Empty]
- Fax Number: [Empty]

The "Club" section contains a "Credit Card" window with the following fields:

- Account Number: [Empty]
- Name on Card: [Empty]
- Expiration: 01 / 2011 (dropdowns)
- Type: --Please Select-- (dropdown)
- Zip Code: [Empty]

An "Ok" button is located at the bottom right of the "Credit Card" window.

Figure 29. Credit Card Information on File

- Cage PADSS opens a Credit Card entry form:

- From the **Credit Card** box, completion of all fields are required:
- In **Account Number**, type the credit card account number.
- In **Name on Card**, type name as it appears on the credit card.
- In **Expiration**, select the expiration date of the credit card.
- In **Type**, select the type of Credit Card
- In **Zip Code**, type the **credit card billing zip code**.

The credit card information is secure as it is not located in any databases on your car wash computers or devices for PCI Compliance. For verification, you can view the basic credit card information in **Club Card on File**.

WARNING: Must be connected to Cage so the credit card can be verified. Safe and secure data transmission via SSL connection with verification or decline notification within seconds. Verification will fail without a connection to Cage.

NOTE: PCI Compliance for safe and secure data: Cage PADSS will approve the credit card overnight without the need to save the credit card number in any car wash database. For security reasons, the only credit card information available is the credit card's last four digits.

5 Click the **Save** button.

The customer information and vehicle information is saved. If the Billing Status or Expiration Date was changed, and the customer's Status is Active, then will autobill overnight on the Expiration Date.



See "Edit Club Member's Billing Date" on page 88.



See "Sort the Columns for the Customer List" on page 89.



See "Retire a Customer" on page 93.



See "View Vehicle Transaction History" on page 96.



See "Customer Notes or Vehicle Notes" on page 97.



See "Print a Customer List" on page 100.




See “Export a Customer Membership List” on page 101.


Edit Club Member’s Billing Date

In a few specific situations and with the manager’s approval, the expiration date of the club can be manually changed or delayed up to 2 months from the current date.

WARNING: The following steps will change the date of the recurring auto billing date (Expiration Date) for the club membership.

- 1 From the **Customers** menu, select **Manage**.
The **Manage** tab appears.
- 2 Search and locate customer.
- 3 Click to select or highlight Customer record, and then click the **Edit** button.
The Customer Information tab appears.
- 4 Click to select the **Vehicle Information** tab.
- 5 Click to select or highlight Club Member’s Vehicle record.
- 6 Click the **Edit Vehicle**  button.
The Vehicle dialog box appears.
- 7 In **Expiration Date**, type or select the new date to attempt auto billing.
- 8 In Billing Status, select **Bill**.

NOTE: Active status will also attempt billing on the expiration date. Auto Billing will attempt billing overnight both the status of Bill and Active.

- 9 Click **OK**.
- 10 Click the **Save**  button.
When the expiration date is mature, the auto billing will take place at midnight or overnight on the expiration date. After the system bills the first time, the status will automatically switch to Active, and then charge the credit card on the monthly club expiration date until the customer cancels the club or the credit card declines.







See “Add Recurring Credit Card for Club Memberships” on page 86.



See “Edit Vehicle Information” on page 91.



See “Retire a Customer” on page 93.

-  See "View Vehicle Transaction History" on page 96.
-  See "Customer Notes or Vehicle Notes" on page 97.
-  See "Print a Customer List" on page 100.
-  See "Export a Customer Membership List" on page 101.

Sort the Columns for the Customer List

Search for customers, and view results in a list form.

- 1 From the **Customers** menu, select **Manage**.
- 2 Select the **View** button.
The customer membership list appears.

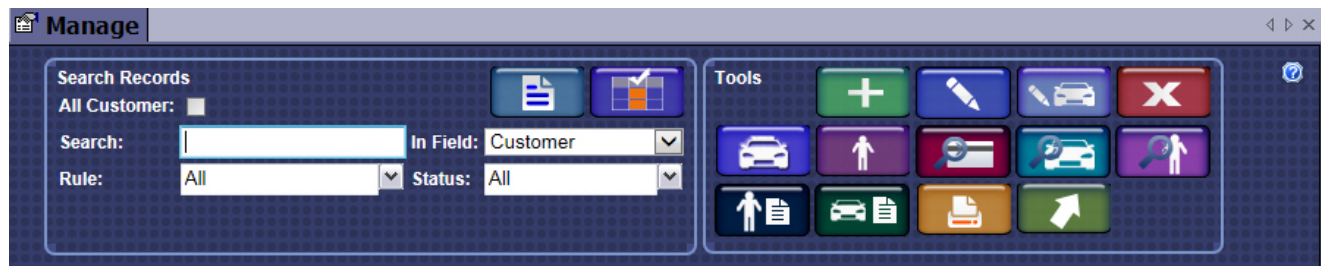



Figure 30. Manage tab - Customer List

- 3 Click the **Select Columns**  button to view the choose necessary viewable columns for the Membership List.

The Select Columns dialog box appears.

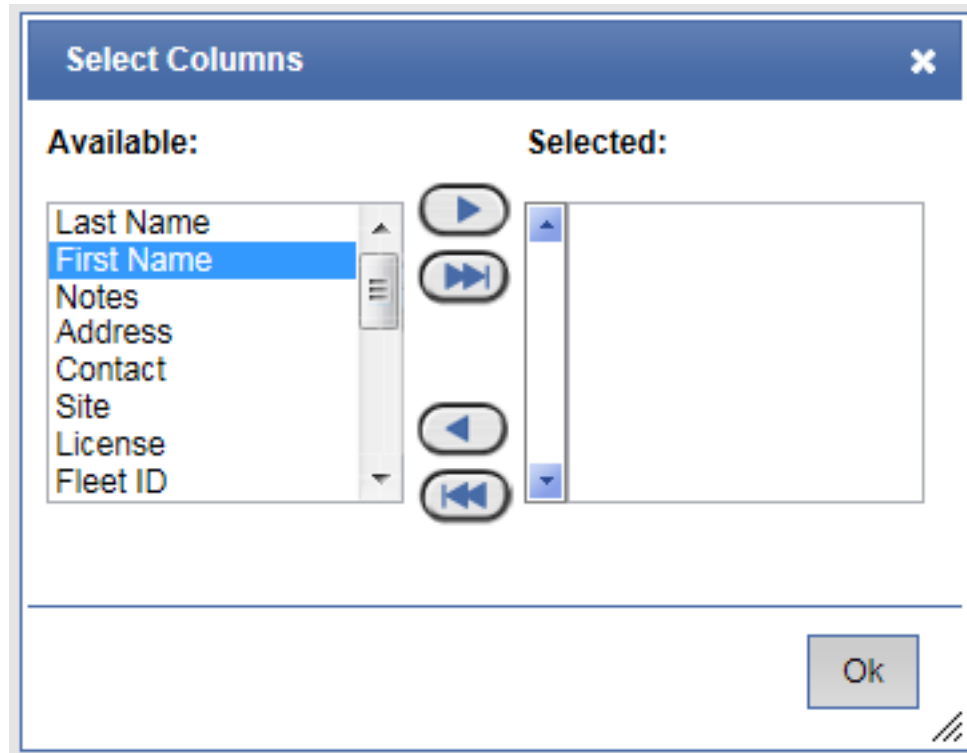



Figure 31. Select Columns Dialog Box for Customer Membership List

NOTE: If printing or exporting, all viewable columns will be printed or exported. If columns are hidden, they will not be printed or exported.

- 4 From the Available list, choose an available column name, and then click the right-arrow  button.
The available Column name appears in the Selected column.
- 5 Repeat the previous step until all necessary columns appear on the Selected Columns.
- 6 When finished making column selections, click **Ok**.



See "Edit Club Member's Billing Date" on page 88.




See "Edit Vehicle Information" on page 91.



See "Retire a Customer" on page 93.



See "View Vehicle Transaction History" on page 96.




 See “Customer Notes or Vehicle Notes” on page 97.


 See “Print a Customer List” on page 100.

 See “Export a Customer Membership List” on page 101.

Edit Vehicle Information

Follow these steps to view Customer list and edit Customer’s vehicle information.

- 1 From the **Customers** menu, select **Manage**.
- 2 In Field **Barcode**, you can search for the vehicle by typing in the barcode number, and type the barcode.
-or-
In Field Customer, type in Customer name.
- 3 Select the **View**  button.
- 4 Select the customer record from the Membership List.
The member’s information is highlighted.
- 5 Click the **Edit Vehicle**  button.
The Edit Vehicle screen appears.
- 6 Edit the customer’s vehicle information.
- 7 Select the **View**  button.
- 8 Click **OK**.
The Customers list appears.

 See “Club Rules Examples” on page 388.

For information on Fleets and Fleet Vehicles:

 See “About the Fleet Accounts” on page 148.

 See “About Fleet Invoice” on page 162.

Search for a Club Member


Perform a search to find an existing customer, search by barcode as well as the RFID tag number. Search for club or fleet customers. View Vehicle History, Membership


history, or Notes for a customer and search for a license plate number from Advanced Search.

From Search Records section, you can perform a search based on the parameters you select:


- 1 From the **Customers** menu, select **Manage**.
The **Manage** tab appears.
- 2 In **All Customers** box, click to select the check box.
-and/or-
In the **Rule** box, click to select one or more Club or Fleet Rule(s) from a list of all available Rules.
-and/or-
In the **Status** box, click to select one or more Status selections:
 - All
 - Active
 - Suspended
 - Terminated
 - Declined
 - Duplicate
 - Bill
 - NotSignedUp

NOTE: Click the **All** box to select all status check marks, or click the **All** box again to clear.

- 3 Click the **View**  button.
The Customers search results appear in a list.
- 4 In **Search**, type item to search.
- 5 In **Field**, select one of the following that pertains to the text you typed in the Search field:
 - Customer
 - AccountID
 - Phone
 - License
 - RFID
 - Barcode
 - CreditCard

- CustomerNumber
 - Fleet Invoice
 - Fleet Prepaid
- 6 Click the **View**  button.
The Customer's search results appear in a list format, and can be exported to a file or printed.
 - 7 Click to select an individual customer.
The customer record will be highlighted.


 See "Export a Customer Membership List" on page 101.

 See "Print a Customer List" on page 100.

 See "Edit Club Member's Billing Date" on page 88.

Terminate a Customer

Follow these steps to retire a customer:


- 1 From the **Customers** menu, select **Manage**.
The Manage tab appears.
- 2 Click the **View**  button.
- 3 From the **Membership** list, click to select the customer record.
The customer record is highlighted.



ID	Name	Address	Contact Info	Club	Start Date	Vehicle	Club Name	Phone	Status	End Date
8	Tom Smith	123 Somewhere Place Any City PA - 12345	(555) 222-1111 (P) (555) 245-9888 (B) (555) 555-5444 (C) smith@washconnect.com smith@washconnect.com	Deluxe Unlimited Wash Club	10/5/2011	Man Car	#0002	4/19/2013	Active	3/19/2013
10	Sam Smith	100 Main Street Anytown PA - 12345	(555) 555-1212 (P) myemail@washconnect.com	Ultimate Wash	1/30/2016	Vinyl Car	#0003	10/5/2016	BB	10/4/2013

Selected Customer Record

Figure 32. Customer Record Selected

- 4 Click the **Retire Customer**  button. A warning message appears:
Are you sure you want to terminate this customer, all its vehicles, and erase its credit card information? Are you sure?
- 5 Click **Yes**.
The customer and all its vehicles are Retired and credit card information is removed and the Status is Terminated.



See "Edit Club Member's Billing Date" on page 88.



See "Sort the Columns for the Customer List" on page 89.



See "View Vehicle Transaction History" on page 96.



See "Customer Notes or Vehicle Notes" on page 97.



See "Print a Customer List" on page 100.




See "Export a Customer Membership List" on page 101.

Terminate/Suspend a Customer

You can terminate or suspend a customer. Suspend a customer if they intend to return to club in the future. Suspending will deactivate customer and retain credit card on file. Terminate if customer will not return to wash again.

WARNING: Terminated customer permanently deletes all credit cards on file for the customer's vehicles.

- 1 Open *WashConnect*®.
- 2 From the **Customers** menu, select **Manage**.
–or–
From the **Fleet** menu, select **Accounts**.
- 3 Search for a Customer.
- 4 Click to select the active customer.
The customer is highlighted.
- 5 Click the **Retire Customer**  button.

A message **Are you sure you want to terminate this customer, and all its customer groups?** appears.

6 Click **Yes**.

7 The message **Vehicle terminated successfully** appears.

8 Click **OK**.

9 In Status, select **Terminated** or **Suspended**.

If terminated, this clears any credit card information immediately at both the current location and at corporate. Even though terminated, the club is still valid until the expiration date. Upon expiration, all vehicles will automatically be terminated.

If suspended, customers' credit card information will be retained.

10 Click the **Save**  button.

11 Click **OK**.



See "Sort the Columns for the Customer List" on page 89.



See "View Vehicle Transaction History" on page 96.



See "Customer Notes or Vehicle Notes" on page 97.



See "Print a Customer List" on page 100.



See "Export a Customer Membership List" on page 101.



See "Edit Club Member's Billing Date" on page 88.



See "Sort the Columns for the Customer List" on page 89.



See "Retire a Customer" on page 93.



See "View Vehicle Transaction History" on page 96.



See “Customer Notes or Vehicle Notes” on page 97.



See “Print a Customer List” on page 100.




See “Export a Customer Membership List” on page 101.

View Vehicle Transaction History

You can view, print or export Vehicle Transaction History for a particular customer all you need is their license plate or RFID number. The Vehicle Transaction History button is a short cut button.

NOTE: You can also select the Vehicle Transaction History from the main menu, select **Clubs > Reports > Vehicle History**.

- 1 From the **Customers** menu, select **Manage**.
The **Manage** tab appears.
- 2 From the list of Members, click to select the customer record.
The **customer record** is highlighted.
- 3 Click the **Vehicle Transaction History**  button.
The Vehicle History Report opens in a new tab named Vehicle History with the license plate for the selected Customer’s vehicle.
- 4 After viewing, printing or exporting, click the **Close** button to close the Vehicle History tab.



See “Sort the Columns for the Customer List” on page 89.



See “Retire a Customer” on page 93.



See “View Vehicle Transaction History” on page 96.



See “Customer Notes or Vehicle Notes” on page 97.




See “Print a Customer List” on page 100.



See “Export a Customer Membership List” on page 101.

View Membership History

Follow these steps to view the Club Membership History information:

- 1 From the **Customers** menu, select **Manage**.
The Manage tab appears.
- 2 Search for a member.
- 3 From the list of members, click to select the customer record.
The customer record is highlighted.
- 4 Click the **Membership History**  button.

The customer's Membership History information appears including Edited At, Rule, Status, Status Date, Joined Date, Expiration Date, Modified on, Modified by, and Application.

- 5 Click the **Close** button to continue.



See "Sort the Columns for the Customer List" on page 89.



See "Retire a Customer" on page 93.



See "Customer Notes or Vehicle Notes" on page 97.



See "Print a Customer List" on page 100.





See "Export a Customer Membership List" on page 101.

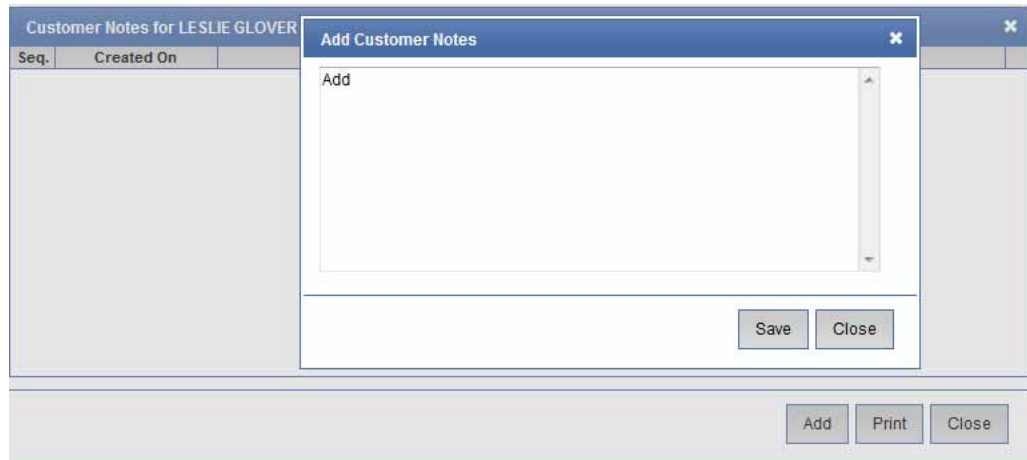
Customer Notes or Vehicle Notes




You can add a note or if a note has been added for a customer or a vehicle, you can view or print Notes.

WARNING: After a Note is saved, it cannot be deleted or removed.

- 1 Click to select an individual customer record from the list, the customer line highlights.

- 2 Select either the **Customer Notes**  button
-or-
the **Vehicle Notes**  button.



- 3 Click the **Add**  button.
- 4 In the **Add Customer Notes** or **Add Vehicle Notes** box, type a note for that customer or vehicle respectively.
- 5 Click the **Save**  button.
The message Customer notes saved successfully appears.
- 6 Click **OK**.
The note is saved with a created on date that is automatically generated with a date and time stamp.
- 7 Click **Close**.
- 8 From the Notes column, you can review the note.
Select the **Note**  button to review the note. If there are two Note buttons for same customer, the top Note is for Customer notes and the bottom Note is for Vehicle notes.
- 9 You can **Print** the note.



See "Sort the Columns for the Customer List" on page 89.



See "Retire a Customer" on page 93.



See "View Vehicle Transaction History" on page 96.





See "Print a Customer List" on page 100.









See "Export a Customer Membership List" on page 101.

Edit a Customer

Follow these steps to edit customer information:

- 1 From the **Customers menu, select Manage**.
The Manage tab appears.
- 2 Search for a customer. From the list of Customers, click to select the customer record.
The customer record is highlighted.
- 3 Click the **Edit Customer**  button.
The Customer dialog box appears.
- 4 Edit the customer information.
- 5 If Promotions section is available, add dates.
- 6 Click the **Save**  button.
The Customer Information is saved.








Manage

Customer Information
Vehicle Information
Customer Group(s):


Club	
Customer	
*First:	<input type="text"/>
Middle:	<input type="text"/>
*Last:	<input type="text"/>
Business Name:	JAMES WILLIAMSON
	<input type="checkbox"/> Tax Exempt
Status:	Active <input type="button" value="v"/>
Card on file:	Amex XXXX1007 12/1/2015
Billing Zip:	<input type="text"/>
Site:	Auto Pros Express <input type="button" value="v"/>
Statistics	
First Visit:	3/5/2014
Last Visit:	3/5/2014
Visit Counter:	1
Average Sales / Car:	21.00
Punch Card Counter:	1
Bonus Points Total:	120
Promotions	
Special Friends	<input type="text"/> <input type="button" value="calendar"/>
Frequency Promo 3	<input type="text"/> <input type="button" value="calendar"/>
Birthday	11/21/2014 <input type="button" value="calendar"/>
Anniversary Frequency Promo	<input type="text"/> <input type="button" value="calendar"/>
Family and Friends	<input type="text"/> <input type="button" value="calendar"/>
Anniversary	03/05/2014 <input type="button" value="calendar"/>
Frequent Promo	<input type="text"/> <input type="button" value="calendar"/>




Figure 33. Customer Information Screen with Sale Promotions Example


-  See "Edit Club Member's Billing Date" on page 88.
-  See "Sort the Columns for the Customer List" on page 89.
-  See "Retire a Customer" on page 93.
-  See "View Vehicle Transaction History" on page 96.
-  See "Customer Notes or Vehicle Notes" on page 97.
-  See "Print a Customer List" on page 100.
-  See "Export a Customer Membership List" on page 101.

Print a Customer List


After searching for the customer(s) or members, the Customer List appears from the Manage tab, and you can Print this list.

- 1** From the **Customers** menu, select **Manage**.
- 2** Search for the customer.
- 3** After search results appear in the Membership list, click the **Print** button. The print dialog box appears.
- 4** Select the **Print**  button. The list prints.

-  See "Edit Club Member's Billing Date" on page 88.
-  See "Sort the Columns for the Customer List" on page 89.
-  See "Retire a Customer" on page 93.


 See “Export a Customer Membership List” on page 101.

 See “View Vehicle Transaction History” on page 96.

 See “Customer Notes or Vehicle Notes” on page 97.

Export a Customer Membership List

After searching for the member or members, the list appears from the Manage tab, you can Export this list to either a PDF document or a Microsoft® Excel spreadsheet. If you want to send a mailing to your customers, export your customer’s addresses to a Microsoft Excel Spreadsheet.

- 1 From the **Customers** menu, select **Manage**.
- 2 Search for customer(s).
- 3 After search results appear in the Membership list, select the **Export**  button.
- 4 Select either **PDF** or **Excel**.
The File Download dialog box appears.
- 5 Click one of the following buttons: **Open**, **Save**, or **Cancel**.
 - Click **Open** to view the list as a PDF or Excel file.
 - Click **Save** to save the file on your computer.
 - Click **Cancel** to close the File Download dialog box.

 See “Create Customer Mailing Labels using Export to Excel” on page 101.

Create Customer Mailing Labels using Export to Excel

After exporting Excel file, you can use that file for a mail merge in Microsoft® Word. Follow these steps if you want to create labels:

- 1 First, export Excel file with addresses.

 See “Export a Customer Membership List” on page 101.

- 2 Open Microsoft® Word.
- 3 Create a Mail Merge.
- 4 Select Labels (to be placed on envelopes).

- 5 Select Recipients, use an Existing List.
- 6 Select the Microsoft Excel file that you saved in step #7.
- 7 Insert Merge Fields on the first label and format.
- 8 Click finish and merge.



See “Sort the Columns for the Customer List” on page 89.



See “Retire a Customer” on page 93.



See “Export a Customer Membership List” on page 101.



See “View Vehicle Transaction History” on page 96.



See “Customer Notes or Vehicle Notes” on page 97.



See “Print a Customer List” on page 100.

About the Group menu

Customers

Group

HELP - What can I do here?

Managers and Owners:


- Create customer group and add specific customers to the group.
- Offer special promotions to the group members only.





See “Add a Customer Group” on page 103.



See “Edit a Customer Group” on page 105.

 See "Delete a Customer Group" on page 106.

 See "Manage Users" on page 541.

 See "Add a Schedule for a Customer Group Profile" on page 104.


Add a Customer Group

Set up customer Groups to be used for customer group special pricing or discounts based on their profile association.

NOTE: Add a new Customer Group is only available from Corporate logon.

- 1 At WashConnect logon, select **Corporate**.
- 2 From the **Customers** menu, select **Group**.



- 3 In **Status**, select **Normal**.
- 4 Click the **Add**  button.
- 5 In **Name**, type a name for the Customer Group.
- 6 In Priority Level, select level 1. (Level is for future use).

Customer Group

*Name: Premium Group


Priority Level: 1

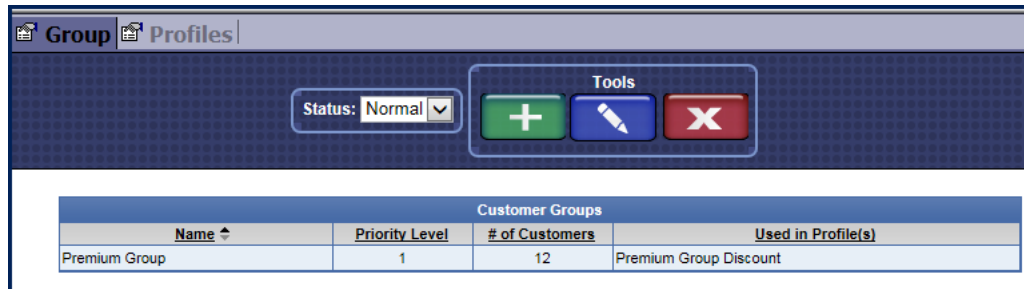
Used In Profile(s):

Search Customer(s):

Customer Listing					
2 of 355					
<input type="checkbox"/>	Business Name	Last Name	First Name	Address	Contact
<input checked="" type="checkbox"/>		Smith	Susan	14 Deibert Dr. Stroudsburg, PA 18360	(555) 555-6666 (H)

Figure 34. Customer - Add a Customer to a Group

- 7 In **Search Customer(s)**, type a customer's name to search.
- 8 In the **Customer Listing**, select the Business Name(s) check box(es) to include the Customer Group.
- 9 Click the **Save**  button.

**Figure 35. Customer - Saved Groups**

Now you can add a profile with a schedule for the Customer Group.



See "Add a Schedule for a Customer Group Profile" on page 104.



See "Add a Customer Group" on page 103.



See "Edit a Customer Group" on page 105.




See "Delete a Customer Group" on page 106.



See "Manage Users" on page 541.

Add a Schedule for a Customer Group Profile

Follow these steps to add a schedule for Customer Groups to a profile:

- 1 From the **Configuration** menu, click **Goods & Services**, and then click **Profile**. The Profile tab appears.
- 2 Select a profile from the list. This is the profile to which you will assign the schedule.
- 3 In the **Schedule** area, select the **Add**  button. The **Schedule** dialog box appears.


Day	Start Date	End Date	Start Time	End Time	Vehicle	Applies To	Rule
All Days	08/22/2014		9:00 am	6:00 pm	Normal	Customer Group	Regular

Figure 36. Schedule Dialog Box

- 4 Select an item for each of the fields relating to time:
- 5 In Vehicle Height, select **Normal** or **High Vehicle**.
- 6 In Applies To, select a **Customer Group**.
- 7 In Rule, select the **Name of the Customer Group**.



See "About Profiles" on page 434.

- 8 Click **OK**.
The schedule is assigned to the profile.
- 9 Click the **Enable**  button, if necessary.
If the Status column displays Enabled, and the profile has a valid schedule, at this time, the profile will be completely enabled.

NOTE: Click the Enable button again to disable.



See "About Profiles" on page 434.



See "About the Group menu" on page 102.

Edit a Customer Group

You can edit the customers in a group.


- 1 From the **Customers** menu, select **Group**.
- 2 Make necessary changes.





Customer Groups			
Name	Priority Level	# of Customers	Used in Profile(s)
Premium	1	20	
Regular	1	1	


Figure 37. Customer - Edit Group

- 3 Click the **Save** button.
You can view the customer group in the list and the number of customers in each group as well as the Profiles they are used in.

 See "Add a Customer Group" on page 103.


 See "Edit a Customer Group" on page 105.

 See "Delete a Customer Group" on page 106.

 See "Manage Users" on page 541.

Delete a Customer Group

You can delete a Customer Group.

- 1 From the **Customers** menu, select **Group**.
- 2 Click to select a customer group from the list.
- 3 Click the **Delete**  button.
The deleted Customer Group will appear in the Closed status listing.
The customer group is moved from the Normal Status and to the Closed Status.



Customer Groups			
Name ↑	Priority Level	# of Customers	Used in Profile(s)
Above Average	1	0	
Exceptional	1	0	
Extraordinary	1	1	
Fast Food	1	0	
High	1	0	
High	1	0	
Low	1	0	
Low	1	0	
Medium	1	0	
New Discount	1	0	
Regular	1	0	
Regular	1	0	
Regular	1	0	
test	1	0	
test	1	0	
TEST	1	0	
test1	1	0	

Figure 38. Customer - Group Closed



See *"Add a Customer Group"* on page 103.



See *"Edit a Customer Group"* on page 105.



See *"Delete a Customer Group"* on page 106.













See *"Manage Users"* on page 541.

CHAPTER 4:

CLUBS

Review the success of your programs and fleet accounts with ten different Reports from the Clubs menu.

For step-by-step instructions for these standard reports:

-  See *"About the Profitability Report"* on page 113.
-  See *"About the Club Usage Report"* on page 115.
-  See *"About the Vehicle History Report"* on page 121.
-  See *"About the Club Summary Report"* on page 125.
-  See *"About the Declined Payment Report"* on page 129.
-  See *"About the Club Revenue Distribution Report"* on page 136.
-  See *"About Autobill Revenue Report"* on page 139.
-  See *"About the Credit Card Expiration Report"* on page 142.
-  See *"About the Renewal and Termination Report"* on page 144.
-  See *"About Advance Expiration"* on page 146.

About Club Membership

Managing club memberships is an easy task with WashConnect.

The system was designed for flexible relationships between the following:

- Customers
- Vehicles
- Membership Programs

For example:

Offer two programs: a deluxe club and a basic club. A customer with an old vehicle and a new vehicle can join both clubs. The old vehicle can belong to the basic club. The new vehicle can belong to the deluxe club. The system allows you to manage the customer, both vehicles and their associated memberships. This is presented in an easy-to-read summary from the customer screen.

Autobill Customers and Track Usage

NOTE: If ICS hosts Corporate, you cannot autobill from Corporate.

Once the customer and his data are in the system, the customer can be auto billed each month. As the customer redeems wash services, the system tracks usage.

Autobilling and **Usage Tracking** are essential to the success of your membership programs.

- You can evaluate the profitability of a club by seeing whether members are costing you more money than you are collecting in the monthly billing cycle. It is easy to run a **Profitability** report that shows you this data.



See “About the Profitability Report” on page 113.

- You can drill down to discover who visited the wash more than anyone else during a given time frame. These are the customers who may be eating into your club membership profits by abusing the program’s terms of use.
- You can see the customers who have not visited the wash as frequently as other club members. These might be customers who have stopped visiting the wash. You can reach out to them with a reminder about the program’s value, convenience and speed of service. If you can’t reach them, and after X months of them not visiting the wash, you can put their membership on hold and stop auto bill. Also, there is a global setting to configure for customers who have not used the wash in X days so they are not charged.

Autobilling Notes for Renewing/Billing Individual Sites

There are several configurations that need to be in place to support the billing/renewal of memberships at the individual sites. These settings will need to be set with Technical Support at the Corporate site.

For example, if attempting to redeem a membership at a different site than the Site ID attached to the membership, the site will attempt to contact the Autobilling site to determine the membership status.

If the membership is expired at the originating site, the local site will state that the membership is expired and only offer the Buy Wash button to continue. It will not attempt to renew the membership because Autobilling is set to happen at individual sites and now the membership is out of range.

If when attempting to redeem the membership at a remote site and the originating site reports the membership to be valid, the remote site will honor the membership and give the wash.



See "Add a Club Customer" on page 85.

Analyze Club Memberships

The **Club Reports** menu makes it possible for you to carefully analyze your club membership. The top three reports: **Profitability**, **Usage** and **Vehicle History** can give you the necessary data required to make strategic decisions:

- Increase or decrease the price of a membership
- Add a new membership
- Eliminate an under-performing membership

Other reports help you track down expired customers, compare one club against another, and examine the revenue distribution between where a customer joined vs. where the customer most often redeemed wash services.



See "About the Profitability Report" on page 113.



See "About the Club Usage Report" on page 115.



See "About the Vehicle History Report" on page 121.

Get Near-Time Replication and Error Checking

As with everything in WashConnect® software, **Membership** functions are multi-site enabled with near-time replication. When a customer signs up at one site, all the

other sites receive that data soon after the transaction is finalized. Duplicate customer error checking thins out accidental sign ups at multiple locations. With WashConnect®, there are no concerns about data lag between sites or a customer signing up at two locations on the same day.



See “About the Reports Menu” on page 112.



See “About Club Membership” on page 110.

About the Reports Menu

You can use the **Clubs Reports** menu and view the ten different reports to determine the success of your programs.

- 1 From the WashConnect® log in screen, connect to the necessary region to view the corresponding report data. To see data for all locations, log in with the Corporate region selected.
- 2 You can set default report date ranges from the Report Default Date menu in the **Set Date Range**.

NOTE: To give reports extra screen width, you can click the vertical **Menu** tab to hide the menu bar.



See “About the Menu Bar” on page 50.



See “About Reports” on page 61.



See “Clubs” on page 109.

About the Profitability Report

Profitability Report

HELP - What can I do here?

Managers:

- Determine which wash club is the most profitable.
- Click any total in the report to open a more detailed report in a new tab.
- View summary on how many vehicles were billed and total revenue was generated for each club.
- Draw conclusions about customer's upgrade habits in each of your clubs, so you then can set up appropriate marketing campaigns to target that club.



The Profitability Report is designed for managers and can be accessed from the Clubs menu, and then select Reports. It summarizes your clubs and their activity.



See "View Profitability Report" on page 113.




See "Profitability Report Descriptions" on page 114.



See "About Club Membership" on page 110.

View Profitability Report

To view report, follow these steps:

- 1 From the **Clubs** menu, select **Reports**, and then select **Profitability**. The **Profitability** tab appears.
- 2 In the **Start Date** and **End Date** boxes, select a date range.
- 3 Click the **View**  button. The report appears.

- To see the total base wash details, hover your mouse over the numbers in the Total Base Wash column. A pop up box appears.

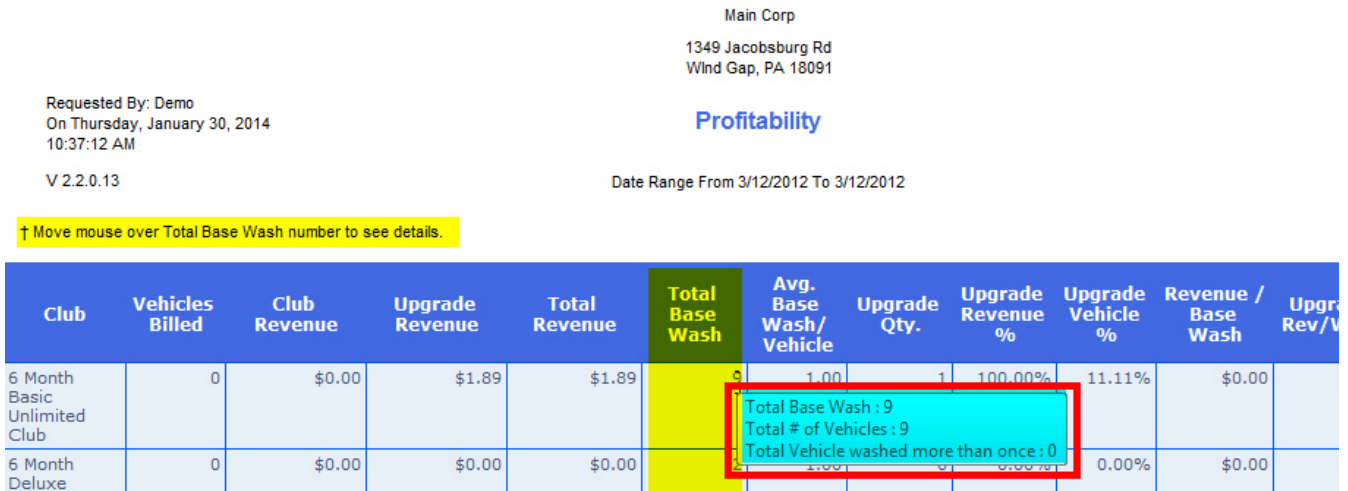


Figure 39. Profitability Report with Total Base Wash popup



See "About Club Membership" on page 110.



See "View Profitability Report" on page 113.



See "Profitability Report Descriptions" on page 114.



See "Clubs" on page 109.

Table 2: Profitability Report Descriptions

Field	Description
Club	Name of the program.
Vehicles Billed	The number of unique vehicles that were either auto billed or initially billed in the given time period. If a vehicle did both, it is still counted only once.
Club Revenue	Total sales from Club Memberships including Auto Sentry sales and auto billing. Divide the Revenue by Vehicles to get an approximate cost of the club. For example, a Revenue of \$5,704 divided by 235 vehicles equals \$24.27. The actual price might be \$24.95. But because of prorating, the calculated amount is slightly less.
Upgrade Revenue	Revenue from upgrades and extra services.
Total Revenue	Total Revenue = Revenue + Upgrade Revenue.
Total Base Wash	Total washes (redeemed) by members for the time frame.

Table 2: Profitability Report Descriptions

Field	Description
Avg. Base Wash /Vehicle	Average number of washes per vehicle for the time frame.
Upgrade Qty.	Upgrade quantity. Number of times customers purchased an upgrade in addition to the included service.
Upgrade Revenue %	Percentage of revenue coming from upgrades. Upgrade Revenue divided by Total Revenue .
Upgrade Vehicle %	Upgrade Quantity divided by Total Wash , expressed as a percentage. Say the vehicle visited 10 times. An upgrade wash purchased 5 times. The Upgrade Vehicle % is 50 percent.
Revenue / Base Wash	Average Revenue per wash. Revenue divided by Total Wash .
Upgrade Rev / Base Wash	Average Upgrade revenue per wash. Upgrade Revenue divided by Total Wash .
Total Rev./Base Wash	Total revenue per wash. Total Revenue divided by Total Wash .



See "View Profitability Report" on page 113.



See "Profitability Report Descriptions" on page 114.



See "About Club Membership" on page 110.



See "Clubs" on page 109.

About the Club Usage Report

Club Usage Report

HELP - What can I do here?

Operators and Managers:

- Sorted by percentiles.
- Most frequent visitors in top 10th percentile.
- Find out which customers redeemed the most club washes.
- View which members were billed.



See “About Club Membership” on page 110.



See “View Profitability Report” on page 113.



See “Profitability Report Descriptions” on page 114.



See “Clubs” on page 109.



See “View the Club Usage Report” on page 116.



See “About the Menu Bar” on page 50.




See “About the Reports Menu” on page 112.

View the Club Usage Report

The Club Usage Report is a tool for managers at site level to view the usage of the club membership wash information is broken down in percentiles.

To view the Usage report, follow these steps:

- 1 From the **Clubs** menu, click **Reports**, and then click **Club Usage**. The **Usage** tab appears.
- 2 In the **Start Date** and **End Date** boxes, select a date range.
- 3 In the **Program** box, select one or more programs.
- 4 Click the **View**  button.

The **Club Usage** report appears.

Most Visited Vehicle	Name	License Plate	Visits	Avg. Visits / Month / Vehicle	Avg Days between Visits	Club Revenue	Upgrade Revenue	Total Revenue	Upgrade Qty	Upgrade Revenue %	Rev/Wash	Upgrade Rev / Wash	Total Rev / Wash
91-100%		168	207	1.23	2.4	\$227.45	\$33.01	\$260.46	4	12.67%	\$1.10	\$0.16	\$1.26
81-90%		168	168	1.00	3.0	\$299.25	\$12.26	\$311.51	2	3.94%	\$1.78	\$0.07	\$1.85
71-80%		168	96	0.57	5.3	\$343.10	\$38.67	\$381.77	5	10.13%	\$3.57	\$0.40	\$3.98
61-70%		168	0	0.00	3.0	\$524.65	\$0.00	\$524.65	0	0.00%	\$524.65	\$0.00	\$524.65
51-60%		168	0	0.00	3.0	\$327.20	\$0.00	\$327.20	0	0.00%	\$327.20	\$0.00	\$327.20
41-50%		168	0	0.00	3.0	\$345.15	\$0.00	\$345.15	0	0.00%	\$345.15	\$0.00	\$345.15
31-40%		168	0	0.00	3.0	\$317.20	\$0.00	\$317.20	0	0.00%	\$317.20	\$0.00	\$317.20
21-30%		168	0	0.00	3.0	\$343.10	\$0.00	\$343.10	0	0.00%	\$343.10	\$0.00	\$343.10
11-20%		168	0	0.00	3.0	\$261.30	\$0.00	\$261.30	0	0.00%	\$261.30	\$0.00	\$261.30
1-10%		168	0	0.00	3.0	\$17.95	\$0.00	\$17.95	0	0.00%	\$17.95	\$0.00	\$17.95
Total		1680	471	0.28	10.7	\$3,006.35	\$83.94	\$3,090.29	11	2.72%	\$6.38	\$0.18	\$6.56

Figure 40. Club Usage Report



See “Club Usage Report Synopsis” on page 117.



See “About the Club Usage Report” on page 115.



See “Clubs” on page 109.

Club Usage Report Synopsis

The Figure 40, “Club Usage Report,” shows all active members and redeemed washes for the period. The total of Unique Active Licenses or memberships is 1,680.

Look at the top row in the report, and then read across. It represents the top tenth percentile (91%-100%) of customers. The report date range is set to one month. For that month, there were 168 customers in the top percentile. They visited 207 times for an average of 1.23 visits per vehicle for the month. The average days between visits were 2.4. In the last column, you can see that since these customers redeemed an average of 1.23 washes, the revenue per wash is low—\$1.26.

Compare that to the bottom row, the 1%-10% percentile. There were 168 customers who did not visit the wash at all, but were auto billed for their

memberships. Therefore, the revenue for these customers is a summation of their auto billing renewals, which was \$3,006.35 for the month.

Finally, look at the totals row, which shows you an average of all percentiles. You can see that Active Club Members visited the wash 471 times in the month. They visited an average of .28 times, or every 10.7 days. Total revenue per wash (displayed in the last column) shows that each wash generated an average of \$6.56 in revenue.

For interpretation, you can consider the actual price of a wash and the monthly auto billing charge for the club, both of which are not shown in the report. Consider the following:

- A basic wash is priced at \$5.00.
- Unlimited basic washes for \$14.95 in a wash club, and then customers are billed monthly.
- The internal break-even price for the basic wash is around \$2.00.

Given these factors, the revenue per wash of \$4.68 is favorable. While it is slightly less than the \$5.00 which would be charged to non-club members for the basic wash, it is still more than the actual break-even price of the basic wash. And finally, consider the \$30.00 monthly auto billing occurs regardless of weather conditions so a rainy month will positively effect the customer revenue. You will still be collecting the club revenue but more than likely running the wash less, increasing your average revenue per wash.



See "About the Club Usage Report" on page 115.



See "View the Club Usage Report" on page 116.



See "About the Reports Menu" on page 112.



See "Clubs" on page 109.

Expand Club Usage Report

Auto Pros Express 1349 Jacobsburg Road Wind Gap, PA 18091 (610) 881-8288
CLUB USAGE

Requested By: Wendy On Monday, December 01, 2014 11:51:56 AM Date Range From: 3/1/2013 To: 3/31/2013 Page: 1 of 1
 Program(s) : Wash Three Club, Wash Two Club, Wash One Club

V 2.3.0.6
 Note: Please use 14x8.5 inch paper to print this report.

Most Visited Vehicle	Name	License Plate	Visits	Avg. Visits / Month / Vehicle	Avg Days between Visits	Club Revenue	Upgrade Revenue	Total Revenue	Upgrade Qty	Upgrade Revenue %	Rev / Wash	Upgrade Rev / Wash	Total Rev / Wash
91-100%		25.00	20	0.80	38.75	\$1,064.91	\$120.52	\$1,185.43	13	10.17 %	\$53.25	\$6.03	\$59.27
81-90%		25.00	0	0.00	31.00	\$562.63	\$0.00	\$562.63	0	0.00 %	\$562.63	\$0.00	\$562.63
71-80%		25.00	0	0.00	31.00	\$624.39	\$0.00	\$624.39	0	0.00 %	\$624.39	\$0.00	\$624.39
61-70%		23.00	0	0.00	31.00	\$497.74	\$0.00	\$497.74	0	0.00 %	\$497.74	\$0.00	\$497.74
51-60%		24.00	0	0.00	31.00	\$497.92	\$0.00	\$497.92	0	0.00 %	\$497.92	\$0.00	\$497.92
41-50%		24.00	0	0.00	31.00	\$603.60	\$0.00	\$603.60	0	0.00 %	\$603.60	\$0.00	\$603.60
31-40%		24.00	0	0.00	31.00	\$468.25	\$0.00	\$468.25	0	0.00 %	\$468.25	\$0.00	\$468.25
21-30%		24.00	0	0.00	31.00	\$516.58	\$0.00	\$516.58	0	0.00 %	\$516.58	\$0.00	\$516.58
11-20%		24.00	0	0.00	31.00	\$480.22	\$0.00	\$480.22	0	0.00 %	\$480.22	\$0.00	\$480.22
1-10%		24.00	0	0.00	31.00	\$466.85	\$0.00	\$466.85	0	0.00 %	\$466.85	\$0.00	\$466.85
Total		242.00	20	0.08	375.10	\$5,783.09	\$120.52	\$5,903.61	13	2.04 %	\$289.15	\$6.03	\$295.18

Figure 41. Club Usage Report

Expand Club Usage Report for more Details

To examine the report more closely, you can click to expand a percentile ranking.

Auto Pros Express 1349 Jacobsburg Road Wind Gap, PA 18091 (610) 881-8288
CLUB USAGE

Requested By: Wendy On Monday, December 01, 2014 11:51:56 AM Date Range From: 3/1/2013 To: 3/31/2013 Page: 1 of 1
 Program(s) : Wash Three Club, Wash Two Club, Wash One Club

V 2.3.0.6
 Note: Please use 14x8.5 inch paper to print this report.

Most Visited Vehicle	Name	License Plate	Visits	Avg. Visits / Month / Vehicle	Avg Days between Visits	Club Revenue	Upgrade Revenue	Total Revenue	Upgrade Qty	Upgrade Revenue %	Rev / Wash	Upgrade Rev / Wash	Total Rev / Wash
91-100%	Evan Abraham	PPL321	7	7.00	4.43	\$509.37	\$22.57	\$531.94	3	4.24 %	\$72.77	\$3.22	\$75.99
	Adam Brown	AWL1234	4	4.00	7.75	\$20.73	\$49.92	\$70.65	4	70.66 %	\$5.18	\$12.48	\$17.66
	Jim Dean	DDM567	2	2.00	15.50	\$29.95	\$0.00	\$29.95	0	0.00 %	\$14.98	\$0.00	\$14.98
	John Doe	FDG55656	2	2.00	15.50	\$29.95	\$11.32	\$41.27	2	27.43 %	\$14.98	\$5.66	\$20.64
	Joseph King	4321ABC	1	1.00	31.00	\$24.99	\$0.00	\$24.99	0	0.00 %	\$24.99	\$0.00	\$24.99
	Aaron Nell	BBB789	1	1.00	31.00	\$39.99	\$9.41	\$49.40	1	19.05 %	\$39.99	\$9.41	\$49.40
	John Stan	CLSC9909	1	1.00	31.00	\$24.99	\$9.41	\$34.40	1	27.35 %	\$24.99	\$9.41	\$34.40
	Leroy Jenkins	DDG-44568	1	1.00	31.00	\$14.15	\$8.48	\$22.63	1	37.47 %	\$14.15	\$8.48	\$22.63
	Lord Thelma	ddd3222	1	1.00	31.00	\$39.99	\$9.41	\$49.40	1	19.05 %	\$39.99	\$9.41	\$49.40
	Ashish Alani	SDDS45	0	0.00	31.00	\$39.99	\$0.00	\$39.99	0	0.00 %	\$39.99	\$0.00	\$39.99
	Brett Binkley	TEK4454	0	0.00	31.00	\$19.95	\$0.00	\$19.95	0	0.00 %	\$19.95	\$0.00	\$19.95
	Terri Reddy	SOQ234	0	0.00	31.00	\$19.95	\$0.00	\$19.95	0	0.00 %	\$19.95	\$0.00	\$19.95
	DJ Dean	TRN3322	0	0.00	31.00	\$14.15	\$0.00	\$14.15	0	0.00 %	\$14.15	\$0.00	\$14.15
	Fred Jones	WRT54G	0	0.00	31.00	\$14.15	\$0.00	\$14.15	0	0.00 %	\$14.15	\$0.00	\$14.15
	George Gong	WFE45689	0	0.00	31.00	\$19.95	\$0.00	\$19.95	0	0.00 %	\$19.95	\$0.00	\$19.95
	Jay Mutchler	TTR4589	0	0.00	31.00	\$19.95	\$0.00	\$19.95	0	0.00 %	\$19.95	\$0.00	\$19.95

Figure 42. Club Usage Report 91-100% expanded for source detail

- 1 Click the expansion box to expand for more details.
- 2 Click again to contract detailed data.
 In the example, the 91%-100% percentile is expanded.



See "Club Usage Report Synopsis" on page 117.



See “Club Usage Report Field Descriptions” on page 120.



See “About the Club Usage Report” on page 115.



See “Clubs” on page 109.

Table 3: Club Usage Report Field Descriptions

Field	Description
Most Visited Vehicle	The Most Visited Vehicle column divides the total vehicles for the date range into ten equal percentiles. You can click a percentile to see customers and vehicles.
Name	Customer name. If the row is a summary percentile (i.e., not expanded), this field is empty. If the row is expanded, it contains customer names.
License Plate	Vehicle license plate. If the row is a summary percentile (i.e., not expanded), this field shows a car count. If the row is expanded, it contains license plates.
Visits	Number of visits for the time frame.
Avg. Visits/Month/ Vehicle	Average number of visits per month for each vehicle. If the row is a summary percentile (i.e., not expanded), this field shows an average of all vehicles. If the row is expanded, it contains the actual number of visits for each vehicle.
Avg. Days Between Visits	Average number of days between visits. This takes into account the date range of the report. For example, if the date range is a month, Avg. Days Between Visits accounts for the number of visits only for the number of days in the month. It would not represent the average since the customer joined the club. To see the average number of visits since a customer joined the club, you can adjust the date range.
Club Revenue	Total revenue collected over time frame for the set of or individual Club members listed.
Upgrade Revenue	Revenue from upgrades and extra services.
Total Revenue	Total Revenue = Revenue + Upgrade Revenue.
Upgrade Qty	Upgrade quantity. Number of times customers purchased an upgrade in addition to the included service.
Upgrade Revenue %	Percentage of revenue coming from upgrades. Upgrade Revenue divided by Total Revenue .
Rev/Wash	Revenue per wash. Revenue divided by Total Wash .
Upgrade Rev/Wash	Upgrade revenue per wash. Upgrade Revenue divided by Total Wash .
Total Rev/Wash	Total revenue per wash. Total Revenue divided by Total Wash .

About the Vehicle History Report

Vehicle History Report

HELP - What can I do here?

Managers:

- Search a license plate number or RFID tag number.
- Find out how often a specific vehicle visited any of your car wash sites.
- Review more than two dozen details on the customer's club usage and auto billing history.
- Increase total revenue per wash amount: First, view the Club Usage report to see customers who visit the wash very frequently. Second, find those customers by searching for the license plate or RFID tag in the Vehicle History report and then offer these customers to purchase upgrades.



The vehicle history report is useful for viewing a club customer's details within a selected date range:

- Auto billing Revenue
- Upgrade Revenue
- Total Revenue per Wash
- Separate Lists for Auto billing Transactions and Usage



See "Profitability Report Descriptions" on page 114.



See "About Club Membership" on page 110.



See "View Profitability Report" on page 113.



See "Clubs" on page 109.



See “View the Vehicle History Report” on page 122.



See “About the Menu Bar” on page 50.



See “About the Reports Menu” on page 112.



See “Vehicle History Report Descriptions” on page 124.

View the Vehicle History Report

To view the Vehicle History Report, follow these steps:

- 1 You will need the following information before you begin:
 - Customer’s license plate number.
 - or–
 - Customer’s RFID tag number.
- 2 From the **Clubs > Reports** menu, click **Vehicle History**. The **Vehicle History** tab appears.
- 3 In the **Start Date** and **End Date** boxes, select a date range.
- 4 In the **In Field** box select a field to search:
 - License
 - or–
 - RFID
- 5 In the **Search** box, type the necessary characters.

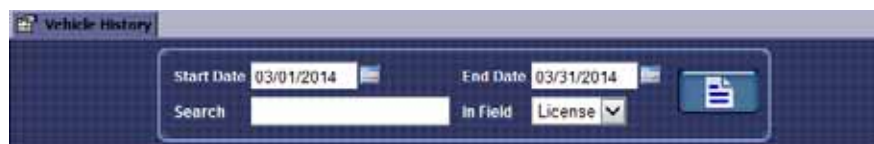


Figure 43. Vehicle History Date Range

- 6 Click the **View**  button. The **Vehicle History Report** appears.

NOTE: The report includes information for the current login location. If you logged in to a site location, for example, then the report will show vehicle history for that site only. To see vehicle history across sites, you can log in at a higher level in the hierarchy, such as the corporate location.

You can view the **Vehicle History** Report for a customer:

Vehicle History Report										
Last Name	First Name	Address			Contact	Recurring ID	License			
Smith	John	123 Somewhere Pl., Any City PA 12345			111-222-3333	1234567	ABC1234 #111			
Revenue	Upgrade Revenue	Total Revenue	Total Wash	Avg. Visit in Days	Upgrade Qty.	Upgrade Revenue %	Upgrade Vehicle %	Revenue / Wash	Upgrade Rev / Wash	Total
\$10.13	\$0.00	\$10.13	2	0.02	1	0.00%	50.00%	\$5.07	\$0.00	
Site	Transaction ID	Posted Date	Service		Amount					
Sparkle Car Wash	1923116	10/13/2009	Exterior Wash-NF		\$5.66					
			Unlimited Wash Disc		(\$5.66)					
Sparkle Car Wash	1922007	10/11/2009	Exterior Wash-NF		\$5.66					
			Unlimited Wash		\$10.13					
			Unlimited Wash Disc		(\$5.66)					

Figure 44. Vehicle History Report

Tip Increase Revenue if you do the following: You can use the vehicle history report in conjunction with other reports. For example, you can first view the usage report to see customers who visit the wash very frequently. Then you can find those customers by searching for the license plate or RFID tag in the vehicle history report. Customers who visit the wash very frequently have a lower total revenue per wash amount. By enticing these customers to purchase upgrades, you can increase the total revenue per wash.



See “Vehicle History Report Descriptions” on page 124.



See “About Club Membership” on page 110.



See “Clubs” on page 109.

Vehicle History Report Descriptions

Table 4: Vehicle History Report Descriptions

Field	Description
Last Name	Customer last name.
First Name	Customer first name.
Address	Customer address.
Contact	Customer contact information.
Recurring ID	<i>TransFirst</i> ® customer ID. If no <i>TransFirst</i> ID is established, this field contains the number 1.
License	Customer license plate on file.
RFID	RFID tag number associated with the plate shown.
Revenue	Revenue from non-club purchases and recurring CLub Fees. Revenue is summed by the grouping and date range. You may see revenue of \$0.00 for the vehicle. This may be the case if the price of the service redeemed (e.g., \$5.66) was offset by the price of the discount (e.g., \$5.66).
Upgrade Revenue	Revenue from upgrades and extra services.
Total Revenue	Revenue plus upgrade revenue.
Total Wash	Total washes (redeemed) by members for the time frame.
Average Days Between Visits	Average number of days between visits. This takes into account the date range of the report. For example, if the date range is a month, Average Days Between Visits accounts for the number of visits only for the number of days in the month. It would not represent the average since the customer joined the club. To see the average number of visits since a customer joined the club, you can adjust the date range.
Upgrade Qty.	Number of times the customer purchased an upgrade in addition to the included service.
Upgrade Revenue %	Percentage of revenue coming from upgrades. Upgrade Revenue divided by Total Revenue .
Upgrade Vehicle %	Upgrade Quantity divided by Total Wash , expressed as a percentage. Say the vehicle visited 10 times. An upgrade wash purchased 5 times. The Upgrade Vehicle % is 50 percent.
Revenue / Wash	Average Revenue per wash.
Upgrade Rev / Wash	Average Upgrade Revenue per wash.
Total Rev./Wash	Average Total Revenue (club revenue and upgrades) per wash.

Table 4: Vehicle History Report Descriptions (Continued)

Field	Description
Site	Site location shows at which site the customer redeemed a wash. If the member has a choice of six sites and visits each, there will be a transaction from each site displayed here.
Transaction ID	Unique identification number for the transaction.
Posted Date	Date the purchase was recorded in the system.
Service	The service redeemed, along with discounts, upgrades, etc.
Amount	Dollar amount of the service redeemed or discount applied.



See "View the Vehicle History Report" on page 122.



See "About Club Membership" on page 110.



See "Clubs" on page 109.

About the Club Summary Report

Club Summary Report



HELP - What can I do here?

Sales and Marketing Manager:

- Discover if a club has added more members than it lost for a given date range, and then market the club that is losing its members.
- Identify trends by looking back on different snapshots of time to review club membership.

Manager:

Each club is listed with the following totals:

Declined • Suspended • Terminated • Current • Renewed
• Renewed and Active • New Total Active

The summary report can help you identify trends in membership and activity over time.

[Click on one of the following:](#)



See “View the Club Summary Report” on page 126.



See “Club Summary Report Descriptions” on page 128.



See “About the Menu Bar” on page 50.




See “About Reports” on page 61.



See “Clubs” on page 109.

View the Club Summary Report

To view the **Club Summary** report, follow these steps:

- 1** Click **Club Summary**.
The **Club Summary** tab appears.
- 2** In the **Start Date** and **End Date** boxes, select a date range.
- 3** Click the **View**  button.
The Summary report appears.

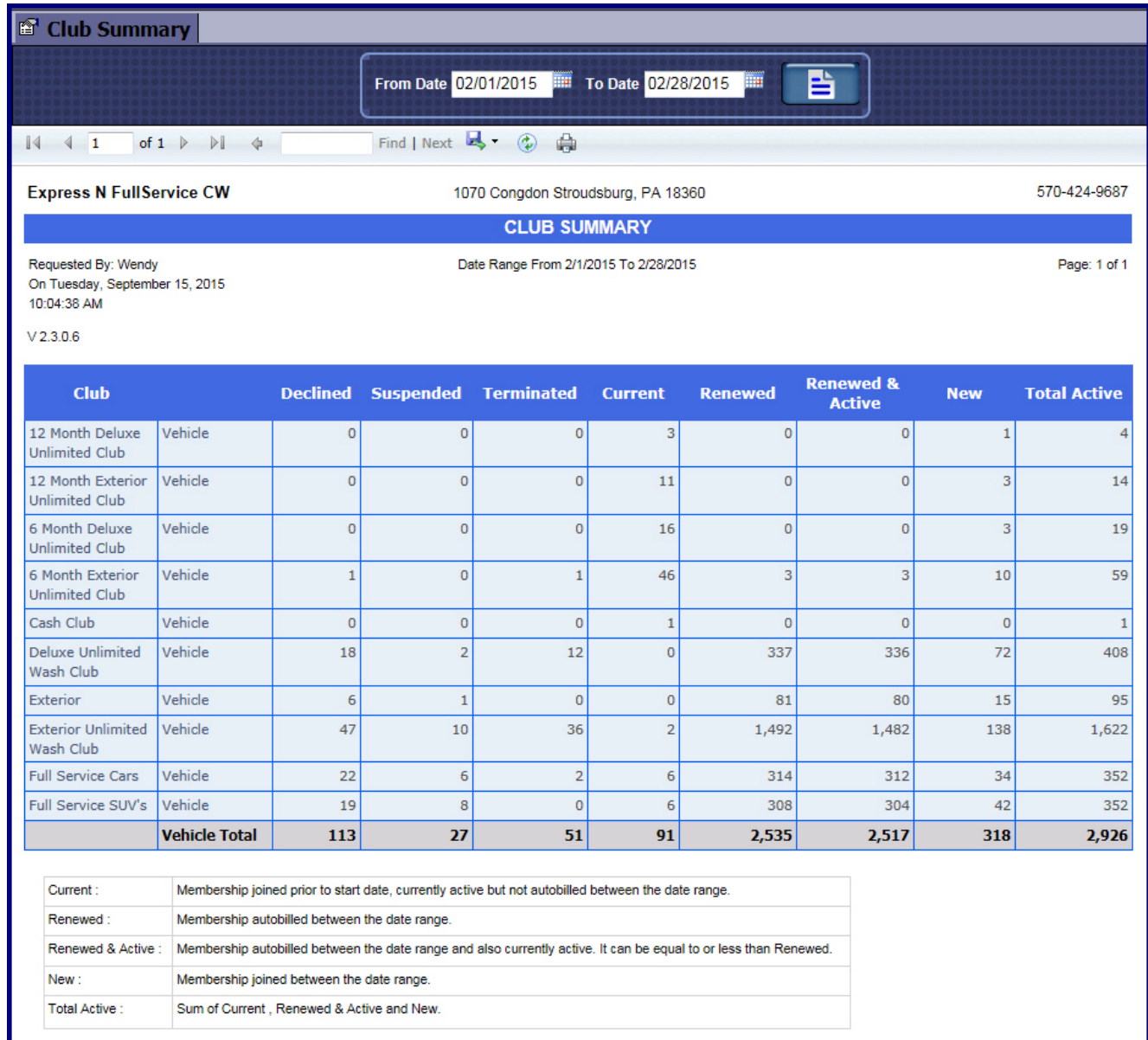


Figure 45. Club Summary Report

Identifying trends in membership can easily be discovered from the Club Summary.

The Declined, Suspended and Terminated columns show negative activity. The Declined column means the credit card was rejected. If a customer is declined, you might decide to suspend, terminate or renew the membership.

The report shows the most recent program membership that applies to each program member. Therefore, if a customer was declined to start the month and later in the month opted to terminate the membership, the report counts the membership as terminated and not declined. But if the report date ends before the termination, the report would count the membership as declined. The sum of

Renewed & Active, Current, & New columns give you the Total Active for the time frame.



See “Club Summary Report Descriptions” on page 128.



See “About Club Membership” on page 110.



See “Clubs” on page 109.

Club Summary Report Descriptions

Table 5: Club Summary Report Field Descriptions

Field	Description
Club	Name of each club.
Vehicle	This entire report is tracked by vehicles.
Declined	Number of members who received a declined response from the processor (e.g., <i>TransFirst</i>) during auto-billing for the time period.
Suspended	Number of members who were manually suspended for the time period. For example, someone who leaves town for the season and does not want to be billed or terminated can be suspended for the time period.
Terminated	Number of members who were manually terminated for the time period.
Current	Number of members who joined prior to start date of the report, currently active but not autobilled between the date range.
Renewed	Total pre-existing members that were autobilled for the date range selected.
Renewed & Active	Number of members autobilled between the date range and also currently active. This number can be equal to or less than Renewed.
New	Number of new members that joined during the date range.
Total Active	The Total or Sum of Current, Renewed & Active, and New members for the date range selected.



See “View the Club Summary Report” on page 126.



See “About Club Membership” on page 110.



See “Clubs” on page 109.

About the Declined Payment Report

Declined Payment Report

HELP - What can I do here?

Managers:

- Interactive Report - Update credit card information directly from this report.
- Find contact information and notes for customers whose credit cards were declined and a reason for each denial.
- Easily reach out to customers who quit a club and sign them up again:
 - Enter new credit card information, and mark them for rebilling during the next autobilling cycle.
 - If customer wants to quit, change status to terminated.



The declined payment report is interactive, allowing you to update information directly in the report.



[See "Search for a Customer from the Declined Payment Report" on page 130.](#)



[See "Edit Customer Notes in the Declined Payment Report" on page 131.](#)



[See "Edit a Customer in the Declined Payment Report" on page 133.](#)



[See "Mark Bill in Declined Payment Club Report" on page 133.](#)



[See "About the Menu Bar" on page 50.](#)



[See "About Reports" on page 61.](#)



[See "Declined Payment Report Descriptions" on page 135.](#)



[See "Clubs" on page 109.](#)

Search for a Customer from the Declined Payment Report

NOTE: This report only works from corporate or the auto billing site.

- From the **Clubs > Reports** menu, select **Declined Payment**. The **Declined Payment** tab appears.

- Optional: Clear the **Show All** box, and then select a new date range in the **Start Date** and **End Date** boxes.
- From the **In Field** list, select a field to search:
 - Customer (This search checks both last name and first name fields, and then returns matching results for both.)Phone
 - License
 - RFID
 - Barcode
 - Credit Card
 - Customer Number
 - Book
 - Fleet Invoice
 - Fleet Prepaid
- In **Search Records** box, type in available field information.

Search Filters

 - **Characters:** The filter is applied on the first few letters of the field. For example, filtering with “B” in the Customer field will return customers whose names begin with “B,” **not** customers who have “B” anywhere in their name.
 - **Numbers:** Another example would be a filter on RFID tag. If you type “4” you will filter the report to show all RFID tags beginning with 4. However, the filter will **not** return all tags that contain 4 anywhere in the number. It will only find tags beginning with 4.

NOTE: For RFID and Credit Card searches, you do not need to precede the search term with a # or XXXX. Just type the first few numbers of the RFID tag or credit card you want to find.

- Click the **View**  button.

- 6 From the search results, locate and then click to select customer.
- 7 Click the **View** button.
The **Declined Payment** report appears.

Declined Payment

Search Records
 Show All
 Start Date: 7/10/2015 End Date: 7/10/2015
 Search: a In Field: License
 Searched for License "a"

Tools

Declined Payment
 1 of 1 Showing 1 - 5

<input type="checkbox"/> All	Last Name	First Name	Notes	Address	Contact	Recurring ID	Credit Card	Transaction	Date Declined	License	RFID	Amount	Declined Reason
<input type="checkbox"/>	Magnum	Mike		PA -		2018074	103 XXXX1007 12/1/2013	99000244082	8/14/2014	ASD1245	#867854	\$21.15	Credit Card Number Or Expire Date is not valid
<input checked="" type="checkbox"/>	Polles	Turbo		- 18886		1539951	102 XXXX8248 12/1/2013	99000003520	4/27/2013	ADF1234	#317792	\$31.75	Payment not found
<input checked="" type="checkbox"/>	WILLIAMS	ABE		673 W. Main St Coopersburg PA - 18036	(610) 474-7363 (H)	2060657	101 XXXX7662 8/1/2013	99000003732	10/1/2013	AWC5748	#26001	\$42.40	Credit Card Number Or Expire Date is not valid Customer AVS failed. This does not mean billing failed. AVS code is Not a valid code

Figure 46. Declined Payment Report

[See "Edit Customer Notes in the Declined Payment Report" on page 131.](#)

[See "Mark Bill in Declined Payment Club Report" on page 133.](#)

[See "Declined Payment Report Descriptions" on page 135.](#)

[See "Clubs" on page 109.](#)

Edit Customer Notes in the Declined Payment Report

You can view customer data and edit notes in the **Declined Payment** report.

- 1 From the **Clubs** menu, select **Reports**.
- 2 In the **Declined Payment** report, search and select a customer.
The selected row is highlighted.

Last Name	First Name	Notes	Address	Contact	Recurring ID	Credit Card	Transaction	Date Declined	License	RFID	Amount	Reason
Cahill	Andrew		100 Main Street Anytown PA - 12345	(555) 555-1212 (H) myemail@contactme.com	799027	101 XXXX3201 7/1/2010	100100003630	7/1/2010	ABC01556	#40390	\$14.95	Do not honor
Smith	George		100 Main Street Anytown PA - 12345	(555) 555-1212 (H) myemail@contactme.com	771227	101 XXXXM70 2/1/2011	1001000012507	2/1/2011	ABC02516	#40579	\$15.05	Expired card
Goodwin	Shannon		100 Main Street Anytown PA - 12345	(555) 555-1212 (H) myemail@contactme.com	130625	101 XXXX8020 7/1/2010	100100006130	8/2/2010	ABC01955	#40633	\$15.85	Pick up card/Customer AVS failed. This does not mean billing failed. AVS code is Address unavailable
La Vega	Migro De		100 Main Street Anytown PA - 12345	(555) 555-1212 (H) myemail@contactme.com	739481	101 XXXX3543 4/1/2011	1001000015407	4/1/2011	ABC03389	#50501	\$15.85	Do not honor/Customer AVS failed. This does not mean billing failed. AVS code is No address or ZIP match
DeHaven	Theresa		100 Main Street Anytown PA - 12345	(555) 555-1212 (H) myemail@contactme.com	767762	101 XXXX3714 10/1/2013	100100006707	8/2/2010	ABC03600	#43962	\$15.85	Restricted card. (invalid in region or country)

Figure 47. Selected Customer in Declined Payment Report

- Click the **View Notes** button. The **Notes** dialog box appears.

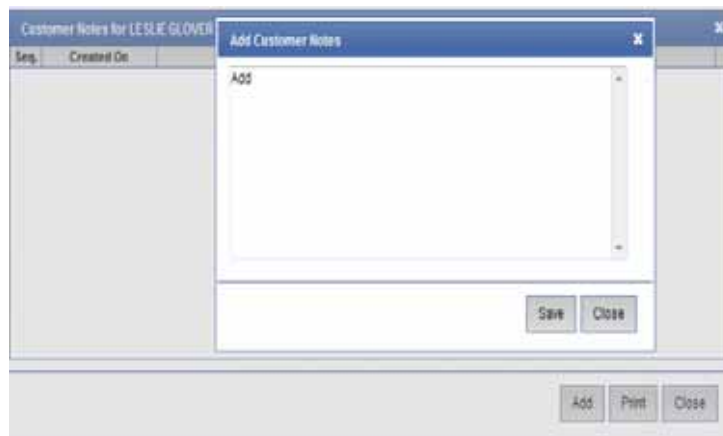


Figure 48. Notes Dialog Box

- Click the **Add** Button from the Notes Dialog Box.
- In the Add Customer Notes box, type the necessary note.
- Click the **Save** button. The Note is added to the customer’s history.



See “Mark Bill in Declined Payment Club Report” on page 133.



See “Search for a Customer from the Declined Payment Report” on page 130.



[See “Edit a Customer in the Declined Payment Report” on page 133.](#)




[See “Declined Payment Report Descriptions” on page 135.](#)



[See “Clubs” on page 109.](#)

Edit a Customer in the Declined Payment Report

You can edit a customer in the Declined Payment report. For example, you might change the customer status.

- 1 From the Clubs menu, select **Reports**.
- 2 In the **Declined Payment** report, select a customer. The selected row is highlighted.
- 3 Click the **Edit**  button. The **Customer** screen appears. You can edit the customer information, credit card information or vehicle information.
- 4 Click the **Save** button.



[See “Search for a Customer from the Declined Payment Report” on page 130.](#)



[See “Edit Customer Notes in the Declined Payment Report” on page 131.](#)



[See “Mark Bill in Declined Payment Club Report” on page 133.](#)



[See “Declined Payment Report Descriptions” on page 135.](#)



[See “Clubs” on page 109.](#)


Mark Bill in Declined Payment Club Report

Autobilling may have failed or you may want to give customers another chance to bill their credit card. From the Declined Payment interactive report, you can select the customer's and then mark them all to bill overnight.

- 1 From the **Clubs > Reports** menu, select **Declined Payment**.
- 2 If necessary, edit customers in the Declined Report.



See “Edit a Customer in the Declined Payment Report” on page 133.

- 3** From the All column, you can select the **All** box to select all customers on this report or select the boxes from this column to mark the individual customers to bill overnight directly on the declined payment report. They will then be billed in the next auto billing cycle.
- 4** Click the **Mark Bill**  button.
The message Are you sure you want to mark selected membership(s) to Bill appears.
- 5** Click **Yes**.
The customer will be removed from the Declined Report and be marked as Bill. The club membership will renew and bill overnight.



See “Clubs” on page 109.

Print the Declined Payment Report

The Declined Payment Report can be printed.

- 1** You can limit the Declined Payment report based on **Start Date**, and **End Date**.
- 2** View the report.
- 3** Click the **Print** button to print the **Declined Payment** report.
The **Print** dialog box appears.
- 4** In the **Print** dialog box, select a printer, and then click **Print**.
The report is sent to the printer.



See “Search for a Customer from the Declined Payment Report” on page 130.



See “Edit a Customer in the Declined Payment Report” on page 133.



See “Declined Payment Report Descriptions” on page 135.



See “Clubs” on page 109.



See “Mark Bill in Declined Payment Club Report” on page 133.

Declined Payment Report Descriptions

The following table describes the **Declined Payment** report.

Table 6: Declined Payment Description

Field	Description
All	Select this box to select all the rows. Click again to clear All check boxes for the rows.
Last Name	Customer last name.
First Name	Customer first name.
Notes	
Address	Customer address.
Contact	Customer contact information.
Recurring ID	<i>TransFirst</i> ® customer ID. If no <i>TransFirst</i> ID is established, this field contains the number 1.
Credit Card	Customer credit card number.
Transaction	Unique identification number for the transaction.
Date Declined	Date on which the transaction was declined.
License	Customer license plate.
RFID	Customer RFID tag number.
Amount	Dollar value of declined transaction.
Declined Reason	Description directly from <i>TransFirst</i> to explain why the transaction was declined.



See “Search for a Customer from the Declined Payment Report” on page 130.



See “Edit Customer Notes in the Declined Payment Report” on page 131.



See “Edit a Customer in the Declined Payment Report” on page 133.



See “Mark Bill in Declined Payment Club Report” on page 133.



See “Clubs” on page 109.

About the Club Revenue Distribution Report

Club Revenue Report



HELP - What can I do here?

Corporate Management:

- This report includes all revenue generated from new club sales and renewal of clubs.
- This report includes both money generated through the Autobilling service as well as money generated through renewal of clubs at the Auto Sentry or Touch POS devices.
- **Multiple Sites Split Club Revenue:** distribute sign-up revenue to offset costs of the club at each site which is helpful if you have different ownership.
- Review multiple sites that report to a corporate office.
- Review independent wash franchises that share club programs.

Report displays:

- Location that the customer signed up for the club.
- Quantity of clubs sold at each location.
- Quantity of club washes redeemed for each site.
- Total revenue for each site.
- Total taxes for each site.



See "Club Revenue Distribution Report Field Descriptions" on page 138.



See "View the Club Revenue Distribution Report" on page 136.



See "About the Reports Menu" on page 112.

View the Club Revenue Distribution Report

NOTE: This report only works from auto-billing site and corporate.

To view the Club Revenue Distribution Report, follow these steps:

- 1 From the **Clubs** menu, select **Reports**, and then click **Club Revenue**. The **Club Revenue** tab appears.
- 2 In the **From Date** and **To Date** boxes, select a date range.

3 Select the **Site per page** button to set up one page break per site, so each Site will have its own page -or- do not check the Site per page for a report without any page breaks per site so that multiple sites may print on the same page.

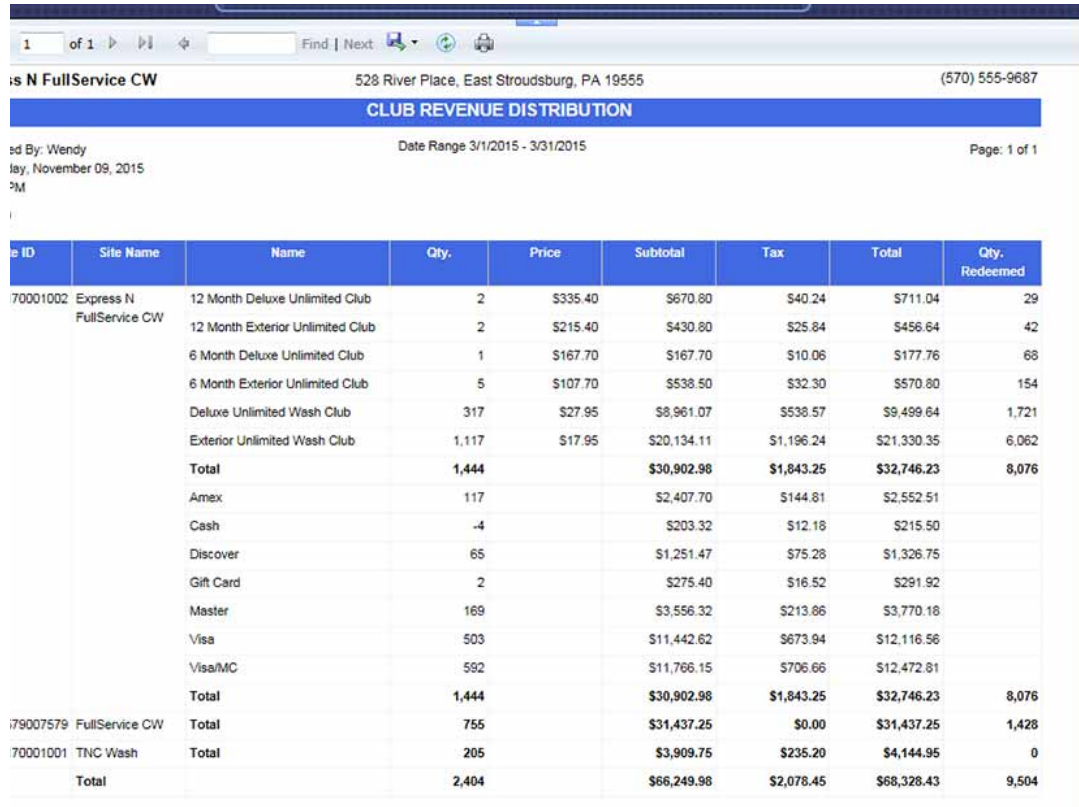
4 Click **View Report**  button.
The Club Revenue Distribution report appears.

The club revenue distribution report is useful for multiple sites that report to a corporate office, and for independent wash franchises that share programs. The report shows the following:

- Where customers signed up, the sign-up quantity and revenue for each site.
- Where customers redeemed washes, and the redemption quantity for each site.

Multiple-Site: For example, this allows corporate office to see both the site-specific revenue and the total combined revenue from sign-ups. The report can help the corporate office decide how to distribute sign-up revenue among sites.

Independent Franchise Owners: The report can also help independent franchise owners who share programs. For example, say a customer signed up at Car Wash A. But he then redeemed his washes at Car Wash B. Car Wash A received the sign-up revenue. But Car Wash B provided the wash services. The report can help franchise owners determine how to distribute the sign-up revenue.



Site ID	Site Name	Name	Qty.	Price	Subtotal	Tax	Total	Qty. Redeemed
70001002	Express N FullService CW	12 Month Deluxe Unlimited Club	2	\$335.40	\$670.80	\$40.24	\$711.04	29
		12 Month Exterior Unlimited Club	2	\$215.40	\$430.80	\$25.84	\$456.64	42
		6 Month Deluxe Unlimited Club	1	\$167.70	\$167.70	\$10.06	\$177.76	68
		6 Month Exterior Unlimited Club	5	\$107.70	\$538.50	\$32.30	\$570.80	154
		Deluxe Unlimited Wash Club	317	\$27.95	\$8,961.07	\$538.57	\$9,499.64	1,721
		Exterior Unlimited Wash Club	1,117	\$17.95	\$20,134.11	\$1,196.24	\$21,330.35	6,062
		Total	1,444		\$30,902.98	\$1,843.25	\$32,746.23	8,076
		Amex	117		\$2,407.70	\$144.81	\$2,552.51	
		Cash	-4		\$203.32	\$12.18	\$215.50	
		Discover	65		\$1,251.47	\$75.28	\$1,326.75	
Gift Card	2		\$275.40	\$16.52	\$291.92			
Master	169		\$3,556.32	\$213.86	\$3,770.18			
Visa	503		\$11,442.62	\$673.94	\$12,116.56			
Visa/MC	592		\$11,766.15	\$706.66	\$12,472.81			
Total	1,444		\$30,902.98	\$1,843.25	\$32,746.23	8,076		
79007579	FullService CW	Total	755		\$31,437.25	\$0.00	\$31,437.25	1,428
70001001	TNC Wash	Total	205		\$3,909.75	\$235.20	\$4,144.95	0
Total			2,404		\$66,249.98	\$2,078.45	\$68,328.43	9,504

Figure 49. Club Revenue Distribution Report

Review the first row of the example Club Revenue Distribution Report. Shine Car Wash sold 130 Deluxe Unlimited Wash membership for \$24.95 each. The total income including tax was \$3,434.00. The last column shows that 717 washes were redeemed.

Review the Second row of the example Club Revenue Distribution Report. Shine Car Wash has 433 Unlimited Wash memberships. The last column shows that 3605 washes were redeemed at this location for ALL members of this club regardless of location of sign up. This works out to an Average of 8.3 washes per paid customer for this site.

Review the next site, Sparkle Car Wash. The Second row for Sparkle Car Wash shows that they have 606 Active Unlimited Wash memberships at this location. But the last column shows only 1802 washes were redeemed. This works out to an average of 2.97 washes per paid customer for this site. Compare the 2.97 wash/ paid car to the estimated 8.3 washes provided per paid car by Shine Car Wash. This shows an example case in which sign-up income at one site may need to be distributed to a different site to offset that site's costs for providing washes..

Club Revenue Distribution Report Field Descriptions

Table 7: Club Revenue Distribution Report

Field	Description
Site ID	Site ID shows the site identification for each site in the hierarchy. You can click to expand the Site ID row.
Site Name	Name of the site.
Name	Name of the wash club.
Qty.	Quantity of wash clubs sold for the time frame.
Price	Sales price of the wash club.
Sub Total	Wash income excluding taxes. Sub Total = Qty × Price.
Tax	Taxes paid on Sub Total income.
Total	Wash income including taxes. Total = Sub Total + Tax.
Qty Redeemed	Quantity of washes redeemed at the site.



See "View the Club Revenue Distribution Report" on page 136.



See "About the Club Revenue Distribution Report" on page 136.



See "Clubs" on page 109.

Customer Step-By-Step Instructions



See "Add a Customer" on page 81.



See "Retire a Customer" on page 93.

About Autobill Revenue Report

Autobill Revenue Report



HELP - What can I do here?

Corporate Management:

- This report includes all revenue generated from new club sales and renewal of clubs.
- This report includes both money generated through the Autobilling service as well as money generated through renewal of clubs at the Auto Sentry or Touch POS devices.
- **Multiple Sites Split Club Revenue:** distribute sign-up revenue to offset costs of the club at each site which is helpful if you have different ownership.
- Review multiple sites that report to a corporate office.
- Review independent wash franchises that share club programs.

Report displays:

- Location that the customer signed up for the club.
- Quantity of clubs sold at each location.
- Quantity of club washes redeemed for each site.
- Total revenue for each site.
- Total taxes for each site.



See "View the Autobill Revenue Distribution Report" on page 140.




See "Autobill Revenue Report Descriptions" on page 141.

View the Autobill Revenue Distribution Report

The Autobill Revenue Distribution Report only includes those memberships that were renewed through the actual Autobilling service. The Club Revenue Report includes all revenue generated by the renewal of clubs, including money generated through the Autobilling service as well as money generated through the renewal of clubs at the Auto Sentry or Touch POS device.

This report only works from autobilling site and corporate.

To view the Autobill Revenue Distribution Report, follow these steps:

- 1 Select **Clubs** menu, select **Reports**, and then click **Autobill Revenue Distribution**.
The **Club Revenue Distribution** tab appears.
- 2 In the **From Date** and **To Date** boxes, select a date range.
- 3 Click the **View**  button.
The Autobill Revenue Distribution Report appears.

The Autobilling Revenue Distribution report is useful for multiple sites that report to a corporate office, and for independent wash franchises that share programs. The report shows the following:

- Where customers signed up, the sign-up quantity and revenue for each site.

NOTE: Self-renew at the terminals and new club members are not found in this report but can be found in the Club Revenue Report.

Multiple-Site Owners: For example, this allows corporate office to see both the site-specific revenue and the total combined revenue from sign-ups. The report can help the corporate office decide how to distribute sign-up revenue among sites.

Independent Franchise Owners: The Autobill Revenue Report can also help independent franchise owners who share programs. For example, say a customer signed up at Car Wash A. But he then redeemed his washes at Car Wash B. Car Wash

A received the sign-up revenue. But Car Wash B provided the wash services. The report can help franchise owners determine how to distribute the sign-up revenue.

V 2.2.0.13

Autobilling Revenue Distribution

Date Range 3/23/2014 - 3/25/2014

Page: 1 of 1

Site ID	Site Name	Name	Qty.	Price	Sub Total	Tax	Total	Qty Redeemed
6170001002	Sparkle Car Wash	Total	131		\$2,551.45	\$156.10	\$2,707.55	449
6170001000	Sparkle Corp	Total	18		\$363.10	\$22.20	\$385.30	0
	Total		149		\$2,914.55	\$178.30	\$3,092.85	449

Figure 50. Autobilling Revenue Distribution Report



See "Clubs" on page 109.



See "Autobill Revenue Report Descriptions" on page 141.

Autobill Revenue Report Descriptions

Table 8: Autobill Revenue Report

Field	Description
Site ID	Car Wash Site ID number.
Site Name	Name of the car wash site.
Name	Name of club.
Qty.	Amount of customers auto-billed in time period shown.
Price	Individual Price of auto-billed PLU item.
Sub Total	Qty. times the Price.
Tax	Applicable Tax on auto-billed PLU items.
Total	Sub Total plus Tax.
Qty Redeemed	Amount of washes redeemed for the Name of the club PLU item.



See "About Autobill Revenue Report" on page 139.



See "Clubs" on page 109.

About the Credit Card Expiration Report

Credit Card Expiration Report



HELP - What can I do here?

Manager:

- View customer's credit cards and their expiration dates.
- Call customers whose credit cards are about to expire and allow them to give a new credit card to keep them current in their club membership.

Report displays:

- Site Name of location where the customer signed up for the club.
- Last four digits of Credit Card number.
- Expire by date.
- Plate and RFID number.
- Club Program Name.
- Status: Active, Suspended, Declined, and Bill



See "About the Reports Menu" on page 112.



See "View Credit Card Expiration Report" on page 142.



See "Clubs" on page 109.

View Credit Card Expiration Report

To view the Credit Card Expiration Report, follow these steps:

- 1 From the **Clubs** menu, select **Reports**, and then click **Credit Card Expiration**. The **Credit Card Expiration** tab appears.
- 2 In **Expiring By** box, select a credit card expires by date.
- 3 Click to mark the **Include Expired Cards** box if necessary.

- 4 In **Site**, click to select one or more sites.
- 5 In **Program**, select one or more programs.
- 6 In **Status**, select one or more status types.
- 7 In **Show Columns**, select All or Individual fields to view.
- 8 Click **View**.
The Credit Card Expiration report appears.



See “Credit Card Expiration Report Descriptions” on page 143.



See “Clubs” on page 109.

Credit Card Expiration Report Descriptions

Table 9: Credit card Expiration Report

Field	Description
Last Name	Last name.
First Name	First name.
Phone	Customer’s Phone number.
Email	Customer’s email address.
Address	Customer’s mailing address.
Site Name	Name of the car wash site.
Credit Card #	Last four digits of credit card on file.
Expiration Date	Date the Credit Card on file expires.
Plate	Alpha Numeric License Plate of Vehicle Identifier.
RFID	A numeric entry for the RFID tag or bar-code number located on the vehicle’s windshield assigned to the selected vehicle.
Program Name	Name of the wash club or fleet.
Joined Date	Date joined as a club or fleet member.
Status	Status of club member.
Status Date	Date the status took effect.



See “View Credit Card Expiration Report” on page 142.



See “Clubs” on page 109.

About the Renewal and Termination Report

Renewal & Termination Report

HELP - What can I do here?

Managers and Owners:

- Quickly view the amount of customers that renewed or terminated during the date range.
- View the club customers in list format that renewed or terminated during the date range.
- This report shows which applicaiton renewed:
 - WashConnect Web
 - POS
 - Club Service Autobilling
 - CoreGatewayService



See "View the Renewal & Termination Report" on page 144.



See "Renewal & Termination Report Descriptions" on page 145.

View the Renewal & Termination Report

- 1 From the **Clubs** menu, select **Reports**, and then click **Renewal & Termination**. The **Renewal & Termination** tab appears.
- 2 In the **From Date** and **To Date** boxes, select a date range.
- 3 In Customer, type customer name, if necessary.
- 4 Click the **View** button. The Renewal & Termination report appears.



See "Renewal & Termination Report Descriptions" on page 145.



See *"About the Renewal and Termination Report"* on page 144.



See *"Clubs"* on page 109.

Renewal & Termination Report Descriptions

Table 10: Renewal & Termination Report

Field	Description
Last Name	Last name.
First Name	First Name.
Plate	License Plate of Vehicle
Program	Name of the wash club or fleet.
Site	Name of the car wash site.
Expiration	Date the Club Membership expires.
Status	Status of club member.
Status Date	Date the status took effect.
Application	This shows which application renewed: <i>WashConnect®</i> Web, Club Service, POS, Auto-billing, and CoreGatewayService.
Device	This shows which device the customer renewed: TouchPOS, Auto Sentry, etc.
Time	Date and Time.
Account	The last four-digits of the credit card.
Type	Credit Card Type.



See *"About the Renewal and Termination Report"* on page 144.



See *"View the Renewal & Termination Report"* on page 144.



See *"Clubs"* on page 109.

About Advance Expiration

Advance Expiration

HELP - What can I do here?

Manager:



- This feature is for club memberships that are paid outside of Autobilling.
- Search customers by clubs or club Status, and then manually select All or individual club members to advance the club membership expirations dates.
- Available at Corporate location only.



See "Clubs" on page 109.

Advance Expiration for Club Members

You can advance the expiration date to the club's next expiration date (if club is monthly, annually, etc.). This can be done all club members or for specific clubs from Corporate only. The expiration date can only be advanced one time, and cannot be undone.

- 1 Select Corporate upon *WashConnect*® login.
- 2 From the **Clubs** menu, select **Advance Expiration**.
- 3 In Club, select **All** (-or- select the necessary individual clubs).
- 4 Click the **View**  button.
All of your club members are listed.
- 5 Mark the **All** check box (-or- select the necessary customers from this club individually).
- 6 Click the **Advance Expiration Date**  button.
The message **Are you sure you want to advance expiration date of selected membership(s)** appears.
- 7 Click **Yes**.
The message **Expiration date advanced successfully** appears.
- 8 Click **OK**.

CHAPTER 5:

FLEET

The fleet menu is comprised of the following commands: Accounts, Rules, Invoice, and Manage.

NOTE: The fleet rules in this *WashConnect®* User Manual pertain to the full version of *WashConnect®*. If you are still using Tunnel Master software for any reason, see Fleets in the Tunnel Master User Manual.



See “About the Fleet Accounts” on page 148.



See “About Fleet Rules” on page 158.



See “About Fleet Invoice” on page 162.



See “About Fleet Manage” on page 171.

About the Fleet Accounts

Fleet Accounts

HELP - What can I do here?

Managers:

- Set up Fleet Account for your corporate customers.
- Encourages customer loyalty.
- Limit wash offerings.
- Monthly invoicing.
- Offer designated options for the fleet member.



See "Add a Fleet Account" on page 149.



See "Add Member(s) to a Fleet Account" on page 151.



See "Add a Vehicle to a Fleet Account" on page 154.



See "Edit a Fleet Account" on page 156.



See "Terminate or Suspend a Fleet Account" on page 157.



See "Edit a Fleet Customer and Edit a Vehicle in a Fleet" on page 156.



See "About the Fleet Accounts" on page 148.



See "About Fleet Rules" on page 158.



See “About Fleet Invoice” on page 162.



See “About Fleet Manage” on page 171.

Add a Fleet Account

Fleet Accounts (Charge Accounts) provide an accurate way of tracking fleet account business. Fleet Account customers can be offered a dollar or percentage discount off regular wash services. The fleet account can be identified as Tax Exempt entity.

To add a corporate or business fleet account, follow these steps:

WARNING: Set up your Fleet Rules first.



See “About Fleet Invoice” on page 162.

- 1 From the **Fleet** menu, click to select **Accounts**.
The **Accounts** tab appears.
- 2 Click the **Add Account**  button.
The **Fleet** dialog box appears.

Accounts

Fleet

Account

*Account #: 10000 **Next ID**

*Business Name: Heartland Assisted Living

First:

Middle:

Last:

Tax Exempt

Status: Active

Rule: Fleet **Add Rule**

Balance: \$0.00

Address

Address1:

Address2:

Address3:

City:

State: --Please Select--

Zip:

Discount

Discount Amount Percentage

Promotion: --Please Select--

Primary Contact Information

First: <input type="text"/>	Last: <input type="text"/>
Home Phone: <input type="text"/>	Alternate Phone: <input type="text"/> ext <input type="text"/>
Business Phone: <input type="text"/> ext <input type="text"/>	Mobile Phone: <input type="text"/>
Fax Number: <input type="text"/>	
Primary Email: <input type="text"/>	Secondary Email: <input type="text"/>

Secondary Contact Information

Figure 51. Fleet Account Dialog Box

- 3 Required: Type your account number in the Account # box.
–or–
Click the **Next ID** button to have the computer generate an Account ID number for you.
- 4 Required: In **Account #**, type your account number.
–OR–
Click the Account # **Next ID** button, the WashConnect system automatically generates an Account ID number.
- 5 Required: In **Business Name**, type a name for the fleet account.
- 6 Required: In **Rule** box, select a rule name that applies to this fleet account.
- 7 In the **Tax Exempt** box, click to select if you have proper documentation on file for the company (or individual) that claims they are tax exempt.

- 8 In **Discount**, type a number (dollar amount or percentage) for the Fleet Discount to be applied at the POS.
- 9 Type the information in each of the other fields as available.
- 10 Click **Save**.
The fleet account saved successfully message box appears.
- 11 Click **OK** to continue.



See "Add a Fleet Account" on page 149.



See "Add Member(s) to a Fleet Account" on page 151.



See "Add a Vehicle to a Fleet Account" on page 154.



See "Edit a Fleet Account" on page 156.



See "Terminate or Suspend a Fleet Account" on page 157.



See "Edit a Fleet Customer and Edit a Vehicle in a Fleet" on page 156.



See "About the Fleet Accounts" on page 148.



See "About Fleet Invoice" on page 162.



See "About Fleet Manage" on page 171.

Add Member(s) to a Fleet Account

After setting up a Fleet program, you can add fleet members to the fleet account.

- 1 From the **Fleet** menu, click to select **Accounts**.
The **Accounts** tab appears.

NOTE: A Fleet Account needs to be set up prior to adding any members.

- 2 Click to select the **Fleet**.

The fleet is highlighted and the Customer section appears below the Fleet Account list.

Search: in Account # ▼

Status: Active ▼

Tools

+
✎
+ 👤
✎ 👤

Fleet Account				
Account #	Business Name	ProgramName	Balance	Invoice / Prepaid
333	Total Trucking	Fleet - No Commission	\$0.00	Prepaid
777	Rocket Motors	Fleet - Commission	\$0.00	Prepaid
785	Subway	Local Restaurants	\$0.00	Invoice
800	test	Fleet - Commission	\$0.00	Invoice
808	Bass Addicts	Local DJs	\$0.00	Invoice
820	Test Fleet	Non Profit Organizations	\$0.00	Invoice
1005	Swedish House Coffee	Local DJs	(\$113.00)	Invoice
1070	Sparkle Car Wash	ICS/Sparkle Employees	(\$70.00)	Invoice
1212	Pay As You Go Trucking	Local DJs	\$471.33	Prepaid
1337	Elite Tablez	Local DJs	\$0.00	Invoice

Customer		
Full Name	Card #	Status
Barry Jones	%68955	Active
Harry Jones	%54798	Active

Figure 52. Fleet Accounts

- 3 Click the **Add Customer**  button.

The Customer Information sub-tab appears with the name of the fleet account in the title bar.

Fleet Account: Crossroads Community Services (101)			
Customer		Statistics	
*First:	<input type="text"/>	First Visit:	<input type="text"/>
Middle:	<input type="text"/>	Last Visit:	<input type="text"/>
*Last:	<input type="text"/>	Visit Counter:	<input type="text"/>
Status:	Active <input type="button" value="v"/>	Average Sales / Car:	<input type="text"/>
Card #:	<input type="text"/>	Punch Card Counter:	<input type="text"/>
Pin:	<input type="text"/>	Bonus Points Total:	<input type="text"/>
Address			
Address1:	<input type="text"/>	City:	<input type="text"/>
Address2:	<input type="text"/>	State:	PA <input type="button" value="v"/>
Address3:	<input type="text"/>	Zip:	<input type="text"/>
Contact Information			
Home Phone:	<input type="text"/>	Alternate Phone:	<input type="text"/>
Business Phone:	<input type="text"/>	Mobile Phone:	<input type="text"/>
Fax Number:	<input type="text"/>		
Primary Email:	<input type="text"/>	Secondary Email:	<input type="text"/>
<input checked="" type="checkbox"/> Receive email receipts			

Figure 53. Fleet Accounts Customer Information tab

- 4 Required: In **First**, type customer's first name.
- 5 Required: In **Last**, type customer's last name.
- 6 In **Card #**, type the fleet account's customer card number.
- 7 Type information in the remaining fields if available.
- 8 Click **Save**.
The Customer saved successfully Information dialog box appears.
- 9 Click **OK** to continue.



See "Add a Fleet Account" on page 149.



See "Add a Vehicle to a Fleet Account" on page 154.

Add a Vehicle to a Fleet Account

Before you can add a fleet vehicle, you need to create a fleet account and then add a Fleet customer. To add the fleet vehicle information, follow these steps:

- 1 From the **Fleet** menu, click to select **Accounts**.
The **Accounts** tab appears.

NOTE: A Fleet Account and Fleet Member need to be set up prior to adding any vehicles.



See "Add a Fleet Account" on page 149.



See "Add Member(s) to a Fleet Account" on page 151.

- 2 Scroll through the list to locate a fleet account.
- 3 Click to select the Fleet business name.
The Fleet business name is highlighted, and the Customer list appears below the Fleet Account list.

The screenshot shows the 'Accounts' interface. At the top, there is a search bar with 'Search: [] in Account # []' and a 'Status: Active' dropdown. To the right are 'Tools' buttons: a green '+' button, a blue pencil icon, a green '+' with a person icon, and a blue pencil with a person icon. Below this is a table titled 'Fleet Account'. The table has columns for 'Account #', 'Business Name', and 'Rule'. The first row is highlighted. Above the table, a red box highlights the pagination controls: '1 << 3 of 3 >> 30'. The table data is as follows:

Account #	Business Name	Rule
1065	STROUD MALL	Micro Fleet
1071	REDEVELOPEMENT AUTHORITY	Micro Fleet
1073	STROUD REGIONAL POLICE	Micro Fleet
1075	POCONO MEDICAL CENTER	Micro Fleet

Figure 54. Fleet Account Scroll Buttons


- 4 Click the column header to organize in ascending or click again for descending order to locate fleet member.
- 5 Click to select **Fleet Member**.
The fleet member is highlighted from the Customer list.

The screenshot shows the 'Customer' interface. A table lists customers with columns for 'Full Name', 'Card #', and 'Status'. The 'Full Name' column header is highlighted with a red box. The table data is as follows:

Full Name	Card #	Status
Wendy Smith	940574	Active
Timothy Jones		Active

- 6 Click the **Edit Customer** button.

The Customer Information and Vehicle sub-tab appears with the name of the fleet account in the title bar.

- 7 Click the **Add Vehicle**  button.
- 8 Fill in the Vehicle fields which you have information:
 - State
 - **Plate No** (Required)
 - Make
 - Model
 - Year
 - Color
 - RFID Tag
 - Pin
 - Barcode
 - Status: Active or Terminated
- 9 Click **OK**.
- 10 Click the **Save** button.



See “Add a Fleet Account” on page 149.



See “Add Member(s) to a Fleet Account” on page 151.



See “Add a Vehicle to a Fleet Account” on page 154.



See “Edit a Fleet Account” on page 156.



See “Terminate or Suspend a Fleet Account” on page 157.



See “Edit a Fleet Customer and Edit a Vehicle in a Fleet” on page 156.



See “About the Fleet Accounts” on page 148.




See “About Fleet Invoice” on page 162.



See “About Fleet Manage” on page 171.

Edit a Fleet Account

You can edit an existing Fleet Account.

- 1 From the **Fleet** menu, click to select **Accounts**.
The **Accounts** tab appears.
- 2 Scroll through the list, and click to select the Fleet.
Underneath the Fleet accounts, the valid Customer list appears for that Fleet account.
- 3 Click the **Edit Account**  button.
The Fleet box appears.
- 4 Make necessary changes.
- 5 Click the **Save** button.
The fleet account changes are saved.



See “Add a Fleet Account” on page 149.



See “Add Member(s) to a Fleet Account” on page 151.



See “Add a Vehicle to a Fleet Account” on page 154.





See “Terminate or Suspend a Fleet Account” on page 157.

Edit a Fleet Customer and Edit a Vehicle in a Fleet

You can edit an existing fleet customer or fleet vehicle at any time.

- 1 From the **Fleet** menu, click to select **Accounts**.
The **Accounts** tab appears.
- 2 Click to select the Fleet Account Business Name.
The fleet is highlighted and the Customer section appears below the Fleet Account list.
- 3 From the Customers list, click the column header to organize it in ascending order or click again for descending order to find fleet member.
- 4 Click to select Fleet Member’s name.

The fleet member is highlighted from the Customer list.

- 5 Click the **Edit Customer**  button.
The Customer Information tab appears.
- 6 Type information in each of the fields if necessary.
- 7 Click **Save**.
The message **Customer Saved Successfully** appears.
- 8 Click **OK** to continue.
- 9 From the Customer section, click to select the customer name, and then click the **Edit Customer** button.
- 10 Click to select the **Vehicle Information** tab.
- 11 Click the **Edit Vehicle**  button.
The vehicle dialog box appears.
- 12 Make any necessary changes.
- 13 Click **Ok**.
- 14 Click the **Save** button.
The message **Customer saved successfully** appears.
- 15 Click **Ok**.
- 16 Click the Close button to exit out of the Accounts tab.



See "Add a Fleet Account" on page 149.



See "Terminate or Suspend a Fleet Account" on page 157.

Terminate or Suspend a Fleet Account

You can terminate or suspend a fleet program.

NOTE: Fleet must have no members before you can terminate. Move Members to another fleet before terminating the fleet.

Follow these steps:

- 1 From the **Fleet** menu, click **Accounts**.
The **Accounts** tab appears.
- 2 Click to select the Fleet.
The fleet is highlighted.
- 3 Click the **Edit Account** button.

The **Fleet** dialog box appears.

- 4 In the Status box, select **Terminate** or **Suspend**.

NOTE: Terminate permanently removes the customer account and their information. Suspend is an inactive status used to preserve customer account information.

- 5 Click **Save**.
The fleet is terminated or suspended.



See "About Fleet Manage" on page 171.

About Fleet Rules

Fleet Rules

HELP - What can I do here?

Managers:

Setup a Fleet Account in 3 easy steps:

- Step #1 - Set up a Fleet Account.
- Step #2 - Set up fleet redemption Rules.
- Step #3 - Set up a fleet Profile.

For each fleet account, you need to assign its redemption rules:



See "Add Fleet Rules" on page 159.



See "Edit Fleet Rules" on page 160.



See "Close Fleet Account Rules" on page 160.



See "Fleet Rules Examples" on page 161.




See "About the Fleet Accounts" on page 148.

 See "About Fleet Invoice" on page 162.


 See "About Fleet Manage" on page 171.

Add Fleet Rules


Follow these steps to set up fleet rules.

- 1 From the **Fleet** menu, click **Rules**.
The Rules tab appears.
- 2 Click the **Add**  button.
- 3 In **Name**, type fleet account name.
- 4 Set redemption rules for the given fleet account.

NOTE: All zeros are used for an unlimited club.

 See "Fleet Rules Examples" on page 161.

- 5 Click the **Save** button.



Fleet Program	Rules	Fleet	Vehicle
*Name	0 is Unlimited		
<input checked="" type="checkbox"/> Include In Accounting Export	Wash per Day	0	0
<input checked="" type="checkbox"/> Eligible for Commissions	Wash per Week	0	0
Termination	Wash per Month	0	0
Close <input type="checkbox"/>	Wash per Quarter	0	0
	Wash per Six Month	0	0
	Wash Per Year	0	0

Figure 55. Fleet Rules Dialog Box

NOTE: The ascending order guideline is not required by the software. Any combination of positive integer values and zeros is valid, whether they are in ascending order or not.

 See "Add Fleet Rules" on page 159.



See “Edit Fleet Rules” on page 160.



See “Close Fleet Account Rules” on page 160.




See “Fleet Rules Examples” on page 161.

Edit Fleet Rules

You can edit and apply fleet rules to all the fleet members.

NOTE: Any changes you make to the fleet rules will be applied to all participating fleet members.

- 1 From the **Fleet** menu, click **Rules**.
The Rules tab appears.
- 2 Click the **Edit**  button.
- 3 Make any necessary changes.
- 4 Click the **Save** button.



See “Add Fleet Rules” on page 159.



See “Close Fleet Account Rules” on page 160.



See “Fleet Rules Examples” on page 161.

Close Fleet Account Rules

You can close or terminate the fleet account rules by following these steps:


WARNING: After closing Fleet Account Rules, they are no longer available to be edited.

- 1 From the **Fleet** menu, click **Rules**.
The Rules tab appears.
- 2 Click the **Edit** button.
- 3 Click to select the **Close** box.
These fleet account rules will no longer be available.
- 4 Click **Save**.
The fleet account rules are terminated.

 See "Add Fleet Rules" on page 159.

 See "Edit Fleet Rules" on page 160.

 See "Close Fleet Account Rules" on page 160.

 See "Fleet Rules Examples" on page 161.

Fleet Rules Examples

Following is an example of fleet rules specifying 31-washes per month, 365-washes per year:

- Wash per Day = 0
- Wash per Week = 0
- Wash per Month = 31
- Wash per Quarter = 0
- Wash per 6 Months = 0
- Wash per Year = 365

In this example, customers may redeem up to 31 washes per month or 365 per year. No limits are imposed for 3- and 6-month intervals. However, if a customer attempted to redeem more than 365 washes in a 3- or 6-month period, he would be denied because the Year limit of 365 was reached.







Following is an example of fleet rules specifying seven washes per week and 31 washes per month:

- Wash per Day = 0
- Wash per Week = 7
- Wash per Month = 31

In this example, the customer can redeem no more than seven washes per week and no more than 31 washes per month. The wash per day limit is assigned zero, meaning there is no explicit maximum number of washes per day. Implicitly, however, it is limited to seven as a consequence of the wash per week limit of seven.

 See "Add Fleet Rules" on page 159.

 See "Edit Fleet Rules" on page 160.

-  See "Close Fleet Account Rules" on page 160.
-  See "Fleet Rules Examples" on page 161.
-  See "About the Fleet Accounts" on page 148.
-  See "About the Fleet Accounts" on page 148.
-  See "About Fleet Invoice" on page 162.
-  See "About Fleet Manage" on page 171.

About Fleet Invoice




Fleet Invoice

HELP - What can I do here?

Controllers and Managers:

- **Generate Invoices for Fleet Accounts.**
- **Search, Print, and Email Invoices.**
- **If Fleet Account is set up as Prepaid Fleet Account, you will not be able to Invoice Prepaid Fleet customer.**

NOTE: An Invoice cannot be voided. However, you can terminate a fleet invoice at Corporate, only if no payments have been applied to it.

-  See "Search for an Invoice" on page 163.
-  See "Generate Invoice" on page 164.
-  See "Print an Invoice" on page 166.



 See "Terminate Fleet Invoice" on page 170.


 See "Email Invoice" on page 170.

 See "About Fleet Manage" on page 171.

Search for an Invoice

You can search for any Invoices that have already been generated.

- 1 From the **Fleet** menu, select **Invoice**.
- 2 In **Invoice() Generated Between**, type or select a beginning invoice date for your search.
- 3 In **And**, type or select an end date for your search.
- 4 In **Business/Account#** click the drop-down list and click to select specific company –or– select **--All--** to search all invoices.
- 5 Click the **Find Account**  button.
The Fleet Invoice list appears.
- 6 From the Fleet Invoice list, click to select a company name.
- 7 Click the **View Invoice**  button.
The Invoice X tab appears with the selected Invoice that you can print or export.

 See "Print an Invoice" on page 166.

 See "Generate Invoice" on page 164.

 See "Terminate Fleet Invoice" on page 170.

 See "Email Invoice" on page 170.



See "About Fleet Invoice" on page 162.

<input type="checkbox"/> All	Invoice #	Invoice Date	Account #	Business Name	Email	Billing Period	Current Period Amount	Amount Billed	Current Period Balance	Not Applied ROA
<input type="checkbox"/>	154	8/6/2014	174212	Wind Gap Police		8/1/2014 - 8/1/2014	\$3.77	\$11.31	\$3.77	\$51.83
<input type="checkbox"/>	155	8/6/2014	1403	Burger King Corporate Account		7/1/2014 - 7/1/2014	\$4.72	\$4.72	\$0.00	
<input type="checkbox"/>	156	8/6/2014	808	Bess Addicts		4/1/2014 - 5/11/2014	\$68.87	\$68.87	\$0.00	

Figure 56. Fleet Invoice Search Example

Fleet Search Field Descriptions

Table 11: Fleet Invoice Find Account Search Field Descriptions

Field	Description
All	Select All Check box for all Fleet Invoice or individually select the specific invoice box(es).
Invoice #	Fleet Invoice Number.You can reorder the invoices with the column header toggle.
Invoice Date	The date the Invoice was generated. You can recorder the Invoice Date column with a double-click on the header title.
Account #	The account number assigned to the fleet account.
Business Name	The name of fleet account business.
Email	Fleet account Email address recipient who would receive fleet invoices sent as attachments.
Billing Period	The selected date range for billing the Fleet customer.
Total Invoiced Amount	Amount due in the billing period (not necessarily the selected date range).
Amount Received on Invoice	This amount is the total outstanding balance for that fleet account.
Current OPen Balance	Billing period balance.


Generate Invoice

Invoices can be generated for a company fleet from Corporate Login of WashConnect.

NOTE: When attempting to generate an invoice for a Fleet or House account with a non-billable amount such as \$0, you can view it in the list but cannot generate or print the invoice.

- 1 Login to WashConnect **Corporate**.
- 2 From the **Fleet** menu, select **Invoice**.
- 3 In **Billing Start Date**, type or select the beginning date for the Invoice period to be generated.
- 4 In **End Date**, type or select the ending date for the Invoice period to be generated.

NOTE: The End Date must be less than the current date.

- 5 In **Business / Account #**, select the individual company from the list.
- 6 Click to select the **Generate Invoice**  button.
The Generate Invoice(s) dialog box appears.

NOTE: If the date range selected already has a generated invoice for an account, the invoice will not show up in the generate invoice list.

- 7 Click to mark the **Account** check boxes.
- 8 Click the **Generate** button.
The message Invoice(s) generated successfully appears.
- 9 Click **OK**.
The Invoice appears from the Fleet Invoice list.



See "Search for an Invoice" on page 163.



See "Generate Invoice" on page 164.



See "Print an Invoice" on page 166.



See "Terminate Fleet Invoice" on page 170.



See "Email Invoice" on page 170.



See "About Fleet Invoice" on page 162.

Print an Invoice

You can print invoices to be sent to Fleet Account Managers.

- 1 From the **Fleet** menu, select **Invoice**.
- 2 Search for Invoice or Generate Invoice.
- 3 From the Fleet Invoice list, click to highlight Invoice to print.
- 4 Click the **View Invoice** button.
A new Invoice tab appears in *WashConnect®* with the selected Invoice.
- 5 You can click the **Print** button.
The invoice prints on two pages.

Main Corp 1349 Jacobsburg Rd Wind Gap, PA 18091 Phone:		Billing Period: 3/1/2013 - 3/31/2013 Invoice Date: 1/30/2014 Invoice Number: 103 Account Number: 115	
Billing Address: Pocono Produce 100 Main Street Anytown, PA 12345		Sold To: Pocono Produce 100 Main Street Anytown, PA 12345	
Page: 1 of 2			

Date	Time	Name	License	ID	Service	Amount
03/02/2013	11:19 AM	Pocono Produce	ABC02052		Deluxe Exterior	\$9.43
					Sales Tax	\$0.57
					Total	\$10.00
04:09 PM	Pocono Produce	ABC02343			Exterior Wash	\$5.66
					Full Service	\$8.49
					Sales Tax	\$0.85
					Total	\$15.00
03/04/2013	03:30 PM	Pocono Produce	ABC02406		Exterior Wash	\$5.66
					Full Service	\$8.49
					Sales Tax	\$0.85
					Total	\$15.00
					Sales Total	\$37.73
					Sales Tax	\$2.27
					Invoice Total	\$40.00
Current	30 Day	60 Day	90 Day	120 Day	Total	
\$40.00	\$0.00	\$0.00	\$0.00	\$0.00	\$40.00	

This is the Invoice Body Info, and can customized to say whatever you would like from Global settings.

Footer: Please remit bill by due date to Car Wash X, Liberty Street, Freedom, PA 18001
 ***** Accounts past due will be charge a late fee. *****
 Thank you for using Car Wash X for your wash and detailing needs!!!

Figure 57. Invoice example

Figure 58. Fleet Invoice Page 1 Example

Main Corp 1349 Jacobsburg Rd Wind Gap, PA 18091 Phone:	Billing Period: 3/1/2013 - 3/31/2013 Invoice Date: 1/30/2014 Invoice Number: 103 Account Number: 115
Billing Address: Pocono Produce 100 Main Street Anytown, PA 12345	Sold To: Pocono Produce 100 Main Street Anytown, PA 12345
Page: 2 of 2	
Please detach and return this portion with payment	
Account Number 115 Pocono Produce 100 Main Street Anytown, PA 12345	Billing Period : 3/1/2013 - 3/31/2013 Balance : \$40.00 Amount Paid : _____
Remit To: Main Corp 1349 Jacobsburg Rd Wind Gap, PA 18091	

Figure 59. Fleet Invoice Page 2 Example

Fleet Invoice Field Descriptions

Table 12: Fleet Invoice Field Descriptions

Field	Description
All	Select All Check box for all Fleet Invoice or individually select the specific invoice box(es).
Invoice Number	Fleet Invoice Number.You can reorder the invoices with the column header toggle.
Invoice Date	The date the Invoice was generated. You can recorder the Invoice Date column with a double-click on the header title.
Account #	The account number assigned to the fleet account.
Business Name	The name of fleet account business.
Unapplied ROA	
Email	Fleet account Email address recipient who would receive fleet invoices sent as attachments.
Billing Period	The selected date range for billing the Fleet customer.
Total Invoiced Amount	Amount due in the billing period (not necessarily the selected date range).
Amount Received on Invoice	This amount is the total outstanding balance for that fleet account.
Current Open Balance	Billing period balance.



See "Search for an Invoice" on page 163.



See "Generate Invoice" on page 164.



See "Print an Invoice" on page 166.



See "Terminate Fleet Invoice" on page 170.




See "Email Invoice" on page 170.



See "About Fleet Invoice" on page 162.

Export Invoice

You can export invoices to be sent to Fleet Customers.

- 1 From the **Fleet** menu, select **Invoice**.
- 2 Search for Invoice or Generate Invoice.
- 3 From the Fleet Invoice list, click to highlight Invoice to print.
- 4 Click the **View Invoice** button.
A new Invoice tab appears in *WashConnect®* with the selected Invoice.
- 5 You can select the **Export**  button.
- 6 Select an Export format from the Export drop-down list:
 - XML file with report data
 - CSV (comma delimited)
 - PDF
 - MHTML (web archive)
 - Excel
 - TIFF file
 - WordThe File Download dialog *Do you want to open or save this file?* appears.
- 7 Select one of the following:
Open file, **Save** file, or **Cancel** this command.



See "Search for an Invoice" on page 163.



See "Generate Invoice" on page 164.



See "Terminate Fleet Invoice" on page 170.



See "Email Invoice" on page 170.




See "About Fleet Invoice" on page 162.

Terminate Fleet Invoice

You can terminate a fleet invoice at Corporate, only if no payments have been applied to it.

NOTE: If the invoice is paid partially or fully, then it cannot be terminated.

- 1 From the **Fleet** menu, select **Invoice**.
- 2 Search for Invoice.
- 3 From the Fleet Invoice list, click to highlight Invoice.
- 4 Click the **Terminate**  button.
A message **Are you sure you want to terminate invoice #** appears.
- 5 Click **Yes**.
The message **Invoice terminated successfully** appears.
- 6 Click **OK**.
The Invoice is removed from list.



See “Search for an Invoice” on page 163.



See “Generate Invoice” on page 164.



See “Print an Invoice” on page 166.



See “Email Invoice” on page 170.



See “Terminate Fleet Invoice” on page 170.



See “About Fleet Invoice” on page 162.

Email Invoice

You can email a generated invoice.

NOTE: Email address must be entered in Fleet Account details.


- 1 From the **Fleet** menu, select **Invoice**.
- 2 Search for an Invoice.
- 3 From Fleet Invoice list, click to select an Invoice.

The Invoice is highlighted.

- 4 Click the **Email Invoice**  button.

 See “Search for an Invoice” on page 163.

 See “Generate Invoice” on page 164.

 See “Print an Invoice” on page 166.

 See “Terminate Fleet Invoice” on page 170.

 See “About Fleet Invoice” on page 162.

About Fleet Manage

Fleet Manage

HELP - What can I do here?

Accountants and Managers:

- View invoices with open balances.
- View current amount due if customer still owes a balance on the open invoice.

 See “About Fleet Invoice” on page 162.

 See “View Invoices with Open Balances” on page 171.

View Invoices with Open Balances

- 1 From the **Fleet** menu, select **Manage**.
- 2 In **Business/Account #**, select the Account or --All-- to view Unpaid Invoice(s) from the drop-down box.

You can view the current amount which is the balance due. The Amount Billed is the total of the original invoice.

- 3 If customer wants to pay on their fleet account, you need to go to the POS and perform an ROA.

NOTE: Payments at the POS are automatically applied to open Fleet invoices, you do not have to apply them manually.



See "ROA (Received on Account)" on page 598.

The screenshot shows the 'Manage Invoice' interface. At the top, there is a 'Business / Account #' dropdown menu set to '143 Domestic Rel.' and a 'Tools' button. Below this is a table titled 'Unpaid Invoice' with the following data:

Invoice #	Invoice Date	Account	Name	Billing Period	Current Amount	Amount Billed	Balance
126	02/04/2014	143	Domestic Rel.	01/01/2014 - 01/31/2014	\$65.06	\$65.06	\$65.06
148	03/03/2014	143	Domestic Rel.	02/01/2014 - 02/28/2014	\$41.49	\$106.55	\$41.49

Figure 60. Manage Fleet Unpaid Invoice example

CHAPTER 6:

FINANCIAL

From *WashConnect*® **Financial** menu, as the name indicates, is where you can manage the financial aspects of your business. It is broken down into four main sections for **Register Reports**, **Audit Controls**, **Cash Management**, and **Ticket Redeemed**.

There are **15 Register Reports** including the **Financial Overview** showing a summary of all financial activity where data is consolidated at a shift level per device at each site. The **Shift Detail** Report was designed to facilitate and streamline balancing the books from the perspective of an accountant or controller who needs to see all the numbers, prove out the day, and then post the data or export to an accounting system such as *Quickbooks*, *Peachtree*, *Alere*, *MAS-90*, and *ProfData*. After proving out the numbers in the **Register Reports** menu, you can use the **Audit Controls** menu to verify tunnel activity against paid services. Register Reports alone cannot show this comparison but reports such as the **Wash to Register Comparison** and **Ticket Comparison** can help identify potential theft by showing tunnel activity versus paid services.

For example, a customer was given an extra service but that extra service was not included on the customer's ticket. If that service was manually provided by an attendant but not recorded as a part of the transaction, you need to ask: Did the attendant collect money for the service, and where is it?

Register Report:



See "About the Financial Overview Report" on page 178.



See "About the Shift Detail Report" on page 186.






See "About the Credit Cards Report" on page 202.





See "About Credit Cards Reconciliation" on page 205.


-  See *"About the Gift Cards Report"* on page 209.
-  See *"About the Checks Report"* on page 213.
-  See *"About the Fleet Activity Report"* on page 217.
-  See *"About the Deposits Report"* on page 221.
-  See *"About the Free Wash Report"* on page 224.
-  See *"About the Re-Wash Report"* on page 228.
-  See *"About the Payouts Report"* on page 232.
-  See *"About the ROA (Received on Account) Report"* on page 235.
-  See *"About the Voids Report"* on page 239.
-  See *"About the Fund Raiser Report"* on page 243.
-  See *"See "About the Fund Raiser Report" on page 243." on page 245.*
-  See *"About View Register"* on page 245.

Audit Controls Report:

-  See *"Introduction to the Audit Controls menu"* on page 249.
-  See *"View the Wash To Register Comparison Report"* on page 251.
-  See *"View the Ticket Comparison Report"* on page 254.

 See *"About Transactional Detail"* on page 258.

 See *"About Terminal Balance Report"* on page 261.

 See *"About Sales Commission"* on page 263.

 See *"About View Site Tickets"* on page 265.

 See *"About the Services Washed Report"* on page 267.

 See *"About the Controller Services Report"* on page 269.

 See *"About the Audit Trail Log"* on page 270.

Cash Management:

 See *"About Journals"* on page 272.

 See *"About Terminal Balances"* on page 289.

 See *"About the Operations Report"* on page 294.

Ticket Redeemed:

 See *"About Ticket Redeemed Summary"* on page 297.

 See *"About Ticket Redeemed Detail"* on page 299.

Frequently Asked Questions

The following table provides answers to frequently asked questions.

Table 13: Financial Menu FAQs

Question	Answer
Who should look at the Financial menu?	<p>The commands in the Financial menu are designed for someone such as a controller, bookkeeper or accountant.</p> <p>You can select from among 15 different Register reports to monitor and verify financial activity.</p>
Where should I look if I suspect theft?	<p>To prove out your wash activity, the Audit Controls sub menu provides a Wash-to-Register comparison report, and a Ticket Comparison report. Journals is available from Cash Management menu.</p>
Which reports will I use the most?	<p>For most general reporting activities, the Financial Overview, Shift and Credit Card reports show you a detailed breakdown of transactions processed for the selected shifts and date range across one or more sites.</p> <p>Prepare to close out a day by comparing the amounts in the Financial Overview report to the details shown in the Shift Detail Report and the Credit Card report.</p> <p>Export the data to your accounting and payroll software, and then close out a day on the books.</p>
Why would I look at the other reports?	<p>Detailed information for each type of transaction can be found in most of the reports from the Financial menu.</p> <p>For example, after reviewing the Financial Overview report, you might have a question free washes given during a particular shift. You can simply click the total shown in the Financial Overview report to see the Free Wash report, which gives more details about exactly what type of free wash was given out and when.</p>
What can I do with each report?	<p>Each report opens in its own tab to simplify navigation and comparison.</p> <p>Within each report, you can print, export, sort and search the data to easily retrieve and display the exact information you want in a format that is most comfortable for you.</p> <p>Reports in <i>WashConnect®</i> are fully compatible with multi-site organizations like all features in <i>WashConnect®</i>. So you can run a report for a single site, or aggregate data from dozens of sites into a single, big-picture view of your financial position.</p>

The following table provides the Financial menu Register Report descriptions.

Table 14: Register Reports Descriptions

Report	Description
Financial Overview	<p>The Financial Overview report is a versatile report for streamlining the steps required to close out the day on the books.</p> <p>You can click any underlined total in the report which then opens a more detailed report in a new tab.</p> <p>After you are satisfied, you can resolve a day and post to accounting by exporting the report.</p>
Shift Detail	<p>The Shift Detail Report summarizes all register transactions. This is the main report for accounting purposes.</p> <p>Includes both cash and non cash transactions.</p> <p>Lists all services sold for the selected date range and shifts.</p>
Credit Card	<p>The Credit Card report summarizes all credit card transactions details for the selected date range and shifts.</p> <p>The report includes Card Name, Card #, Transaction, Date, Time, Ticket and amount Charged.</p>
Gift Cards	<p>The Gift Card Report shows all gift card transactions.</p> <p>The report includes Gifts Sold, Gifts Redeemed and Gifts Free.</p>
Checks	<p>The Checks report shows a detailed list of all transactions paid by check.</p> <p>The report includes Check Number, Check Amount and Transaction Number (if applicable).</p>
Fleet Activity	<p>The Fleet Activity report shows all fleet account transactions.</p> <p>The report includes Transaction ID, License (if known), Service and amount Charged.</p>
Deposits	<p>The Deposits report shows all deposits.</p> <p>The report includes Date, Time, unique Journal transaction ID, Cash, Checks, and Total.</p>
Free Wash	<p>The Free Washes report shows all free washes.</p> <p>The report includes Date, Time, Ticket, Service, Price, and Reason (if applicable).</p>
Re-wash	<p>The Re-wash report shows all rewashes.</p> <p>The report includes Transaction, Date, Time, Ticket, Service, Price, and Reason (if applicable).</p>
Payouts	<p>The Payouts report shows all payouts.</p> <p>The report includes Transaction, Account (where item is expensed to), Date, Time, Item Description and Amount.</p>
ROA	<p>The ROA or Received on Account report shows account payments received.</p> <p>The report includes Transaction, Account, Date, Time, Customer Name, Payment Type and Price.</p>

Table 14: Register Reports Descriptions (Continued)

Report	Description
Voids	The voided transactions allow you to view voids at a glance.
Refunds	The Refunds report shows the refunds.
Fund Raiser	The Fund Raiser report shows the fund raiser profit center sales.
View Register	The View Register report shows the transactions.

About the Financial Overview Report

Financial Overview Report

HELP - What can I do here?

Managers:

- Easily compare totals to close books.
- View all financial data consolidated on a device per shift at each site.
- TaskCentric Reporting: Click any total with an underline in the report, and then a new tab opens underlying report that details that figure.

Accountant or Controller:

- Compare this report to the Shift Detail and Credit Card Reports.
- Post to accounting by exporting the report.



See "View the Financial Overview Report" on page 179.



See "Open a Report from the Financial Overview Report" on page 180.



See "Export Data from the Financial Overview Report" on page 181.

View the Financial Overview Report

The Financial Overview is a task centric report. This type of report displays totals, and how the figures are comprised. Just click on the underlined total, and then the underlying report opens for you to review the sub task items.

- 1 Log in to *WashConnect*®.
- 2 From the **Financial** menu, click the **Register Reports** sub menu.
- 3 Click **Financial Overview**.
The **Financial Overview** tab appears.

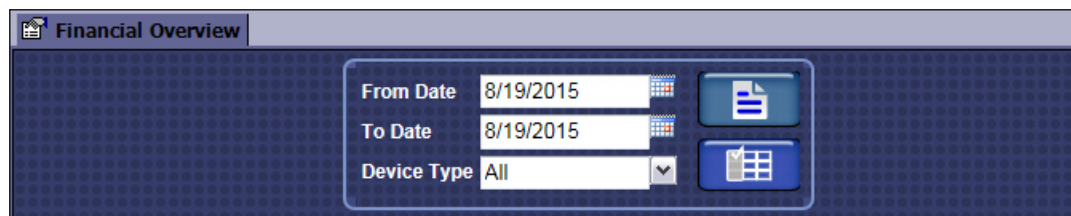


Figure 61. Financial Overview Tab



- 4 In the **From Date** and **To Date** boxes, select a date range.
- 5 In the **Device Type** box, select one or more devices.
- 6 Click the **Preferences**  button.
More options appear at the top of the Financial Overview tab.



Figure 62. Financial Overview Preferences

- 7 In **Top Level**, select the top most level you would like to view on your Financial Overview Report (derived from the levels defined for your organization). For example, levels might be **Corporate**, **Region Level**, **State Level**, and **Site Level**. If you select **Region Level**, then the report summarizes data beginning with **Region** (not **Corporate**) as the highest level.
- 8 In **Show Columns**, select the columns to appear in your report or click **All** to select All columns or click All again to remove all check marks.
- 9 Click the **Save** button.
The columns saved will be used in Financial Overview Reporting until you save a different column selection from Preferences.
- 10 Click the **View Report**  button.
The **Financial Overview** report is generated based on your selected criteria.

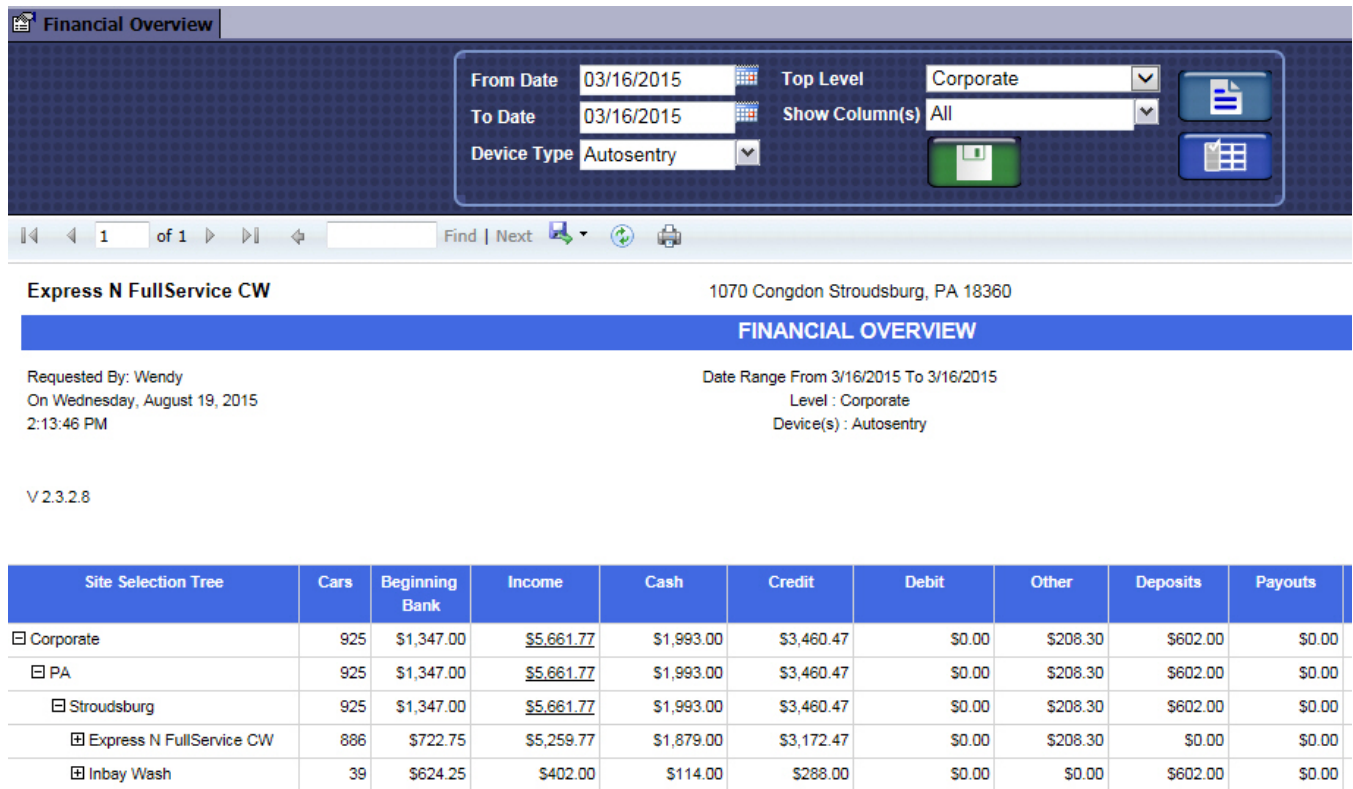


Figure 63. Financial Overview Report



See “Open a Report from the Financial Overview Report” on page 180.



See “Export Data from the Financial Overview Report” on page 181.



For more information regarding Levels, see “About the Organizational Layout” on page 625.

Open a Report from the Financial Overview Report

The Financial Overview report is based on Task Centric Reporting. Easily scale a detailed report. Underlined figures can be clicked on to see how the figure was comprised. Every item reported is a total from another sub task on a different report.

- 1 From WashConnect® Log in window, select the **Corporate** Region.
- 2 Type User ID and Password, and then select Log In.
- 3 After opening the **Financial Overview** report, click to select the **Expand Tree** button to expand the site selection tree. Some totals may have an underline in one or more columns.

Site Selection Tree	Cars	Beginning Bank	Income	Cash	Credit	Debit	Other
[-] Corporate	1,198	\$1,608.50	<u>\$7,759.09</u>	\$2,834.00	\$4,666.42	\$0.00	\$258.67
[-] PA	1,198	\$1,608.50	<u>\$7,759.09</u>	\$2,834.00	\$4,666.42	\$0.00	\$258.67
[-] Stroudsburg	1,198	\$1,608.50	<u>\$7,759.09</u>	\$2,834.00	\$4,666.42	\$0.00	\$258.67
[+] Express N FullService CW	1,147	\$1,280.25	\$7,265.09	\$2,674.00	\$4,332.42	\$0.00	\$258.67
[+] Inbay Wash	51	\$328.25	\$494.00	\$160.00	\$334.00	\$0.00	\$0.00

CLICK AN UNDERLINED TOTAL TO VIEW THE UNDERLYING REPORT THAT AGGREGATES THIS TOTAL.

Figure 64. Financial Overview Report with Underlined Total

- From the **Financial Overview** report, click to select the underlined total. A new report opens in a new tab. For example, if you click an underlined total in the **Income** column, the **Shift Detail Report** appears in a new tab, displaying the details of the Income total.



See “Open a Report from the Financial Overview Report” on page 180.



See “Export Data from the Financial Overview Report” on page 181.



For more information regarding Levels, see “About the Organizational Layout” on page 625.

Export Data from the Financial Overview Report

You can export financial overview report data to a format compatible with your accounting system. Export one shift at a time. Each shift is saved in a separate file, which you can export to an accounting program such as *QuickBooks®*, *Peachtree*, *Alere*, *MAS-90*, and *ProfData*.

Follow these instructions to export **Financial Overview** report data:

- After opening the **Financial Overview** report, expand and contract the site selection tree until the necessary lines appear.

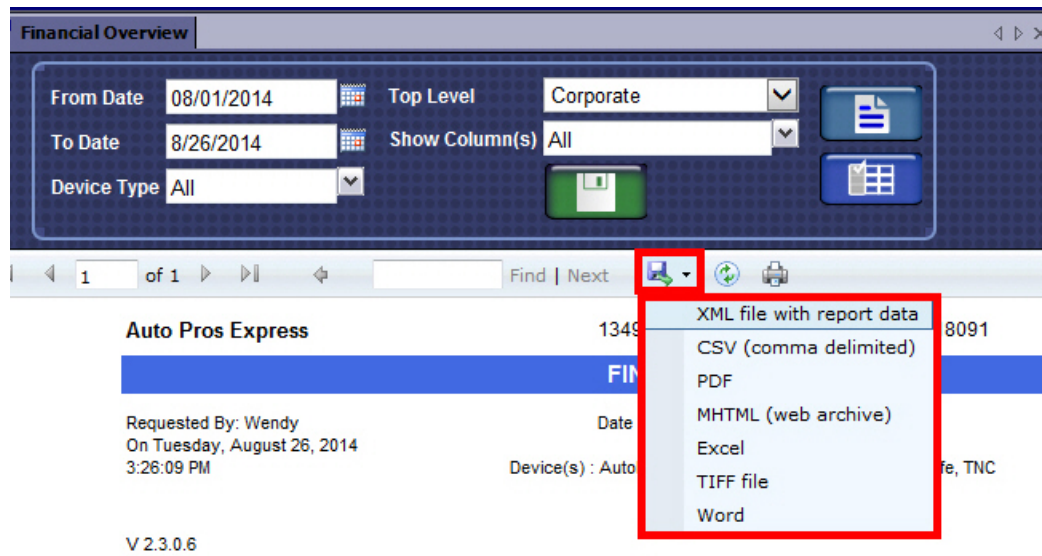


Figure 65. Financial Overview Report Export tools

- From the toolbar, click the **Export** button drop-down arrow.
- From the list, select one of the following formats:

- XML file with report data
- CSV (comma delimited)
- PDF
- MHTML (web archive)
- Excel
- TIFF file
- Word

The File Download dialog box appears.

- Click **Open** to View, and then Print or Save the file.
–or–
Click **Save** to Save the file without viewing.
–or–
Click **Cancel**.

The **Financial Overview** report is unlike any other POS system report.

Express N FullService CW		1070 Congdon Stroudsburg, PA 18360								
FINANCIAL OVERVIEW										
Requested By: Wendy On Wednesday, August 19, 2015 2:20:17 PM			Date Range From 3/1/2015 To 3/31/2015 Level : Corporate Device(s) : AutoBilling, Autosentry, Fuel, POS, Safe, TNC							
V 2.3.2.8										
Site Selection Tree	Cars	Beginning Bank	Income	Cash	Credit	Debit	Other	Deposits	Payouts	Ending Bank
Corporate	25,536	\$5,171.82	\$243,662.89	\$59,276.77	\$176,176.38	\$0.00	\$15,803.33	\$60,880.24	(\$282.92)	\$182.25
PA	25,536	\$5,171.82	\$243,662.89	\$59,276.77	\$176,176.38	\$0.00	\$15,803.33	\$60,880.24	(\$282.92)	\$182.25
Stroudsburg	25,536	\$5,171.82	\$243,662.89	\$59,276.77	\$176,176.38	\$0.00	\$15,803.33	\$60,880.24	(\$282.92)	\$182.25
TNC Wash	3,755	\$891.00	\$14,877.28	\$9,534.00	\$5,240.28	\$0.00	\$103.00	\$8,406.00	\$0.00	\$0.00
Express N FullService CW	17,035	\$4,130.57	\$130,972.79	\$35,024.20	\$90,188.01	\$0.00	\$4,764.17	\$37,135.41	(\$282.92)	\$0.00
3/1/2015	86	\$4,130.57	\$2,101.72	\$102.00	\$1,992.72	\$0.00	\$7.00	\$710.00	(\$27.37)	\$0.00
3/2/2015	820	\$0.00	\$4,841.16	\$1,309.66	\$3,383.14	\$0.00	\$148.36	\$1,350.00	(\$56.18)	\$0.00
3532 AS-Inside Lane	443	\$271.25	\$2,042.95	\$745.50	\$1,180.09	\$0.00	\$117.36	\$0.00	\$0.00	\$317.75
3533 AS-Outside Lane	377	\$264.75	\$1,423.78	\$444.00	\$948.78	\$0.00	\$31.00	\$0.00	\$0.00	\$264.75
3536 Autobilling	0	\$0.00	\$879.72	\$0.00	\$879.72	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3537 Lobby POS	0	\$0.00	\$494.71	\$120.16	\$374.55	\$0.00	\$0.00	\$0.00	(\$56.18)	\$0.00
3535 Safe	0	\$2,959.10	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,350.00	\$0.00	\$2,826.18
3/3/2015	475	\$0.00	\$3,256.87	\$818.00	\$2,383.15	\$0.00	\$55.72	\$1,020.00	\$0.00	\$0.00
3/4/2015	219	\$0.00	\$1,724.82	\$200.00	\$1,511.22	\$0.00	\$13.60	\$0.00	\$0.00	\$0.00
3/5/2015	2	\$0.00	\$1,525.88	(\$430.32)	\$1,095.56	\$0.00	\$430.32	\$430.32	\$0.00	\$0.00

Figure 66. Financial Overview Report

The Financial Overview report is a versatile report for streamlining the steps required to close the books on a day. Unlike other point-of-sale systems where you need to open and close one report after another to compare totals, the Financial Overview report puts all your information in one place.

You can look at totals for credit cards, fleets, and clubs at a glance. You can then click any total in the report to open a more detailed report in a new tab. For example, if you want to look at just your fleet sales for yesterday, you can click the Fleet total to see that report.

You can easily switch back and forth between tabs to prove out the numbers. Then you can export the Financial Overview report data to an accounting system.

The Financial Overview report was designed with your productivity in mind. The idea is to improve your efficiency, so you can resolve a day and post to accounting in less time.

The following table describes the **Financial Overview** report section headings and line-item labels.

Table 15: Financial Overview Report Descriptions

Label	Description
Site Selection Tree	Column is frozen. The row headers will scroll to the left as you navigate across the report. The Resolution is the line that is being shown.
Cars	Number of cars. Cars count only reflects base wash sold under conveyor profit center. For TouchNClean, the car count is reflected in the Self Serve Profit Center.
Beginning Bank	The dollar amount entered into the system as Beginning Bank at the opening of the shift.
Income	Total receipts for the shift type. Includes both cash and non-cash totals.
Cash	Portion of the income that was processed as cash.
Credit	Portion of the income that was processed as credit. Click a total to see the Credit report.
Debit	
Other	Portion of the income that was processed as neither cash nor credit.
Deposits	Dollar amount removed from the Safe or POS to be deposited in the bank. Click a total to see the Deposits report.
Payouts	This entry includes the number and total dollar value of all cash payouts made during the shift. Click a total to see the Payouts report.
Ending Bank	The dollar amount entered into the system as ending amount at the closing of the shift.
Over Under	Dollar amount at end of shift for the difference in the POS, AS terminal and Safe totals. Over means the devices ended the shift with extra money than what was recorded by the software. Under means the devices ended the shift with less money than what was recorded by the software. See Under or Over in Shift Detail Report for more information.
Free Wash	All free washes for the selected shifts. Click a total to see the Free Wash report.
Rewash	All rewashes for the selected shift. Click a total to see the Re-wash report.
Sales Revenue	Total representative of the Income received from Sales for the time frame not inclusive of Over Under, payouts, etc.
ROA	ROA (Received on Account) Total amount received as payment on an account (i.e. fleet). Click a total to see the Received on Account report.
Gift Sales	This entry includes the number and total dollar value of all Gift Certificates and Gift Cards sold during the shift.
Gift Redeemed	This entry includes the number and total dollar value of all Gift Certificates and Gift Cards redeemed during the shift.

Table 15: Financial Overview Report Descriptions (Continued)

Label	Description
Fleet Accts.	Total sales from fleet account customers. Click a total to see the Fleet Accounts report.
Checks	Entry includes the number and total dollar value of checks used in the transactions during the shift. Click a total to see the Checks report.
Tokens	The dollar value of the tokens used toward payment of services.
Void Qty.	Number of voids completed at selected level within selected date range.
Void Amt.	Dollar amount of voids completed at selected level within selected date range.
Edit Qty.	Number of transactions edited for selected level within selected date range.
Edit Amt.	Dollar amount of transactions edited for selected level within selected date range.



See “View the Financial Overview Report” on page 179.



See “Open a Report from the Financial Overview Report” on page 180.



See “Export Data from the Financial Overview Report” on page 181.

About the Shift Detail Report

Shift Detail Report



HELP - What can I do here?

Managers:

- Summarizes all services sold.
- Tracks business and improves bottom line.
- View all daily cash and noncash register transaction data.

Accountant or Controller:

- Compare this report to the Financial Overview and Credit Card Reports in preparation to close the books on any given day.
- Export to Accounting (.csv format).



See "View a Shift Detail Report" on page 187.



See "Printing a Report" on page 66.



See "Export a Report" on page 67.



See "Shift Detail Report Example" on page 190.



See "" on page 196.



See "Unverified Journal Entries" on page 193.




See "Unverified Shifts" on page 194.

View a Shift Detail Report

The Shift Detail Report is the main report that accounting views at the end of the day. This report summarizes all transactions for the shift.

- 1 On the **Financial** menu, click **Register Reports**, and then click **Shift Detail**. The **Shift Detail** tab appears.

Figure 67. Shift Detail Report Tab

- 2 In the **From Date** and **To Date** boxes, you can type a new date or select a date from the calendar.
- 3 In the **Level** box, choose a level from your Corporate structure.
- 4 In the **Device Type** box, select one or more devices.
- 5 In **Group On**, select PLU or Account.
- 6 In **Shift**, select shift(s), or All shifts.
- 7 In the **Condensed** check box, click to select. Click again to clear the Condensed check box.
The report will do one of the following:
 - If Condensed formatting option is not selected:
The report will appear formatted with a lot more white space between the columns.
 - If Condensed formatting option is selected:
The report is formatted to allow the exact same content to appear closer together.
- 8 If available, in the **Run report locally from http://** box, click to select if you want to run Shift Detail Report directly from the POS device without data from replication. This feature is unavailable when using centralized databases.
- 9 Click the **View Report**  button.
The **Shift Detail** Report appears.


NOTE: Voids are never counted as actual cars washed.



See "About the Voids Report" on page 239.

10 You can **Print** the Shift Detail Report.

11 If available, you can click the **Export To**  button to export your shift data to the accounting package.

NOTE: The **Export To**  button only appears if there is an Accounting interface for your car wash. This initially needs to be set up with Technical Support. The Export To button is used to export the shift data for use in an accounting package such as Alere, Quickbooks, MAS-90 and ProfData in CSV.

12 From the report toolbar, you can select the **Export** button.

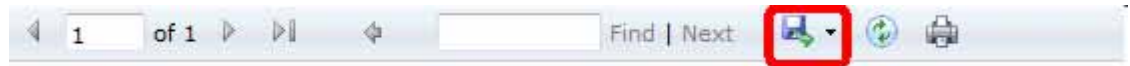


Figure 68. Export button located on Shift Detail Report toolbar

13 You can export the **Shift Detail** Report and choose from several file formats:

- XML file with report data
- CSV (comma delimited)
- PDF
- MHTML (web archive)
- Excel
- TIFF file
- Word



See "Printing a Report" on page 66.



See "Export a Report" on page 67.



See "Searching a Report" on page 69.




See "Shift Detail Report Example" on page 190.



See "" on page 196.

 See *"Shift Detail Report Sections"* on page 189.

 See *"Verify or Edit a Journal Entry"* on page 277.

 See *"Unverified Journal Entries"* on page 193.

 See *"Unverified Shifts"* on page 194.

Shift Detail Report Sections


- Net Sales (total sales before tax)
- Sales Tax (tax based on taxable Net Sales)
- Total Income (All Monies received for report period including Gift Cards Sold, Received on Accounts (Fleets), and PLU discounts before any payouts or over unders are accounted for).
- Total Non-Cash Income (credit cards, gift cards, and fleet charges)
- Cash To Account For = Beginning Banks + Adds + Refunds Due + Cash & Checks from Operations
- Cash Accounted for = Payouts + Removes + Bank Deposits + Ending Banks

NOTE: The Cash to Account For and Cash Accounted For should balance.

 See *"Printing a Report"* on page 66.

 See *"Export a Report"* on page 67.

 See *"Shift Detail Report Example"* on page 190.

 See *"* on page 196.

 See *"Unverified Journal Entries"* on page 193.

 See *"Unverified Shifts"* on page 194.

Shift Detail Report Example

Express N FullService CW		1070 Congdon Stroudsburg, PA 18360		570-424-9600	
SHIFT DETAIL					
Requested By: Wendy		Date Range From: 3/10/2015 To: 3/10/2015		Page: 1 of 1	
On Wednesday, August 19, 2015		Logged At: Express N FullService CW			
2:45:32 PM		Device(s): Autobilling[1001], AS-Inside Lane[1011], AS-Outside Lane[1012], Lobby POS[6001], HS POS[6002], Safe[8001]			
All Shifts					
V 2.3.2.9					
Express					
Base	PLU	Service	Quantity	Price	Amount
	1	Exterior Wash	586	\$6.60	\$3,867.60
	2	Deluxe Exterior Protection Package	239	\$11.32	\$2,705.48
Total Base			825		\$6,573.08
Extra	PLU	Service	Quantity	Price	Amount
	33	Clear Coat Conditioner	7	\$2.83	\$19.81
	34	Underbody & Rust Inhibitor	13	\$2.83	\$36.79
	51	Deluxe Upgrade	2	\$4.72	\$9.44
	54	Deluxe with Tire Shine	1	\$7.55	\$7.55
Total Extra			23		\$73.59
Discount	PLU	Service	Quantity	Price	Amount
	101	Police/Fire Fleet Ext Discount	7	(\$4.60)	(\$32.20)
	1500	Exterior Wash	3	(\$6.60)	(\$19.80)
	1501	Deluxe Exterior	5	(\$11.32)	(\$56.60)
	1512	Stgb HS Discount 7	1	(\$6.60)	(\$6.60)
Total Discount			16		(\$115.20)
Total for Express			825		\$6,531.47
Hand Services					
Base	PLU	Service	Quantity	Price	Amount
	5	Full Service	67	\$9.43	\$631.81
	60	Add Vac Charge	3	\$0.94	\$2.82
	62	Towel Dry	1	\$4.72	\$4.72
	92	Full Service Club	4	\$9.43	\$37.72
			75		\$677.07
Refund	5	Full Service	-1	\$9.43	(\$9.43)
		Total Refund	-1		(\$9.43)
Total Base			74		\$667.64

Figure 69. Shift Detail Report, Page 1

Extra	PLU	Service	Quantity	Price	Amount
	8	Tire Shine	16	\$2.83	\$45.28
	30	Towel & Tire Shine	5	\$7.55	\$37.75
	37	Towel Dry	3	\$4.72	\$14.16
Total Extra			24		\$97.19
Discount	PLU	Service	Quantity	Price	Amount
	102	Police/Fire Fleet FS Discount	1	(\$5.43)	(\$5.43)
	1502	Towel Dry	1	(\$4.72)	(\$4.72)
	1503	Full Service	1	(\$9.43)	(\$9.43)
Total Discount			3		(\$19.58)
Total for Hand Services			101		\$745.25
Club					
Club	PLU	Service	Quantity	Price	Amount
	900	Exterior Unlimited Wash Club	53	\$17.95	\$951.35
	901	Deluxe Unlimited Wash Club	20	\$27.95	\$559.00
	904	12 Month Exterior Unlimited Club	1	\$215.40	\$215.40
Total Club			74		\$1,725.75
Discount	PLU	Service	Quantity	Price	Amount
	1400	Exterior Unlimited	264	(\$6.60)	(\$1,742.40)
	1401	Deluxe Unlimited	89	(\$11.32)	(\$1,007.48)
	1402	Exterior Unlimited	3	(\$6.60)	(\$19.80)
Total Discount			356		(\$2,769.68)
Total for Club			430		(\$1,043.93)
Impulse					
Base	PLU	Service	Quantity	Price	Amount
	31	Towel Exchange	1	\$2.83	\$2.83
Total Base			1		\$2.83
Total for Impulse			1		\$2.83
Net Sales Without Sales Tax					\$6,235.62
Sales @ NonTaxable [0.00%]			\$100.99		\$0.00
Sales @ PA State [6.00%]			\$6,134.63		\$369.87
Total Sales:					\$6,605.49
Gift Card	<input checked="" type="checkbox"/> Sold		7	for	\$0.00
Total Income					\$6,605.49

Figure 70. Shift Detail Report, Page 2

Total Noncash Reconciliation				
Amex	14	for	\$248.47	
Discover	14	for	\$196.75	
Visa/MC	296	for	\$4,116.55	
	Total Credit Cards	324	for	\$4,561.77
Fleets	27	for		\$102.72
Gift Card Redeemed	10	for		\$83.25
	Total Noncash			\$4,747.74
Cash Reconciliation				
☒ Beginning Bank				\$3,928.50
☒ Adds	18	for		\$7,658.25
Refunds Due	3	for		\$16.25
Cash from Operations				\$1,857.75
	Cash To Account For			\$13,460.75
☒ Payout	1	for		\$2.75
☒ Removes	18	for		\$7,658.25
Bank Deposits (Cash)	1		\$2,225.00	
Total Bank Deposits:	1			\$2,225.00
☒ Ending Bank				\$3,539.75
	Cash Accounted For			\$13,425.75
Under				(\$35.00)

[Click Here to View Verified and Reverified Journals](#)

Figure 71. Shift Detail Report page 3

The Shift Detail Report is a cash management tool. The report was designed to account for all the money taken in during the day as well as money added to cash drawers and any Auto Sentry on site to prevent theft. The report summarizes all register transactions and lists all services sold for the selected shift.



See "Printing a Report" on page 66.



See "Export a Report" on page 67.




See "Shift Detail Report Example" on page 190.



See "" on page 196.




To view all edits, See "Verify or Edit a Journal Entry" on page 277.

 See "Unverified Journal Entries" on page 193.

 See "Unverified Shifts" on page 194.

Bonus Point and Punch Card Edits appear on Shift Detail

If bonus points/punch cards promotions were edited, they appear at bottom of Shift Detail Report.

 Edited Customer Promotions

Full Name	Account ID	Note	Modified by First Name	Modified by Last Name
USAF	2001	Bonus point changed from 160 to 180. Reason : Didn't get credit for a wash	Wendy	Sites
USAF	2001	Bonus point changed from 180 to 175. Reason : Customer voided last transaction.	Wendy	Sites

Figure 72. Shift Detail Report with Edited Customer Promotions at bottom of report

 See "Printing a Report" on page 66.

 See "Export a Report" on page 67.

 See "Shift Detail Report Example" on page 190.

 To view all edits, See "Verify or Edit a Journal Entry" on page 277.

 See "Unverified Journal Entries" on page 193.

 See "Unverified Shifts" on page 194.

Unverified Journal Entries

At the bottom of the Shift Detail Report, if there are unverified shifts available, a link for the Shift Not Verified Report will be appear.


 ***** Unverified Journal Entries Exist *****

Date	Device	Journal
3/23/2015	Safe [8001]	869520
3/22/2015	HS POS [6002]	867348

Figure 73. Unverified Journal Entries at the bottom of the Shift Detail Report

Unverified Shifts

If a shift is not verified for the selected date(s) of your shift detail report, you will see a red warning at the top of the Shift Detail report.

- 1 On the **Financial** menu, click **Register Reports**, and then click **Shift Detail**.
- 2 Click the **View Report**  button. The **Shift Detail** tab appears. The warning message and link **Shift(s) are not verified. Click here to see unverified shifts.** appears.

Express N FullService CW

1070 Congdon Stroudsburg, PA 18360

SHIFT DETAIL

Requested By: Wendy
On Monday, August 24, 2015
8:37:38 AM

Date Range From: 3/4/2015 To: 3/31/2015
Logged At: Express N FullService CW
Device(s): Autobilling[1001], AS-Inside Lane[1011], AS-Outside Lane[1012],
Lobby POS[6001], HS POS[6002], Safe[8001]

All Shifts

V 2.3.2.9

[Shift\(s\) are not verified. Click here to see unverified shifts.](#)

Figure 74. Shift Detail Report with Shift(s) not verified hyperlink



See "Printing a Report" on page 66.



See "Export a Report" on page 67.



See "Shift Detail Report Example" on page 190.



See "" on page 196.



See "Verify or Edit a Journal Entry" on page 277.



See "Unverified Journal Entries" on page 193.



See "Unverified Shifts" on page 194.

Shift Detail Report Field Descriptions

The following table describes the **Shift Detail Report** section headings and line-item labels. The table is comprehensive and not every Shift Detail Report includes all the labels described in the table. For example, if there were no fuel sales to show in your report, then the **Fuel Sales** heading does not appear on the report.

Table 16: Shift Detail Report Field Descriptions

Field	Description
Profit Center	Each Profit Center will be itemized based on how the PLUs were setup for the specific Profit Center, i.e. Base, Extra, Other, etc. Anything not sold during the shift being viewed will not appear. In each category, the units sold will be broken down by PLU, the name of the item or service, the total number sold (quantity), and the total dollar value of the quantity sold (price).
Base	Base lists those PLUs setup in Sales Items as Base items in the Type box. Base items will always appear first. Base may be the only category listed in the Profit Center unless there are discounts or promotions possible within that profit center.
Extra	Extra lists those PLUs setup in Sales Items as Type: Extra.
Discount	Discount lists those PLUs setup in the Sales Items as Discount in the Type box.
Promotion	Promotion lists discounts that were applied to purchases made by customers who were eligible for system promotions. The System automatically applies all such discounts to a PLU # (-204). This discount PLU can include the following promotions: Frequent Customer, Frequent Car, Bonus Points, Anniversary, Birthday, Punch Card, Cascading Prices and Wash Books. It will also include discounts applied from the sale of services to customers who are members of Promotion PLUs. The total from the Promotion type will be subtracted from the sales within the profit center.
Other	Other lists those PLUs setup in Sales Items as Type: Other. They refer to items with no dollar value but things that need to be accounted for.
Miscellaneous	Miscellaneous lists discounts that were applied to Fleet Account customers where the fleet account receives a discount for the purchase. This system automatically applies all such discounts to a PLU# (-203). The total from the Miscellaneous type will be subtracted from the sales within the profit center.
Net Sales Without Sales Tax:	
Wash or Account (Profit Center) Name	Main headings indicate the specific Profit Center sales information that is being viewed. Each category will display the type of service, PLU number, name, along with the combined quantity and price for each service purchased. The total quantity and price for each PLU is multiplied to display the total revenue. For example, in the displayed Shift Detail Report, the following are the Profit Centers show in the report: Base, Express, Hand Services, and Club.
Net Sales Without Sales Tax	Total Sales in all profit centers prior to tax. Note: Gift Cards sold are not a Sale but a liability.
Sales Tax:	

Table 16: Shift Detail Report Field Descriptions (Continued)

Field	Description
Sales @ NonTaxable	This entry will include all sales in all profit centers from PLUs setup as Never Taxable in Sales Item.
Sales @ Tax Rate 1	This entry will include all sales in all profit centers from PLUs setup as Always, Conditional or Force Taxable at Item Tax Rate 1 in the Sales Item. For example, if rate 1 is 6% (the PA Department of Revenue tax rate), and sales are \$1000.00, then Taxes at Rate 1 is \$60.00.
Sales @ Tax Rate 2	This entry will include all sales in all profit centers from PLUs setup as Always, Conditional or Force Taxable at Item Tax Rate 2 in the Sales Item.
Sales @ Combined Tax Rates	This entry will include all sales in all profit centers from PLUs setup as Taxable at both Item Tax Rates 1 and 2 in Sales Item.
Total Sales	The total dollars of revenue for all sales including tax received from all profit centers during the shift.
Total Income:	
Gift Sold	The total value of gift cards sold during the shift. This total is added to the amount of total income.
Fund raiser	The total value of fund raiser sales sold during the shift.
ROA Received on Account	Total amount received as payment on an account (i.e. fleet).
Gift Free	The dollar amount equal to the percent set up for the Add Value Promo when a customer adds value to a gift card. Also shows fund raisers, if applicable.
Total Income	The total dollars of revenue for all sales made from all profit centers during the shift including Prepay and Post Pay Sales that have been paid for in the date range.
Total Non-Cash Reconciliation	
Credit Card	The total dollar amount of all sales identified as being processed with a Credit Card. If Payment Methods have been setup, the Credit Card totals will instead be broken down by type, i.e. Visa, MasterCard, etc. The total from these entries will be subtracted from the amount of Total Income.
Debit Card	The number and total dollar value of all sales identified as being processed with a Debit Card.
Fuel Sales	Includes the total dollar amount of sales for wash services sold at a fuel pump.
Fleets	The number and total dollar value of sales that were charged to Fleet Account customers.
Gift Cards Redeemed	This entry includes the number and total dollar value of all Gift Cards redeemed during the shift. This total is subtracted from the amount of total income.

Table 16: Shift Detail Report Field Descriptions (Continued)

Field	Description
Tokens Redeemed	The dollar value of the tokens used toward payment of services. This amount is part of the non-cash total.
Total Non-Cash	Combined amount of non-cash items which include credit cards, debit cards, tokens, gift cards, fleet accounts, and fuel sales.
Cash Reconciliation:	
Cash To Account For:	
Beginning Bank	The dollar amount entered into the system as Beginning Bank at the opening of the shift.
Adds	A sum added to any device that is in addition to the Beginning Bank. This can be verified by reviewing the Cash Management Summary Report for the Adds to count the total number of transactions and confirm the total amount.
Refunds Due	The Refund Due amount does not carry over to the next day. Refunds that are not paid out during the same shift, will cause an overage that will be included in the total cash amount for the day.
Checks from Operations	Entry includes the number and total dollar value of checks used in the transactions during the shift.
Cash from Operations	Entry includes the total dollar value of cash used in the transactions during the shift.
Cash To Account For	
Cash Accounted For:	
Payouts	This entry includes the number and total dollar value of all cash Paid outs made during the shift.
Removes	A sum removed from the Safe to an Auto Sentry or POS device. It does not have to have the safe enabled. This can be verified by reviewing the Cash Management Summary report for the Removes to count the total number of transactions and confirm the total amount.
Bank Deposits (Checks)	Total of checks being taken from the system and sent to the Bank for Deposit. Checks deposited to the Bank will be deducted from your total Cash on Hand.
Bank Deposits (Cash)	Total of cash being taken from the system and sent to the Bank for Deposit. Cash deposited to the Bank will be deducted from your total Cash on Hand.
Total Bank Deposits	Total Amount taken in Cash and Check to be deposited in the Bank.
Dispenser Edits	Dollar amount for edits completed for the Auto Sentry terminal bill dispenser or coin hopper. Each edit references a cash management journal number. Also shows modifications (i.e., re-verifying and already verified entry).

Table 16: Shift Detail Report Field Descriptions (Continued)

Field	Description
Acceptor Edits	Dollar amount for edits completed for the AST bill/coin acceptors. Each edit references a cash management journal number.
Over/Under/Even	Total difference in Dollars between what revenue the software says you should have based on recorded transactions, and what you actually count as a physical Cash on Hand from transactions and your Banks. Over means the devices ended the shift with extra money than what was recorded by the software. Under means the devices ended the shift with less money than what was recorded by the software. See Under or Over in Shift Detail Report for more information.
Ending Bank (-)	Ending bank is the cash in the drawer at the end of the shift less the deposit.
Cash Advances	Amount of cash removed from POS when payment is received in a different form. For example, a customer's price is \$5.00 for the wash and they want to leave a \$2.00 tip. The customer is using a credit card for to pay the entire \$7.00. The \$2.00 would be removed from the POS for the tip.
Cash Accounted For	
Unverified	
Voided Transactions	Displays the number of transactions and the total dollar amount of transactions that were voided while the shift was open.
Edited Transactions	Displays the number of transactions and the dollar value of all transactions that have been edited for this shift. These transactions could have been edited while the shift was open or after it was closed. When transactions are edited after a shift has been closed it will be necessary to reprint the shift check to see the updated entry for Edited Transactions.
Retired Transactions	Displays the number of transactions and the dollar value of all transactions that have been retired for this shift. These transactions could have been retired while the shift was open or after it was closed. When transactions are retired after a shift has been closed it will be necessary to reprint the shift check to see the updated entry for Retired Transactions.
No Sale Count	Displays the number of times during the shift the F6 button was pressed to open the cash drawer.
Edited Customer Promotions	If any employee manually changes a customer's bonus points or punch card, it will appear on the bottom of the Shift Detail Report. Track any promotion that was manually modified with the reason and the name of who made the modification.



See "About the Shift Detail Report" on page 186.



See “View a Shift Detail Report” on page 187.



See “Printing a Report” on page 66.



See “Export a Report” on page 67.



See “Shift Detail Report Example” on page 190.



See “” on page 196.



To view all edits, See “Verify or Edit a Journal Entry” on page 277.



See “Unverified Journal Entries” on page 193.



See “Unverified Shifts” on page 194.

About the Credit Card Summary

Credit Cards Summary

HELP - What can I do here?

Managers:

- Summarizes all credit card transaction data for the selected shifts across the specified corporate level and report date range.

Accountant or Controller:

- View quantity of credit card transactions.
- Breakdown of the credit card company transaction totals.

You can view the Credit Card Summary for a specific level of your corporate tree structure, for example, Corporate, Region, State, City, or Site.

To view credit card transaction details, See “About the Credit Cards Report” on page 202.

To view the **Credit Cards Summary**, follow these steps:

- 1 On the **Financial** Menu, click **Credit Cards Summary**, and then click **Credit Card**. The **Credit Cards** tab appears.

Credit Cards Summary

From Date: 10/7/2015
 To Date: 10/7/2015
 Top Level: Corporate
 Device Type: All

Buttons: View Report, Save

Figure 75. Credit Cards tab

- 2 In the **From Date** and **To Date** boxes, type a date or select a date from the calendar.
- 3 In the **Top Level** box, select a site or level of your corporate structure.
- 4 In **Device Type**, select device type(s) or All device types.
- 5 You can click the **Save** button to save these preferences for future use.
- 6 Click the **View Report** button.
The Credit Card Summary appears.

Credit Cards Summary

From Date: 3/3/2015
 To Date: 03/03/2015
 Top Level: Site
 Device Type: All

Express N FullService CW 1070 Congdon Stroudsburg, PA 18360 570-424-9687

CREDIT CARDS SUMMARY

Requested By: Wendy
 On Monday, October 26, 2015
 4:25:30 PM

Date Range From 3/3/2015 To 3/3/2015 Page: 1 of 1

V.2.3.2.0

Site Selection Tree	Qty.	Credit
TNC Wash	14	\$49.37
Express N FullService CW	172	\$2,383.15
Full Service Wash	97	\$4,002.30
Inbay Wash	7	\$66.00

Figure 76. Credit Cards Summary Example

- 7 From the Credit Cards Summary toolbar, you can **Print** or **Export** the report.



See "About the Credit Cards Report" on page 202.

About the Credit Cards Report

Credit Cards Report

HELP - What can I do here?

Managers:

- Displays all credit card transaction data for the selected shifts across the specified report date range.

Accountant or Controller:

- View details for credit card transactions.
- Close out a day by comparing the amounts in the Shift Detail report to the details shown in the Credit Card report.

 See "View the Credit Cards Report" on page 202.

 See "Credit Cards Report Example" on page 204.

 See "Credit Cards Report Descriptions" on page 204.

 See "About the Credit Card Summary" on page 200.

View the Credit Cards Report

You can view the credit card transaction data for the selected shifts across the specified date range.

To view the **Credit Cards** report, follow these steps:

- 1 On the **Financial** Menu, click **Register Reports**, and then click **Credit Card**. The **Credit Cards** tab appears.

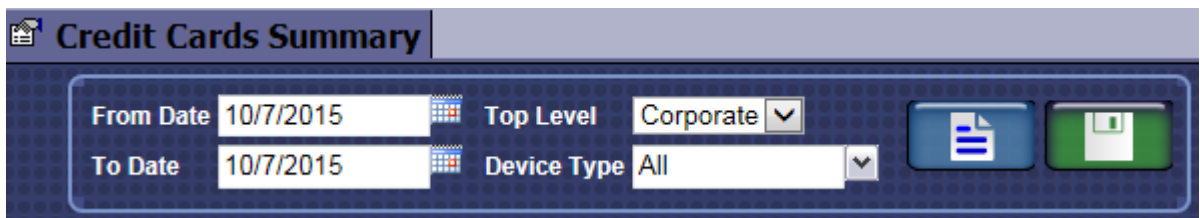

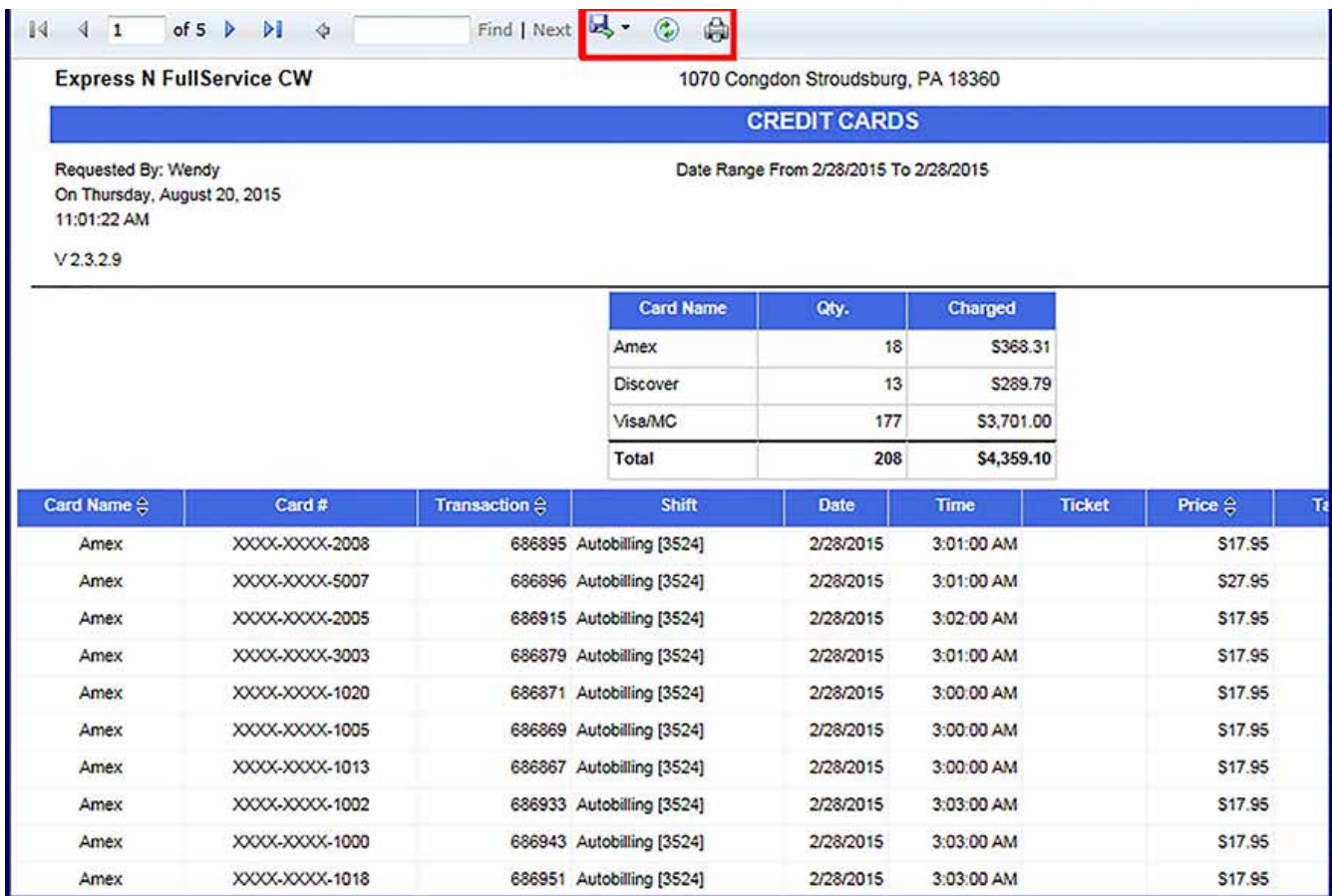


Figure 77. Credit Cards tab

- 2 In the **From Date** and **To Date** boxes, type a date or select a date from the calendar.
- 3 In the **Top Level** box, select a site or level of your corporate structure.
- 4 In **Device Type**, select device type(s) or All device types.
- 5 In **Device** box, select device(s) or All devices
- 6 In **Shift** box, select a single shift, a combination of shifts, or All shifts.
- 7 Click the **View Report**  button.
The Credit Card report appears.
- 8 From the Credit Cards report toolbar, you can **Print** or **Export** the report.



Card Name	Qty.	Charged
Amex	18	\$368.31
Discover	13	\$289.79
Visa/MC	177	\$3,701.00
Total	208	\$4,359.10

Card Name	Card #	Transaction	Shift	Date	Time	Ticket	Price
Amex	XXXX-XXXX-2008	686895	Autobilling [3524]	2/28/2015	3:01:00 AM		\$17.95
Amex	XXXX-XXXX-5007	686896	Autobilling [3524]	2/28/2015	3:01:00 AM		\$27.95
Amex	XXXX-XXXX-2005	686915	Autobilling [3524]	2/28/2015	3:02:00 AM		\$17.95
Amex	XXXX-XXXX-3003	686879	Autobilling [3524]	2/28/2015	3:01:00 AM		\$17.95
Amex	XXXX-XXXX-1020	686871	Autobilling [3524]	2/28/2015	3:00:00 AM		\$17.95
Amex	XXXX-XXXX-1005	686869	Autobilling [3524]	2/28/2015	3:00:00 AM		\$17.95
Amex	XXXX-XXXX-1013	686867	Autobilling [3524]	2/28/2015	3:00:00 AM		\$17.95
Amex	XXXX-XXXX-1002	686933	Autobilling [3524]	2/28/2015	3:03:00 AM		\$17.95
Amex	XXXX-XXXX-1000	686943	Autobilling [3524]	2/28/2015	3:03:00 AM		\$17.95
Amex	XXXX-XXXX-1018	686951	Autobilling [3524]	2/28/2015	3:03:00 AM		\$17.95

Figure 78. Credit Cards Report Example



See "About Report Toolbar" on page 64.

Credit Cards Report Example

In the previous Figure 78, “Credit Cards Report Example,” the body of the report includes details on actual credit card transactions for the register on 2/28/2015. All of these credit card sales are Autobilling and do not generate ticket numbers.



See “Searching a Report” on page 69.



See “Credit Cards Report Example” on page 204.



See “Credit Cards Report Descriptions” on page 204.



See “Printing a Report” on page 66.



See “Export a Report” on page 67.

Credit Cards Report Descriptions

The following table describes the **Credit Cards** report section headings and line-item labels.

Table 17: Credit Cards Report Descriptions

Field	Description
Card Name	Amex, Discover, Visa/MC
Card #	Only the last four digits of the card.
Transaction	Unique transaction ID number. Click the column header to sort on this field.
Shift	Selected shift: all shifts, a single shift, or a combination of shifts.
Date	Date the transaction was finalized. Click the column header to sort on this field.
Time	Time the transaction was finalized.
Ticket	Ticket number, if a ticket was generated for the transaction. Zero if no ticket was generated.
Price	Price of the transaction. Refunds appear in parenthesis.

Table 17: Credit Cards Report Descriptions (Continued)

Field	Description
Tax	Tax on the transaction.
Total	Price plus tax.
Charged	Actual billed amount on the card. Billed can account for split payment amounts. For example, if a transaction costs \$100.00 and \$20.00 was on a gift card and \$80.00 was on a credit card, then Total is \$100.00, but billed is \$80.00. Cannot split payment on two of the same card types: i.e., cannot use 2 credit cards.



See “About the Credit Cards Report” on page 202.



See “Credit Cards Report Example” on page 204.



See “Printing a Report” on page 66.



See “Export a Report” on page 67.

About Credit Cards Reconciliation

NOTE: The Credit Cards Report can only be viewed at Corporate.

This report displays a break down of the credit cards for a period of time.

Use this report to reconcile your credit cards every day and then compare the amounts to this report to your Detail report from your credit card processor. If all goes well, both amounts will match the Shift Detail Report Total Credit Cards.

Credit Card Reconciliation Example

This is a step by step instruction on reconciling a credit card statement. It is strongly recommended to reconcile credit cards daily or at the very latest, every other day. You can reconcile with any time period but it makes it difficult to track down any possible error or omission.

IMPORTANT: Internet access needs to be available through your credit card clearing to reconcile credit cards every day.

- 1 Login to WashConnect.
- 2 From the Financial menu, select the **Shift Detail** Report.

SHIFT DETAIL						
On Tuesday, October 06, 2015 11:39:18 AM		Logged At: Corporate Device(s): TNC Bay 1[2021], TNC Bay 2[2022], TNC Bay 3[2023], TNC Bay 4 [2024], TNC Bay 5[2025] All Shifts				
V 2.3.2.9						
Sales Time Package	PLU	Service	Quantity	Price	Amount	
	5000	Standard Package	18	\$4.72	\$84.89	
Total Sales Time Package			18		\$84.89	
		Total for Self Serve	18		\$84.89	
Net Sales Without Sales Tax					\$84.89	
Sales @ PA State [6.00%]				\$84.89	\$5.06	
Total Sales:					\$89.95	
Total Income					\$89.95	
Total Noncash Reconciliation						
Amex		1 for		\$10.00		
Visa/MC		6 for		\$23.95		
Total Credit Cards		7 for			\$33.95	
Total Noncash					\$33.95	
Cash Reconciliation						
Beginning Bank					\$1,825.00	
Cash from Operations					\$56.00	
Cash To Account For					\$1,881.00	
Bank Deposits (Cash)		5		\$1,837.00		
Total Bank Deposits:		5			\$1,837.00	

Figure 79. Shift Detail Report with Total Credit Cards amount shown

- 3 From the Total Noncash Reconciliation amount, you can view the Total Credit Cards amount that you will need to confirm against both the credit card processor detail report and the Credit Card Report in WashConnect. Follow the next steps to do this comparison.
- 4 Log in to your credit card clearing company. In this example, Log in to TransLink (TransFirst).
- 5 In Merchant ID, type your merchant ID number.
- 6 In Search by, select Merchant ID.
- 7 In Start Date, enter start date of reconciliation. **September 30**
- 8 In End Date, enter end date of reconciliation. **September 30**

9 Select the **Find Merchant** button.

Settled Batches and Transaction Look-up

Express N Full Service CW
Stroudsburg, PA
(610) 881-8000
Assoc Num: 103752
Agent: Innovative Control Systems Inc

Merchant ID: 41201131020113
Search By: Merchant ID
Start Date: 09/30/2015
End Date: 09/30/2015

Find Merchant Create Report

Rows Per Page: 10

Details	Card Types	Network	Batch Date	Net Deposit	Total Tickets	Number of Debits	Amount of Debits	Number of Credits	Amount of Credits	Hold Amount	Withhold Amount	Terminal ID	Deposit Amount	ACH Date
Details	Card Types	TFNB	09/30/15	\$33.95	7	7	\$33.95	0	\$0.00		\$0.00	00010001	\$33.95	10/02/15
TOTAL:				\$33.95	7	7	\$33.95	0	\$0.00	\$0.00	\$0.00		\$33.95	

1 Records Return << < Previous Page Next Page > >> Page 1 of 1
Printable Version Display Excel
Printable Version With Details Excel Version With Details

Figure 80. Credit Card Processor on-line login screen - translink example

10 Click **Create Report** to view all credit card details for that date range..

Close Details Window

Translink Report
Merchant ID: 41801111398011 ; Batch Date: 09/30/15

Detail #	Cardholder Number	Tran Date	Tran Amt	Auth Code	Tran Ref #	Entry Mode	Auth Amt	Auth Date	Network ID	Voided
1	xxxxx.....3022	09/30/15	\$10.00	546788	00773497173	Swiped	\$10.00	09/30/15		N
2	xxxxx.....4055	09/30/15	\$3.00	MJEEYK	00773505765	Swiped	\$3.00	09/30/15		N
3	xxxxx.....4355	09/30/15	\$2.00	MJEKJR	00773524729	Swiped	\$2.00	09/30/15		N
4	xxxxx.....0030	09/30/15	\$6.95	02429B	00773525911	Swiped	\$10.00	09/30/15		N
5	xxxxx.....8721	09/30/15	\$8.00	958719	00773607398	Swiped	\$8.00	09/30/15		N
6	xxxxx.....2863	09/30/15	\$2.00	497275	00773696070	Swiped	\$2.00	09/30/15		N
7	xxxxx.....6784	09/30/15	\$2.00	679810	00773703295	Swiped	\$2.00	09/30/15		N

7 Records Return << < Previous Page Next Page > >> Page 1 of 1
Printable Version Display Excel
Close Details Window

Figure 81. Translink Credit Card Processor's Report Detail page example

11 Click the **Printable Version** button.

12 Click the **Print** button.

Hold this report as you will compare the credit card totals against the WashConnect Credit Card Report that we will generate in the next few steps.

Tip It's good practice Print the Reports from both the credit card processor as well as WashConnect daily to stay organized.


- 13 Open **WashConnect**.
- 14 Login to **Corporate**.
- 15 From the **Financial** menu, select **Register Reports**, and then select **Credit Cards**.
- 16 Select the **From Date** and **To Date**.
- 17 Select the Level: select the site.
- 18 In Device Type: **All**
- 19 In Device: **All**
- 20 In Shift: **All**
- 21 Click the **View Report** Button.

The Credit Cards Report appears. You can search, print, or export this report.

Card Name	Qty.	Charged
Amex	1	\$10.00
Visa/MC	6	\$23.95
Total	7	\$33.95

Card Name	Card #	Transaction	Shift	Date	Time	Ticket	Price	Tax	Total	Charged
Amex	XXXX-XXXX-3002	35443	TNC Bay 5 [3311]	9/30/2015	10:38:00 AM		\$9.43	\$0.57	\$10.00	\$10.00
Visa/MC	XXXX-XXXX-0030	186150	TNC Bay 2 [3358]	9/30/2015	11:22:00 AM		\$6.56	\$0.39	\$6.95	\$6.95
Visa/MC	XXXX-XXXX-4355	194499	TNC Bay 3 [3356]	9/30/2015	10:42:00 AM		\$2.83	\$0.17	\$3.00	\$3.00
Visa/MC	XXXX-XXXX-4355	194500	TNC Bay 3 [3356]	9/30/2015	11:10:00 AM		\$1.89	\$0.11	\$2.00	\$2.00
Visa/MC	XXXX-XXXX-2863	194503	TNC Bay 3 [3356]	9/30/2015	4:20:00 PM		\$1.89	\$0.11	\$2.00	\$2.00
Visa/MC	XXXX-XXXX-2863	194505	TNC Bay 3 [3356]	9/30/2015	4:33:00 PM		\$1.89	\$0.11	\$2.00	\$2.00
Visa/MC	XXXX-XXXX-8721	50842	TNC Bay 4 [3331]	9/30/2015	1:51:00 PM		\$7.55	\$0.45	\$8.00	\$8.00
Total							\$32.04	\$1.91	\$33.95	\$33.95

Figure 82. Credit Cards Report

- 22 Click the **Print**  button.
- 23 With both reports printed, compare the (TransLink) Credit Card Processor Detail report against the Credit Cards Report.
When all goes as planned, the total numbers should be the same.

- 24** Next, wait until the total credit card amount for the selected date appears in your corporate bank account. You can view the amounts on-line with your bank. This could take a few days.
- 25** After this amount appears in your corporate bank account, you can post this entry to your general ledger.
Congratulations, you have completed all the steps to reconcile the credit cards for this day.



See "About the Credit Cards Report" on page 202.



See "About the Shift Detail Report" on page 186.

About the Gift Cards Report

Gift Cards Report

HELP - What can I do here?

Managers:

- Displays all gift card transaction data for specified site(s) and shift(s) across the selected date range.



See "View the Gift Cards Report" on page 209.



See "Gift Card Report Example" on page 211.



See "Gift Cards Report Descriptions" on page 212.



See "Printing a Report" on page 66.



See "Export a Report" on page 67.

View the Gift Cards Report

To view the **Gift Cards** report, follow these steps:

- 1 From the **Financial** Menu, click **Register Reports**, and then click **Gift Cards**. The **Gift Cards** tab appears.

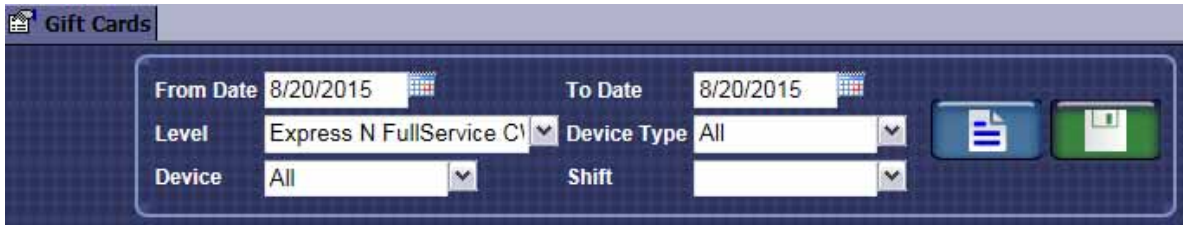



Figure 83. Gift Cards tab

- 2 In the **From Date** and **To Date** boxes, select a date range.
- 3 In the **Level** box, select a site or level.
- 4 In **Device Type**, select one or more device types.
- 5 In **Device**, select one or more devices depending on the device type selected.
- 6 In the **Shift** box, select a single shift, all shifts, or a combination of shifts.

NOTE: Shift selection option is disabled after date range is more than 31 days.

- 7 Click the **View Report**  button. The Gift Cards report appears.
- 8 From the Gift Card report toolbar, you can print or export the report.

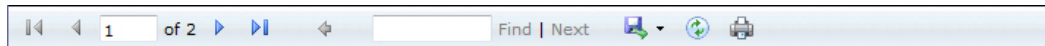






Figure 84. Gift Card Report Toolbar

-  See "Gift Card Report Example" on page 211.
-  See "Gift Cards Report Descriptions" on page 212.
-  See "Printing a Report" on page 66.
-  See "Export a Report" on page 67.

Gift Card Report Example

Express N FullService CW

1070 Congdon Stroudsburg, PA 18360

570-424-9687

GIFT CARD

Requested By: Wendy
On Thursday, August 20, 2015
12:40:23 PM

Date Range From 3/10/2015 To 3/10/2015

Page: 1 of 1

V.2.3.0.10

Total Gift Sold : \$225.00
Total Gift Free : \$0.00
Total Gift Redeemed : (\$83.25)
Grand Total : \$141.75

Shift	Transaction ID	Date	Time	Card #	Service	Price
3583 AS-Inside Lane - 3/10/2015						
	703578	3/10/2015	9:00:18 AM	XXXX-XXXX-3367	Gift Redeemed	(\$7.00)
	703714	3/10/2015	9:44:23 AM	XXXX-XXXX-4477	Gift Redeemed	(\$7.00)
	704023	3/10/2015	11:11:11 AM	XXXX-XXXX-3542	Gift Redeemed	(\$7.00)
	704089	3/10/2015	11:28:58 AM	XXXX-XXXX-3316	Gift Redeemed	(\$7.00)
	704417	3/10/2015	12:56:46 PM	XXXX-XXXX-3531	Gift Redeemed	(\$22.00)
	704654	3/10/2015	2:00:33 PM	XXXX-XXXX-3741	Gift Redeemed	(\$7.00)
					Total Gift Sold :	\$0.00
					Total Gift Free :	\$0.00
					Total Gift Redeemed :	(\$57.00)
					3583 AS-Inside Lane Total :	(\$57.00)
3585 AS-Outside Lane - 3/10/2015						
	703562	3/10/2015	8:56:13 AM	XXXX-XXXX-4547	Gift Redeemed	(\$5.25)
	704058	3/10/2015	11:21:43 AM	XXXX-XXXX-3438	Gift Redeemed	(\$2.00)
	704081	3/10/2015	11:27:24 AM	XXXX-XXXX-0515	Gift Redeemed	(\$7.00)
	704812	3/10/2015	2:40:31 PM	XXXX-XXXX-4429	Gift Redeemed	(\$12.00)
					Total Gift Sold :	\$0.00
					Total Gift Free :	\$0.00
					Total Gift Redeemed :	(\$26.25)
					3585 AS-Outside Lane Total :	(\$26.25)
3589 Lobby POS - 3/10/2015						
	703691	3/10/2015	9:33:55 AM	XXXX-XXXX-3655	Gift Card Sale	\$50.00
	703755	3/10/2015	9:53:09 AM	XXXX-XXXX-3656	Gift Card Sale	\$50.00
	703938	3/10/2015	10:48:23 AM	XXXX-XXXX-4662	Gift Card Sale	\$25.00
	703942	3/10/2015	10:49:03 AM	XXXX-XXXX-4657	Gift Card Sale	\$25.00
	703952	3/10/2015	10:51:24 AM	XXXX-XXXX-4630	Gift Card Sale	\$25.00
	703956	3/10/2015	10:52:09 AM	XXXX-XXXX-4655	Gift Card Sale	\$25.00
	704927	3/10/2015	3:15:03 PM	XXXX-XXXX-3742	Gift Card Sale	\$25.00
					Total Gift Sold :	\$225.00
					Total Gift Free :	\$0.00
					Total Gift Redeemed :	\$0.00
					3589 Lobby POS Total :	\$225.00

Figure 85. Gift Card Report

The body of the report includes details on actual gift card transactions for the **AS-Inside Lane**, **AS-Outside Lane**, and **Lobby POS** on 3/10/15. In the example, you can see the report includes six transactions on the **AS-Inside Lane**, and four transactions on the **AS-Outside Lane** include gift cards redeemed. On 3/10/2015, customers purchased a \$225 Gift cards.



See “View the Gift Cards Report” on page 209.



See “Gift Cards Report Descriptions” on page 212.



See “Printing a Report” on page 66.



See “Export a Report” on page 67.

Gift Cards Report Descriptions

The following table describes the **Gift Cards** report section headings and line-item labels.


Field	Description
Shift	Indicates during what shift and at which device the gift card transaction was done. Select a shift: all shifts, a single shift, or a combination of shifts can appear on the Gift Card Report.
Transaction ID	Unique transaction ID number.
Date	Date the transaction was placed.
Time	Time the transaction was finalized.
Card #	The last four digits of the gift card number used for the gift card sale transaction.
Service	This shows Gift Redeemed or Gift Card Sale.
Price	Amount of Gift Card Redeemed or sold in that transaction. The Price of the Transaction is independent of the amount redeemed or sold.



See “View the Gift Cards Report” on page 209.



See “Gift Card Report Example” on page 211.

 See "Searching a Report" on page 69.

 See "Printing a Report" on page 66.

 See "Export a Report" on page 67.


About the Checks Report

Checks Report


HELP - What can I do here?

Managers:

- Displays a detailed list of all transactions paid by check.

 See "View the Checks Report" on page 213.

 See "Checks Report Example" on page 215.

 See "Searching a Report" on page 69.

 See "Printing a Report" on page 66.

 See "Export a Report" on page 67.

View the Checks Report

Search for all checks received on account or to pay for a sales transaction by a specified date range, shift, or site. To view the Checks Report, follow these steps:

- 1 From the **Financial** menu, click **Register Reports**, and then click **Checks**. The **Checks** tab appears.

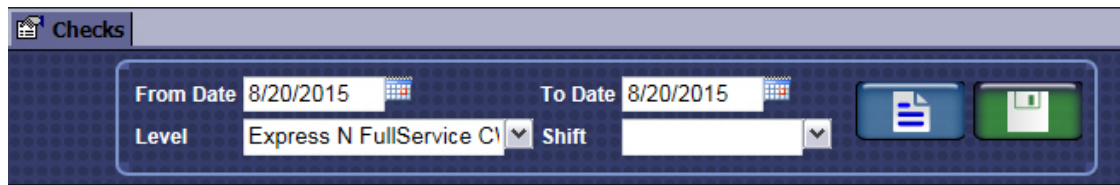



Figure 86. Checks tab

- 2 In the **From Date** and **To Date** boxes, select a date range.
- 3 In the **Level** box, select a site or level.
- 4 In **Shift**, select shift(s) or All.
- 5 Click the **View Report**  button.
The Checks Report appears including **Check #, Price, Tax, Total, Billed,** and **Ticket** number (if applicable).
- 6 From the Checks report toolbar, you can Print or Export the report.



See "About Report Toolbar" on page 64.



See "Checks Report Example" on page 215.



See "Checks Report Field Descriptions" on page 215.



See "Export a Report" on page 67.



See "Printing a Report" on page 66.



See "Export a Report" on page 67.

Checks Report Example

Express N FullService CW		1070 Congdon Stroudsburg, PA 18360				570-424-9687			
CHECKS									
Requested By: Wendy On Thursday, August 20, 2015 2:59:26 PM V.2.3.0.6			Date Range From 2/17/2015 To 2/17/2015				Page: 1 of 1		
Transaction	Date	Time	Shift	Check #	Ticket	Price	Tax	Total	Billed
666644	2/17/2015	4:23:05 PM	Lobby POS [3455]	63512		\$13.20	\$0.00	\$13.20	\$13.20
666649	2/17/2015	4:24:25 PM	Lobby POS [3455]	985		\$14.00	\$0.00	\$14.00	\$14.00
666654	2/17/2015	4:25:20 PM	Lobby POS [3455]	2655		\$28.00	\$0.00	\$28.00	\$28.00
666689	2/17/2015	4:34:18 PM	Lobby POS [3455]	202547		\$46.20	\$0.00	\$46.20	\$46.20
666694	2/17/2015	4:35:03 PM	Lobby POS [3455]	234201		\$76.00	\$0.00	\$76.00	\$76.00
666700	2/17/2015	4:35:57 PM	Lobby POS [3455]	12758		\$200.00	\$0.00	\$200.00	\$200.00
666706	2/17/2015	4:36:48 PM	Lobby POS [3455]	55582		\$313.00	\$0.00	\$313.00	\$313.00
7 Checks for						\$690.40	\$0.00	\$690.40	\$690.40

Figure 87. Checks Report



See "Checks Report Field Descriptions" on page 215.



See "View the Checks Report" on page 213.



See "Export a Report" on page 67.



See "Searching a Report" on page 69.



See "Printing a Report" on page 66.



See "Export a Report" on page 67.

Checks Report Field Descriptions

The following table describes the **Checks** Report headings and line item labels.

Table 18: Checks Report Field Descriptions

Field	Description
Transaction	Unique transaction ID number.
Date	Date the transaction was placed. Click the column header to sort on this field.
Time	Time the transaction was finalized.
Shift	The shift that was open when the transaction took place.
Check #	Number on the customer's check.
Ticket	Ticket number, if a ticket was generated for the transaction. If there is not a ticket number generated, then nothing appears in this column.
Price	Price of the transaction.
Tax	Tax on the transaction.
Total	Price plus tax.
Billed	Total amount billed.



See *"View the Checks Report"* on page 213.



See *"Checks Report Example"* on page 215.



See *"Printing a Report"* on page 66.



See *"Export a Report"* on page 67.



See *"Searching a Report"* on page 69.

About the Fleet Activity Report

Fleet Activity Report

HELP - What can I do here?

Managers:

- Displays all fleet account transactions.
- Search by customer status of fleet.
- Print or Export Report.



See "View the Fleet Activity Report" on page 217.



See "Fleet Activity Report Descriptions" on page 220.



See "Printing a Report" on page 66.



See "Export a Report" on page 67.



See "Searching a Report" on page 69.

View the Fleet Activity Report

To view the Fleet Activity report, follow these steps:

- 1 From the **Financial** menu, click **Register Reports**, and then click **Fleet Activity**. The **Fleet Activity** tab appears.

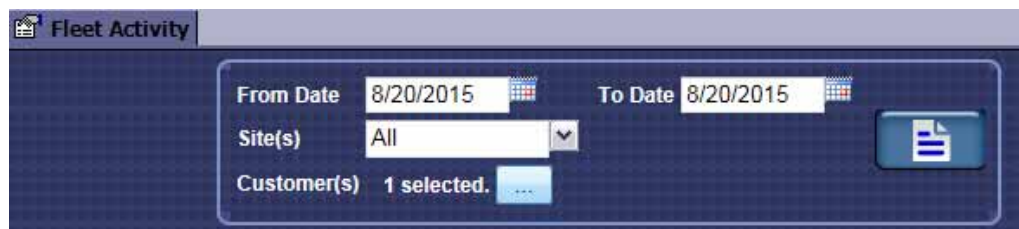

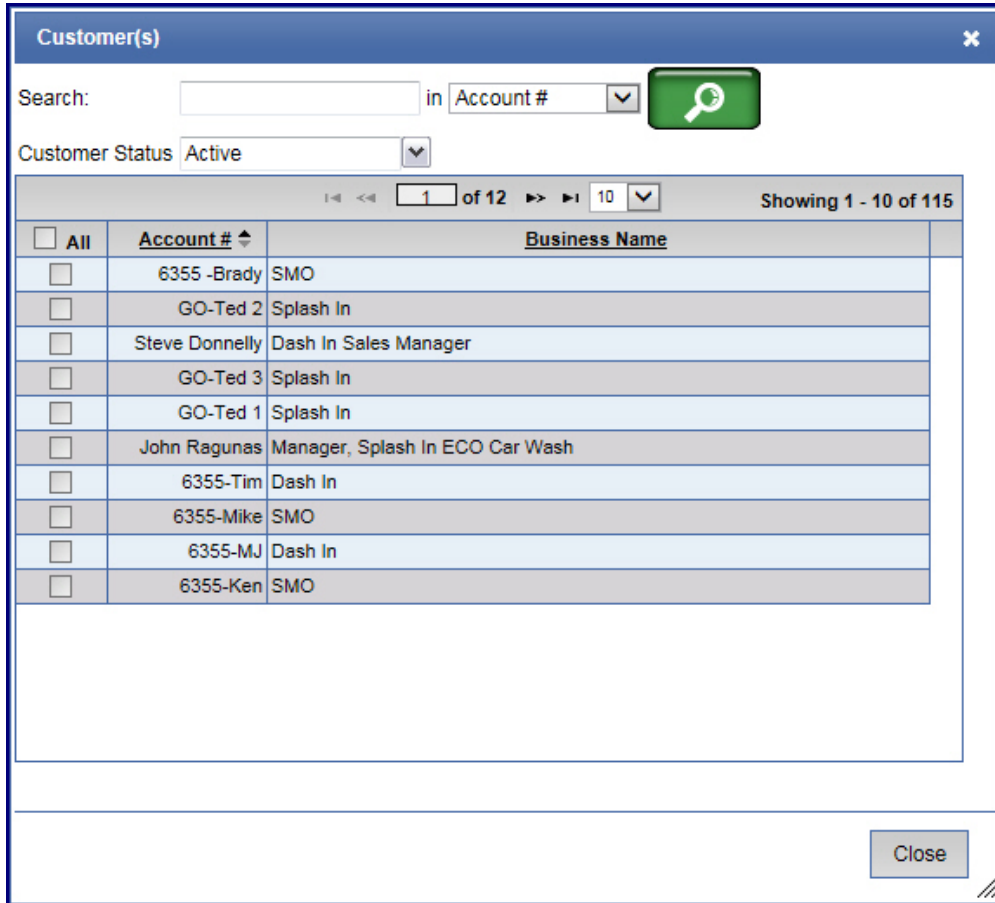



Figure 88. Fleet Activity tab


- 2 In the **From Date** and **To Date** boxes, type or select a date range.
- 3 In the **Site(s)** box, select site(s) or All.

- 4 Click the **Select Customer**  box, to search for one or more fleet accounts. The Customer(s) dialog box appears.



Customer(s)

Search: in Account # 



Customer Status Active 

Showing 1 - 10 of 115

<input type="checkbox"/> All	Account #	Business Name
<input type="checkbox"/>	6355 -Brady	SMO
<input type="checkbox"/>	GO-Ted 2	Splash In
<input type="checkbox"/>	Steve Donnelly	Dash In Sales Manager
<input type="checkbox"/>	GO-Ted 3	Splash In
<input type="checkbox"/>	GO-Ted 1	Splash In
<input type="checkbox"/>	John Ragunas	Manager, Splash In ECO Car Wash
<input type="checkbox"/>	6355-Tim	Dash In
<input type="checkbox"/>	6355-Mike	SMO
<input type="checkbox"/>	6355-MJ	Dash In
<input type="checkbox"/>	6355-Ken	SMO

Close

Figure 89. Fleet Activity - Customer(s) dialog box

- 5 In **Search** box, you can type text if searching for a **Business Name** or type number if searching for an **Account #**.
- 6 In **Customer Status**, make a selection:
- **All** means all of the fleet customers.
 - **Active** means the fleet customer is paid and current.
 - **Suspended** means the fleet customer is not paid.
 - **Terminated** means the fleet customer account is canceled.
- 7 Click the **Search**  button.
- 8 Select the individual fleet customer(s) or All.
- 9 After making Customer selection, click the **Close** button.
- 10 Click the **View Report**  button.


The Fleet Activity report appears.

11 From the Fleet Activity report, you can Search, Print or Export the report.

 See "About Report Toolbar" on page 64.

 See "Export a Report" on page 67.

 See "Fleet Activity Report Descriptions" on page 220.

 See "Printing a Report" on page 66.

 See "Searching a Report" on page 69.

 See "Export a Report" on page 67.

Fleet Activity Report Example

FLEET ACTIVITY										
Requested By: Wendy On Wednesday, August 27, 2014 4:45:17 PM					From: 7/1/2014 To: 7/15/2014					
V 2.3.0.9										
Bass Addicts (AccountID :808)										
PA										
Trans Id	Device	Date	Name	License	RFID/ Barcode	Service	Item Price	Sub Total	Sales Tax	Total
SiteAuto Pros Express										
241612	Flex Near Lane 1000	7/2/2014 3:08 PM	Dj iLLER J	WUBWUB30 3	#909015			\$7.56	\$0.00	\$7.56
						Both Rain X n Tire1	\$2.83			
						Car Lovers Wash	\$6.60			
						Discount \$2	(\$1.87)			
242294	Flex Near Lane 1000	7/15/2014 9:16 AM	Dj iLLER J	WUBWUB30 3	#909015			\$6.62	\$0.00	\$6.62
						Car Lovers Wash	\$6.60			
						Discount \$2	(\$1.87)			
						Tire Shine	\$1.89			
Auto Pros Express Total for 2 Transactions								\$14.18	\$0.00	\$14.18
Total for 2 Transactions								\$14.18	\$0.00	\$14.18

Figure 90. Fleet Activity Report Example

Every fleet customer begins on a separate page of the report.

The following table describes each of the fields in the fleet activity report.



See “View the Fleet Activity Report” on page 217.



See “Fleet Activity Report Descriptions” on page 220.



See “Printing a Report” on page 66.



See “Searching a Report” on page 69.



See “Export a Report” on page 67.

Fleet Activity Report Descriptions

Table 19: Fleet Activity Report

Field	Description
Trans ID	Unique Transaction ID number.
Date	Date of transaction.
Name	Customer name.
License	Customer’s License plate number (if present in the system).
RFID/Barcode	Customer’s RFID sticker tag number.
Service	PLU Item purchased.
Item Price	Price of PLU Item.
Sub Total	Transaction total before tax.
Sales Tax	Taxes applied to transaction.
Total	Subtotal plus Sales Tax.
Amount Tendered	Amount received for payment.
Charged	Amount charged for transaction. Amount charged can account for split payment amounts. For example, if a transaction costs \$100.00 and \$20.00 was on a gift card and \$80.00 was charged to the fleet account, then Total is \$100.00, but Charged is \$80.00.



See “View the Fleet Activity Report” on page 217.

 See “See “Export a Report” on page 67.” on page 219.

 See “Printing a Report” on page 66.

 See “Searching a Report” on page 69.

 See “Export a Report” on page 67.

About the Deposits Report

Deposits Report

HELP - What can I do here?

Managers:

- View the deposits and corresponding journal entries for a selected date range.


 See “View the Deposits Report” on page 221.

 See “Deposits Report Example” on page 222.

 See “Deposits Report Descriptions” on page 223.

View the Deposits Report

To view the Deposits report, follow these steps:

- 1 Select **Register Reports**, and then click **Deposits**.
The **Deposits** tab appears.
- 2 In the **From Date** and **To Date** boxes, select a date range.
- 3 In the **Site** box, select a site.
- 4 In the **Shift** box, select a shift.
- 5 Click the **View Report**  button. The deposits report appears.

6 From the Deposits report toolbar, you can Print or Export the report.

 See "About Report Toolbar" on page 64.

 See "Deposits Report Example" on page 222.

 See "Deposits Report Descriptions" on page 223.

 See "Printing a Report" on page 66.

 See "Export a Report" on page 67.

Deposits Report Example


DEPOSITS							
Requested By: Wendy On Wednesday, August 27, 2014 3:17:44 PM			Date Range From 1/1/2014 To 8/15/2014			Page: 1 of 1	
V 2.3.0.6							
Date	Time	Shift	Journal	Before Verify	Checks	After Verify	Total
3/17/2014	4:02:09 PM	Safe [10617]	1051225	\$0.00	\$1,046.10	\$0.00	\$1,046.10
3/17/2014	4:02:24 PM	Safe [10617]	1051226	\$0.00	\$1,327.15	\$0.00	\$1,327.15
3/17/2014	4:02:38 PM	Safe [10617]	1051227	\$0.00	\$1,042.00	\$0.00	\$1,042.00
Total for 3/17/2014				\$0.00	\$3,415.25	\$0.00	\$3,415.25
Date	Time	Shift	Journal	Before Verify	Checks	After Verify	Total
3/18/2014	5:37:31 PM	Safe [10623]	1051248	\$0.00	\$33.00	\$0.00	\$33.00
3/18/2014	5:58:28 PM	Safe [10623]	1051261	\$55,000.00	\$0.00	\$55,000.00	\$55,000.00
Total for 3/18/2014				\$55,000.00	\$33.00	\$55,000.00	\$55,033.00
Date	Time	Shift	Journal	Before Verify	Checks	After Verify	Total
3/20/2014	12:44:55 PM	Safe [10636]	1051363	\$20,000.00	\$0.00	\$20,000.00	\$20,000.00
3/20/2014	12:50:41 PM	Safe [10638]	1051371	\$1,790.80	\$0.00	\$1,790.80	\$1,790.80
3/20/2014	12:52:07 PM	Safe [10638]	1051373	\$23,299.00	\$0.00	\$23,299.00	\$23,299.00
Total for 3/20/2014				\$45,089.80	\$0.00	\$45,089.80	\$45,089.80
Date	Time	Shift	Journal	Before Verify	Checks	After Verify	Total
4/30/2014	12:09:57 PM	Safe [10989]	1054353	\$6,666.00	\$250.75	\$6,665.00	\$6,915.75

Figure 91. Deposits Report

 See "Searching a Report" on page 69.

 See "View the Deposits Report" on page 221.

 See “Deposits Report Descriptions” on page 223.

 See “Printing a Report” on page 66.

 See “Export a Report” on page 67.

Deposits Report Descriptions

The following table describes the fields in the Deposits report.

Table 20: Deposits Report Field Descriptions


Field	Description
Date	Date the transaction was finalized.
Time	Time the transaction was finalized.
Shift	Lists the shift Device Name and Shift number assigned to it.
Journal	Cash management journal ID number. The journal number may also include the device ID and the journal ID. For example, the number 2021000008430 includes the device ID (2021) leading zeros and the journal ID (8430).
Before Verify	Amount of Deposit as figured by WashConnect® before physical Count is conducted.
Checks	Amount of deposit recorded as checks.
After Verify	Amount of Confirmed deposit keyed in after physical count is conducted.
Total	Total deposit in cash and checks.

 See “View the Deposits Report” on page 221.

 See “Deposits Report Example” on page 222.

 See “Printing a Report” on page 66.

 See “Export a Report” on page 67.

 See “Searching a Report” on page 69.

About the Free Wash Report

Free Wash Report



HELP - What can I do here?

Managers:

- Displays details of all free wash transactions.
- Offer a free wash as a promotional wash to a prospective customer.
- Report Details:
 - Transaction
 - Date
 - Time
 - Ticket
 - Service
 - Price



See “View the Free Wash Report” on page 224.



See “Free Wash Report Example” on page 226.



See “Free Wash Report Descriptions” on page 226.



See “Tracking Rewash or Free Washes” on page 598.



See “Printing a Report” on page 66.



See “Export a Report” on page 67.




See “Searching a Report” on page 69.

View the Free Wash Report

To view the free wash report, follow these steps:


- 1 Select **Register Reports**, and then click **Free Wash**.

The **Free Wash** tab appears.

- 2 In the **From Date** and **To Date** boxes, select a date range.
- 3 In the **Site** box, select a site.
- 4 In the **Shift** box, select a shift.
- 5 Click the **View Report**  button.
The free wash report appears.
- 6 From the Free Wash report toolbar, you can Search, Print or Export the report.



See “About Report Toolbar” on page 64.

- 7 You can save the preferences for the next time you want to generate the report, click the **Save Preference**  button.



See “View the Free Wash Report” on page 224.



See “Free Wash Report Example” on page 226.



See “Free Wash Report Descriptions” on page 226.



See “Tracking Rewash or Free Washes” on page 598.



See “Printing a Report” on page 66.



See “Searching a Report” on page 69.



See “Export a Report” on page 67.

NOTE: Tracking Customer Data and Reason for the Free Washes / Rewashes is optional. Tracking the actual washes is not optional.

Free Wash Report Example

Transaction	Date	Time	Shift	Ticket	Service	Price	Reason
520006	9/15/2014	11:52:01 AM	HS POS [2507]	66970	Exterior Protection Package	\$9.43	
520006	9/15/2014	11:52:01 AM	HS POS [2507]	66970	Free Wash	(\$9.43)	
						1 for	\$0.00

Figure 92. Free Wash Report



See “View the Free Wash Report” on page 224.



See “Free Wash Report Descriptions” on page 226.



See “Tracking Rewash or Free Washes” on page 598.



See “Printing a Report” on page 66.



See “Searching a Report” on page 69.



See “Export a Report” on page 67.

Free Wash Report Descriptions

The following table describes the fields in the Free Wash report.

Table 21: Free Wash Report Field Descriptions

Field	Description
Transaction	Unique transaction ID number.
Date	Date the transaction was placed. Click the column header to sort on this field.
Time	Time the transaction was finalized.
Shift	The POS device is listed along with the shift number assigned by the system.
Ticket	Ticket number, if a ticket was generated for the transaction. Zero if no ticket was generated.
Service	PLU Item purchased.
Price	Price of the transaction. Refunds appear in parenthesis.
Reason	This is typed in by the POS cashier or manager who set up the Free Wash in the system.



See *“View the Free Wash Report”* on page 224.



See *“Free Wash Report Example”* on page 226.



See *“Tracking Rewash or Free Washes”* on page 598.



See *“Printing a Report”* on page 66.



See *“Export a Report”* on page 67.

About the Re-Wash Report

Re-Wash Report **HELP - What can I do here?**

Managers:

- Displays the details of all re-washes.
- Report Details:
 - Transaction
 - Date
 - Time
 - Ticket
 - Service
 - Price



See "View the Re-Wash Report" on page 228.



See "Rewash Report Example" on page 230.



See "Rewash Report Descriptions" on page 231.



See "Tracking Rewash or Free Washes" on page 598.



See "Printing a Report" on page 66.



See "Searching a Report" on page 69.




See "Export a Report" on page 67.

View the Re-Wash Report


To view the Re-Wash report, follow these steps:

- 1 From the Financial menu, select **Register Reports**, and then **Re-wash**. The **Re-Wash** tab appears.
- 2 In the **From Date** and **To Date** boxes, select a date range.

- 3 In the **Level** box, select a site or level.
- 4 In the **Shift** box, select a shift(s) or All.
- 5 Click the **View Report**  button.
The REWASH Report appears.
- 6 From the Rewash Report toolbar, you can Search, Print or Export the report.



See “About Report Toolbar” on page 64.

- 7 You can save the preferences for the next time you want to generate the report, click the **Save Preference**  button.

NOTE: Tracking Customer Data and Reason for the Free Washes / Rewashes is optional. Tracking the actual washes is not optional.



See “View the Re-Wash Report” on page 228.



See “Rewash Report Descriptions” on page 231.



See “Tracking Rewash or Free Washes” on page 598.



See “Printing a Report” on page 66.



See “Searching a Report” on page 69.



See “Export a Report” on page 67.

Rewash Report Example

Re-Wash

From Date To Date

Level Shift

1 of 1 Find | Next

Express N FullService CW 1070 Congdon Stroudsburg, PA 18360

REWASH

Requested By: Wendy Date Range From 3/1/2015 To 3/31/2015 Page: 1 of 1

On Thursday, September 24, 2015 11:56:53 AM

V 2.3.0.6

570-424-9887

Transaction	Date	Time	Shift	Ticket	Service	Price	Reason
720179	3/20/2015	12:41:51 PM	Lobby POS [3653]	43247	Exterior Wash	\$6.60	
720179	3/20/2015	12:41:51 PM	Lobby POS [3653]	43247	Rewash	(\$6.60)	
724272	3/23/2015	11:15:35 AM	HS POS [3671]	70627	Deluxe Exterior Protection Package	\$11.32	
724272	3/23/2015	11:15:35 AM	HS POS [3671]	70627	Rewash	(\$11.32)	
2 for						\$0.00	

Re-Wash

From Date To Date

Level Shift

1 of 1 Find | Next

Express N FullService CW 1070 Congdon Stroudsburg, PA 18360

REWASH

Requested By: Wendy Date Range From 3/1/2015 To 3/31/2015 Page: 1 of 1

On Thursday, September 24, 2015 11:56:53 AM

V 2.3.0.6

570-424-9887

Transaction	Date	Time	Shift	Ticket	Service	Price	Reason
720179	3/20/2015	12:41:51 PM	Lobby POS [3653]	43247	Exterior Wash	\$6.60	
720179	3/20/2015	12:41:51 PM	Lobby POS [3653]	43247	Rewash	(\$6.60)	
724272	3/23/2015	11:15:35 AM	HS POS [3671]	70627	Deluxe Exterior Protection Package	\$11.32	
724272	3/23/2015	11:15:35 AM	HS POS [3671]	70627	Rewash	(\$11.32)	
2 for						\$0.00	

Figure 93. Rewash Report Example



See "View the Re-Wash Report" on page 228.



See "Rewash Report Descriptions" on page 231.

 See *“Tracking Rewash or Free Washes”* on page 598.

 See *“Printing a Report”* on page 66.


 See *“Export a Report”* on page 67.

Rewash Report Descriptions

The following table describes the fields in the Rewash report.

Table 22: Rewash Report Descriptions


Field	Description
Transaction	Unique transaction ID number.
Date	Date the transaction was placed. Click the column header to sort on this field.
Time	Time the transaction was finalized.
Shift	The POS device is listed along with the shift number assigned by the system.
Ticket	Ticket number, if a ticket was generated for the transaction. Zero if no ticket was generated.
Service	Name of PLU Item purchased.
Price	Price of the transaction. Refunds appear in parenthesis.
Reason	This is typed in by the POS cashier or manager who set up the Rewash in the system.

 See *“View the Re-Wash Report”* on page 228.

 See *“Rewash Report Example”* on page 230.

 See *“Tracking Rewash or Free Washes”* on page 598.

 See *“Printing a Report”* on page 66.

 See *“Searching a Report”* on page 69.



See "Searching a Report" on page 69.



See "Export a Report" on page 67.

About the Payouts Report

Payout Report

HELP - What can I do here?

Managers:

- Displays all payout transaction data.
- Report Details:
 - Transaction
 - Date
 - Time
 - Ticket
 - Service
 - Price



See "About the Payouts Report" on page 232.



See "Payouts Report Example" on page 234.



See "Payouts Report Descriptions" on page 234.



See "Printing a Report" on page 66.




See "Searching a Report" on page 69.



See "Export a Report" on page 67.

View the Payouts Report

To view the payouts report, follow these steps:

- 1 On the Financial menu, click **Register Reports**, and then click **Payouts**. The **Payouts** tab appears.
- 2 In the **From Date** and **To Date** boxes, select a date range.
- 3 In the **Level** box, select a site or other level.
- 4 In the **Shift** box, select a shift.
- 5 Click the **View Report**  button.
The payouts report appears.
- 6 From the Payouts report toolbar, you can Print or Export the report.



See "About Report Toolbar" on page 64.



See "About Report Toolbar" on page 64.



See "Payouts Report Example" on page 234.



See "Payouts Report Descriptions" on page 234.



See "Printing a Report" on page 66.



See "Searching a Report" on page 69.



See "Export a Report" on page 67.

Payouts Report Example

Auto Pros Corporate		1349 Jacobsburg Road Wind Gap, PA 18091			(610) 881-8288	
PAYOUTS						
Requested By: Wendy On Wednesday, August 27, 2014 4:53:24 PM		Date Range From 7/1/2014 To 7/31/2014			Page: 1 of 1	
V 2.3.0.6						
Transaction	Shift	Account	Date	Time	Item	Price
241668	TouchPOS Front Lobby [11550]	Petty Cash	7/3/2014	3:21:32 PM	tyu	(\$25.00)
241768	TouchPOS Front Lobby [11580]	Petty Cash	7/7/2014	8:55:51 AM	phtuh	(\$25.00)
241803	TouchPOS Front Lobby [11580]	Petty Cash	7/7/2014	1:11:38 PM	ttyy	(\$25.00)
241891	TouchPOS Front Lobby [11589]	Petty Cash	7/8/2014	12:17:12 PM	erkd	(\$25.00)
242859	TouchPOS Front Lobby [11714]	Petty Cash	7/24/2014	8:31:45 AM	jnrfl	(\$25.00)
243221	TouchPOS Front Lobby [11761]	Petty Cash	7/30/2014	10:54:43 AM	qwerty	(\$25.00)
					6 for	(\$150.00)

Figure 94. Payouts Report Example



See "About the Payouts Report" on page 232.



See "View the Payouts Report" on page 232.



See "Payouts Report Descriptions" on page 234.



See "Printing a Report" on page 66.



See "Export a Report" on page 67.

Payouts Report Descriptions

The following table describes the fields in the Payouts report.

Table 23: Payouts Report Descriptions

Field	Description
Transaction	Unique transaction ID number.
Shift	Indicates during what shift and at which device the payout was done.
Account	This is the Account associated with the Expense Account from the Accounting software.

Table 23: Payouts Report Descriptions (Continued)

Field	Description
Date	Date the transaction was finalized. Click the column header to sort on this field.
Time	Time the transaction was finalized.
Item	Description of the payout. Employees are responsible for typing payout descriptions in the software.
Price	Price of the payout. Since payouts are recorded as negatives against Income, amounts appear in parenthesis.



See "About the Payouts Report" on page 232.



See "View the Payouts Report" on page 232.



See "Payouts Report Example" on page 234.



See "Printing a Report" on page 66.



See "Export a Report" on page 67.


About the ROA (Received on Account) Report

Received on Account Report


HELP - What can I do here?

Managers:

- Displays transactions for account payments received.
- Report Details:
 - Account
 - Date
 - Time
 - Customer name
 - Payment Type
 - Price

 See “View the ROA (Received on Account) Report” on page 236.

 See “Received on Account Report Example” on page 237.

 See “Received on Account Report Descriptions” on page 238.

 See “Printing a Report” on page 66.

 See “Searching a Report” on page 69.


 See “Export a Report” on page 67.

View the ROA (Received on Account) Report

To view the received on account report, follow these steps:

- 1 Select **Register Reports**, and then click **ROA**.
The **ROA** tab appears.
- 2 In the **From Date** and **To Date** boxes, select a date range.
- 3 In the **Level** box, select a site or level.
- 4 In the **Shift** box, select a shift.
- 5 Click to mark the **Show Accounts per page** check box to show one customer per page on the ROA Report.


NOTE: If Show Accounts per page is unmarked, the ROA report will show all customers instead of showing one customer per page.


- 6 Click the **View Report**  button.
The received on account report appears.
- 7 From the Received on Account report toolbar, you can Search, Print or Export the report.

 See “About Report Toolbar” on page 64.

 See “Received on Account Report Example” on page 237.

 See “Received on Account Report Descriptions” on page 238.

 See "Printing a Report" on page 66.


 See "Searching a Report" on page 69.


 See "Export a Report" on page 67.

Received on Account Report Example


Auto Pros Express		1349 Jacobsburg Road Wind Gap, PA 18091			(610) 881-8288		
RECEIVED ON ACCOUNT							
Requested By: Wendy On Thursday, August 28, 2014 10:17:25 AM		Date Range From 5/1/2014 To 5/31/2014			Page: 1 of 1		
V 2.3.0.6							
Transaction	Shift	Account	Date	Time	Customer Name	Payment Type	Price
202970	TouchPOS Front Lobby [11031]	1005	5/5/2014	9:36:25 AM	Swedish Coffee House	Cash	\$22.00
212936	TouchPOS Front Lobby [11057]	1000004	5/7/2014	5:09:30 PM	Limo One	Cash	\$88.00
212990	TouchPOS Front Lobby [11071]	1070	5/8/2014	10:15:21 AM	Sparkle Car Wash	Cash	\$20.00
213077	TouchPOS Front Lobby [11071]	1788	5/8/2014	4:05:31 PM	Petal Pushez	Cash	\$22.00
220000	TouchPOS Front Lobby [11119]	1788	5/14/2014	8:52:10 AM	Petal Pushez	Cash	\$88.00
220747	TouchPOS Front Lobby [11128]	8293	5/15/2014	8:53:08 AM	Jacobsburg Realty	Cash	\$20.00
221393	TouchPOS Front Lobby [11202]	1403	5/23/2014	9:26:23 AM	Burger King Corporate Account	Cash	\$20.00
227157	TouchPOS Front Lobby [11240]	123456	5/26/2014	9:45:34 AM	Bollocks Tech	Cash	\$16.60
231635	TouchPOS Front Lobby [11246]	1788	5/29/2014	12:59:08 PM	Petal Pushez	Cash	\$22.00
9 for							\$318.60

Figure 95. Received on Account Register Report

 See "View the ROA (Received on Account) Report" on page 236.

 See "Received on Account Report Descriptions" on page 238.

 See "Printing a Report" on page 66.

 See "Searching a Report" on page 69.

 See "Export a Report" on page 67.

Received on Account Report Descriptions

The following table describes the fields in the Received on Account report:

Table 24: Received on Account Report Descriptions

Field	Description
Transaction	Unique transaction ID number.
Shift	Indicates during what shift and at what device the payout was done.
Account	This is the Account associated with the Expense Account from the Accounting software.
Date	Date the transaction was placed. Click the column header to sort on this field.
Time	Time the transaction was finalized.
Customer Name	Customer name on the account.
Payment Type	Type of payment used to settle the account balance.
Price	Amount of payment received.



See *“View the ROA (Received on Account) Report”* on page 236.



See *“Received on Account Report Example”* on page 237.



See *“Printing a Report”* on page 66.



See *“Searching a Report”* on page 69.



See *“Export a Report”* on page 67.

About the Voids Report

Voids Report

HELP - What can I do here?

Managers:

View all Voided transactions at a glance.


Note: Voids were only performed during the same shift. Refunds would have been done for other shifts or locations.



See "Void Sales Transaction" on page 592.

View the Voids Report

To view the voids report, follow these steps:

- 1 From the **Financial** menu, select **Register Reports**, and then click **Voids**. The **Voids** tab appears.
- 2 In the **From Date** and **To Date** boxes, select a date range.
- 3 In the **Level** box, select a site or level.
- 4 In the **Shift** box, select a shift.
- 5 Click the **View Report**  button. The Voids report appears.
- 6 From the Voids report toolbar, you can Search, Print or Export the report.



See "About Report Toolbar" on page 64.

NOTE: Voids are never counted as actual cars washed.



See "Searching a Report" on page 69.




See "Printing a Report" on page 66.

 See "Export a Report" on page 67.

 See "Voids Report Example" on page 240.

 See "Voids Report Descriptions" on page 241.


 See "Void Sales Transaction" on page 592.

Voids Report Example

Auto Pros Express		1349 Jacobsburg Road Wind Gap, PA 18091		(610) 881-8288		
VOIDS						
Requested By: Wendy On Thursday, August 28, 2014 10:25:36 AM		Date Range From 5/1/2014 To 5/31/2014			Page: 1 of 1	
V 2.3.0.10						
Transaction	Shift	Date	Service	Price	Sales Tax	Total
231642	TouchPOS Front Lobby [11246]	5/29/2014 1:00 PM		\$6.56	\$0.39	\$6.95
			Wonder Wash	\$6.56	\$0.39	\$6.95
227227	TouchPOS Front Lobby [11240]	5/28/2014 3:53 PM		\$5.66	\$0.68	\$6.00
			Penny Pinchers Wash1	\$5.66	\$0.68	\$6.00
227079	TouchPOS Front Lobby [11229]	5/27/2014 9:10 AM		\$100.00	\$6.00	\$106.00
			Caviar	\$100.00	\$6.00	\$106.00
222019	TouchPOS Front Lobby [11202]	5/23/2014 2:55 PM		\$6.56	\$0.39	\$6.95
221414	TouchPOS Front Lobby [11202]	5/23/2014 9:52 AM		\$100.00	\$6.00	\$106.00
221402	TouchPOS Front Lobby [11202]	5/23/2014 9:30 AM		\$100.00	\$6.00	\$106.00
221387	TouchPOS Front Lobby [11202]	5/23/2014 9:23 AM		\$55.98	\$3.88	\$59.86

Figure 96. Voids Register Report

 See "View a Shift Detail Report" on page 187.

 See "Searching a Report" on page 69.

 See "Printing a Report" on page 66.

 See "Export a Report" on page 67.

 See "Voids Report Descriptions" on page 241.



See *“Void Sales Transaction”* on page 592.

Voids Report Descriptions

The following table describes the fields in the Voids report.

Table 25: Voids Report Descriptions

Field	Description
Transaction	Unique transaction ID number.
Shift	Indicates during what shift and at what device the payout was done.
Date	Date and time the transaction was finalized.
Service	Name of PLU Item that was voided and its only viewable when expanding the Transaction node.
Price	Amount of the voided PLU Item.
Sales Tax	Amount of the voided sales tax from the PLU Item.
Total	Total amount of the voided PLU Item plus voided sales tax.



See *“View a Shift Detail Report”* on page 187.



See *“Shift Detail Report Example”* on page 190.



See *“Searching a Report”* on page 69.



See *“Printing a Report”* on page 66.



See *“Export a Report”* on page 67.

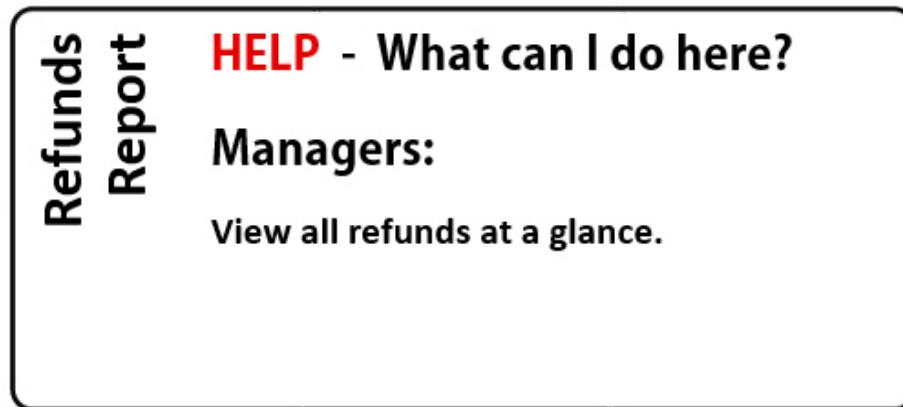


See *“Voids Report Descriptions”* on page 241.



See *“Void Sales Transaction”* on page 592.

About the Refunds Report



View the Refunds Report

You can view the refunds for a specified time period, shift, or Corporate Structure level.

- 1 From the **Financial** menu, select **Register Reports**, and then click **Refunds**. The Refunds tab appears.
- 2 In the **From Date** and **To Date** boxes, select a date range.
- 3 In the **Level** box, select a site or level.
- 4 In the **Shift** box, select a shift.
- 5 Click the **View Report** button. The Refunds report appears.
- 6 From the Refunds report toolbar, you can Search, Print or Export the report.

NOTE: Refunds are never counted as actual cars washed.

The following is an example of the Refunds Report.

14 1 of 1 Find | Next

Auto Pros Corporate 1349 Jacobsburg Road Wind Gap, PA 18091 (610) 881-8288

REFUNDS

Requested By: Wendy
On Wednesday, August 06, 2015
3:47:09 PM

Date Range From 8/1/2014 To 8/5/2015

Page: 1 of 1

V2.3.0.12

Date	Site	Device	Shift	Transaction	Refund Type	Subtotal	Sales Tax	Refund	Original Transaction	Original Shift	Original Device
8/5/2014	Auto Pros Express	TouchPOS Front Lobby [6001]	11810	243545	Cash	(5.66)	(0.34)	(\$6.00)	243541	11810	TouchPOS Front Lobby [6001]
8/11/2014	Auto Pros Express	TouchPOS Front Lobby [6001]	11853	243816	Cash	(6.60)	0.00	(\$6.60)	243815	11853	TouchPOS Front Lobby [6001]
8/11/2014	Auto Pros Express	TouchPOS Front Lobby [6001]	11853	243882	Cash	(6.60)	0.00	(\$6.60)	243881	11853	TouchPOS Front Lobby [6001]
8/11/2014	Auto Pros Express	TouchPOS Front Lobby [6001]	11853	243886	Cash	(4.72)	(0.28)	(\$5.00)	243885	11853	TouchPOS Front Lobby [6001]
8/12/2014	Auto Pros Express	TouchPOS Front Lobby [6001]	11860	243905	Cash	(5.66)	(0.34)	(\$6.00)	243902	11860	TouchPOS Front Lobby [6001]
8/12/2014	Auto Pros Express	TouchPOS Front Lobby [6001]	11860	243915	Cash	(3.77)	(0.23)	(\$4.00)	243914	11860	TouchPOS Front Lobby [6001]
8/13/2014	Auto Pros Express	TouchPOS Front Lobby [6001]	11866	244026	Cash	(3.77)	(0.23)	(\$4.00)	244022	11866	TouchPOS Front Lobby [6001]
8/13/2014	Auto Pros Express	TouchPOS Front Lobby [6001]	11868	244031	Cash	(3.77)	(0.23)	(\$4.00)	244030	11868	TouchPOS Side Lobby [6004]

Figure 97. Refunds Report



See "About Refunds" on page 594.



See "Financial" on page 173.

About the Fund Raiser Report

Fund Raiser Report

HELP - What can I do here?

Managers:

View all or just one fund raiser at a glance.



See "View the Fund Raiser Report" on page 244.




See "Fund Raiser Example" on page 244.

Tip Fund raisers allow your car wash to acquire new customers while donating a portion of the proceeds to charity.


View the Fund Raiser Report

To view the fund raiser register report, follow these steps:

NOTE: The Fund Raiser Report is based on the Fundraiser Profit Center when setting up the Fund Raiser Sales Item PLUs.

- 1 From the Financial menu, select **Register Reports**, and then click **Fund Raiser**. The **Fund Raiser** tab appears.
- 2 In **From Date** and **To Date** boxes, select or type a date range.
- 3 In **Site** box, select a site.
- 4 In **Fund Raiser** box, select a Fund Raiser from the drop-down list.
- 5 Click the **View Report**  button. The Fund Raiser report appears.
- 6 From the Fund Raiser report toolbar, you can Print or Export the report.

 See "About Report Toolbar" on page 64.

 See "Fund Raiser Example" on page 244.

Fund Raiser Example

Auto Pros Corporate	1349 Jacobsburg Road Wind Gap, PA 18091	(610) 881-8288
FUND RAISER		
Requested By: Wendy On Thursday, August 28, 2014 12:02:27 PM	Date Range From 6/1/2014 To 7/31/2014	Page: 1 of 1
V 2.3.0.9		
Name	Qty.	Total Donation
Childrens Fundraiser	14	\$27.98
Auto Pros Express	14	\$27.98
General Fundraiser Other	1	\$4.00
Local Childrens Hopsital	2	\$4.00
PTA Fundraiser	8	\$24.00
PTA Fundraiser Extra	4	\$20.00

Figure 98. Fund Raiser Register Report



See "About the Fund Raiser Report" on page 243.

About View Register

View Register

HELP - What can I do here?

Cashiers and Managers:

- Reprint Customer's Receipt.
- Search for a transaction.
- View Register of transactions from POS, TNC and Auto Sentry terminals.



See "Set previous days privilege on View Register Report" on page 245.




See "Reprint a Customer's Receipt" on page 246.



See "View Register Transactions" on page 247.

Set previous days privilege on View Register Report

Someone with a security role can change privileges. There is a privilege setting available to view previous days within the View Register Report on devices other than the Global device.

- 1 From the **Users** menu, select **Security Roles**.
- 2 Click to select the name of a security role to allow this privilege.
- 3 Click the **Edit**  button.
- 4 From the Select Privileges section, scroll and click in the box to select Register Reports.
- 5 Scroll down and select **View Register Transactions** check box.
- 6 If necessary, click to select **View Previous Days** check box.
- 7 Click the **Save** button.



See “Reprint a Customer’s Receipt” on page 246.





See “View Register Transactions” on page 247.

Reprint a Customer’s Receipt

From the View Register tab, you can reprint a transaction receipt for a customer.

- 1 From the **Financial** menu, select **Register Reports**, and then click **View Register**. The **View Register** tab appears.

Figure 99. View Register tab

- 2 In **Start Date** and **End Date** boxes, select or type a date range.
- 3 In **Site** box, select a site.
- 4 In **Device** box, select a device.
- 5 In **Shift** box, select a shift from the drop-down list.
- 6 In **Search**, type a search item, if necessary.
- 7 **In Field**, select a search criteria from the drop-down list, if necessary.
- 8 Click the **View Transactions**  button. The Transaction List appears.
- 9 Click to highlight a Transaction.
- 10 Click the **Reprint Receipt**  button.

The receipt prints.

Transaction List										
Transaction	Date	Time	SubTotal	Tax	Tendered	Payment	Ticket	Invoice	Status	
724033	3/23/2015	10:09 AM	\$0.00	\$0.00	\$0.00	Cash	54082		Normal	
724037	3/23/2015	10:11 AM	\$6.60	\$0.40	\$7.00	Visa XXXX-XXXX-7082	73830		Normal	
724041	3/23/2015	10:12 AM	\$23.58	\$1.42	\$25.00	Visa XXXX-XXXX-3247	34788		Normal	
724045	3/23/2015	10:13 AM	\$6.60	\$0.40	\$20.00	Cash	73571		Normal	
724049	3/23/2015	10:14 AM	\$6.60	\$0.40	\$7.00	Visa XXXX-XXXX-9698	72853		Normal	
724053	3/23/2015	10:15 AM	\$6.60	\$0.40	\$10.00	Cash	33072		Normal	
724057	3/23/2015	10:16 AM	\$16.03	\$0.97	\$17.00	Master XXXX-XXXX-6835	89799		Normal	
724062	3/23/2015	10:17 AM	\$0.00	\$0.00	\$0.00	Cash	40704		Normal	
724067	3/23/2015	10:18 AM	\$6.60	\$0.40	\$7.00	Master XXXX-XXXX-9437	84546		Normal	
						Gift Card XXXX-XXXX-				

Figure 100. View Register Unlimited Club Transaction Example



See "About View Register" on page 245.




See "View Register Transactions" on page 247.

View Register Transactions

Throughout the day, various customer transactions take place at POS, TNC and Auto Sentry terminals. You can click the View Register to search for a specific transaction or view a list of transactions for a designated date range.

- 1 From the **Financial** menu, select **Register Reports**, and then click **View Register**. The **View Register** tab appears.
- 2 In **Start Date** and **End Date** boxes, select or type a date range.
- 3 In **Site** box, select a site.
- 4 In **Shift** box, select a shift from the drop-down list.
- 5 In **Search**, type a search item, if necessary.
- 6 From the **In Field** list, select one of the following search criteria:
 - Amount Tendered
 - CTN
 - Payment/Card Number
 - RFID
 - Sub Total

- Tax
- Ticket ID
- Time
- Total Sale
- Transaction ID
- Transaction Status

7 Click the **View Transactions**  button. The Transaction List appears.




Transaction List									
Transaction	Date	Time	SubTotal	Tax	Tendered	Payment	Ticket	Invoice	Status
724037	3/23/2015	10:11 AM	\$6.60	\$0.40	\$7.00	Visa XXXX-XXXX-7082	73830		Normal
724041	3/23/2015	10:12 AM	\$23.58	\$1.42	\$25.00	Visa XXXX-XXXX-3247	34788		Normal
724045	3/23/2015	10:13 AM	\$6.60	\$0.40	\$20.00	Cash	73571		Normal
724049	3/23/2015	10:14 AM	\$6.60	\$0.40	\$7.00	Visa XXXX-XXXX-9698	72853		Normal
724053	3/23/2015	10:15 AM	\$6.60	\$0.40	\$10.00	Cash	33072		Normal
724057	3/23/2015	10:16 AM	\$16.03	\$0.97	\$17.00	Master XXXX-XXXX-6835	89799		Normal
724062	3/23/2015	10:17 AM	\$0.00	\$0.00	\$0.00	Cash	40704		Normal
724067	3/23/2015	10:18 AM	\$6.60	\$0.40	\$7.00	Master XXXX-XXXX-9437	84546		Normal
724071	3/23/2015	10:20 AM	\$6.60	\$0.40	\$7.00	Gift Card XXXX-XXXX-3542	41184		Normal

Line Items		
PLU	Service	Price
2	Deluxe Exterior Protection Package	\$11.32
5	Full Service	\$9.43
8	Tire Shine	\$2.83

Payments	
Payment	Amount
Visa XXXX-XXXX-3247	\$25.00

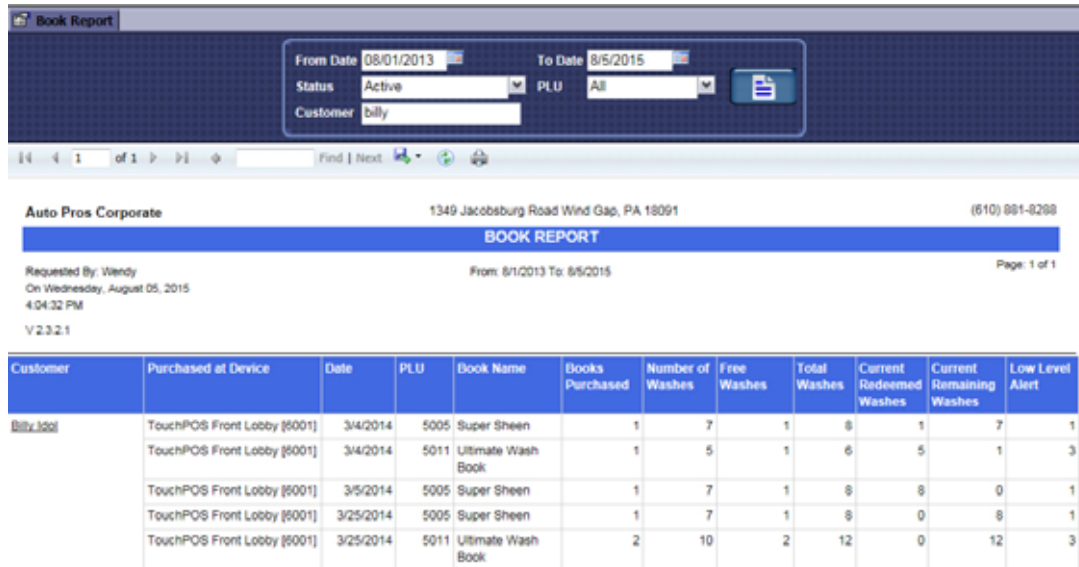
CTN: 664041
 Cashier: Default Employee
 Manager:
 License Plate:
 Customer:
 Account:

Figure 101. View Register Transaction Details example

-  To view the current balances for the Auto Sentry terminal, other devices and the virtual safe, see "About Terminal Balances" on page 289.
-  See "Reprint a Customer's Receipt" on page 246.
-  See "About View Register" on page 245.

About Book Report

Wash Book information can be viewed from the Book Report. This report displays customer's wash book information such as where and when wash book was purchased, how many books were purchased, number of washes redeemed, etc.



Customer	Purchased at Device	Date	PLU	Book Name	Books Purchased	Number of Washes	Free Washes	Total Washes	Current Redeemed Washes	Current Remaining Washes	Low Level Alert
billy	TouchPOS Front Lobby [6001]	3/4/2014	5005	Super Sheen	1	7	1	8	1	7	1
billy	TouchPOS Front Lobby [6001]	3/4/2014	5011	Ultimate Wash Book	1	5	1	6	5	1	3
billy	TouchPOS Front Lobby [6001]	3/5/2014	5005	Super Sheen	1	7	1	8	8	0	1
billy	TouchPOS Front Lobby [6001]	3/25/2014	5005	Super Sheen	1	7	1	8	0	8	1
billy	TouchPOS Front Lobby [6001]	3/25/2014	5011	Ultimate Wash Book	2	10	2	12	0	12	3

Figure 102. Book Report Example



See "About Wash Books" on page 424.



See "Financial" on page 173.

Introduction to the Audit Controls menu

The **Audit Controls** menu includes commands for the following reports: **Wash to Register Comparison**, **Ticket Comparison**, **Transactional Detail**, **Terminal Balance**, **Sales Commission**, **View Site Tickets**, **Services Washed**, and **Controller Services**.

After proving out the numbers in the **Register Reports** menu, you can use the **Audit Controls** menu to verify tunnel activity against paid services. Register reports alone cannot show this comparison but reports such as the **Wash to Register Comparison** and **Ticket Comparison** can help identify potential theft by showing tunnel activity versus paid services.

For example, a customer was given an extra service but that extra service was not included on the customer's ticket. If that service was manually provided by an

attendant but not recorded as a part of the transaction, you need to ask: Did attendant collect money for the service, and where is it?

Audit Controls Step-By-Step Instructions

For more information on an individual Audit Control, click on one of the following:



See “About the Wash to Register Comparison Report” on page 251.



See “View the Ticket Comparison Report” on page 254.



See “About Transactional Detail” on page 258.



See “About Terminal Balance Report” on page 261.



See “About Sales Commission” on page 263.



See “About View Site Tickets” on page 265.




See “About the Services Washed Report” on page 267.



See “About the Controller Services Report” on page 269.

About the Wash to Register Comparison Report

Wash to Register
Comparison Report



HELP - What can I do here?

Managers:

- **This is the Key report to financial integrity at your wash!**
- **Identify and eliminate fraud and potential theft by showing tunnel activity vs. paid services.**
- **If service provided was not recorded, then you need to find out who has the money and why it was not collected.**




See “View the Wash To Register Comparison Report” on page 251.



See “Introduction to the Audit Controls menu” on page 249.

View the Wash To Register Comparison Report

View the Wash to Register report for a comparison of cars that were actually washed in the tunnel vs. those sold at any POS.

- 1** From the **Financial** menu, click **Audit Controls**, and then click **Wash To Register**. The **Wash To Register** tab appears.
- 2** In the **From Date** and **To Date** boxes, select a date range.
- 3** In the **Site** box, select one or more a sites.
- 4** In the **Controller** box, select one or more controller shift.
- 5** In the **POS** box, select one or more point-of-sale shifts.
- 6** Click the **View Report**  button. The wash to register report appears.
- 7** From the Wash To Register report toolbar, you can Search, Print or Export the report.



See "About Report Toolbar" on page 64.



See "About the Wash to Register Comparison Report" on page 251.



See "Introduction to the Audit Controls menu" on page 249.



See "Wash to Register Comparison Report Descriptions" on page 253.

Wash to Register Comparison Report Example

PLU	Service	Paid Count	Wash Count	Paid Dollars	Wash Dollars	Quantity Difference	Amount Difference
	Cars Washed	22,626	22,597	\$0.00	\$0.00	29	\$0.00
1	Exterior Wash	15,652	15,634	\$103,303.20	\$103,184.40	18	\$118.80
2	Deluxe Exterior Protection Package	6,971	6,960	\$78,911.72	\$78,787.20	11	\$124.52
3	Exterior Protection Package	3	3	\$28.29	\$28.29	0	\$0.00
7	Add Exterior Protection Package	94	94	\$266.02	\$266.02	0	\$0.00
11	Deluxe Exterior Protection Upgrade	8	8	\$37.76	\$37.76	0	\$0.00
33	Clear Coat Conditioner	206	206	\$582.98	\$582.98	0	\$0.00
34	Underbody & Rust Inhibitor	486	486	\$1,375.38	\$1,375.38	0	\$0.00
51	Deluxe Upgrade	7	7	\$33.04	\$33.04	0	\$0.00
54	Deluxe with Tire Shine	1	1	\$7.55	\$7.55	0	\$0.00
93	Exterior Protection Upgrade Club	12	12	\$33.96	\$33.96	0	\$0.00
Amount Difference							\$243.32

Figure 103. Wash to Register Comparison Report



See "About the Wash to Register Comparison Report" on page 251.



See "View the Wash To Register Comparison Report" on page 251.



See “Introduction to the Audit Controls menu” on page 249.



See “Wash to Register Comparison Report Descriptions” on page 253.

Wash to Register Comparison Report Descriptions

The following table describes the fields in the **Wash to Register Comparison Report**.

Table 26: Wash to Register Comparison Descriptions

Field	Description
PLU	Sales Item number.
Service	Name of PLU Item that was actually performed.
Paid Count	
Wash Count	
Paid Dollars	
Wash Dollars	
Quantity Difference	
Amount Difference	



See “View the Wash To Register Comparison Report” on page 251.



See “Introduction to the Audit Controls menu” on page 249.


About the Ticket Comparison Report

Ticket Comparison Report

HELP - What can I do here?

Managers:

- View a variance listing of washes paid but not washed.
- View a variance listing of washes given that were not paid.
- Used to identify potential theft.





See “View the Ticket Comparison Report” on page 254.



See “Identifying Potential Theft” on page 255.



See “Ticket Comparison Report Example” on page 256.



See “Printing a Report” on page 66.



See “Searching a Report” on page 69.




See “Export a Report” on page 67.

View the Ticket Comparison Report

The Ticket Comparison Report compares services sold to services processed by ticket number. To view the Ticket Comparison report, follow these steps:

- 1 In the **Financial** menu, click **Audit Controls**, and then click **Ticket Comparison**. The **Ticket Comparison** tab appears.
- 2 In the **From Date** and **To Date** boxes, select a date range.

- 3 In the **Site** box, select one or more sites.
- 4 In the **Controller** box, select one or more controller shifts.
- 5 In the **POS** box, select one or more point-of-sale shifts.
- 6 Click the **View Report**  button.
The ticket comparison report appears.



See *"Identifying Potential Theft"* on page 255.



See *"Ticket Comparison Report Example"* on page 256.



See *"Ticket Comparison Field Descriptions"* on page 257.



See *"Printing a Report"* on page 66.



See *"Searching a Report"* on page 69.



See *"Export a Report"* on page 67.



See *"View the Ticket Comparison Report"* on page 254.



See *"Identifying Potential Theft"* on page 255.

Identifying Potential Theft

Compare the Wash to Register Report with the Ticket Comparison Report. For Cash Management, you can use the comparison to identify potential theft by showing tunnel activity versus paid services. Also, if a service is provided by an attendant and not recorded, then you may want to question, where is the missing revenue is?



See *"View the Ticket Comparison Report"* on page 254.



See *"Ticket Comparison Report Example"* on page 256.



See "Ticket Comparison Field Descriptions" on page 257.



See "Printing a Report" on page 66.



See "Searching a Report" on page 69.



See "Export a Report" on page 67.

Ticket Comparison Report Example

Ticket	Date	Item Description	Salesperson	Washed Not Paid	Paid Not Washed	Variance
89524	8/1/2014 3:29 PM	Car Care Wash		\$5.66	\$0.00	
854701	8/1/2014 4:12 PM	Package Test Base	DenisF	\$0.00	\$4.72	
650297	8/1/2014 4:16 PM	Package Test Base	DenisF	\$0.00	\$4.72	
636444	8/1/2014 4:29 PM	Package Test Base	LauraF	\$0.00	\$4.72	
496525	8/1/2014 4:33 PM	Package Test Base	DenisF	\$0.00	\$4.72	
391658	8/1/2014 4:36 PM	Package Test Base	LauraF	\$0.00	\$4.72	
714467	8/1/2014 4:37 PM	Package Test Base	LauraF	\$0.00	\$4.72	
361067	8/1/2014 4:41 PM	Package Test Base	LauraF	\$0.00	\$4.72	
44481	8/2/2014 2:01 AM	Wonder Wash	DenisF	\$6.60	\$0.00	
61472	8/2/2014 2:01 AM	Wonder Wash	DenisF	\$6.60	\$0.00	
64882	8/2/2014 2:01 AM	Rounding 25 Test		\$8.08	\$0.00	
81186	8/2/2014 2:01 AM	Always 1.75		\$1.75	\$0.00	

Figure 104. Ticket Comparison Example



See "View the Ticket Comparison Report" on page 254.



See "Ticket Comparison Field Descriptions" on page 257.



See "Identifying Potential Theft" on page 255.

 See "Printing a Report" on page 66.

 See "Searching a Report" on page 69.

 See "Export a Report" on page 67.

Ticket Comparison Field Descriptions

Table 27: Ticket Comparison Field Descriptions


Field	Description
Ticket	Ticket number for the transaction.
Date	Date and time of transaction.
Item Description	Description of the service selected in the transaction.
Salesperson	Salesperson who sold the customer the wash service.
Washed Not Paid	This is the amount of services washed but not paid.
Paid Not Washed	This is the amount Paid and the vehicle was not washed.
Variance	This is the difference between the Washed Not Paid column with the Paid Not Washed column.

 See "About the Ticket Comparison Report" on page 254.

 See "View the Ticket Comparison Report" on page 254.

 See "Identifying Potential Theft" on page 255.

 See "Printing a Report" on page 66.

 See "Searching a Report" on page 69.

 See "Export a Report" on page 67.

About Transactional Detail

Transaction Detail

HELP - What can I do here?

Accountant:

- View the transactions in detail for Site, Shift, and Device:
 - Transaction ID
 - Posted Date/Time
 - Payment
 - Ticket Number
 - Status of Transaction



See "View Transaction Detail Report" on page 258.



See "Transaction Detail Field Descriptions" on page 260.

View Transaction Detail Report

Select a date range to display the Transactional Detail Report.

- 1 From the **Financial** menu, select **Audit Controls**, and then **Transaction Detail**. Transaction Detail tab appears.

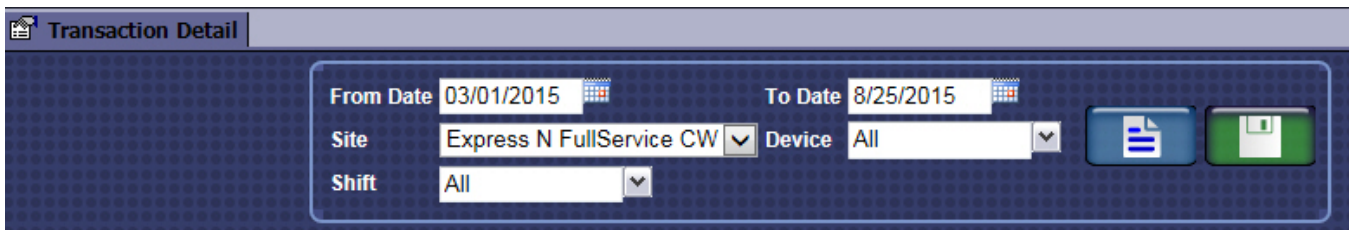



Figure 105. Transactional Detail tab and toolbar

- 2 In **Start Date**, select a date.
- 3 In **End Date**, select a date.
- 4 In **Site**, select one car wash site from the list.
- 5 In **Devices**, select one or more devices from the list.

- 6 In **Shift**, select one or more shifts from the list.
- 7 Click the **View Report**  button.
The Transaction Detail Report appears.
You can scroll through the pages of the report, Search, Export or Print the report.

Sparkle Car Wash
1070 Congdon
Stroudsburg, PA 18360
570-424-9687

Requested By: Demo
On Monday, April 07, 2014
3:30:50 PM

V 2.2.0.16

Transaction Detail

For Date 3/7/2013

Device : AS-Inside Lane, AS-Outside Lane, Autobilling, Lobby POS, WBC

Shift		Device				Start Date	Sta
312		AS-Outside Lane				03/07/2013	12:0

Transaction	Date	Time	Sub Total	Sales Tax	Amount Tendered	Payment Type	Ticket	Trans Statu:
55984	3/7/2013	8:02:53 AM	\$0.00	\$0.00	\$0.00	Cash	49428	Normal
Service	Quantity	Item Price	Payment Amount	Payment Typ				
Deluxe Unlimited	1.00	(\$9.43)	\$0.00	Club				
Deluxe Exterior	1.00	\$9.43						

Transaction	Date	Time	Sub Total	Sales Tax	Amount Tendered	Payment Type	Ticket	Trans Statu:
55985	3/7/2013	8:14:13 AM	\$5.66	\$0.34	\$6.00	Cash	41930	Normal
Service	Quantity	Item Price	Payment Amount	Payment Typ				
Exterior Wash	1.00	\$5.66	\$6.00	Cash				

Figure 106. Transaction Detail



See "View Transaction Detail Report" on page 258.



See "Transaction Detail Field Descriptions" on page 260.

Transaction Detail Field Descriptions

The following table describes each field in the Transaction Detail Report.

Table 28: Transaction Detail Field Descriptions

Field	Description
Shift	Indicates during what shift and at what device the transaction was done.
Device	
Start Date	
Start Time	
Stop Date	
Stop Time	
Transaction	
Date	
Time	
Sub Total	
Sales Tax	
Amount Tendered	
Payment Type	
Ticket	
Trans Status	
Customer Name	
Plate	
Customer ID	
Account#	
RFID	Customer's RFID tag number.
Service	
Quantity	
Item Price	
Payment Amount	

Table 28: Transaction Detail Field Descriptions

Field	Description
Payment Type	
Account	
Auth Code	



See “View Transaction Detail Report” on page 258.



See “Transaction Detail Field Descriptions” on page 260.

About Terminal Balance Report

Terminal Balance Report

HELP - What can I do here?

Managers:


Find out how many bills, coins, or token are in each device for each site.



See “View Terminal Balance Report” on page 261.

View Terminal Balance Report

You can select any date to view the ending total balance from the Terminal Balance Report.

- 1 From the **Financial** menu, select **Audit Controls**, and then **Terminal Balance**.
- 2 In **Start Date**, select a date.
- 3 Click the **View Report**  button.
The ending balance for the Date selected appears in the heading of the Terminal Balance Report.

- 4 You can expand the Site level to see the balances for each device and then components.
- 5 Expand or contract the Report to your parameters. The Terminal Balance report appears.
- 6 You can Search, Print, or Export it.

Site	Component	Display Name	Quantity	Amount	
Inbay Wash		Cash		\$352.25	
		Tokens		\$0.00	
	Site Total		167	\$352.25	
TNC Wash		Cash		\$2,521.00	
		Tokens		\$0.00	
	Site Total		1,656	\$2,521.00	
Express N FullService CW	Autobilling			\$0.00	
		Cash		\$0.00	
		Tokens		\$0.00	
	Total			\$0.00	
	AS-Inside Lane	Bill Acceptor	\$1.00 (Bill)	42	\$42.00
			\$2.00	0	\$0.00
			\$5.00	10	\$50.00
			\$10.00	11	\$110.00
			\$20.00	12	\$240.00
			Bill Dispenser		
\$1.00 (Bill)		150	\$150.00		
\$5.00	0	\$0.00			

Figure 107. Terminal Balance Report



See "About Terminal Balance Report" on page 261.

Terminal Balance Field Descriptions

The following table describes each field in the Terminal Balance Report.

Table 29: Terminal Balance Report Descriptions

Field	Description
Site	
Component	
Display Name	
Quantity	
Amount	



See “View Terminal Balance Report” on page 261.



See “About Terminal Balance Report” on page 261.

About Sales Commission

Sales Commission Report

HELP - What can I do here?

Greeter and Site Managers:

- View Sales Commission by Profit Center
 - Filter by Greeter
 - Greet can evaluate their own performance



See “About Commissions” on page 513.




See “View Sales Commission” on page 264.

View Sales Commission

The Sales Commission Report requires that Schedules and Eligibility rules be configured and incorporated into a Position before it can be used. To view Sales Commission report, follow these steps.

NOTE: For sales commissions to be paid, a user must have a Commission Position assigned, clocked in and signed in as Greeter from the POS terminal at the time of sale.

- 1 In **From Date** and **To Date**, set a date range by typing or selecting dates.
- 2 In **Greeter**, select a Greeter.
- 3 Click the **View Report**  button.
The Sales Commission Report appears.
- 4 You can **Search**, **Print** or **Save** the report.

Auto Pros Corporate		1349 Jacobsburg Road Wind Gap, PA 18091				(610) 881-8288				
SALES COMMISSION REPORT										
Requested By: DenisF On Monday, May 19, 2014 11:43:51 AM			Date Range From 5/19/2014 To 5/19/2014				Page: 1 of 1			
V 2.2.3.1										
Employee : Dengler, John										
Profit Center	Position	Cars	Sales	Buying Extras	Extra Sales	Sales/Car	Buying Extras	Extra Sales/Car	Extra Sales	Commission
Express	Pusher	4	\$28.17	1	\$2.83	\$7.04	25%	\$0.71	10.05%	\$0.28
Total										\$0.28
PLU	Service/Schedule	Profit Center	Position	Eligibility	Commission					
	Extra Sales	Express	Pusher	10.00% of ExtraSales	\$0.28					
Total										\$0.28

Figure 108. Salesman Commission Report



See "About Sales Commission" on page 263.



See "About Commissions" on page 513.

About View Site Tickets

View Site Tickets

HELP - What can I do here?

Owners and Managers:

- View tickets for any day or date range.
- View tickets for any or a specific status.




See “View Site Tickets” on page 265.

View Site Tickets

Follow these steps to view tickets for any day or date range from all or a specific status such as Fuel, Unpaid, Paid, etc..

- 1 In **Start Date** and **End Date**, set a date range by typing or selecting dates.
- 2 In **Status**, select All or one of the following:
 - Created
 - Fuel
 - Unpaid
 - Paid
 - Washed
 - Delete
 - Upgrade
 - etc.

–or–

- In **Ticket ID**, type the Ticket ID number.
- 3 Click the **View Tickets**  button.

The Ticket List appears.

View Site Tickets

Express N FullService CW

Start Date: End Date:

Status: Ticket ID:



Ticket List			
Ticket ID	Created Date	Status	Expiration Date
456887	3/17/2014 8:21:43 AM	Paid	4/21/2015
457114	3/17/2014 8:24:06 AM	Paid	4/21/2015
456790	3/17/2014 8:21:43 AM	Unpaid	4/21/2015
456791	3/17/2014 8:21:43 AM	Unpaid	4/21/2015
456795	3/17/2014 8:21:43 AM	Unpaid	4/21/2015
456796	3/17/2014 8:21:43 AM	Unpaid	4/21/2015
456797	3/17/2014 8:21:43 AM	Unpaid	4/21/2015
456799	3/17/2014 8:21:43 AM	Unpaid	4/21/2015
456800	3/17/2014 8:21:43 AM	Unpaid	4/21/2015
456801	3/17/2014 8:21:43 AM	Unpaid	4/21/2015
456802	3/17/2014 8:21:43 AM	Unpaid	4/21/2015
456803	3/17/2014 8:21:43 AM	Unpaid	4/21/2015
456804	3/17/2014 8:21:43 AM	Unpaid	4/21/2015
456805	3/17/2014 8:21:43 AM	Unpaid	4/21/2015
456806	3/17/2014 8:21:43 AM	Unpaid	4/21/2015
456809	3/17/2014 8:21:43 AM	Unpaid	4/21/2015
456810	3/17/2014 8:21:43 AM	Unpaid	4/21/2015
456812	3/17/2014 8:21:43 AM	Unpaid	4/21/2015
456814	3/17/2014 8:21:43 AM	Unpaid	4/21/2015
456817	3/17/2014 8:21:43 AM	Unpaid	4/21/2015

Line Items		
PLU	Item Name	Price
1	Exterior Wash	\$6.60
1512	Stgb HS Discount 7	(\$6.60)

Figure 109. View Site Tickets Example



See "About View Site Tickets" on page 265.

About the Services Washed Report

Services Washed Report

HELP - What can I do here?

Owners and Managers:

- Records PLU services that were sent to the Controller from WashConnect and have been washed.
- Meaning the Ticket has been sent to the controller, and when minimum car length is reached, a controller transaction is created.
- Contrast this report to the Shift Detail Report.
- Shift Detail displayed purchased services but not necessarily washed.

This report displays only those services that have been washed. The Services Washed Report records only PLUs that were sent to the Controller from Wash Connect and completed.

- 1 From the **Financial** menu, select **Audit Controls**, and then **Services Washed**.
-or-
In menu Search box, type **Services Washed**.
The Services Washed tab appears.

1 of 1 Find | Next

Express N FullService CW 1070 Congdon Stroudsburg, PA 18360 570-424-9687


SERVICES WASHED

Requested By: Wendy Date Range From: 2/1/2015 To 2/28/2015 Page: 1 of 1
 On: Thursday, September 03, 2015 Level: Express N FullService CW
 4:47:37 PM All Shifts

V 2.3.0.6

EXPRESS						
Base	PLU	Service	Quantity	Price	Amount	
	1	Exterior Wash	15,636	\$6.60	\$103,197.60	
	2	Deluxe Exterior Protection Package	6,962	\$11.32	\$78,809.84	
	3	Exterior Protection Package	3	\$9.43	\$28.29	
Total Base			22,601		\$182,035.73	
Extra	PLU	Service	Quantity	Price	Amount	
	7	Add Exterior Protection Package	94	\$2.83	\$266.02	
	11	Deluxe Exterior Protection Upgrade	8	\$4.72	\$37.76	
	33	Clear Coat Conditioner	206	\$2.83	\$582.98	
	34	Underbody & Rust Inhibitor	486	\$2.83	\$1,375.38	
	51	Deluxe Upgrade	7	\$4.72	\$33.04	
	54	Deluxe with Tire Shine	1	\$7.55	\$7.55	
	93	Exterior Protection Upgrade Club	12	\$2.83	\$33.96	
Total Extra			814		\$2,336.69	
Retract	PLU	Service	Quantity	Price	Amount	
	9	Pick Up Dryer Retract	50	\$0.00	\$0.00	
	12	Retract Hitch	979	\$0.00	\$0.00	
	13	Convertible Dryer Retract	203	\$0.00	\$0.00	
Total Retract			1,232		\$0.00	
Total for Express			22,601		\$184,372.42	

Figure 110. Services Washed Report

- In **From Date**, select a date for the report.
- In **To Date**, select a date for the report.
- In **Level**, select a shift(s) or levels.
- In **Shift**, select one or more shift for the report.
- Click the **View Report**  button. You can compare the Services Washed Report to the Controller Services Report.



See "About the Controller Services Report" on page 269.



See "About the Shift Detail Report" on page 186.

About the Controller Services Report

Controller Services Report

HELP - What can I do here?

Owners and Managers:

- Records PLU services that were used within the controller transaction created for each washed car.
- Controller Services are not necessarily indicative of the number of cars washed.
 - Multiple Controller Services can be assigned to singular wash service PLUs, especially in more complex packages.
- Contrast this report to the Shift Detail Report that displays purchased services but not necessarily washed.
- Contrast this report to Controller Washed report that records only controller services that were sent to the Controller from WashConnect and were completed.




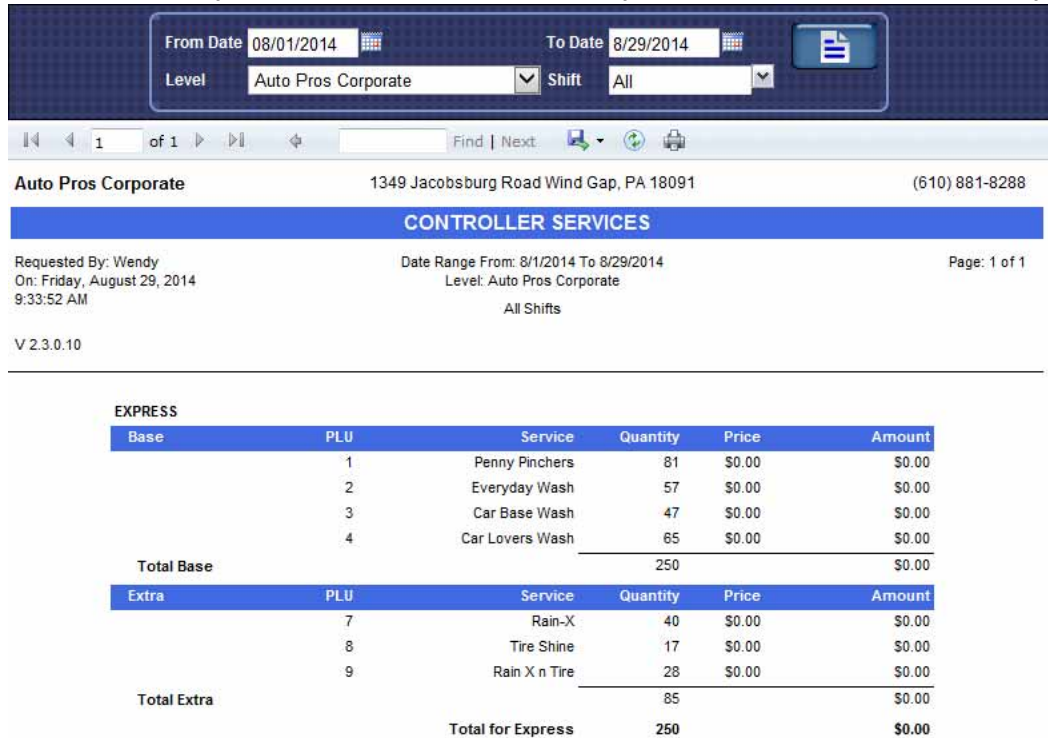
See "View Controller Services Report" on page 269.

View Controller Services Report

This report shows the number of services provided by the controller for each washed car for a selected date range. It also tracks unloaded vehicles (cars washed, but not programmed with a base wash service).

- 1 From the **Financial** menu, select **Audit Controls**, and then **Controller Services**. The Controller Services tab appears.
- 2 In **From Date**, select a date for the report.
- 3 In **To Date**, select a date for the report.
- 4 In **Level**, select site(s) or level for the report.
- 5 In **Shift**, select one or more shift for the report.

- Click the **View Report**  button.
You can compare the Controller Services Report to the Services Washed Report.



Auto Pros Corporate 1349 Jacobsburg Road Wind Gap, PA 18091 (610) 881-8288




CONTROLLER SERVICES

Requested By: Wendy On: Friday, August 29, 2014 9:33:52 AM Date Range From: 8/1/2014 To 8/29/2014 Level: Auto Pros Corporate All Shifts Page: 1 of 1

V 2.3.0.10

EXPRESS						
Base	PLU	Service	Quantity	Price	Amount	
	1	Penny Pinchers	81	\$0.00	\$0.00	
	2	Everyday Wash	57	\$0.00	\$0.00	
	3	Car Base Wash	47	\$0.00	\$0.00	
	4	Car Lovers Wash	65	\$0.00	\$0.00	
Total Base			250		\$0.00	
Extra	PLU	Service	Quantity	Price	Amount	
	7	Rain-X	40	\$0.00	\$0.00	
	8	Tire Shine	17	\$0.00	\$0.00	
	9	Rain X n Tire	28	\$0.00	\$0.00	
Total Extra			85		\$0.00	
Total for Express			250		\$0.00	

Figure 111. Controller Services


-  See "About the Services Washed Report" on page 267.
-  See "About the Shift Detail Report" on page 186.
-  See "About the Controller Services Report" on page 269.

About the Audit Trail Log

NOTE: This report is only available from Corporate.

Protect against fraud with the Audit Trail Log. The log tracks whenever out of the normal activities occur at your wash. You can view the activity logs of who performed the activity type including a date and time stamp in chronological order. For example, a log is created for any time clock edit, when a cash drawer is opened with no sale, if a user is terminated, and a few more.

- From the **Financial** menu, select **Audit Controls**, and then **Audit Trail**. The Audit Trail tab appears.


- 2 In **Start Date**, select a date for the report.
- 3 In **End Date**, select a date for the report.
- 4 In **Audit Log Type**, select the type the report.
- 5 Click the **View Report**  button.

Audit Trail

Search Audit Log

Start Date: End Date:

Audit Log Type:



Audit Log Activity					
Audit Type	Modified at Site ID	Modified at Site Name	Date Occurred	Completed By	Record Info
Login Override	6170001002	Express N FullService CW	3/23/2015 4:28:51 PM	Renee Smith	OpenClose
Customer Changed	6170001002	Express N FullService CW	3/23/2015 4:27:16 PM	Admin User	Customer Name: Walter Smith
Customer Changed	6170001002	Express N FullService CW	3/23/2015 3:48:47 PM	Admin User	Customer Name: George Smith
Customer Changed	6170001002	Express N FullService CW	3/23/2015 3:42:22 PM	Admin User	Customer Name: Robert Smith
Time Clock Entry	6170001002	Express N FullService CW	3/23/2015 3:41:01 PM	Admin User	Employee Name: Erik Smith; Site Name: Express N Start Time: 3/23/2015 3:41:01 PM
Customer Changed	6170001002	Express N FullService CW	3/23/2015 3:34:53 PM	Admin User	Customer Name: UNKNOWN UNKNOWN
Club Membership Changed	6170001002	Express N FullService CW	3/23/2015 3:28:20 PM	Admin User	Customer Name: John Smith; Club: Deluxe Unlimite RFID: #857709; Customer No: n/a
Customer Changed	6170001002	Express N FullService CW	3/23/2015 3:28:20 PM	Admin User	Customer Name: John Smith
Customer Changed	6170001002	Express N FullService CW	3/23/2015 3:27:10 PM	Admin User	Customer Name: UNKNOWN UNKNOWN
Time Clock Entry	6170001002	Express N FullService CW	3/23/2015 3:20:50 PM	Admin User	Employee Name: Christopher Smith; Site Name: Exp FullService CW; Start Time: 3/23/2015 12:05:29 PM
Customer Changed	6170001002	Express N FullService CW	3/23/2015 3:15:54 PM	Admin User	Customer Name: Robert Smith
Customer Changed	6170001002	Express N FullService CW	3/23/2015 3:03:39 PM	Admin User	Customer Name: Mark Smith
Time Clock Entry	6170001002	Express N FullService CW	3/23/2015 2:30:34 PM	Michele Smith	Employee Name: Michele Smith; Site Name: Expres CW; Start Time: 3/23/2015 7:30:00 AM

Figure 112. Audit Trail Example

About Cash Management

Cash Management menu is comprised of three tools: Journals, Terminal Balances, and Operations Report.

- 1 **Journals** is a cash management tool to verify journal entries, print journal detail receipts, and safe actions.
- 2 **Terminal Balances** is a cash management tool. This tool allows you to view how much money is in each terminal in real time. You can view it by quantity or amount.

- 3 The **Operations Report** is another cash management tool. This report displays the details of Beginning Balance, Adds, Transactions, Removes and Ending Balance for the shift on a given date.



See "About Journals" on page 272.



See "View Terminal Balances" on page 289.



See "About the Operations Report" on page 294.

About Journals

Journals

HELP - What can I do here?

Accountant:

- View all the journal entries for a given time period.
- Compare journal entries to Wash to Register and Ticket comparison for cash management.



See "Journal Safe Actions" on page 280.



See "Search for a Journal Entry" on page 273.



See "View the Journal Entry History" on page 274.



See "About Journal History Actions" on page 276.



See "Verify or Edit a Journal Entry" on page 277.



See “Edit a Verified Journal Entry” on page 279.

Search for a Journal Entry

You can view journals for each device and shift combination. You cannot simultaneously view multiple shifts and multiple devices.

NOTE: If you are operating with a Safe connected to all devices, only the Safe journals will appear as everything moves back and forth from the safe.

To search for a journal, follow these steps:


- 1 On the **Financial** menu, click **Cash Management**, and then click **Journals**. The **Journals** tab appears.

The screenshot shows the 'Journals' search interface. It includes a search form with the following fields and values:

- Start Date: 9/4/2015
- End Date: 9/4/2015
- Site: Express N FullService CW
- Device: Safe
- Shift: (empty)
- Show Journals: Unverified

There are also several buttons and panels:

- A blue button with a document icon (Search).
- A blue button with a refresh icon.
- A 'Tools' panel with a green checkmark button and a brown printer icon button.
- A 'Safe Actions' panel with six buttons: a red '+' button, an orange '+>' button, a green '\$<' button, a blue '\$>' button, a red 'X>' button, and a green checkmark '\$' button.

- 2 In the **Start Date** and **End Date** boxes, select a date range.
- 3 In the **Site** box, select a site.
- 4 In the **Device** box, select a device.
- 5 In the **Shift** box, select a shift.
- 6 In **Show Journals** box, click to select one of the following:
 - Unverified (not yet manually verified)
 - Unverified and Verified (not yet manually verified and manually verified)
 - All (auto verified, unverified and manually verified.)
- 7 Click the **Search**  button.
The journals for that shift and device appears.



See “View the Journal Entry History” on page 274.



See “About Journal History Actions” on page 276.



See “Search for a Journal Entry” on page 273.




See "Verify or Edit a Journal Entry" on page 277.



See "Edit a Verified Journal Entry" on page 279.

View the Journal Entry History

To view journal entry history, following these steps:

- 1 In the **Financial** menu, click **Cash Management**, and click **Journals**. The **Journals** tab appears.
- 2 In the **Start Date** and **End Date** boxes, select a date range.
- 3 In the **Site** box, select a site.
- 4 In the **Device** box, select a device.
- 5 In the **Shift** box, select a shift.
- 6 In **Show Journals** box, click to select one of the following:
 - Unverified (not yet manually verified)
 - Unverified and Verified (not yet manually verified and manually verified)
 - All (auto verified, unverified and manually verified.)
- 7 Click the **Search**  button. The journals for that shift and device appears.
- 8 Move the pointer over the journal entry. Cash detail will appear in a pop up.

Shift	Journal ID	Date	Action	Remove From	Add To	Cash to Verify
3517	849117	2/27/2015 4:57:28 PM	Add	AS-Inside Lane (Bill Acceptor)	Safe	\$2,002.00
Component Denomination		Value	Qty.	Amt.		
Drawer	\$1.00 (Bill)	\$1.00	162.00	\$162.00		
Drawer	\$5.00	\$5.00	64.00	\$320.00		
Drawer	\$10.00	\$10.00	46.00	\$460.00		
Drawer	\$20.00	\$20.00	53.00	\$1,060.00		

Figure 113. Journal Entry Cash Detail Popup

The screenshot shows a 'Search Journal' window with the following fields: Start Date (04/01/2014), End Date (04/16/2014), Site (Wind Gap), Device (Safe), Shift (4/16/2014 479), and Show Journals (All). There are 'Tools' buttons for search and refresh, and a 'Safe Actions' panel with various icons. Below the search area is a table of journal entries:

Shift	Journal ID	Date	Action	Remove From	Add To	Cash	Token	Check	Difference	Verified By	Verified Date
479	1681	4/16/2014 8:14:55 AM	-	Safe	POS6001 (Drawer)	\$0.00	\$0.00	\$0.00		AUTO	4/16/2014 8:14:55 AM
479	1688	4/16/2014 11:03:19 AM	-	Corporate Bank	Safe	\$45.00	\$0.00	\$0.00	(\$5.00)	ICS	4/16/2014 11:17:04 AM

Figure 114. Select Journal Entry

9 Click to select a journal entry.
The journal entry is selected and highlighted.

10 Click **View Journal History**  button.
The **Journal History** appears.

The screenshot shows a 'Journal History' window with the following table:

Journal ID	Date	Action	Cash	Token	Check	Verified By	Verified Date
825638	2/1/2015 8:08:24 AM	Add	\$150.00	\$0.00	\$0.00	PipherK	2/1/2015 8:19:30 AM
825652	2/1/2015 8:19:30 AM	Verify	\$150.00	\$0.00	\$0.00	PipherK	2/1/2015 8:19:30 AM

Figure 115. View Journal History example


11 Move the pointer over the journal entry.


A pop-up window gives additional cash detail for the journal entry.


Journal History							
Journal ID	Date	Action	Cash	Token	Check	Verified By	Verified Date
850347	2/28/2015 4:06:55 PM	Add	\$2,373.00	\$0.00	\$0.00	ColluraM	2/28/2015 4:19:20 PM
850387	2/28/2015 4:19:20 PM	Verify	\$2,373.00	\$0.00	\$0.00	ColluraM	2/28/2015 4:19:20 PM


Component	Denomination	Value	Qty.	Amt.
Drawer	\$1.00 (Bill)	\$1.00	148.00	\$148.00
Drawer	\$5.00	\$5.00	83.00	\$415.00
Drawer	\$10.00	\$10.00	53.00	\$530.00
Drawer	\$20.00	\$20.00	64.00	\$1,280.00


Figure 116. Journal History with a cash detail pop-up.

12 Click the **Close**  button to exit the Journal History box.

 See "Search for a Journal Entry" on page 273.

 See "View the Journal Entry History" on page 274.

 See "About Journal History Actions" on page 276.

 See "Verify or Edit a Journal Entry" on page 277.

 See "Edit a Verified Journal Entry" on page 279.

About Journal History Actions

The **Action** column shows what activity occurred for the journal entry. The following table describes each of the possible descriptions that can appear in the **Action** column.

Table 30: View Journal History and Verify Journal Action Descriptions

Label	Description
Deposit	Amount of funds added to the bank.
Add	Amount of funds added to a device.
Verify	Amount confirmed.

Table 30: View Journal History and Verify Journal Action Descriptions (Continued)

Label	Description
Remove	Amount of money removed from a device.
BeginningBank	Beginning Balance is the amount of funds in a device at the beginning of its shift.
EndingBank	Ending Balance is the amount of funds in a device at the end of its shift.
Bank Deposit	Amount of funds removed from a device.
Site Safe Deposit	Amount of funds added to a device.
Edit	Amount of funds edited at the device (e.g., using the service unit screen on the Auto Sentry Flex). For example, Edit appears if you verify a coin hopper, and then make changes at the Auto Sentry Flex.



See “Search for a Journal Entry” on page 273.



See “View the Journal Entry History” on page 274.



See “About Journal History Actions” on page 276.



See “Edit a Verified Journal Entry” on page 279.

Verify or Edit a Journal Entry

Add and remove journal entries should be verified as soon as possible preferably on the same day by the person who did the add or remove. You can verify a journal entry from the **Journals** tab. Use the **Verify** command to confirm cash movements across your devices. For instance, use the **Verify** button when change is added to the drawer from the safe.

- Auto Safe journal entries are added at midnight. It’s not recommended that every day the safe is verified and counted but from time to time, it’s good to verify the contents of the bank matches what the system has calculated.
- You cannot verify an Ending Bank.
- You cannot verify an Auto Journal entry.

To verify or edit an unverified entry, follow these steps:

- 1 Log in to WashConnect at the site level to verify an entry.

NOTE: If you are not logged in at the site level, then the following message appears: **Journals from selected site cannot be edited/verified.**


- 2 In the **Financial** menu, click **Cash Management**, and then click **Journals**. The **Journals** tab appears.
- 3 Search for an unverified Journal entry, and then click to select the entry. The entry is selected.
- 4 Click the **Verify** button.

Remove From Lobby POS, Add To Safe			
Device:	Safe		
Shift:	3678	Journal ID:	100099212
Cash Total:	\$1,279.45	Verified Cash Total:	\$1,279.45
Check Total:	\$0.00	Verified Check Total:	\$0.00
Token Total:	\$0.00	Verified Token Total:	\$0.00

Add to Drawer				
Denomination	Qty.	Amt.	New Qty.	New Amt.
1¢ (Penny)	0	\$0.00		\$0.00
5¢ (Nickel)	0	\$0.00		\$0.00
10¢ (Dime)	2	\$0.20	2	\$0.20
25¢ (Quarter)	1	\$0.25	1	\$0.25
\$1.00 (Bill)	9	\$9.00	9	\$9.00
\$1.00 (Coin)	0	\$0.00		\$0.00
\$2.00	0	\$0.00		\$0.00
\$5.00	0	\$0.00		\$0.00
\$10.00	7	\$70.00	7	\$70.00
\$20.00	0	\$0.00		\$0.00
\$50.00	0	\$0.00		\$0.00
\$100.00	12	\$1,200.00	12	\$1,200.00


Figure 117. Verify Journals Dialog Box


- 5 Verify totals by typing amounts in the **New Quantity** column. Make changes, if necessary.


- Click the **Save**  button.
The entry is verified with any changes and now appears in the **Journal** as verified. The **Verified Date** column shows the date and time the journal entry was verified. The **Verified By** column will display who was logged in when the entry was verified.

Action	Remove From	Add To	Cash to Verify	Difference	Verified Cash	Token	Check	Verified By	Verified Date
Remove	Safe	AS-Outside Lane (Bill Dispenser)	\$200.00	\$0.00	\$200.00	\$0.00	\$0.00	AUTO	3/2/2015 6:04:12 PM
Deposit	Safe	Bank	\$1,350.00	\$0.00	\$1,350.00	\$0.00	\$0.00	ColluraM	3/3/2015 1:19:57 PM
Verify	Safe	Safe	\$2,815.83	\$10.35	\$2,826.18	\$0.00	\$0.00	ColluraM	3/2/2015 6:32:31 PM
Ending Balance	Safe	Safe	\$2,826.18	\$0.00	\$2,826.18	\$0.00	\$0.00	AUTO	3/2/2015 11:59:59 PM
Beginning Balance	Safe	Safe	\$2,826.18	\$0.00	\$2,826.18	\$0.00	\$0.00	AUTO	3/3/2015 12:00:10 AM
Verify	Safe	Safe	\$2,826.18	\$0.00	\$2,826.18	\$0.00	\$0.00	ColluraM	3/3/2015 7:46:25 AM
Remove	Safe	Lobby POS (Drawer)	\$300.00	\$0.00	\$300.00	\$0.00	\$0.00	AUTO	3/3/2015 7:58:04 AM
Add	AS-Inside Lane (Bill Dispenser)	Safe	\$158.00	\$0.00	\$158.00	\$0.00	\$0.00	ColluraM	3/3/2015 10:45:27 AM
Remove	Safe	AS-Inside Lane (Bill Dispenser)	\$300.00	\$0.00	\$300.00	\$0.00	\$0.00	AUTO	3/3/2015 8:02:50 AM
Remove	Safe	AS-Inside Lane (Bill Dispenser)	\$400.00	\$0.00	\$400.00	\$0.00	\$0.00	AUTO	3/3/2015 8:02:59 AM

Figure 118. Journals Verified Time and Date Stamp

 See "Search for a Journal Entry" on page 273.

 See "View the Journal Entry History" on page 274.

 See "About Journal History Actions" on page 276.

 See "Edit a Verified Journal Entry" on page 279.

Edit a Verified Journal Entry

You can edit a journal entry that has already been verified.

To edit a verified journal entry, follow these steps:

- In the **Financial** menu, click **Cash Management**, and then click **Journals**. The **Journals** tab appears.
- Search for a Verified Journal entry, and then click to select the entry. The Verified entry is selected.

- Click the **Verify**  button.

⁴ A Verify Journal message **Warning! Journal is verified Are you sure you want to verify again.** appears.

- Click **Yes**.





- 6 Type changes in the **New Qty.** boxes.
- 7 Click the **Save** button.
The entry is adjusted to reflect the changes.

Remove From Corporate Bank, Add To Safe				
Device:		Safe		
Shift:	479	Journal ID:	1688	
ORIGINAL CASH	Cash Total:	\$50.00	Verified Cash Total:	\$50.00
	Check Total:	\$0.00	Verified Check Total:	\$0.00
	Token Total:	\$0.00	Verified Token Total:	\$0.00
			NEW CASH	

Add to Drawer				
Denomination	Qty.	Amt.	New Qty.	New Amt.
Penny	0	\$0.00		\$0.00
Nickel	0	\$0.00		\$0.00
Dime	0	\$0.00		\$0.00
Quarter	0	\$0.00		\$0.00
One (Bill)	0	\$0.00		\$0.00
One (Coin)	0	\$0.00		\$0.00
Two	0	\$0.00		\$0.00
Five	10	\$50.00	10	\$50.00
Ten	0	\$0.00		\$0.00
Twenty	0	\$0.00		\$0.00
Fifty	0	\$0.00		\$0.00
One Hundred	0	\$0.00		\$0.00

BILL ACCEPTOR EDIT

Figure 119. Verified Journal

-  See "Search for a Journal Entry" on page 273.
-  See "View the Journal Entry History" on page 274.
-  See "About Journal History Actions" on page 276.
-  See "Verify or Edit a Journal Entry" on page 277.

Journal Safe Actions

Manage your physical safe and virtual safe with the Safe Actions section from the Journals tab. In the **Safe Actions** toolbox, you can quickly make a safe journal entry. The six Safe Actions buttons will allow a valid user to make additions to and removals from the safe as well as convert currency and verify Safe Balance:


- "Add from Bank"
- "Add from Other Source"
- "Convert Currency"
- "Deposit to Bank"
- "Remove to Other Source"
- "Verify Safe"



Figure 120. Safe Actions Buttons

Add from Bank

Add from Bank is used when bringing additional money into the system that was not there before (most often from a bank account.)

- 1 In the **Financial** menu, click **Cash Management**, and then click **Journals**. The **Journals** tab appears.
- 2 Click to select the **Add from Bank**  button.
- 3 Type the correct quantity from the Currency Details section.
- 4 Click the **Save** button.
The Safe is updated and currency is added to the safe and Journal needs to be verified.

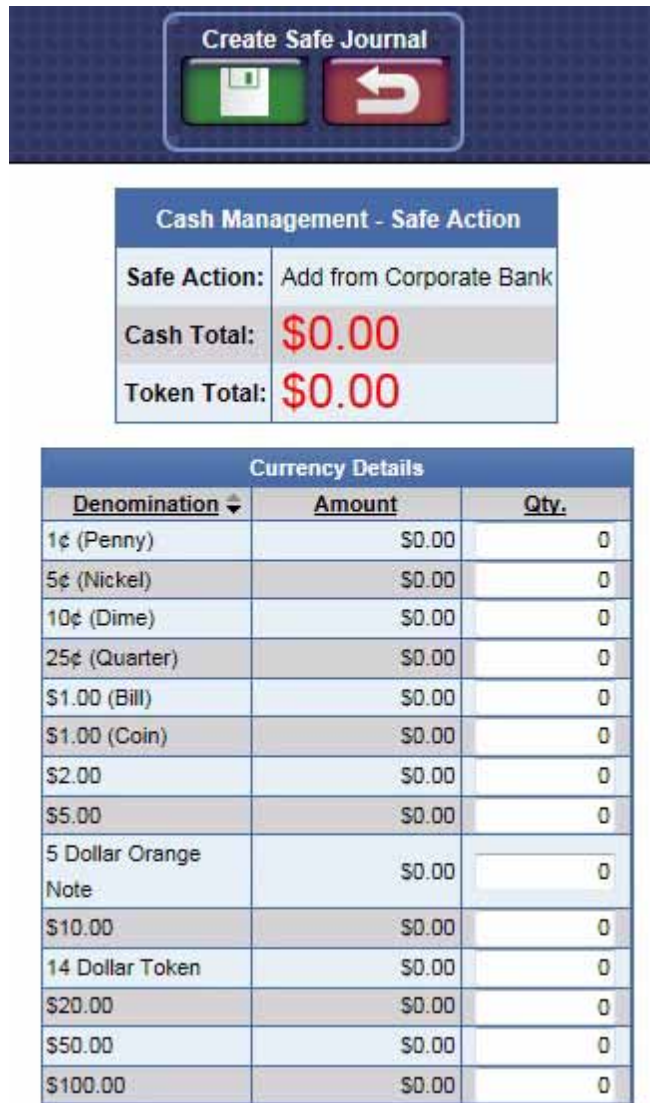


Figure 121. Safe Action - Add from Bank



See "Journal Safe Actions" on page 280.

Add from Other Source

Add from another Source is used when bringing additional money into the system from another source other than bank account. From the Safe Actions toolbox, you can quickly make a safe journal entry.

- 1 In the **Financial** menu, click **Cash Management**, and then click **Journals**. The **Journals** tab appears.
- 2 Click to select the **Add from Other Source**  button.

- 3 In **Qty** box, type the correct quantity.
- 4 Click the **Save** button.
The Safe is updated and the Journal entry must be verified.

Cash Management - Safe Action	
Safe Action:	Add from Other Source
Cash Total:	\$0.00
Token Total:	\$0.00

Currency Details		
Denomination	Amount	Qty.
1¢ (Penny)	\$0.00	0
5¢ (Nickel)	\$0.00	0
10¢ (Dime)	\$0.00	0
25¢ (Quarter)	\$0.00	0
\$1.00 (Bill)	\$0.00	0
\$1.00 (Coin)	\$0.00	0
\$2.00	\$0.00	0
\$5.00	\$0.00	0
5 Dollar Orange Note	\$0.00	0
\$10.00	\$0.00	0
14 Dollar Token	\$0.00	0
\$20.00	\$0.00	0
\$50.00	\$0.00	0
\$100.00	\$0.00	0

Figure 122. Safe Action - Add from Other Source



See "Journal Safe Actions" on page 280.

Convert Currency

From the safe, you can take currency (bills or coins) and exchange them for a different bill or coin type at the bank and return them back to the safe. Follow these steps, to track the movement of cash for this conversion of currency in the system.


- 1 In the **Financial** menu, click **Cash Management**, and then click **Journals**.
The **Journals** tab appears.
- 2 Click to select the **Convert Currency**  button.
The Currency Detail section appears for this Safe Action.



Figure 123. Convert Currency Journal Entry dialog box

- In the Currency Detail quantity columns, type the amount of bills or coins to remove from the safe to convert them at the bank into smaller bills or coins.
- Click the **Save** button.

NOTE: Convert Currency is always expected to be an even exchange.

The Safe’s content and calculations are updated and the corresponding Journal entry created for the exchange but is **not** verified yet.

- Physically take the currency from the safe to the bank and return to the safe.

NOTE: You will need to Verify the original journal entry with the new denominations to complete the convert currency transaction.

- Upon returning from the bank, you will need to verify the Convert journal entry to complete the transaction.
- From the **Journal** tab, click to select the Convert Journal entry. The journal entry is selected.

Shift	Journal ID	Date	Action	Remove From	Add To	Cash to Verify	Difference	Verified Cash	Token	Check	Verified By	Verified Date
3686	100099247	9/2/2015 9:56:34 AM	Convert	Safe	Safe	\$200.00			\$0.00	\$0.00		
3686	100099249	9/2/2015 10:18:56 AM	Add	Lobby POS (Drawer)	Safe	\$2,000.00			\$0.00	\$0.00		
3688	100099257	9/3/2015 2:42:52 PM	Add	Lobby POS (Drawer)	Safe	\$500.00			\$0.00	\$0.00		

Figure 124. Convert Journal Entry

- 8 Click the **Verify**  button.

Cash Management - Safe Action	
Safe Action:	Convert Currency
Cash Total:	\$0.00
Token Total:	\$0.00

Currency Details		
Denomination ↕	Amount	Qty.
1¢ (Penny)	\$0.00	0
5¢ (Nickel)	\$0.00	0
10¢ (Dime)	\$0.00	0
25¢ (Quarter)	\$0.00	0
\$1.00 (Bill)	\$0.00	0
\$1.00 (Coin)	\$0.00	0
\$2.00	\$0.00	0
\$5.00	\$0.00	0
5 Dollar Orange Note	\$0.00	0
\$10.00	\$0.00	0
14 Dollar Token	\$0.00	0
\$20.00	\$0.00	0
\$50.00	\$0.00	0
\$100.00	\$0.00	0

Figure 125. Safe Action - Convert Currency

- 9 In the **New Qty.** column, type the correct quantities of the Converted Currency that you are putting back into the safe.
The system tracks Convert Currency by creating a journal entry and it's now verified.




See "Journal Safe Actions" on page 280.

Deposit to Bank

For safety reason, make a bank deposit during bank hours. With WashConnect system, you can remove money from the safe any time and make a deposit at the bank when it's convenient for you.

NOTE: If you are breaking bills to make change or converting money, that needs to be tracked separately from your deposit.

From the Safe Actions toolbox, you can quickly make a Deposit to Bank:

- 1 In the **Financial** menu, click **Cash Management**, and then click **Journals**. The **Journals** tab appears.
- 2 In the Safe Actions section, click the **Deposit to Bank**  button. The Currency Detail section appears for this Safe Action.

- In the Currency Detail **Qty.** column, enter the quantities of the individual denominations that you want to remove from the safe and deposit into your Corporate Bank Account. The Cash Total amount displays the amount to deposit in the bank.



Cash Management - Safe Action	
Safe Action:	Deposit to Bank
Cash Total:	\$0.00
Token Total:	\$0.00
Check Total:	\$0.00

Currency Details		
Denomination	Amount	Qty.
1¢ (Penny)	\$0.00	0
5¢ (Nickel)	\$0.00	0
10¢ (Dime)	\$0.00	0
25¢ (Quarter)	\$0.00	0
\$1.00 (Bill)	\$0.00	0
\$1.00 (Coin)	\$0.00	0
\$2.00	\$0.00	0
\$5.00	\$0.00	0
\$10.00	\$0.00	0
\$20.00	\$0.00	0
\$50.00	\$0.00	0
\$100.00	\$0.00	0

Check Details			
No.	Deposit?	Check No./Description	Amount

Figure 126. Safe Action - Deposit to Bank

- Click the **Save** button.
The message Journal transaction is created successfully appears, click OK.
Physically count the money as you remove it from the safe.
- Next, verify the Bank deposit.




See "Journal Safe Actions" on page 280.

Remove to Other Source

With Remove to other Source, money is leaving the system to another source other than the Bank. From the Safe Actions toolbox, you can quickly make a removal to an outside location.

- In the **Financial** menu, click **Cash Management**, and then click **Journals**.
The **Journals** tab appears.

- Click to select the **Remove to other Source**  button. The Currency Detail section appears for this Safe Action.
- In the Currency Detail quantity columns, type the amount of bills or coins to remove from the system and deposit to another source other than the Bank.



The screenshot shows the 'Create Safe Journal' interface with a 'Remove to Other Source' button. Below it, the 'Cash Management - Safe Action' screen displays:

Cash Management - Safe Action	
Safe Action:	Remove to Other Source
Cash Total:	\$0.00
Token Total:	\$0.00

Below this is the 'Currency Details' table:

Currency Details		
Denomination	Amount	Qty.
1¢ (Penny)	\$0.00	0
5¢ (Nickel)	\$0.00	0
10¢ (Dime)	\$0.00	0
25¢ (Quarter)	\$0.00	0
\$1.00 (Bill)	\$0.00	0
\$1.00 (Coin)	\$0.00	0
\$2.00	\$0.00	0
\$5.00	\$0.00	0
\$10.00	\$0.00	0
\$20.00	\$0.00	0
\$50.00	\$0.00	0
\$100.00	\$0.00	0

Figure 127. Safe Action - Remove to Other Source

- Click the **Save** button. The Safe is updated and a Journal entry needs to be verified.



See "Journal Safe Actions" on page 280.

Verify Safe

With Verify Safe, you need to physically count the cash in the safe. The history stored of the Safe contents before and after a Safe Verify action. From the Safe Actions toolbox, you can quickly Verify Safe:


- Before you Verify Safe, view Terminal Balances to determine amount that the system has calculated in the Safe. You can compare this amount to the amount you physically count during Verify Safe.



See "View Terminal Balances" on page 289.

- In the **Financial** menu, click **Cash Management**, and then click **Journals**.

The **Journals** tab appears.

- 3 Click to select the **Verify Safe**  button.
The Currency Detail section appears for the Safe Action.
- 4 In the **Currency Detail** quantity columns, type the amount of bills or coins that you have on hand in the safe.



Cash Management - Safe Action	
Safe Action:	Verify Safe
Cash Total:	\$0.00
Token Total:	\$0.00
Check Total:	\$0.00

Currency Details			Check Details		
Denomination	Amount	Qty.	No.	Check No./Description	Amount
1¢ (Penny)	\$0.00	0			
5¢ (Nickel)	\$0.00	0			
10¢ (Dime)	\$0.00	0			
25¢ (Quarter)	\$0.00	0			
\$1.00 (Bill)	\$0.00	0			
\$1.00 (Coin)	\$0.00	0			
\$2.00	\$0.00	0			
\$5.00	\$0.00	0			
\$10.00	\$0.00	0			
\$20.00	\$0.00	0			
\$50.00	\$0.00	0			
\$100.00	\$0.00	0			

Figure 128. Safe Action - Verify Safe

- 5 Click the **Save** button.
The Safe is updated and a Journal entry is verified.



See "Journal Safe Actions" on page 280.

Print Journal Detail Receipt

You can print a duplicate Journal Item Receipt.

- 1 In the **Financial** menu, click **Cash Management**, and then click **Journals**.
The **Journals** tab appears.
- 2 Search for a Journal entry.

3 Click to select the journal entry.
The journal entry is highlighted.

4 Click the **Print**  button.
The Journal Receipt prints.

NOTE: This print button will only appear if there is a printer set up for the Site.



See "About Journals" on page 272.

About Terminal Balances

Terminal Balances

HELP - What can I do here?

Managers:

- View a Snapshot of current cash amounts or terminal balances in real time.
- At a glance, i.e., view the amount bills in the Auto Sentry's Bill Dispenser to determine how many you may need to add.
- View by Quantity or Amount.
- Select by Site(s) or All Sites.



See "View Terminal Balances" on page 289.



See "About Terminal Balance Report" on page 261.

View Terminal Balances

Terminal Balances is a cash management tool. You can view exactly how much money is in each device in real time by quantity or amount.

- 1 From the **Financial** menu, select **Cash Management**, and then **Terminal Balances**.
The Terminal Balances tab appears.
- 2 In **Site**, select a site or select **All** to display the Terminal Balances.
- 3 In **View**, select **Quantity** or **Amount** to display the Terminal Balances Report.

- 4 Scroll down to view the Site's devices or components for the real time terminal balances.
Terminal Balances appear for the selected site with a Total for each device. The combined total of all the devices appears for each site appears in Cash on Hand which can be viewed by scrolling to the bottom of Terminal Balances tab.

- 5 Select the **Refresh Balances**  button to view the current balances.

NOTE: By selecting the **Refresh Balances** button, it always refreshes to the current time..



Figure 129. Terminal Balances example of Touch 'N Clean (TNC)

- From **Bill Acceptor** or **Bill Dispenser**, the denominations accepted or dispensed are shown in the yellow boxes.
- From the **Coin Acceptor** or **Coin Hopper**, the coins accepted or dispensed are shown in the yellow boxes.
- If the device or denomination is not displayed, then it is not accepted.
- Depending on your selection, the Amount or the Quantity of the bills or coins appear in the white boxes directly underneath the yellow denominations.
- The **Total** box tallies the dollar amount of all the coins and bills for the individual terminal or device.



Set an alert email to be sent when device is low on cash. See “Subscribe to Email Alerts” on page 497.

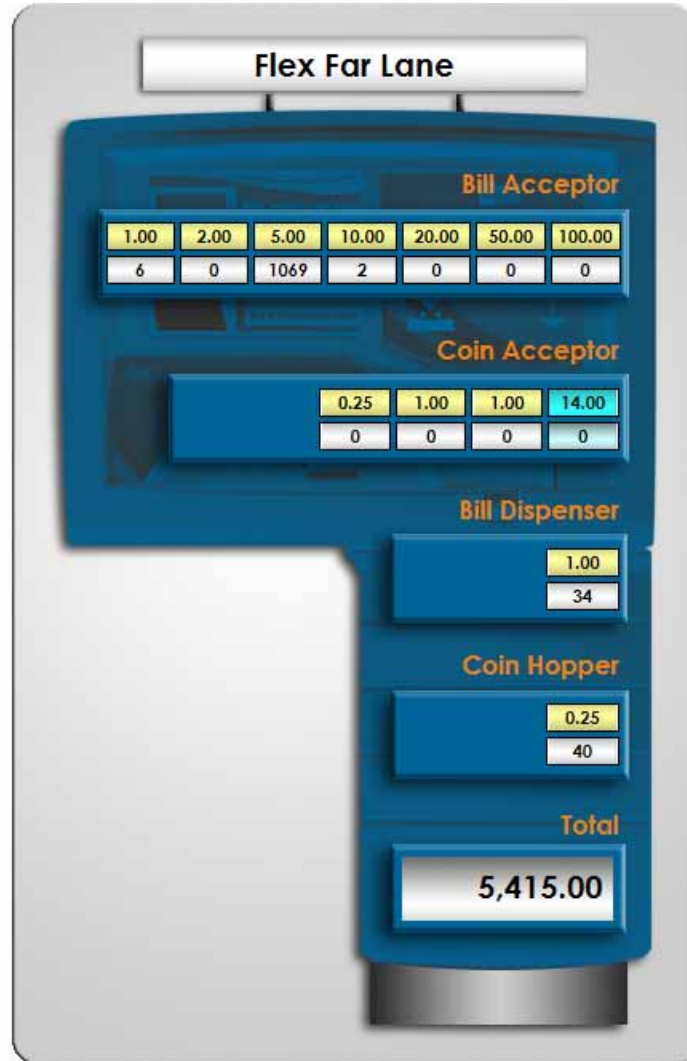


Figure 130. Terminal Balances AS - Flex Far Lane

From the Terminal Balances tab, you are only able to view a snapshot of the current cash amounts in the devices or the terminal balances in real time.



Figure 131. Terminal Balances Lobby POS

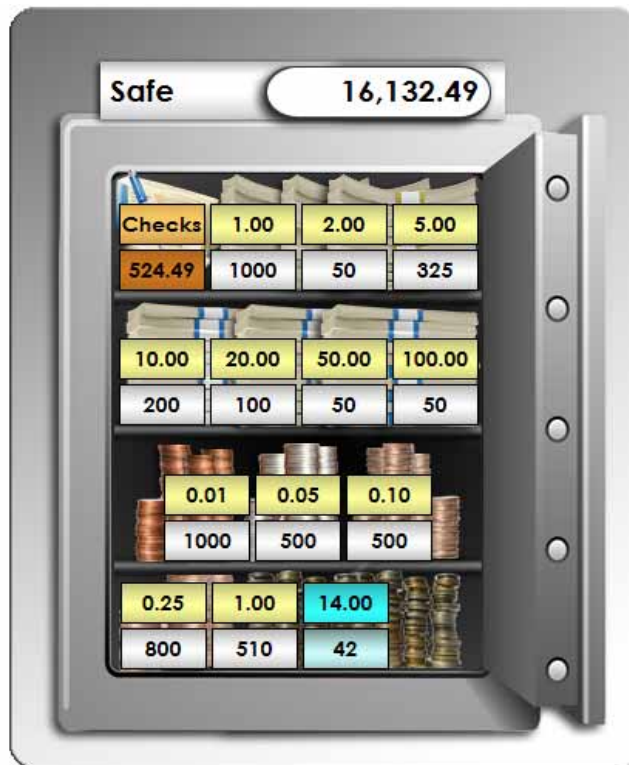


Figure 132. Terminal Balances Safe

- 6 Scroll down to view all the terminals that accept cash or checks at the selected site.
 You can view all the individual terminals Bills, Coins of the Auto Sentries and the Touch 'N Cleans. The POS cash drawers do not keep track of which bills and coins are received and given out as change. POS Cash is simply totaled as well as Checks.
- 7 Scroll to the bottom and view the collective **Cash On Hand** of all the payment terminals.
 You can view the total of all the terminals for the selected site(s).



Figure 133. Terminal Balances Cash On Hand



See "About Terminal Balances" on page 289.



See "About Terminal Balance Report" on page 261.

About the Operations Report

Operations Report

HELP - What can I do here?

Owners and Managers:

- Review cash management.
- View Report for a particular shift date and site.



See “View Operations Report” on page 294.

View Operations Report

You can review the cash management Operations Report from a Particular Shift Date and Site.

- 1 From the **Financial** menu, select **Cash Management**, and then **Operations Report**.
The Operation Report tab appears.
- 2 In **Shift Date**, select a date for the report.
- 3 In **Site**, select one or more sites for the report.

Operations Report								
Shift Date		02/04/2012						
Site		All						
Cash Management - Operations Report								
Device Name			Shift			Start Date		
TNC Bay 1			1548			2/4/2012 12:00:00 AM - 2/4/2012 11:59:59 PM		
Action	Time	Transaction ID	Cash Total	Non Cash	Bill Acceptor	Tokens Dispensed	Refund Due	
▶ Beginning Balance			\$70.00		\$70.00	-		
▶ Transactions			\$60.00	\$34.00	\$60.00	-		
▶ Ending Balance			\$128.00		\$128.00	-		
TNC Bay 1			1913			2/4/2012 12:00:01 AM - 2/4/2012 11:59:59 PM		
TNC Bay 2			1547			2/4/2012 12:00:01 AM - 2/4/2012 11:59:59 PM		
Action	Time	Transaction ID	Cash Total	Non Cash	Bill Acceptor	Tokens Dispensed	Refund Due	
▶ Beginning Balance			\$59.00		\$59.00	-		
▶ Transactions			\$104.00	\$21.00	\$104.00	-		
▶ Ending Balance			\$163.00		\$163.00	-		
TNC Bay 2			1912			2/4/2012 12:00:00 AM - 2/4/2012 11:59:59 PM		
TNC Bay 3			1548			2/4/2012 12:00:00 AM - 2/4/2012 11:59:59 PM		
Action	Time	Transaction ID	Cash Total	Non Cash	Bill Acceptor	Tokens Dispensed	Refund Due	
▶ Beginning Balance			\$89.00		\$89.00	-		
▶ Transactions			\$124.00	\$28.00	\$124.00	-		
▶ Ending Balance			\$213.00		\$213.00	-		
TNC Bay 3			1913			2/4/2012 12:00:00 AM - 2/4/2012 11:59:59 PM		
Action	Time	Transaction ID	Cash Total	Non Cash	Check	Tokens Dispensed	Refund Due	
TNC Bay 4			1521			2/4/2012 12:00:00 AM - 2/4/2012 11:59:59 PM		
Action	Time	Transaction ID	Cash Total	Non Cash	Bill Acceptor	Tokens Dispensed	Refund Due	
▶ Beginning Balance			\$718.00		\$718.00	-		
▶ Transactions			\$121.00	\$11.00	\$121.00	-		
▶ Ending Balance			\$839.00		\$839.00	-		
TNC Bay 4			1886			2/4/2012 12:00:00 AM - 2/4/2012 11:59:59 PM		
Action	Time	Transaction ID	Cash Total	Non Cash	Check	Tokens Dispensed	Refund Due	
TNC Bay 5			1502			2/4/2012 12:00:01 AM - 2/4/2012 11:59:59 PM		
Action	Time	Transaction ID	Cash Total	Non Cash	Bill Acceptor	Tokens Dispensed	Refund Due	
▶ Beginning Balance			\$40.00		\$40.00	-		
▶ Transactions			\$82.00	\$9.00	\$82.00	-		
▶ Ending Balance			\$122.00		\$122.00	-		
TNC Bay 5			1867			2/4/2012 12:00:00 AM - 2/4/2012 11:59:59 PM		

Figure 134. Operations Report



See "About the Operations Report" on page 294.



See "Operations Report Field Descriptions" on page 296.

Operations Report Field Descriptions

Table 31: Operations Report field descriptions

Label	Description
Device Name	The name of the Device.
Shift	The Shift number assigned by <i>WashConnect</i> ®.
Start Date	The date range including the start date and time and end date and time.
Action	General Ledger description for the action.
Time	The time stamp.
Transaction ID	The Transaction ID for the General ledger entry.
Cash Total	The total amount of the entry.
Non Cash	
Bill Acceptor	The amount in Bill Acceptor for the shift.
Tokens Dispensed	Tokens dispensed.
Refund Due	Total dollar amount due to customers that are owed a refund from the Auto Sentry. The Refund Due amount does not carry over to the next day. Refunds that are not paid out during the same shift, will cause an overage that will be included in the total cash amount for the day.



See “About the Operations Report” on page 294.



See “View Operations Report” on page 294.

About Ticket Redeemed

Track fuel tickets in *WashConnect*® with two Ticket Redeemed reports: **Summary** and **Detail**. Both reports are available for Fuel Shifts only.



See “About Ticket Redeemed Summary” on page 297.



See “About Ticket Redeemed Detail” on page 299.

About Ticket Redeemed Summary

Ticket Redeemed Summary

HELP - What can I do here?

Owners and Managers:

NOTE: This summary is only available for Fuel Shifts.

- Track Fuel Tickets sold at the Fuel Pump.
- Track upgrades purchased at the car wash.



See “View, Print or Export the Ticket Redeemed Summary” on page 297.





See “Ticket Redeemed Detail Field Descriptions” on page 302.

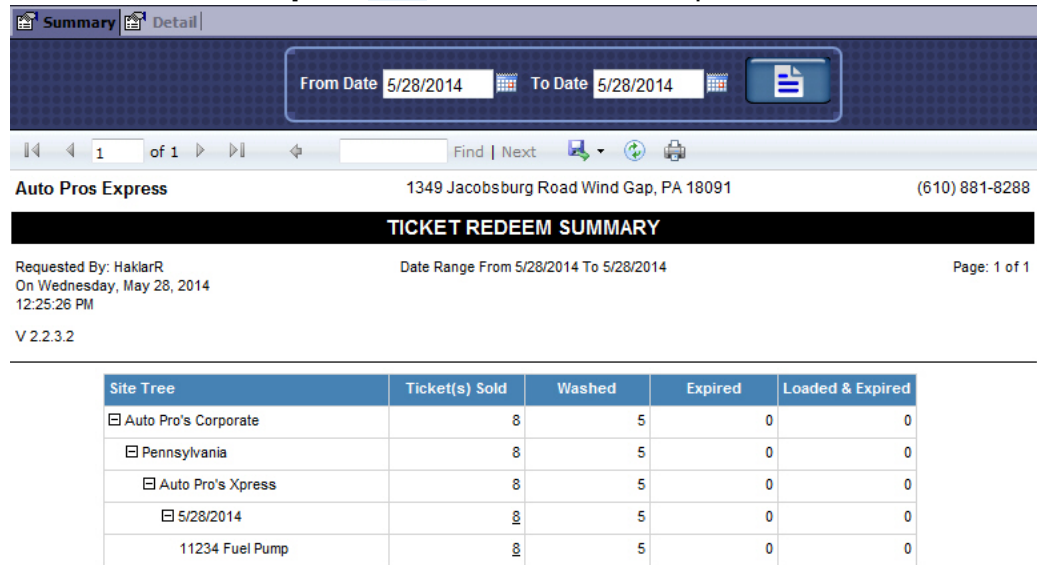
View, Print or Export the Ticket Redeemed Summary

The Ticket Redeemed Summary displays the washes sold, washed and expired that were purchased from the fuel interface only. The Fuel Tickets display at the time of issue or purchase.

NOTE: If the customer upgrades the fuel ticket or purchases extras at the car wash, the fuel ticket will no longer be available on this report but can be found on the Ticket Redeemed Detail because the car wash system will generate and replace the fuel ticket with a new ticket number.

- 1 From the **Financial** menu, select **Ticket Redeemed**, and then **Summary**. The Ticket Redeemed Summary tab appears.
- 2 In **From Date** and **To Date**, select a date range for the summary.
- 3 Click the **View Report**  button. The Ticket Redeemed Summary appears.

4 Click the **Print Report**  button from the Report toolbar.



Auto Pros Express 1349 Jacobsburg Road Wind Gap, PA 18091 (610) 881-8288

TICKET REDEEM SUMMARY

Requested By: HaklarR Date Range From 5/28/2014 To 5/28/2014 Page: 1 of 1
On Wednesday, May 28, 2014 12:25:26 PM
V 2.2.3.2

Site Tree	Ticket(s) Sold	Washed	Expired	Loaded & Expired
[-] Auto Pro's Corporate	8	5	0	0
[-] Pennsylvania	8	5	0	0
[-] Auto Pro's Xpress	8	5	0	0
[-] 5/28/2014	8	5	0	0
11234 Fuel Pump	8	5	0	0

Figure 135. Ticket Redeemed Summary

Important: If the originating wash was purchased as a fuel ticket and the customer upgraded or purchased extras at the car wash, you can view these tickets from Ticket Redeemed Detail Report in Status Upgraded.

5 Click the **Export**  button to export the Ticket Redeemed Summary file.



See "About Ticket Redeemed Detail" on page 299.



See "About Ticket Redeemed" on page 296.

Ticket Redeemed Summary Field Descriptions

Table 32: Ticket Redeemed Summary field descriptions

Label	Description
Site Tree	Expand or contract to view details of the corporate structure. When expanded to view Fuel Pump, the number preceding the fuel pump is the shift number.
Ticket(s) Sold	Amount of car wash(es) sold at the Fuel Pump. When the wash is sold at the fuel pump, the system generates a Fuel Ticket.
Washed	Amount of cars washed that were sold as Fuel tickets.
Expired	Amount of Fuel Tickets that have expired and can no longer be washed. The expiration is programmable. See Fuel Expiration Period setting from "Global > GlobalConfiguration > Global".
Loaded & Expired	Amount of Fuel Tickets that customers entered the fuel ticket wash code but either canceled the transaction or drove off without a wash and the fuel ticket has also expired.



See "About Ticket Redeemed Detail" on page 299.



See "About Ticket Redeemed" on page 296.

About Ticket Redeemed Detail

Ticket Redeemed Detail

HELP - What can I do here?

Owners and Managers:

- Track Fuel tickets sold at the Fuel Pump.
- Only available for Fuel Shifts.
- Search for a Fuel Ticket by Ticket number.
- See all fuel tickets on purchased (issue) date.



See "View Ticket Redeemed Detail" on page 300.



See “Ticket Redeemed Detail Field Descriptions” on page 302.



See “Search for a Fuel Ticket Number” on page 302.

View Ticket Redeemed Detail


- 1 Track fuel tickets sold at the Fuel Pump and any upgrades purchased at the car wash.

NOTE: This report is only available for fuel shifts.

- 2 From the **Financial** menu, select **Ticket Redeemed**, and then **Detail**. The Ticket Redeemed Detail tab appears.
- 3 In **From Date** and **To Date**, select a date range for the report.
- 4 From the **Level** drop-down box, select a Level within your Corporate structure.



See “About Create Levels” on page 631.

- 5 In **Shift**, select one or more shifts.
- 6 Click the **View Report**  button.
The Ticket Redeemed Detail Report appears. From Figure 136, “Ticket Redeemed Detail,” you can see all the Fuel Tickets that were purchased (issued) on 5/28/14 at Auto Pro’s Express during All shifts are listed in this report. You can see Fuel Ticket number 96403 was washed on 6/2/14. Fuel Ticket 96238 was upgraded and washed on 5/28/14.

You can Save, Print or Export the Report.

Auto Pros Express

Shift : 11234

Transaction	Date Issued	Fuel Ticket	Shift	Controller		
				Transaction	Date	Status
227148	5/28/2014 9:27 AM	36920	11236	227162	5/28/2014 9:52 AM	Washed
227149	5/28/2014 9:27 AM	84474	11236	227178	5/28/2014 11:16 AM	Washed
227170	5/28/2014 9:59 AM	20521	11236	227179	5/28/2014 11:21 AM	Washed
227171	5/28/2014 10:00 AM	51340	11236	227180	5/28/2014 11:30 AM	Washed
227172	5/28/2014 10:00 AM	85661	11236	227184	5/28/2014 11:35 AM	Washed
227181	5/28/2014 11:34 AM	96238	11236	227203	5/28/2014 12:24 PM	Upgraded
227182	5/28/2014 11:34 AM	96403	11275	239156	6/2/2014 3:44 PM	Washed
227183	5/28/2014 11:34 AM	97671				

Figure 136. Ticket Redeemed Detail



See "About Ticket Redeemed Summary" on page 297.



See "About Ticket Redeemed" on page 296.



See "Search for a Fuel Ticket Number" on page 302.

Ticket Redeemed Detail Field Descriptions

Table 33: Ticket Redeemed Summary Field Descriptions

Label	Description
Transaction	WashConnect® Transaction number generated when the Fuel Ticket was sold.
Date Issued	The date and time of the transaction for the wash purchase at the Fuel Pump.
Fuel Ticket	Amount of car wash(es) sold at the Fuel Pump. When the wash is sold at the fuel pump, the system generates a Fuel Ticket.
Controller	
Shift	Shift report number for the Fuel Ticket wash transaction.
Transaction	Transaction number in WashConnect® for the Fuel Ticket wash.
Date	The date and time when the Fuel Ticket redeemed for a wash.
Status	Washed or Upgraded. Washed means the Fuel Ticket wash took place exactly as it was purchased at the fuel pump. Upgraded means that the Fuel Ticket wash was upgraded or extra services were purchased. Upgraded Fuel Tickets appear on the Ticket Redeemed Detail Report but not on the Ticket Redeemed Summary.

Search for a Fuel Ticket Number

If customer brings a Fuel Ticket receipt, you can search for the fuel ticket number found on this receipt to view details:

- 1 From the **Financial** menu, select **Ticket Redeemed**, and then **Detail**.
The Ticket Redeemed Detail tab appears.
- 2 In **Ticket**, type a Fuel Ticket number.
The Ticket Redeemed fuel ticket details will appear.

Auto Pros Express

Shift : 11234

				Controller		
Transaction	Date Issued	Fuel Ticket	Shift	Transaction	Date	Status
227171	5/28/2014 10:00 AM	51340	11236	227180	5/28/2014 11:30 AM	Washed



See "About Ticket Redeemed Detail" on page 299.



See "Ticket Redeemed Detail Field Descriptions" on page 302.



See "About Ticket Redeemed Summary" on page 297.

CHAPTER 7:

PERFORMANCE

The Performance menu includes the following reports:

- Dashboard
- Vehicle Performance
- Performance Gauge
- Sales Distribution
- TouchNClean Usage (Installed TouchNClean Devices only)
- RFID Statistics
- Statistical Comparison (Corporate Only)
- Projection (Corporate Only)

For step-by-step instructions on each report, click on one of the following:



See “About the Dashboard Report” on page 310.



See “View the Vehicle Statistical Performance Report (VSPR)” on page 315.



See “About the Performance Gauge Report” on page 327.



See “View the Sales Distribution Report” on page 332.



See “About the Touch ‘N Clean Usage Report” on page 335.



See “About RFID Statistics” on page 337.



See “About Statistical Comparison Report” on page 344.



See “About the Projection Report” on page 346.



See “Performance Reports Menu FAQs” on page 306.



See “Performance Reports Menu Descriptions” on page 307.

Performance Reports Menu FAQs







The following table provides answers to frequently asked questions.

Table 34: Performance Menu FAQs

Question	Answer
Who should look at the Performance menu?	The commands in the Performance menu are designed for someone such as a site manager who needs to track labor and performance statistics. Labor is the largest controllable expense for most full-service car washes. If you do a good job managing labor, you can be more confident that both customer service and profitability will increase.
What are labor and performance statistics?	Labor statistics are your actual versus targeted staffing requirements. Performance statistics are the sales per car by profit center. Together they can give you an idea of how well employees are delivering the service quality you expect.
Why should I be concerned if my labor and performance statistics are off?	The Vehicle Performance report shows percentages against a given standard. However, percentages can be difficult to interpret and often do not tell the whole story. The Performance Gauge report includes variance and performance percentages as well, but those percentages are converted to absolute dollars, not just statistics. You can see your actual labor cost versus what was budgeted. The resulting variance appears in total labor dollars for each hour and for the day. The Performance Gauge report is vital since managers may not understand the total financial impact of the labor decisions they make. A small change in labor statistics can equate to hundreds of dollars per day in labor costs.
Sales data by profit center?	The Sales Distribution report shows sales PLUs by quantity and amount for each profit center.
Can I see sales data for my self-serve bays?	If self-serve bays have TouchNClean payment terminals installed, the TNC Service report shows sales time package statistics for each bay.



See “View the Vehicle Statistical Performance Report (VSPR)” on page 315.

-  See "About the Performance Gauge Report" on page 327.
-  See "View the Sales Distribution Report" on page 332.
-  See "About the Touch 'N Clean Usage Report" on page 335.
-  See "About RFID Statistics" on page 337.
-  See "Performance Reports Menu Descriptions" on page 307.
-  See "About the Performance Menu" on page 308.

Performance Reports Menu Descriptions

The following table describes each report type.

Table 35: Performance Menu Report Descriptions

Report	Description
Dashboard	In a quick glimpse you can now see ALL the information that YOU want! The NEW Dashboard Reporting for WashConnect® allows you to choose the reports you care about and see them ALL on ONE screen. No more clicking back and forth refreshing information to see how you wash is doing. Simply Log in and watch your profits soar. View tables and Charts. Organize to suit your needs. Real Time Data
Vehicle Statistical Performance	The Vehicle Statistical Performance report shows volume, sales and labor key performance indicators, hour-by-hour, for the selected date range. Indicators include required man hours, man hours, cars per man hour, labor cost per car, and the percentage of labor to sales. Call support to set up your Vehicle Statistical Performance report to show data by Tunnel.
Performance Gauge	Like the Vehicle Performance report, the Performance Gauge report shows volume, sales and labor key performance indicators, hour-by-hour, for the selected date range and profit center. It also includes variance and performance numbers, which show absolute dollars, not just statistics.

Table 35: Performance Menu Report Descriptions (Continued)

Report	Description
Sales Distribution	The Sales Distribution report shows sales PLUs by quantity and amount for each profit center.
TouchNClean Usage	The TNC Service report shows sales time package statistics for each bay.
RFID Statistics	Filter RFID Statistics report by Admin Card Swipes Only or multiple RFID Reads for the date range selected.



See “View the Vehicle Statistical Performance Report (VSPR)” on page 315.



See “About the Performance Gauge Report” on page 327.



See “View the Sales Distribution Report” on page 332.



See “About the Touch ‘N Clean Usage Report” on page 335.



See “About RFID Statistics” on page 337.



See “Performance Reports Menu FAQs” on page 306.



See “About the Performance Menu” on page 308.

About the Performance Menu

The **Performance** menu can help change how you manage your wash and gauge the performance of your employees, leading to greater insight about your business and improved profitability.

The system helps to guarantee customers receive the speed of service and quality you intended within the costs you have budgeted.

Staffing in the car wash industry is about optimizing, not minimizing labor. Inadequate staffing causes:

- Lines
- Drive-offs
- Poor quality

All three result in lower sales. But too much labor has a negative impact on the bottom line. Whether you have an express exterior, full-service, or flex-service—you can set specific labor requirements for your particular business model.

You also have the flexibility to manage separate profit centers—whether they are part of the wash itself, such as the wash tunnel and the hand finished services area—or whether they are separate from the wash, such as a quick lube or convenience store. The **Performance** menu can show multiple profit centers and multiple facilities.

You can see the labor cost for only the hand finished services profit center, for example. Then you can compare it to the exterior wash profit center. You can start to see where labor is utilized effectively and the sales per car by profit center. This can give you an idea of how well employees are delivering the service quality you expect.



See “View the Sales Distribution Report” on page 332.



See “View the Vehicle Statistical Performance Report (VSPR)” on page 315.



See “About the Performance Gauge Report” on page 327.



See “About the Touch 'N Clean Usage Report” on page 335.



See “About RFID Statistics” on page 337.



See “Vehicle Statistical Performance Report Example” on page 319.



See “Vehicle Statistical Performance Report Descriptions” on page 320.



See “Site Selection Search Tools for Vehicle Statistical Performance Report” on page 321.

About the Dashboard Report

Dashboard

HELP - What can I do here?

Managers:

- Choose the reports you want to view on ONE screen in a quick glimpse.
- Login from WashConnect or a web browser and watch your profits soar:
- Real Time Data.
- View tables and charts.
- Review Historical Data.



See “View Dashboard Reports” on page 310.



See “Change Dashboard Cards” on page 312.



See “View Historical Data” on page 313.

View Dashboard Reports

You can view several reports at one time from the Dashboard from WashConnect or from a web browser. The reports are on cards that have a link to the underlying report from WashConnect. You must be logged in at your site to see the underlying reports.

NOTE: From the Users menu, Privileges can be set up to access the Dashboard Reports upon logon.

To view the Dashboard reports, follow these steps:

- 1 From the **Performance** menu, click **Dashboard**.

The Dashboard tab appears with all the available cards or reports..



Figure 137. Dashboard - real time example

- If you have more than one site, you can view **Total Cars Washed** at each site by scrolling left and right across the banner.



Figure 138. Dashboard tab banner with Total Cars Washed per site



See “Change Dashboard Cards” on page 312.



See “View Historical Data” on page 313.

Change Dashboard Cards

You can save up to 11 report cards to appear on your dashboard. These cards will appear until you save a new set of report cards. Each card has a link to its underlying report if you are logged in to WashConnect.

- 1 From the **Performance** menu, click **Dashboard**.
- 2 Click the **Settings**  icon.

The Settings dialog box appears with all Available Cards.

Figure 139. Settings dialog box

- 3 In **Profit Centers**, select the profit centers to view.
- 4 In **Available Cards**, select the report cards to view in the dashboard.
- 5 Click the **Save** button.

The selected cards will be saved and will appear on the Dashboard until you save a new selection of cards.



See “View Dashboard Reports” on page 310.



See “View Historical Data” on page 313.

View Historical Data

View the Dashboard with Historical Data. Past dates can be retrieved for most Cards.



- 1 From the **Performance** menu, click **Dashboard**.
- 2 Click the **Settings**  icon to make setting changes. The Settings dialog box appears with three setting sections: for Historical Data Options, Profit Centers, and Available Cards.

Figure 140. Dashboard Settings

- 3 In **From Date** and **To Date**, select the previous point in time to view dashboard data.

NOTE: In historical mode, some weather forecasts and some cards will not be available.

- 4 In **Profit Centers**, select the profit centers to view.
- 5 In **Available Cards**, select the report cards to view in the dashboard.
- 6 Click the **View Historical Data**.
- 7 Click the **Save** button.
View the cards for the selected dates and profit centers.
- 8 After selecting and viewing historical data, select the **Settings**  icon.
- 9 Click the **View Live Data** button.

NOTE: This button only appears after you viewed historical dates and have not closed the Dashboard tab.

- 10 Click the **Save** button.
The settings are saved with the selected profit centers and cards for real-time data.



See “View Dashboard Reports” on page 310.



See “Change Dashboard Cards” on page 312.

Access to Dashboard Directly through Web Browser

This feature will allow the site’s Dashboard reports to be accessed outside of the WashConnect application through the use of a Web Browser. The customer needs to enter the URL to reach their WashConnectWeb. The Login page is presented. The default login will be disabled, and user must enter a valid WashConnect username and password to gain access to the Dashboard report. The Region selection tree will be disabled, and only those Dashboard reports that the logged in user has privileges to see will be displayed.

The Dashboard report will not refresh every 10 minutes so if the user doesn’t refresh manually, the session will expire and the user will be signed out.

All links to the reports from the Dashboard report will be disabled.

Added support for the dashboard to work in Chrome, Firefox, and Safari.

About the Vehicle Statistical Performance Report (VSPR)

Vehicle Statistical Performance Report (VSPR)



HELP - What can I do here?

Managers:

- View trends.
- Compare your actual staffing to see if you are running too much or too little labor.
- Calculate required man hours based on the volume of vehicles and confirm you are operating with labor minimums.

View Industry Labor Metrics:

- Labor costs per Car
- Cars per Man hour
- Percent of Labor to Sales

Note: The above metrics do not take labor minimums or labor efficiencies into account. See the Performance Gauge report for a truer picture.



See "View the Vehicle Statistical Performance Report (VSPR)" on page 315.



See "Vehicle Statistical Performance Report Example" on page 319.



See "Vehicle Statistical Performance Report Descriptions" on page 320.



See "Site Selection Search Tools for Vehicle Statistical Performance Report" on page 321.

View the Vehicle Statistical Performance Report (VSPR)

The Vehicle Statistical Performance Report (VSPR) will allow expansion of each hour to see the number of cars that went through each tunnel at that hour. Cars count

only reflects base wash sold under conveyor profit center. Determine if you want your entire Corporate entity included in the report, or select a different level from the Group box.

To view the **Vehicle Statistical Performance Report**, follow these steps:

- 1 From the **Performance** menu, click **Vehicle Performance**.
The **Vehicle Performance** tab appears.

Figure 141. Vehicle Performance tab

- 2 In the **From Date** and **To Date** boxes, select dates for a date range.
- 3 In the **Profit Center** box, select a profit center.
This is the level where you want reporting to start in the organizational layout.
- 4 In the **Resolution** box, select a resolution: Annual, Month, Week, Day, or Hour.
For example, if you select **Day**, then each lowest-level summary row in the report will be totaled for a day, not a month or a year.

NOTE: Weather data will be displayed on an hour by hour basis as well as daily averages. Weather settings need to be configured, see Global Configurations. Also, if selecting week, weeks will begin with the First Day of Week setting from the Global Configuration.



See “Setup Weather Settings for the Vehicle Performance Report” on page 691.


- 5 In **Show Washed** box, click to mark the check box.
 - If the box is unchecked, the report will show car washes sold, meaning not necessarily washed.
 - If the box is checked, the report will show data from the controller transactions only, meaning cars washed. The report will always show data by tunnel.
- 6 Click the **Preferences**  button, to select the **Group, Report Level,** and **Columns**.

Figure 142. Vehicle Performance tab with Preferences

- In the **Group** box, select a Group.
- In the **Report Level** box, select a report level where you want reporting to end in the hierarchy.
- In the **Show Column(s)** box, select one or more columns to determine the report column headers.
- Click the **Save** button to save the Group, Report Level and Show Columns preferences for future ease of use.

7 Click the **View Report**  button.

The **Vehicle Performance** report appears.

The Vehicle Statistical Performance Report includes familiar car wash industry metrics, such as Labor Costs per Car, Cars per Man Hour and Percent of Labor to Sales. But those metrics alone do not take labor minimums or labor efficiencies into account. For a truer picture, you can view the Performance Gauge report.



See “View the Performance Gauge report” on page 327.

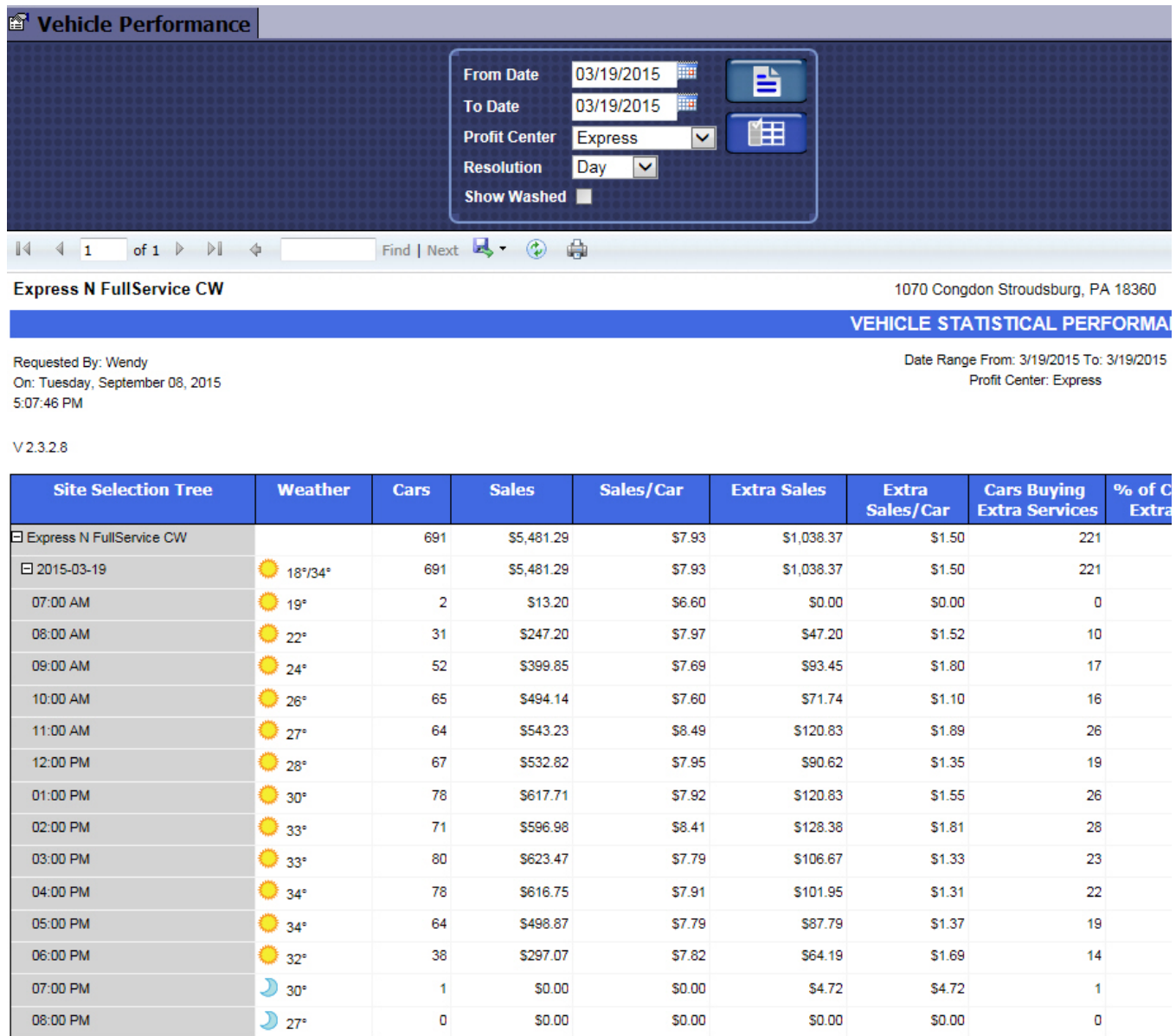


Figure 143. Vehicle Statistical Performance with Day Resolution and Weather icons



See "View the Vehicle Statistical Performance Report (VSPR)" on page 315.



See "Vehicle Statistical Performance Report Example" on page 319.



See "Vehicle Statistical Performance Report Descriptions" on page 320.



See “Site Selection Search Tools for Vehicle Statistical Performance Report” on page 321.

Vehicle Statistical Performance Report Example

Express N FullService CW

1070 Congdon Stroudsburg, PA 18360

VEHICLE STATISTICAL PERFORMANCE

Requested By: Wendy
 On: Tuesday, September 08, 2015
 5:12:58 PM

Date Range From: 2/17/2015 To: 2/17/2015
 Profit Center: Express

V.2.3.2.8

Site Selection Tree	Weather	Cars	Sales	Sales/Car	Extra Sales	Extra Sales/Car	Cars Buying Extra Services	% of Cars Buying Extra Services
[-] Express N FullService CW		839	\$6,597.16	\$7.86	\$1,139.36	\$1.36	249	29.68 %
[-] 2015-02-17	☀️ 0°/21°	839	\$6,597.16	\$7.86	\$1,139.36	\$1.36	249	29.68 %
09:00 AM	☁️ 9°	1	\$0.00	\$0.00	\$0.00	\$0.00	0	0.00 %
10:00 AM	☁️ 13°	39	\$298.94	\$7.67	\$52.86	\$1.36	12	30.77 %
11:00 AM	☁️ 16°	83	\$624.38	\$7.52	\$81.18	\$0.98	18	21.69 %
12:00 PM	☁️ 17°	105	\$822.32	\$7.83	\$138.76	\$1.32	29	27.62 %
01:00 PM	☁️ 17°	102	\$792.15	\$7.77	\$125.55	\$1.23	27	26.47 %
02:00 PM	☀️ 20°	110	\$850.84	\$7.73	\$134.04	\$1.22	30	27.27 %
03:00 PM	☀️ 21°	116	\$969.63	\$8.36	\$219.95	\$1.90	47	40.52 %
04:00 PM	☀️ 20°	111	\$904.40	\$8.15	\$171.80	\$1.55	38	34.23 %
05:00 PM	☀️ 16°	116	\$910.15	\$7.85	\$160.47	\$1.38	36	31.03 %
06:00 PM	☀️ 12°	56	\$424.35	\$7.58	\$54.75	\$0.98	12	21.43 %
07:00 PM	🌙 11°	0	\$0.00	\$0.00	\$0.00	\$0.00	0	0.00 %
08:00 PM	🌙 5°	0	\$0.00	\$0.00	\$0.00	\$0.00	0	0.00 %
09:00 PM	🌙 3°	0	\$0.00	\$0.00	\$0.00	\$0.00	0	0.00 %
10:00 PM	🌙 0°	0	\$0.00	\$0.00	\$0.00	\$0.00	0	0.00 %

Figure 144. Vehicle Statistical Performance Report Example



See “View the Vehicle Statistical Performance Report (VSPR)” on page 315.



See “Vehicle Statistical Performance Report Example” on page 319.



See “Vehicle Statistical Performance Report Descriptions” on page 320.



See “Site Selection Search Tools for Vehicle Statistical Performance Report” on page 321.

Vehicle Statistical Performance Report Descriptions

The following table describes each label in the **Vehicle Statistical Performance** report.

Table 36: Vehicle Statistical Performance Report Descriptions

Column	Description
Site Selection Tree	Column is frozen. The row headers will scroll to the left as you navigate across the report. From this column, a plus sign indicates that it can be expanded to reveal more details of the data; a minus sign indicates that it can be collapsed.
Weather	Hourly weather is set up from an outside source, the WeatherUnderground. See "Global > GlobalConfiguration > Weather" on page 688.
Cars	Number of cars. The VSPR report will allow expansion of each hour to see the number of cars that went through each tunnel at that hour. Cars count only includes base wash PLU sold under conveyor or WA (wash) profit center. It does not include, for example, Base services from the WD profit center. Likewise, it does not include Misc. transactions from other profit centers (e.g., LB, IM, etc.).
Sales Performance Statistics	
Sales	Total sales for the time frame.
Sales/Car	Pre-tax Sales per car for the time frame.
Extra Sales	Total extra sales for the time frame.
Extra Sales per Car	Total extra sales per car for the time frame.
Cars Buying Extra Services	Number of vehicles purchasing extra services for the time frame.
% of Cars Buying Extra Services	Number of vehicles purchasing extra services for the time frame shown as a percentage of total vehicles (i.e., Cars).
Labor Performance Statistics	
Required Man Hours	Number of man hours necessary to handle the cars per hour for the time frame. (Based on Cars per Employee increments in Management Standards in <i>Tunnel Master</i> .)
Actual Man Hours	Total number of hours logged by all employees who were clocked in for the time frame. This number reflects the total number of hours worked for all employees who have clocked into the system time clock, up to the time that is being viewed. By taking this and comparing it to the Req. Man Hours figure the manager can determine if he or she should send workers home or if additional workers should be brought onto the time clock. NOTE: Employees working who are not clocked into the system time clock will not be accounted for and these important operational indicators will be inaccurate.

Table 36: Vehicle Statistical Performance Report Descriptions (Continued)

Column	Description
Cars/Man Hour	Number of vehicles processed each hour for the time frame. Cars per Man Hour (CPMH) is an industry standard in the calculation of labor productivity for full service car washes. Though the car wash industry has identified a 3.0 ratio as being the benchmark level for most full service car wash operations, this ratio becomes impossible to achieve at lower car volume levels and possible to exceed at higher volumes. Other factors such as facility layout, type of wash operation, (e.g., hand wash vs. equipment) will affect the productivity of a particular facility. It is therefore recommended that the operator carefully review the facility to ascertain the desired ratio and manage this ratio on an hourly basis, based on car volumes. The Cars/Man Hour ratio is determined by dividing the number of transactions which include a "Base" service divided by the number of hours worked of all employees who have clocked into the system time clock.
Labor Cost	The sum of wages for each employee on the clock for the time frame.
Labor/Car	The sum of wages for each employee on the clock divided by the number of cars sold.
% of Labor to Sales	Sum of total sales divided by sum of total labor costs shown as a percentage.



See "View the Vehicle Statistical Performance Report (VSPR)" on page 315.



See "Vehicle Statistical Performance Report Example" on page 319.



See "Vehicle Statistical Performance Report Descriptions" on page 320.



See "Site Selection Search Tools for Vehicle Statistical Performance Report" on page 321.

Site Selection Search Tools for Vehicle Statistical Performance Report

You can use the **Group**, **Report Level**, **Profit Center**, and **Resolution** fields to narrow the results of your report. These fields work together to build the **Site Selection Tree** for the report.

The following examples show the results of different settings for each field. In each example, the hierarchy is as follows:

■ **Corporate > Region > State > Site**

The organization layout is shown in the following illustration.

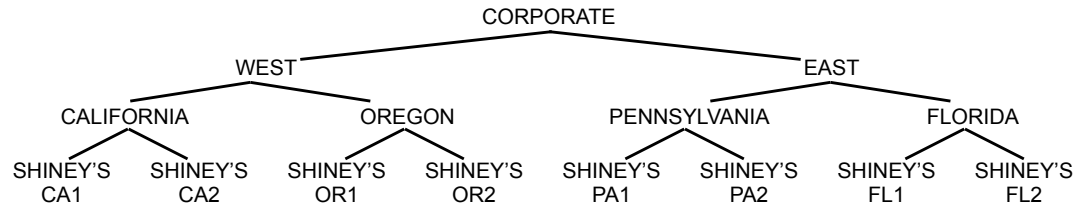


Figure 145. Example Organizational Layout

In Figure 145, “Example Organizational Layout,” shows an example of an organizational layout with eight sites, four states, two regions and a corporate location.



See “View Daily VSPR” on page 322.



See “View Annual VSPR” on page 324.



See “View Weekly VSPR” on page 325.



See “View the Vehicle Statistical Performance Report (VSPR)” on page 315.



See “Vehicle Statistical Performance Report Example” on page 319.



See “Vehicle Statistical Performance Report Descriptions” on page 320.



See “Site Selection Search Tools for Vehicle Statistical Performance Report” on page 321.

View Daily VSPR

Consider the following example:

- **Selected Entity** is East.
- **Report Level** is State.
- **Resolution** is Day.

Given these parameters, the **Site Selection Tree** would appear as shown in the following illustration.

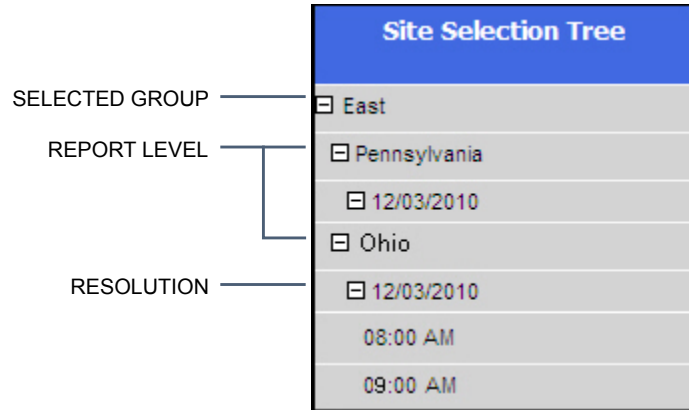


Figure 146. Site Selection Tree with Day Resolution

In Figure 146, “Site Selection Tree with Day Resolution,” the **Site Selection Tree** includes **East** as the top-level and **State** as the lowest level. The **Resolution** is **Day**. You are building a Site Selection Tree that starts reporting at **East**, reports down to the **State** level, and totals the results by **Day**.

Notice how each hour of the day is also displayed. This is because you can expand the report down to each hour for the breakdown of the daily totals. You cannot expand these rows. The **Resolution** setting controls the lowest-level **summary** row, which always appears directly above the hourly totals.



See “View Daily VSPR” on page 322.



See “View Annual VSPR” on page 324.



See “View Weekly VSPR” on page 325.



See “View the Vehicle Statistical Performance Report (VSPR)” on page 315.



See “Vehicle Statistical Performance Report Example” on page 319.



See “Vehicle Statistical Performance Report Descriptions” on page 320.



See “Site Selection Search Tools for Vehicle Statistical Performance Report” on page 321.

View Annual VSPR

Consider the following:

- **Selected Entity** is **East**.
- **Report Level** is **State**.
- **Resolution** is **Annual**.

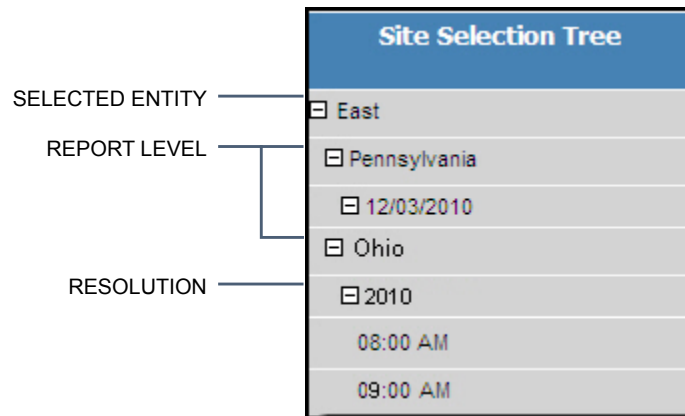


Figure 147. Site Selection Tree with Annual Resolution

In Figure 147, “Site Selection Tree with Annual Resolution,” the **Resolution** has been changed to **Annual**. The lowest-level summary rows are shown for each year, and then hourly totals are shown. This is an example of how you can examine trends for each hour of the day given a longer date range, such as one or two years.



See “View Daily VSPR” on page 322.



See “View Weekly VSPR” on page 325.



See “View the Vehicle Statistical Performance Report (VSPR)” on page 315.



See “Vehicle Statistical Performance Report Example” on page 319.



See “Vehicle Statistical Performance Report Descriptions” on page 320.



See “Site Selection Search Tools for Vehicle Statistical Performance Report” on page 321.

View Weekly VSPR

Consider the following:

- Group is **Auto Pro’s Corporate**.
- Report Level is **Region**.
- Resolution is **Week**.

Site Selection Tree	
SELECTED GROUP	<input type="checkbox"/> Auto Pro's Corporate
REPORT LEVEL	<input type="checkbox"/> Pennsylvania
RESOLUTION	<input checked="" type="checkbox"/> 4/27/2014 - 5/3/2014
	<input checked="" type="checkbox"/> 5/4/2014 - 5/10/2014
	<input type="checkbox"/> 5/11/2014 - 5/17/2014
	01:00 AM
	02:00 AM
	03:00 AM
	04:00 AM
	05:00 AM
	06:00 AM

In the illustration, the **Site Selection Tree** includes **Auto Pro’s Corporate** as the top-level and **State** as the lowest level. The **Resolution** is **Week**. You are building a Site Selection Tree that starts reporting at **Corporate**, reports down to the **State** level, and totals the results by **Week**.

Notice how the weeks will now be broken up by the first Day of the Week Setting from the Global Settings. Each week displays the date for the beginning of the week through the ending date of the week. This is because you can set the resolution to week which expands the report down to each week as the final displayed totals. You can only expand these rows to show the hourly breakdown for the week. The **Resolution** setting controls the lowest-level **summary** row, which always appears directly above the hourly totals.



To setup the First Day of Week Setting, See “Global > GlobalConfiguration > Global” on page 686.

Empty Sites Selection Tree

Finally, you should be careful to not select mismatched parameters. Consider the following:

- **Selected Group** is **Shiney’s PA1**.

- **Report Level** is **Corporate**.
- **Resolution** is **Day**.



Figure 148. Empty Site Selection Tree

In Figure 148, “Empty Site Selection Tree,” the **Site Selection Tree** is empty and the report contains no data because the parameters were mismatched. You should not select a site in the **Selected Entity** box, and then select **Corporate** in the **Report Level** box. This is a mismatch because you cannot start reporting at a site, and then report down to **Corporate**. **Selected Entity** should be higher than **Report Level** in the organizational layout.



See “View Daily VSPR” on page 322.



See “View Annual VSPR” on page 324.



See “View the Vehicle Statistical Performance Report (VSPR)” on page 315.



See “Vehicle Statistical Performance Report Example” on page 319.



See “Vehicle Statistical Performance Report Descriptions” on page 320.



See “Site Selection Search Tools for Vehicle Statistical Performance Report” on page 321.



See “About the Performance Gauge Report” on page 327.



See “About the Touch ‘N Clean Usage Report” on page 335.



See “View the Sales Distribution Report” on page 332.



See “About RFID Statistics” on page 337.

About the Performance Gauge Report

Performance Gauge Report

HELP - What can I do here?

Site Managers

Track Labor and Performance:

- Labor is the largest controllable expense.
- Daily: Understand the total financial impact of your labor decisions in dollars.
 - Variance results appears in total labor dollars for each hour and for the day.
- Compare the labor percentages before and after a change in management.
- Labor burden per man hour is calculated.
- View the actual labor cost vs. what was budgeted.

TIP: A small change in labor can amount to hundreds of dollars per day in labor costs.



See "View the Performance Gauge report" on page 327.



See "Performance Gauge Report Example" on page 328.




See "Performance Gauge Report Descriptions" on page 330.

View the Performance Gauge report

Follow the steps:

- 1 Select **Performance**, and then click the **Performance Gauge** button. The **Performance Gauge** tab appears.

Figure 149. Performance Gauge Tab

- 2 In the **Start Date** and **End Date** boxes, select a date range.
- 3 In the **Site** box, select one or more sites.
- 4 In the **Profit Center** box, select one or more profit centers.
- 5 Click the **View Report**  button.
The **Performance Gauge** report appears.



See “Performance Gauge Report Example” on page 328.



See “Performance Gauge Report Descriptions” on page 330.



See “About the Performance Gauge Report” on page 327.

Performance Gauge Report Example

Like the Vehicle Statistical Performance report, the Performance Gauge report shows volume, sales and labor performance indicators, hour-by-hour, for the selected date range and profit center. It also includes variance and performance numbers, which show absolute dollars, not just statistics. The Sales Variance will be greater than the Performance Indicator, if the wash is doing better than expected. The Sales Variance will be less than the Performance Indicator if the wash is doing poorly.

Express N FullService CW			1070 Congdon Stroudsburg, PA 18360				570-424-9687		
PERFORMANCE GAUGE									
Requested By: Wendy On Wednesday, September 09, 2015 10:15:51 AM			Date Range 2/22/2015 To 2/27/2015 Site : Express N FullService CW Profit Center : Express				Page: 1 of 1		
V.2.3.0.10									
Profit Center: Express									
KPI Sales Per Car:		\$5.92				KPI Labor Burden:		\$9.20	
Hour	Cars	Sales Per Car	Sales Variance	Sales Performance	Required Man-hours	Actual Man-hours	Labor Variance	Labor Performance	Total Performance
7	21	\$7.77	\$1.85	\$38.95	5	2.02	2.98	\$27.42	\$66.36
8	341	\$7.71	\$1.79	\$609.95	6	6.00	0.00	\$0.00	\$609.95
9	475	\$8.12	\$2.20	\$1,046.66	6	6.00	0.00	\$0.00	\$1,046.66
10	536	\$8.14	\$2.22	\$1,187.99	6	5.58	0.42	\$3.86	\$1,191.85
11	499	\$8.32	\$2.40	\$1,197.65	6	6.10	-0.10	(\$0.92)	\$1,196.73
12	563	\$8.32	\$2.40	\$1,348.61	6	7.12	-1.12	(\$10.30)	\$1,338.31
13	610	\$8.26	\$2.34	\$1,426.12	6	7.32	-1.32	(\$12.14)	\$1,413.98
14	664	\$8.25	\$2.33	\$1,544.33	6	7.00	-1.00	(\$9.20)	\$1,535.13
15	677	\$8.16	\$2.24	\$1,513.10	6	5.61	0.39	\$3.59	\$1,516.68
16	670	\$8.14	\$2.22	\$1,486.53	6	6.09	-0.09	(\$0.83)	\$1,485.70
17	599	\$8.23	\$2.31	\$1,380.75	6	11.25	-5.25	(\$48.30)	\$1,332.45
18	234	\$7.81	\$1.89	\$441.35	6	12.00	-6.00	(\$55.20)	\$386.15
19	6	\$6.45	\$0.53	\$3.15	4	10.58	-6.58	(\$60.54)	(\$57.39)
20	0	\$0.00	(\$5.92)	\$0.00	0	3.14	-3.14	(\$28.89)	(\$28.89)
Total	5,895	\$8.16	\$2.24	\$13,225.13	75	95.81	-20.81	(\$191.45)	\$13,033.68
Total	5,895	\$8.16	\$2.24	\$13,225.13	75	95.81	-20.81	(\$191.45)	\$13,033.68

Figure 150. Performance Gauge Report



See "View the Performance Gauge report" on page 327.



See "Performance Gauge Report Descriptions" on page 330.



See "About the Performance Gauge Report" on page 327.

Performance Gauge Report Descriptions

The following table describes each label in the **Performance Gauge** report.

Label	Description
KPI Sales per Car	Key performance indicator for sales per car. This value is entered in the Performance Indicator. See “Performance Indicator” on page 730. This is the targeted amount in sales per car expected for the profit center.
KPI Labor Burden	Key performance indicator for labor burden. This is the fully burdened hourly pay rate of a single employee for the selected profit center. Labor Burden includes workers compensation, payroll taxes, etc. It typically factors in a 22 to 23 percent markup on the base hourly rate.
Hour	Hour of the day for the date range selected.
Cars	Number of cars. Cars count only reflects base wash sold under conveyor profit center.
Sales Performance Statistics	
Sales Per Car	Sales per car for the time period. $\text{Sales/Car} = \text{Sales amount/Number of cars washed}$.
Sales Variance	Sales per car - KPI sales per car. The Sales Variance will be greater if the wash is doing better than expected and less (negative) if the wash is doing poorly.
Sales Performance	$\text{Sales Variance} * \text{Cars}$.
Labor Performance Statistics	
Required Man Hours	Number of required man necessary to wash given number of cars at that hour in the profit center. Based on Cars per Employee increments in Management Standards in <i>Tunnel Master</i> . See “About Req Man Hours” on page 732.
Actual Man Hours	Actual man hours worked at that hour.
Labor Variance	Required man hours minus Actual man hours.
Labor Performance	Labor Variance multiplied by KPI Labor Burden. Labor Performance figure represents dollars spent over or under targeted labor costs.
Total Performance	Sales Performance plus Labor Performance.

At the end of the day after you have managed the labor for each profit center, you can view the **Performance Gauge** report. It is like your ultimate report card, and shows you in real dollars how you did managing labor for the day.

Your labor burden per man hour appears in the report. You can see the actual labor cost vs. what was budgeted. The resulting variance appears in total labor dollars for each hour and for the day.

This report is vital since some managers may not understand the total financial impact of the labor decisions they make. A small change in labor statistics can equate to hundreds of dollars per day in labor costs.

All together, the system helps customers receive the consistent speed of service and quality you intend, at the costs you have budgeted.

The Performance Gauge screen is only as good as your targets. Go back and review those estimates first in the Config/Management Standards screen. The Sales Per Car and Labor Burden amounts are the key drivers of this screen. Try changing them, and then re-run the report to see how it affects your numbers. You can also change the date range to view the Performance Gauge for a month, a quarter or the whole year to date. All the numbers for the date range you select are boiled down to a single representative workday.

Adjusting your targets and reviewing the numbers like this can quickly show you whether your facility is overstaffed or understaffed during peak hours, and whether your employees are exceeding their sales performance targets, or costing you money.



See “View the Performance Gauge report” on page 327.



See “Performance Gauge Report Example” on page 328.



See “Performance Gauge Report Descriptions” on page 330.



See “View the Performance Gauge report” on page 327.



See “Performance Gauge Report Descriptions” on page 330.



See “View the Vehicle Statistical Performance Report (VSPR)” on page 315.



See “About the Performance Gauge Report” on page 327.



See “View the Sales Distribution Report” on page 332.



See “About the Touch ‘N Clean Usage Report” on page 335.



See "About the Performance Gauge Report" on page 327.

About the Sales Distribution Report

Sales Distribution Report

HELP - What can I do here?

Managers:

- View sales item PLUs by quantity and amount for each profit center.



See "View the Sales Distribution Report" on page 332.



See "Sales Distribution Example" on page 333.



See "Sales Distribution Report Descriptions" on page 334.

View the Sales Distribution Report

The Sales Distribution report shows sales PLUs by quantity and amount for each profit center.

- 1 In the **Performance** menu, click **Sales Distribution**.
The **Sales Distribution** tab appears.

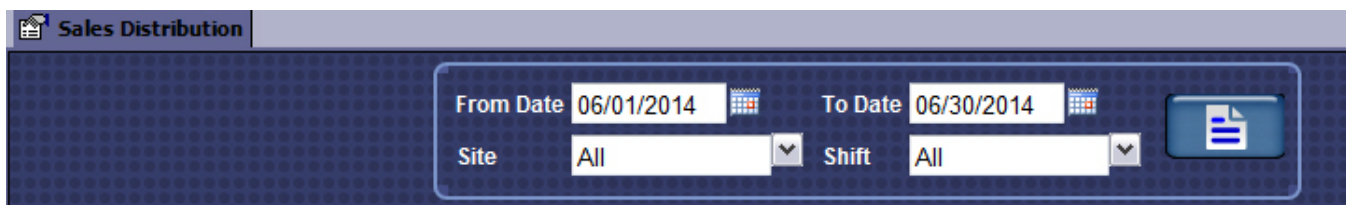


Figure 151. Sales Distribution tab

- 2 In the **From Date** and **To Date** boxes, select a date range.

- 3 In the **Site** box, select one or more sites.
- 4 In the **Shift** box, select one or more shifts.
- 5 Click the **View** button.
The Sales Distribution report appears.



See "Sales Distribution Example" on page 333.



See "Sales Distribution Report Descriptions" on page 334.

Sales Distribution Example

Express N FullService CW		528 River Place, East Stroudsburg, PA 19555		(570) 555-9687	
SALES DISTRIBUTION					
Requested By: Wendy On Wednesday, December 09, 2015 10:51:38 AM V 2.3.1.9		Date Range From 2/1/2015 To 2/7/2015 Site: Express N FullService CW All Shifts		Page: 1 of 1	
Profit Center	PLU	Service	Quantity	Amount	% Amount
<input checked="" type="checkbox"/> Express			5,429	\$41,144.71	118.10 %
	<input checked="" type="checkbox"/> 1	Exterior Wash	3,672	\$24,235.20	59.50 %
	<input checked="" type="checkbox"/> 2	Deluxe Exterior Protection Package	1,499	\$16,968.68	40.50 %
<input checked="" type="checkbox"/> Hand Services			224	\$1,572.75	4.51 %
<input checked="" type="checkbox"/> Club			2,751	(\$7,899.30)	-22.67 %
	<input checked="" type="checkbox"/> 900	Exterior Unlimited Wash Club	337	\$6,049.15	-76.58 %
	<input checked="" type="checkbox"/> 901	Deluxe Unlimited Wash Club	87	\$2,431.65	-30.78 %
	<input checked="" type="checkbox"/> 902	6 Month Exterior Unlimited Club	5	\$538.50	-6.82 %
	<input checked="" type="checkbox"/> 903	6 Month Deluxe Unlimited Club	1	\$167.70	-2.12 %
	<input checked="" type="checkbox"/> 904	12 Month Exterior Unlimited Club	1	\$215.40	-2.73 %
	<input checked="" type="checkbox"/> 905	12 Month Deluxe Unlimited Club	1	\$335.40	-4.25 %
	<input checked="" type="checkbox"/> 1400	Exterior Unlimited	1,788	(\$11,800.80)	149.39 %
	<input checked="" type="checkbox"/> 1401	Deluxe Unlimited	494	(\$5,592.08)	70.79 %
	<input checked="" type="checkbox"/> 1402	Exterior Unlimited	37	(\$244.22)	3.09 %
<input checked="" type="checkbox"/> Impulse			7	\$19.81	0.06 %
Total Sales			8,411	\$34,837.97	

Figure 152. Sales Distribution Report

See “View the Sales Distribution Report” on page 332.



See “Sales Distribution Report Descriptions” on page 334.

Sales Distribution Report Descriptions

The following table describes each label in the **Sales Distribution** report.

Table 37: Sales Distribution Report Descriptions

Label	Description
PLU	PLU stands for Price or Product Look Up. This is the list of PLU codes for each service or item sold. You can expand a profit center to see the PLU codes.
Service	Name of the service or product sold.
Quantity	Number of services or products sold.
Amount	Total sales for the product or service.
% Amount	The percentage of the total sales for the selected time period.



See “View the Sales Distribution Report” on page 332.



See “Sales Distribution Example” on page 333.



See “View the Sales Distribution Report” on page 332.



See “Sales Distribution Example” on page 333.



See “Sales Distribution Report Descriptions” on page 334.



See “View the Vehicle Statistical Performance Report (VSPR)” on page 315.



See “About the Performance Gauge Report” on page 327.



See “View the Sales Distribution Report” on page 332.



See “About the Touch ‘N Clean Usage Report” on page 335.

About the Touch ‘N Clean Usage Report

TNC Usage Report

HELP - What can I do here?

Managers:

For Touch 'N Clean (TNC) Devices Only

- View sales and time statistics for every service transaction in each bay.



See “View TouchNClean Usage Report” on page 335.



See “Touch ‘N Clean Services Report Descriptions” on page 336.

View TouchNClean Usage Report

The TNC Services report shows sales and time statistics for each service in each bay.

NOTE: This feature is only available if Touch ‘N Clean devices are installed at your site.

To view the **TouchNClean Services** report, follow these steps:

- 1 In the **Performance** menu, click **TouchNClean Usage**.
The **TouchNClean Usage** tab appears.

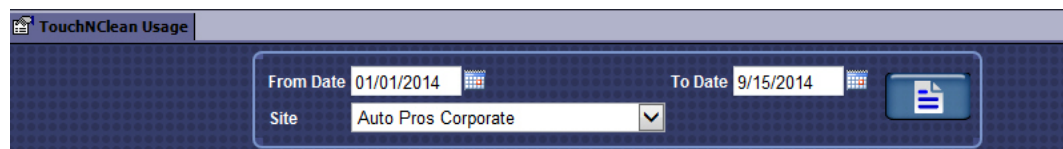


Figure 153. TouchNClean Usage Tab

- 2 In the **From Date** and **To Date** boxes, select a date range.
- 3 In the **Site** box, select a site.
- 4 Click the **View Report**  button.
The **Touch ‘N Clean Services** report appears.

Auto Pros Express 1349 Jacobsburg Road Wind Gap, PA 18091 (610) 881-8288

TOUCH N CLEAN SERVICES

Requested By: Wendy On Wednesday, September 03, 2014 11:37:28 AM Date Range From 8/1/2014 To 8/31/2014 Page: 1 of 1

V.2.3.0.10

Bay	Service	Total Transaction	Total Minutes	Avg. Minutes / Service Transaction	Avg. Minutes / Transaction	Total Dollars	% Revenue	Maint. Min.	Unused Min. †
TouchNClean		10	38:29	3:51	3:51	\$37.97		0:00	-1:00
	High Pressure Rinse	10	38:18	3:50	3:50	\$37.79	99.52 %	0:00	
	High Pressure Soap	1	0:03	0:03	0:00	\$0.05	0.13 %	0:00	
	PreSoak	1	0:02	0:02	0:00	\$0.03	0.09 %	0:00	
	Tire Cleaner	1	0:04	0:04	0:00	\$0.07	0.18 %	0:00	
	High Pressure Wax	1	0:02	0:02	0:00	\$0.03	0.09 %	0:00	
Total	All Services	10	38:29	3:51	3:51	\$37.97		0:00	-1:00

† Stop pressed before timer completion.

Figure 154. Touch 'N Clean Services Report



See "View TouchNClean Usage Report" on page 335.



See "Touch 'N Clean Services Report Descriptions" on page 336.



See "About the Touch 'N Clean Usage Report" on page 335.

Touch 'N Clean Services Report Descriptions

NOTE: This feature is only available if Touch 'N Clean devices are installed at your site.

The following table describes each label in the **Touch 'N Clean Services** report.

Table 38: TouchNClean Services Report Descriptions

Label	Description
Bay	The bay number.
Service	Name of the service or product sold.
Total Transaction	Total transactions.
Total Minutes	Total minutes purchased for the service during the date range.
Avg. Minutes / Service Transaction	Average number of minutes per service transaction during the date range.

Table 38: TouchNClean Services Report Descriptions (Continued)

Label	Description
Avg. Minutes / Transaction	Average number of minutes per transaction for the service during the date range.
Total Dollars	Total dollars or cash collected at each device for the service during the time date range.
% Revenue	Percentage of total revenue for the service at the bay during the date range.
Maint. Min.	(TBD. This total is not yet available in the report. Results are zeros.) Total minutes logged as maintenance for the bay and the service during the date range. Maintenance minutes are logged whenever a user swipes the wash bay card at the unit.
Unused Min.	Number of minutes logged after users pressed Stop. Amount shown is per bay during the date range.



See “View TouchNClean Usage Report” on page 335.



See “About the Touch ‘N Clean Usage Report” on page 335.

About RFID Statistics

RFID Statistics Report

HELP - What can I do here?

Site Managers

View RFID transaction reads:

- Filter RFID Statistics Report by Admin card swipes.
- Filter RFID Statistics Report by multiple RFID reads.



See “View RFID Transactions Reads” on page 338.



See “RFID Statistics Report Admin Swipes Only” on page 341.



See “RFID Statistics Report Multiple RFID Reads Only Example” on page 342.



See “RFID Statistics Report Descriptions” on page 343.

View RFID Transactions Reads

Filter RFID Statistics report by Admin Card Swipes Only or multiple RFID Reads for the date range selected based on transaction timestamps.

NOTE: Contact ICS technical support for multiple Admin Cards to be used at the TouchNClean and the Auto Sentry flex for RFID overrides. Each card can be security configured for each employee.

- 1 In the **Performance** menu, click the **RFID Statistics** button.
The **RFID Statistics** tab appears.

Figure 155. RFID Statistics tab

- 2 In the **From Date** and **To Date** boxes, select a date range.
- 3 In **Site** box, select a site.
- 4 In **Device**, select device.
- 5 Click the **View** button.
The **RFID Statistics** report appears.
- 6 In **RFID**, type an **RFID** number to view.
- 7 Click to select Show Multiple RFID Reads Only to filter multiple RFID reads only.
- 8 Click to select Show Admin Swipes Only to filter Admin swipes only.
The **RFID Statistics** report appears for the selected Device and filters.



See “RFID Statistics Report Admin Swipes Only” on page 341.



See "RFID Statistics Report Multiple RFID Reads Only Example" on page 342.



See "RFID Statistics Report Descriptions" on page 343.

RFID Statistics Report

Auto Pros Express

1349 Jacobsburg Road Wind Gap, PA 18091

(610) 881-8288

RFID STATISTICS

Requested By: Wendy
On Thursday, July 02, 2015
8:58:40 AM

Date Range From 1/28/2015 To 1/28/2015
Flex Far Lane, Flex Near Lane, TouchPOS Front Lobby,
Flex 998 Petro

Page: 1 of 1

V 2.3.2.4

- White** : Represents a normal one time read that resulted in a transaction.
- Green** : Represents the same tag was read multiple times but they resulted in a single transaction.
- Orange** : Represents the same tag was used to create multiple transactions within 10 minutes of each other. These can be normal reads or they may indicate cross reads where multiple transactions were created for cars near each other.
- Blue** : Represents an Admin card was used.

Date	RFID	Time	Device	Antenna	Reads	Transaction ID
1/28/2015	#490936	4:34:28 PM	AS-Outside Lane	1	390	1012000636093
1/28/2015	#341543	4:36:19 PM	AS-Inside Lane	2	390	1011000636100
1/28/2015	#490872	4:39:14 PM	AS-Inside Lane	2	355	1011000636103
1/28/2015	#319168	4:40:42 PM	AS-Outside Lane	1	385	1012000636104
1/28/2015	#341661	4:41:43 PM	AS-Inside Lane	2	388	1011000636109
1/28/2015	#9694	4:41:54 PM	AS-Outside Lane	1	373	
1/28/2015	#319142	4:42:15 PM	AS-Inside Lane	2	360	1011000636113
1/28/2015	#118281	4:43:55 PM	AS-Outside Lane	1	375	1012000636115
1/28/2015	#526002	4:45:56 PM	AS-Outside Lane	1	390	
1/28/2015	#490812	4:48:54 PM	AS-Inside Lane	2	388	1011000636128
1/28/2015	#526002	4:49:46 PM	AS-Outside Lane	1	390	
1/28/2015	#526002	4:50:05 PM	AS-Outside Lane	1	390	
1/28/2015	#526002	4:50:47 PM	AS-Outside Lane	!13044	Admin	1012000636119
1/28/2015	#198777	4:52:10 PM	AS-Inside Lane	2	5	
1/28/2015	#528421	4:52:36 PM	AS-Outside Lane	1	390	1012000636137
1/28/2015	#528471	4:52:56 PM	AS-Outside Lane	1	390	1012000636139
1/28/2015	#198885	4:53:15 PM	AS-Outside Lane	1	386	1012000636140
1/28/2015	#198777	4:53:44 PM	AS-Inside Lane	2	385	1011000636141
1/28/2015	#525935	4:54:50 PM	AS-Inside Lane	!13044	Admin	1011000636144
1/28/2015	#525941	4:55:13 PM	AS-Outside Lane	1	375	1012000636146
1/28/2015	#490847	4:55:14 PM	AS-Outside Lane	1	3	1012000636146
1/28/2015	#528425	4:55:54 PM	AS-Inside Lane	2	377	1011000636147

Figure 156. RFID Statistics Report

RFID Statistics Report Color Descriptions

The RFID Statistics report uses different color coding based on defined report criteria.



See “RFID Statistics Color Code Key” on page 340.

Table 39: RFID Statistics Color Code Key

Color	Description
White	This color represents a normal one time read resulting in a transaction.
Green	This color represents when the same tag is read multiple times but they result in a single transaction. This typically shows a tag that is struggling to reach the minimum read count.
Orange	This color represents is when the same tag is used to create multiple transactions within 10 minutes of each other. These can be normal reads or they may indicate cross reads where multiple transactions are created for cars near each other.
Blue	This color represents when an Admin card is used to enter the tag number and there are no other attempts with that number. NOTE: The record with the Admin card may be Green if the tag was being read but couldn't reach the minimum read count, then the Admin card was used.

RFID Statistics Report Admin Swipes Only

Auto Pros Express

1349 Jacobsburg Road Wind Gap, PA 18091

(610) 881-8288

RFID STATISTICS

Requested By: Wendy
On Wednesday, September 03, 2014
11:44:20 AM

Date Range From 5/1/2014 To 5/4/2014
Flex Far Lane, Flex Near Lane, TouchPOS Front Lobby,
Flex 998 Petro

Page: 1 of 1

V 2.3.0.6

Date	RFID	Time	Device	Antenna	Reads	Transaction ID
5/1/2014	#196928	5:32:07 PM	Flex Near Lane	I13491001	Admin	<u>1000000196930</u>
5/1/2014	#8124	5:35:50 PM	Flex Far Lane	I13491001	Admin	
5/1/2014	#8124	5:37:49 PM	Flex Far Lane	I13491001	Admin	
5/1/2014	#8124	5:39:16 PM	Flex Far Lane	I13491001	Admin	
5/1/2014	#8124	5:52:56 PM	Flex Far Lane	I13491001	Admin	
5/1/2014	#8124	6:01:07 PM	Flex Far Lane	I13491001	Admin	
5/1/2014	#8124	6:07:54 PM	Flex Far Lane	I13491001	Admin	
5/1/2014	#8124	6:17:51 PM	Flex Far Lane	I13491001	Admin	
5/1/2014	#8124	6:21:07 PM	Flex Far Lane	I13491001	Admin	
5/1/2014	#8124	6:26:01 PM	Flex Far Lane	I13491001	Admin	
5/1/2014	#8124	6:32:27 PM	Flex Far Lane	I13491001	Admin	
5/2/2014	#8124	8:43:27 AM	Flex Far Lane	I13491001	Admin	
5/2/2014	#41217	9:17:40 AM	Flex Near Lane	I13491001	Admin	
5/2/2014	#41217	9:34:58 AM	Flex Near Lane	I13491001	Admin	
5/2/2014	#8124	9:42:36 AM	Flex Far Lane	I13491001	Admin	<u>999000196970</u>
5/2/2014	#987654321	9:49:54 AM	Flex Far Lane	I13491001	Admin	<u>999000196978</u>
5/2/2014	#76019	9:52:36 AM	Flex Far Lane	I13491001	Admin	<u>999000196983</u>
5/2/2014	#41217	10:03:49 AM	Flex Near Lane	I13491001	Admin	
5/2/2014	#41217	10:11:50 AM	Flex Near Lane	I13491001	Admin	
5/2/2014	#41217	10:22:38 AM	Flex Near Lane	I13491001	Admin	
5/2/2014	#41217	10:23:52 AM	Flex Near Lane	I13491001	Admin	
5/2/2014	#41217	10:24:16 AM	Flex Near Lane	I13491001	Admin	
5/2/2014	#41217	10:25:41 AM	Flex Near Lane	I13491001	Admin	

Figure 157. RFID Statistics Report Admin Swipes Only



See "View RFID Transactions Reads" on page 338.



See "RFID Statistics Report Multiple RFID Reads Only Example" on page 342.



See "RFID Statistics Report Descriptions" on page 343.

RFID Statistics Report Multiple RFID Reads Only Example

Auto Pros Express

1349 Jacobsburg Road Wind Gap, PA 18091

(610) 881-8288

RFID STATISTICS

Requested By: Wendy
On Wednesday, September 03, 2014
11:46:28 AM

Date Range From 5/1/2014 To 5/4/2014
Flex Far Lane, Flex Near Lane, TouchPOS Front Lobby,
Flex 998 Petro

Page: 1 of 1

V 2.3.0.6

Date	RFID	Time	Device	Antenna	Reads	Transaction ID
5/2/2014	#76034	11:10:42 AM	Flex Far Lane	0	52	999000197021
5/2/2014	#76034	11:11:05 AM	Flex Near Lane	0	10	
5/2/2014	#76034	11:11:56 AM	Flex Far Lane	0	71	999000197022
5/2/2014	#76034	11:11:56 AM	Flex Near Lane	0	25	1000000197020
5/2/2014	#76034	11:12:20 AM	Flex Near Lane	0	21	
5/2/2014	#76034	11:19:56 AM	Flex Near Lane	0	50	1000000197023
5/2/2014	#76034	11:20:31 AM	Flex Near Lane	0	41	1000000197026
5/2/2014	#76034	11:21:15 AM	Flex Near Lane	0	34	1000000197027
5/2/2014	#1304	11:24:04 AM	Flex Near Lane	0	84	
5/2/2014	#1304	11:24:41 AM	Flex Near Lane	0	3	
5/2/2014	#1304	11:26:53 AM	Flex Near Lane	0	108	
5/2/2014	#1304	11:27:19 AM	Flex Near Lane	0	6	
5/2/2014	#1304	11:28:21 AM	Flex Near Lane	0	3	
5/2/2014	#1304	11:28:32 AM	Flex Near Lane	0	33	1000000197027
5/2/2014	#1304	4:51:02 PM	Flex Near Lane	0	11	
5/2/2014	#1304	4:51:15 PM	Flex Near Lane	0	77	1000000197087
5/2/2014	#1304	4:56:09 PM	Flex Near Lane	0	5	
5/2/2014	#1304	4:56:33 PM	Flex Near Lane	0	35	1000000197089
5/2/2014	#1304	4:57:20 PM	Flex Near Lane	0	46	1000000197091
5/2/2014	#1304	4:57:54 PM	Flex Near Lane	0	32	1000000197092

Figure 158. RFID Statistics Report Multiple RFID Reads Only



See "View RFID Transactions Reads" on page 338.



See "RFID Statistics Report Admin Swipes Only" on page 341.



See "RFID Statistics Report Descriptions" on page 343.

RFID Statistics Report Descriptions

Table 40: RFID Statistics Report Descriptions

Label	Description
Date	Date.
RFID	RFID sticker tag number.
Time	Time of RFID read.
Device	Device used for RFID read.
Antenna	Antenna number.
Reads	Number of reads that the RFID reader captures.
Transaction ID	The transaction number for the RFID lead. The ID is also a link to View Register Transactions for the actual transaction.



See *“View RFID Transactions Reads”* on page 338.



See *“RFID Statistics Report Admin Swipes Only”* on page 341.



See *“RFID Statistics Report Multiple RFID Reads Only Example”* on page 342.



See *“View the Vehicle Statistical Performance Report (VSPR)”* on page 315.



See *“About the Performance Gauge Report”* on page 327.



See *“View the Sales Distribution Report”* on page 332.



See *“About the Touch ‘N Clean Usage Report”* on page 335.

About Statistical Comparison Report

Statistical Comparison

HELP - What can I do here?

Managers:

Available at Corporate Only

- Compare the sales performance of one period versus another period.



See “View Statistical Comparison” on page 344.




See “Statistical Comparison Report Descriptions” on page 346.

View Statistical Comparison

- 1 In the **Performance** menu, select **Statistical Comparison**. The **Statistical Comparison** tab appears.

Figure 159. Statistical Comparison tab

- 2 In the **Base Start Date** and **Base End Date** boxes, select a Base period date range.
- 3 In the **Comparison Start Date** and **Comparison End Date** boxes, select a comparison period date range.
- 4 In **Level** box, click to select a site from the Corporate tree structure.
- 5 In **Profit Center** list, select one or more profit centers to compare.
- 6 Click the **Save** button to save these preferences for future use of this report.
- 7 Click the **View Report**  button.

The **Statistical Comparison** report appears.

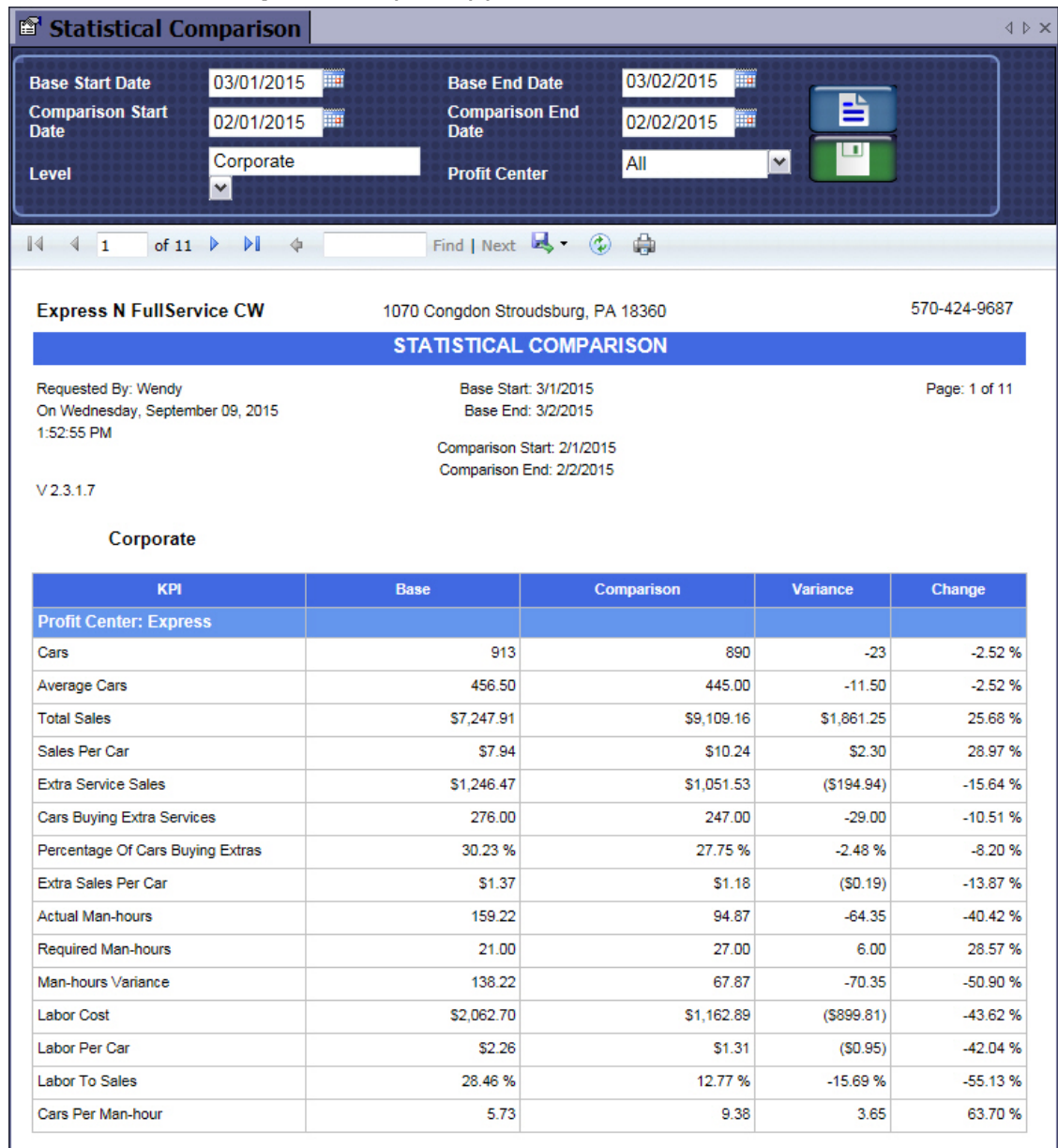


Figure 160. Statistical Comparison Report Example



See "Statistical Comparison Report Descriptions" on page 346.



See "About Statistical Comparison Report" on page 344.

Statistical Comparison Report Descriptions

Table 41: RFID Statistics Report Descriptions

Label	Description
KPI	Key Performance Indicator. Ex: Cars, Average Cars, Total Sales, Sales per Car, Extra Service Sales, Cars Buying Extra Services, Percentage of Cars Buying Extras, Extra Sales per Car, Actual Man-hours, Required Man-hours, Man-hours variance, Labor Cost, Labor per Car, Labor to Sales, Cars per Man-hour.
Base	This is the total Key Performance Indicator's amount for the duration of the Base period.
Comparison	This is the total Key Performance Indicator's amount for the duration of the Comparison period.
Variance	This is the difference from the Comparison Key Indicator's total amount less the Base Key Indicator's total amount.
Change	This is the percentage of the change between the Base and Comparison duration periods.



See "View Statistical Comparison" on page 344.



See "About Statistical Comparison Report" on page 344.

About the Projection Report

NOTE: This is available at Corporate only.

The Dashboard Projection Analysis is available from the Dashboard as well as directly from the Performance menu. Provides charts and graphs to view the weather conditions, cars washed, and labor required in man-hours for your selected profit center and dates.



See "View the Projection Analysis" on page 346.

View the Projection Analysis

To view the Projection Analysis, follow these steps:

- 1 From the **Performance** menu, select **Projection**.
The **Projection** tab appears.
- 2 In **Group**, make a selection.
- 3 In **From Date** and **To Date** boxes, select a Base period date range.
- 4 In **Profit Center** list, select a profit center, Facility Totals or Wash Totals.

5 Click the **View Report**  button.
The **Projection Analysis** appears

6 From the report toolbar, you can print, export or search this report.

Express N FullService CW															1070 Congdon Stroudsburg, PA 18360			570-424-9687		
Dashboard Projection Analysis - Site: Express N FullService CW																				
Requested By: Wendy					Date Range From: 3/15/2015 To: 3/21/2015					Page: 1 of 2										
On: Wednesday, September 09, 2015					Profit Center: Express															
4:32:21 PM																				
V 2.3.2.2																				
Sunday		Monday		Tuesday		Wednesday		Thursday		Friday		Saturday								
☁ Overcast		☀ Clear		☁ Light Rain		☀ Clear		☀ Clear		☁ Overcast		☁ Overcast								
30°/39°		28°/46°		26°/46°		20°/31°		18°/34°		22°/26°		25°/41°								
Hour	Cars	Labor	Cars	Labor	Cars	Labor	Cars	Labor	Cars	Labor	Cars	Labor	Cars	Labor						
7	3	1	7	1	0	0	10	1	2	1	2	1	0	0						
8	31	1	51	1	2	1	65	1	31	1	20	1	20	1						
9	40	1	66	1	12	1	67	1	52	1	29	1	19	1						
10	47	1	77	1	36	1	63	1	65	1	17	1	36	1						
11	49	1	69	1	55	1	86	1	64	1	12	1	35	1						
12	66	1	82	1	82	1	77	1	67	1	2	1	52	1						
13	52	1	104	1	62	1	101	1	78	1	0	0	56	1						
14	56	1	89	1	70	1	89	1	71	1			63	1						
15	45	1	84	1	63	1	105	1	80	1			84	1						
16	55	1	104	1	78	1	97	1	78	1			75	1						
17	44	1	84	1	75	1	73	1	64	1			68	1						
18	19	1	69	1	62	1	54	1	38	1			52	1						
19	0	0	0	0	4	1	1	1	1	1			0	0						
20					0	0	0	0	0	0										
Total	507	12	886	12	601	12	888	13	691	13	82	6	560	11						

Figure 161. Projection Analysis

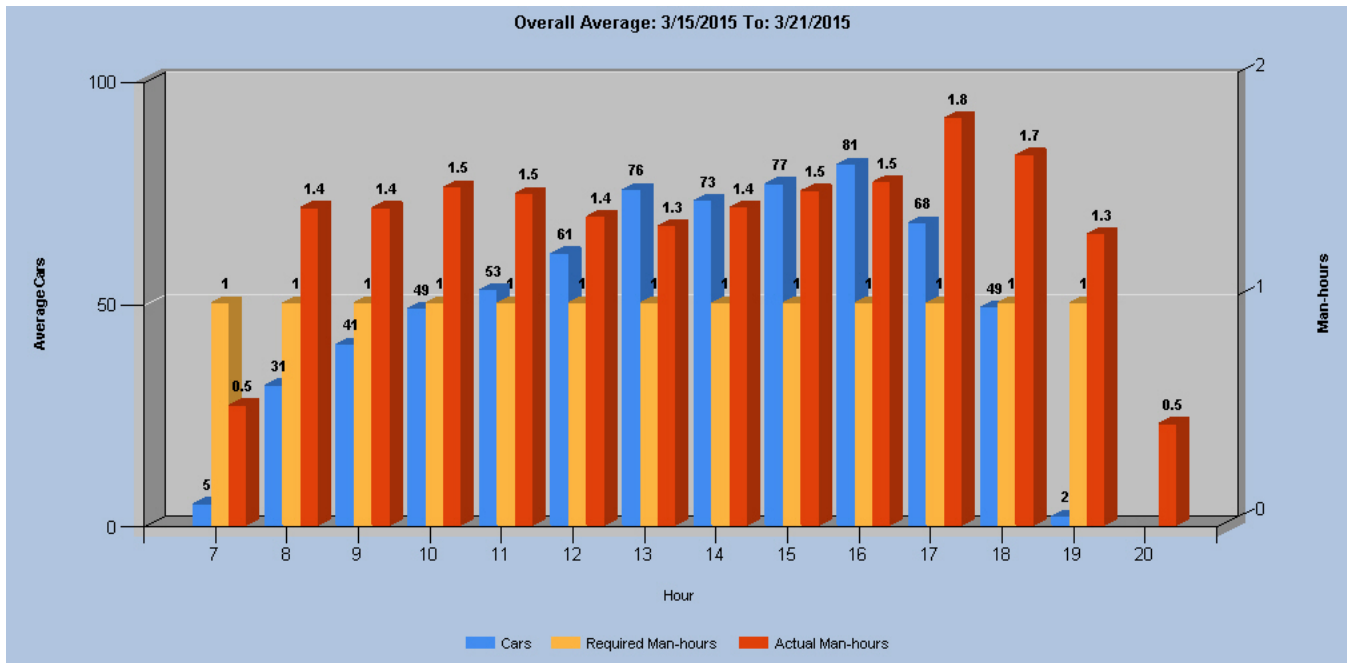


Figure 162. Projection Analysis Chart



See "About the Projection Report" on page 346.

CHAPTER 8:

MONITORING SYSTEM

The commands in the **Monitoring System** menu are designed for someone like an operations manager who needs to monitor site statistics, devices and components. The **Monitoring System** menu includes:

- **Status**
- **Wash Status**
- **Event History**
- **Device Statistics**
- **Version History**



See “About the Monitoring System” on page 352.



See “About Status” on page 354.



See “About the Status of Entities, Devices and Components” on page 356.



See “Wash Status” on page 359.



See “View Event History Log” on page 361.



See “View Device Statistics” on page 366.



See “About Version History” on page 368.

Monitoring System Menu FAQ

The following table describes the Monitoring System's most frequently asked questions.

Table 42: Monitoring System Menu FAQs

Question	Answer
Who should look at the Monitoring System menu?	The commands in the Monitoring System menu are designed for someone such as an operations manager who needs to monitor site statistics, devices and components.
Why should I monitor site statistics?	<p>For a variety of reasons, you will want to stay informed about site statistics. For example, at any time, you can view the Status to see if all the sites are open and functioning. If there is a bill jam or a low bill warning, the site icon in the software will appear yellow. By clicking the icon, you can see which component generated the error.</p> <p>If you operate numerous sites, and cannot be at every site, the Monitoring System can be your remote eyes and ears. Site managers may not accurately report problems. If a device, such as an Auto Sentry Flex, stops working, the site manager might simply throw a switch, open the gate and collect money at the tunnel. That device icon in the software will turn red so you can investigate and help the site manager troubleshoot the issue.</p>
Can I track failure rates for my devices?	The system is monitoring every component inside every device at each site. This data helps to determine the failure rate of any single component. For example, at a bill dispenser the system tracks how many bills were dispensed and counts each one as either a successful, impaired or failed attempt. If the device dispensed 6,000 bills, you can see how many were successful. The errors are segregated into system errors, user errors and informational alerts.

Table 42: Monitoring System Menu FAQs (Continued)

Question	Answer
What can an error code tell me?	If a component fails, for example, you can receive an email alert with an error code. The error code links to an online database with step-by-step troubleshooting instructions. Additionally, an ICS Support Technician can receive the same email alert, and then contact your site manager to tell him. For example, if the Auto Sentry Flex is not communicating with the bill acceptor. ICS customers are amazed when a technician calls to report an issue before anyone at the site knew about it.
Can I eliminate recurring problems?	Recurring problems are identified because the error history for a component is available for whatever date range you select. After time, the system will include enough historical data to identify these recurring problems. For example, you might see that a bill dispenser has reported the same problem every two months for the past year. This data is collected by ICS to improve future designs. Knowing about system problems, what the problems are, and when they occurred gives ICS the fact-based data necessary to improve our products and eliminate components with a high failure rate.
Can I tell if my software is up-to-date?	The Version History includes an historical upgrade schedule for each hardware and software component at your site. You can see each date a firmware version changed, for example. After a firmware upgrade, you can see if the errors for that component went away. The version history also helps ICS technicians troubleshoot issues. Since each site has numerous components, and each component must be synchronized with all the rest, a component that appears to be failing may simply need an upgrade to correct the issue.



See *“About the Monitoring System”* on page 352.

About the Monitoring System

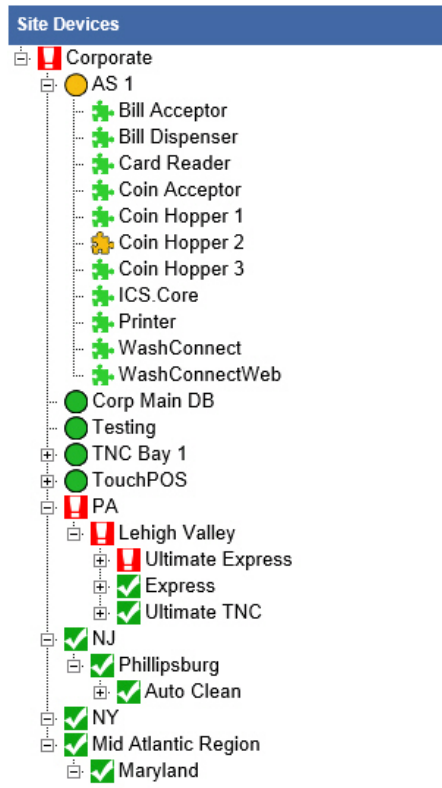


Figure 163. Monitoring System Site Device

The **Monitoring System** menu can help you to stay informed about site statistics: see if all the sites are open and functioning, identify a bill jam or a low bill warning, etc.



See “View an Error Code” on page 352.

View an Error Code

- 1 From the **Monitoring System** menu, select **Status**.
- 2 Click the device in question.
The component that generated an error will be red or yellow.
- 3 Click the component to view error details.
The error code appears with an error message, and incident date and time.



Figure 164. Site Status component error message

- 4 Click on the **Code** link.
Each error or event code links to an online database with step-by-step troubleshooting instructions.

The screenshot shows the ICS website interface. At the top left is the ICS logo with the tagline 'Innovative Control Systems'. To the right of the logo is the company address: '1349 Jacobsburg Road, Wind Gap, PA 18091, 800.642.9396'. Below the logo is a navigation menu with links for 'Home', 'Business Models', 'Products', 'Services', 'Support', and 'Experience ICS'. A search bar is located in the top right corner. In the main content area, there is a form with the label 'Event Code:' followed by a text input field and a 'Submit' button. Below the form, the results are displayed: 'Event Code: 10541' and 'Component: Coin Acceptor'. Under the heading 'Definition:', the text reads: 'This error indicates the Coin Hopper is Empty. The application has tried to dispense for a fixed number of times and could not dispense any coins.' Under the heading 'Recovery:', there are four numbered steps: 1. Check to see if Coin Hopper is Empty. 2. Fill up the Coin hopper with coins. 3. Goto [Service Screen](#), select verify count and exit to reset the hopper. 4. Enter [Diagnostics](#) from the service screen and try to dispense a coin. At the bottom, there are links for 'Remote Control: [AutoSentry1](#) [AutoSentry2](#) [AutoSentry3](#)'.

Figure 165. Event Code for Error Message Coin Acceptor example

You can receive email alerts with error codes. If a device stops working, the device icon in the software will turn red, indicating that you should investigate and troubleshoot the issue. The system monitors and collects data for every component and device. This data helps to determine the failure rate of any single component. The errors are segregated into system errors, user errors and informational alerts.

The **Version History** includes the upgrade schedule for each hardware and software component. After a firmware upgrade, you can see if the errors for a particular component disappeared.



For more information on email alerts, See "Subscribe to Email Alerts" on page 497.

For step-by-step instructions on the **Monitoring System**:



See “About Status” on page 354.



See “About the Status of Entities, Devices and Components” on page 356.



See “View Event History Log” on page 361.



See “View Device Statistics” on page 366.



See “About the Monitoring System” on page 352.

About Status

Status

HELP - What can I do here?

Operations Managers:

- View this report first thing in the morning to see if all your sites are open and functioning properly.
- All entities, devices and components are green if working properly.
 - If blue or red, drill down to view message and troubleshoot.



See “View Status” on page 355.



See “About the Status of Entities, Devices and Components” on page 356.



See “Site Device Key” on page 358.




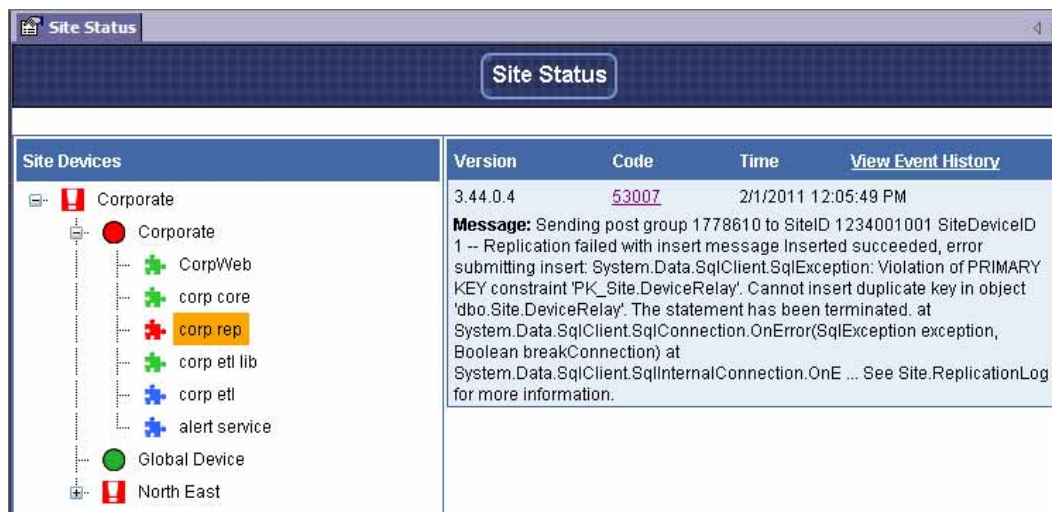
See “Status and Error Message Descriptions” on page 358.

View Status

The site status report allows you to see if all your sites are open and functioning properly. View the status or error message associated with that component.

To view the status of an device or component, follow these steps:

- 1 In the **Monitoring System** menu, click the **Status** button.
The **Status** tab appears.
- 2 Click the **Expand Tree**  node to view devices and components. Status icons appear.
- 3 Only components report messages, click to select a component.
 - Select a red component to see error messages.
 - Select a blue component to see status messages.
 - Select a yellow component to see status message. (This indicates a minor system issue such as a device out of paper.)



The screenshot shows the 'Site Status' window. On the left, a tree view under 'Site Devices' shows a hierarchy: Corporate (red icon), Corporate (red icon), CorpWeb (green icon), corp core (green icon), corp rep (red icon, highlighted in yellow), corp etl lib (green icon), corp etl (blue icon), alert service (blue icon), Global Device (green icon), and North East (red icon). The main pane displays a table with columns: Version, Code, Time, and View Event History. The table contains one row with the following data:

Version	Code	Time	View Event History
3.44.0.4	53007	2/1/2011 12:05:49 PM	View Event History

Below the table, a message box displays the following text:

```

Message: Sending post group 1778610 to SiteID 1234001001 SiteDeviceID
1 -- Replication failed with insert message Inserted succeeded, error
submitting insert: System.Data.SqlClient.SqlException: Violation of PRIMARY
KEY constraint 'PK_Site.DeviceRelay'. Cannot insert duplicate key in object
'dbo.Site.DeviceRelay'. The statement has been terminated. at
System.Data.SqlClient.SqlConnection.OnError(SqlException exception,
Boolean breakConnection) at
System.Data.SqlClient.SqlInternalConnection.OnE ... See Site.ReplicationLog
for more information.

```

Figure 166. Component Error Message



Figure 167. Site Status



See “About the Status of Entities, Devices and Components” on page 356.



See “Site Device Key” on page 358.



See “Status and Error Message Descriptions” on page 358.

About the Status of Entities, Devices and Components

- A component is hardware or software that operates as part of a device. For example, a printer is a component of the *Auto Sentry Flex* device.
- Replication is a component of the main corporate database device.
- An entity is a logical level in the organizational hierarchy.
- Entities often represent sites, states and regions in the hierarchy.
- Entities can also represent special groupings such as all sites with hand finishing services, or all in-bay sites.

For a variety of reasons, you will want to stay informed about site **Status** statistics. For example, perhaps there is a bill jam or a low bill warning. In that case, the site icon in the software will appear yellow. You can click the icon to see which component generated the error.

If you operate numerous sites, you can access remotely and be the eyes and ears from the **Monitoring System**. Site managers may not accurately report problems. If a device, such as an Auto Sentry flex, stops working, then the site manager might simply throw a switch, open the gate and collect money at the tunnel. The device icon in the software will turn red, so you can investigate and help the site manager troubleshoot the issue.

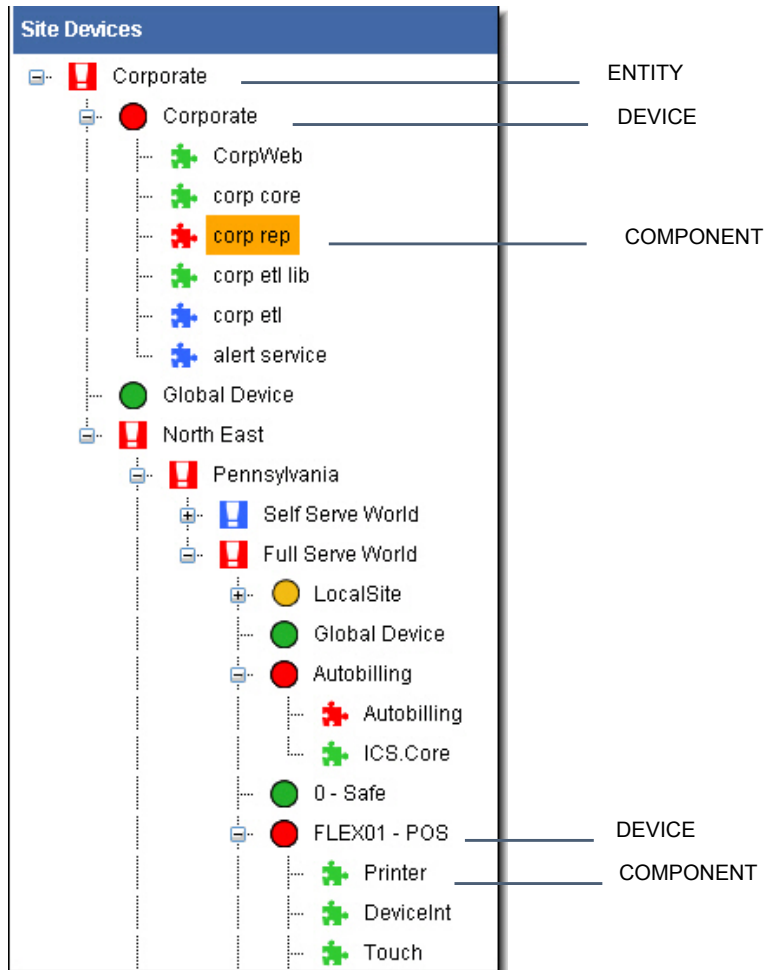


Figure 168. Devices and Components

 See "View Status" on page 355.

 See "Site Device Key" on page 358.

 See "Status and Error Message Descriptions" on page 358.



See “About the Monitoring System” on page 352.

Site Device Key

Each entity, device and component is designated with an icon. Icon colors indicate status.

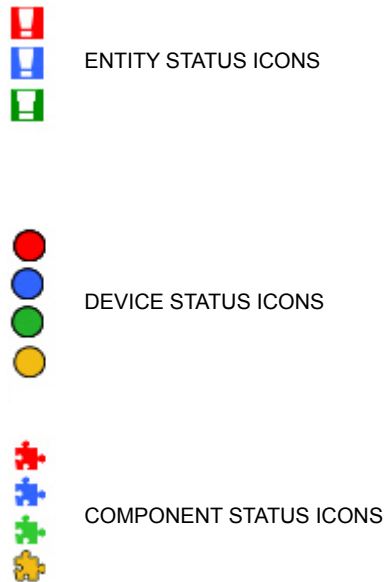


Figure 169. Entity, Device and Component Status Icons

Site Monitoring Color Key

- Red: Stopped responding.
- Blue: Has been Repaired.
- Green: Operating normally.
- Yellow: Requires attention.



See “View Status” on page 355.



See “About the Status of Entities, Devices and Components” on page 356.



See “Status and Error Message Descriptions” on page 358.



See “About the Monitoring System” on page 352.

Status and Error Message Descriptions

The following table describes each column in the message screen.

Table 43: Status and Error Message Descriptions

Column	Description
Version	Software or hardware version number.
Code	Error code. Click to see more details in the online database.
Time	Reporting time of message.
View Event History	Click to open the Event History tab for that Device and Component.



See “View Status” on page 355.



See “About the Status of Entities, Devices and Components” on page 356.



See “Site Device Key” on page 358.



See “About the Monitoring System” on page 352.

Wash Status

Open and close Auto Sentry terminals. The Wash Status tab is located under the Monitoring System menu. Within this tab, you can view or change the Open or Close status of the Auto Sentries with the use of the slide switch. This is only available from Corporate Login. TouchNClean terminals status can be viewed only from this tab. The Raise Gate open command is available for user to request the gate open.

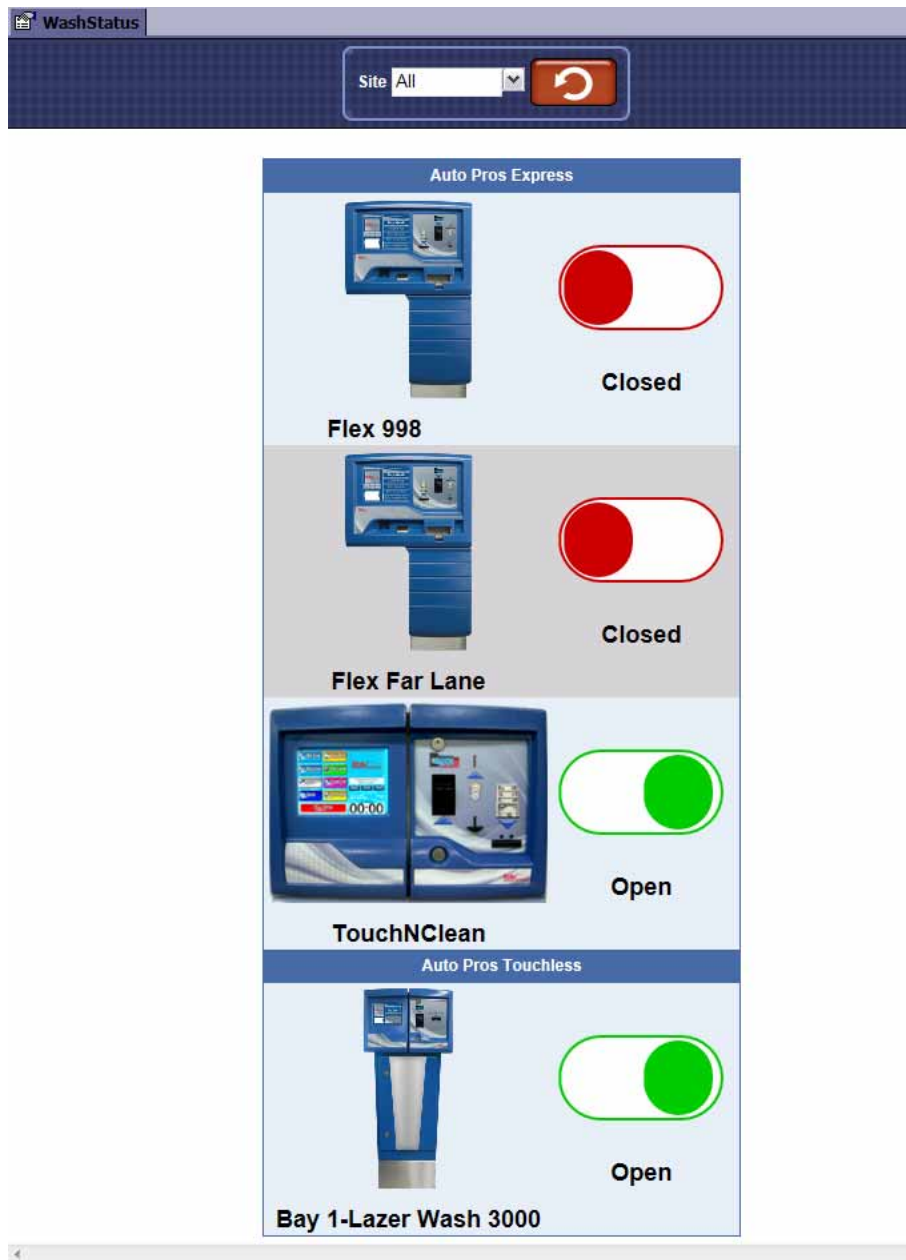


Figure 170. Wash Status tab

About Event History

Event History

HELP - What can I do here?

Operations and Managers:

- Log of events for components inside every device at every site.
- Evaluate if new components are necessary or just need servicing.
- Data helps to determine the success rate of any single component.
- Find trends to determine if a device needs servicing.



See "View Event History Log" on page 361.



See "Search for an Event Code" on page 362.

View Event History Log

To view event history, follow these steps:

- 1 In the **Monitoring System** menu, click **Event History**. The **Event History** tab appears.

The screenshot shows the 'Event History' tab interface. It features a search form with the following fields and options:



- Site:** A dropdown menu with 'Auto Clean' selected.
- Device:** A dropdown menu with '--Show All--' selected.
- Start Date:** A date input field with '08/30/2012' and a calendar icon.
- Event Code:** An empty text input field.
- Component:** A dropdown menu with '--Show All--' selected.
- End Date:** A date input field with '08/30/2012' and a calendar icon.
- Include cleared events:** A checkbox that is currently unchecked.
- Search:** A green magnifying glass button to the right of the date fields.










Figure 171. Event History Tab

- 2 In the **Site** box, select a site.
- 3 In the **Device** box, select a device.
- 4 In the **Component** box, select a component.
- 5 In the **Start Date** and **End Date** boxes, select a date range.
- 6 Optional: Check **Include cleared events** to see cleared events.


7 Click the **Search History**  button.

The Event History record list appears.

 1 of 2 
 Total records 13, Showing 1 - 10.

Device	Component	Time	Code	Description	Total Attempts	Total Success	Transaction # Impaired	Transaction # Cleared	Cleared Time
FLEX01 - POS	Bill Acceptor	1/31/2011 10:20:26 AM	10208	Show Details... 	0	0		317089	1/31/2011 10:24:35 AM
	Bill Acceptor	1/27/2011 9:53:43 AM	10208	Show Details... 	1	1	316926	316930	1/27/2011 9:55:50 AM
	Bill Acceptor	1/26/2011 1:56:17 PM	10208	Show Details... 	0	0		316852	1/26/2011 1:58:54 PM
	Bill Acceptor	1/26/2011 10:12:00 AM	10208	Show Details... 	0	0		316787	1/26/2011 10:13:47 AM
	Bill Acceptor	1/26/2011 8:31:58 AM	10208	Show Details... 	0	0		316773	1/26/2011 8:43:07 AM
	Bill Acceptor	1/26/2011 8:27:50 AM	10208	Show Details... 	0	0		316760	1/26/2011 8:29:12 AM
	Bill Acceptor	1/26/2011 8:19:27 AM	10208	Show Details... 	0	0		316735	1/26/2011 8:20:19 AM
	Bill Acceptor	1/26/2011 8:12:53 AM	10208	Show Details... 	1	1	316706	316716	1/26/2011 8:13:42 AM
	Bill Acceptor	1/25/2011 4:51:59 PM	10208	Show Details... 	0	0		314873	1/25/2011 4:54:48 PM

 See "View Device Statistics" on page 366.

 See "Search for an Event Code" on page 362.

 See "View Event History Log" on page 361.


Search for an Event Code

To search for an event code, follow these steps:

- 1 In the **Monitoring System** menu, and click **Event History**. The Event History tab appears.

The screenshot shows the 'Event History' tab in a monitoring system. It features a search form titled 'Event History Records'. The form includes several input fields: 'Site' with a dropdown menu showing 'Auto Clean', 'Device' with a dropdown menu showing '--Show All--', 'Start Date' with a date picker showing '08/30/2012', 'Event Code' with a text input field, 'Component' with a dropdown menu showing '--Show All--', and 'End Date' with a date picker showing '08/30/2012'. Below these fields is a checkbox labeled 'Include cleared events.' and a green button with a magnifying glass icon for searching.

Figure 172. Event History Tab

- 2 In the **Site** box, select a site.
- 3 In the **Event Code** box, type an event code number.
- 4 Optional: Select parameters in any of the other fields.
- 5 Click the **Search History**  button.
The Events History record list appears for the event code and any additional parameters.
- 6 From the Code column, click on the Event Code link, and be directed to the ICS website Event Code directory.

This data helps to determine the failure rate of any single component. For example, at a bill dispenser, the system tracks how many bills were dispensed and counts each one as either a successful, impaired or failed attempt. If the device dispensed 6,000 bills, you can see how many were successful. The errors are segregated into system errors, user errors and informational alerts.

Event History

Event History Records

Site: Full Serve World
 Device: FLEX01 - POS
 Start Date: 1/3/2011
 Event Code:
 Component: Bill Acceptor
 End Date: 2/2/2011
 Include cleared events.

1 of 2
Total records 13, Showing 1 - 10.

Device	Component	Time	Code	Description	Total Attempts	Total Success	Transaction # Impaired	Trans Clear
FLEX01 - POS	Bill Acceptor	1/31/2011 10:20:26 AM	10208	Show Details...	0	0		3
	Bill Acceptor	1/27/2011 9:53:43 AM	10208	Show Details...	1	1	316926	3
	Bill Acceptor	1/26/2011 1:56:17 PM	10208	Show Details...	0	0		3
	Bill Acceptor	1/26/2011 10:12:00 AM	10208	Show Details...	0	0		3
	Bill Acceptor	1/26/2011 8:31:58 AM	10208	Show Details...	0	0		3
	Bill Acceptor	1/26/2011 8:27:50 AM	10208	Show Details...	0	0		3
	Bill Acceptor	1/26/2011 8:19:27 AM	10208	Show Details...	0	0		3

Figure 173. Event History

The following table describes each column in the **Event History** tab.

Table 44: Event History Descriptions (sheet 1 of 2)

Column	Description
Device	Name of the device.
Component	Name of the component.
Time	Reporting time of the event.
Code	Event code number. Click to see more details in the online database.
Description	Description of event. Click to see details.
Total Attempts	Number of times the component attempted to process the event.
Total Success	Number of times the event was processed successfully.

Table 44: Event History Descriptions (sheet 2 of 2)

Column	Description
Transaction # Impaired	If the event involved a transaction, this is the transaction number associated with the event when it was impaired.
Transaction # Cleared	If the event involved a transaction, this is the transaction number associated with the event when it was cleared.
Cleared Time	If the transaction was successfully cleared, this is the date and time that occurred.



See “View Event History Log” on page 361.



See “Search for an Event Code” on page 362.



See “About Device Statistics” on page 365.

About Device Statistics

Device Statistics

HELP - What can I do here?

Operations and Managers:

- Monitor the system by viewing the device statistics which summarizes each and every component inside every device at each site.
- Determine the success rate of any single component.
- Component transactions are marked as successful, impaired or failed attempts.
- Find trends to determine if a device needs servicing.
- Errors are segregated into system errors, user errors, and information alerts.



See “View Device Statistics” on page 366.



See “Device Statistics Descriptions” on page 367.


View Device Statistics

To view Site Device Statistics, follow these steps:

- 1 From the **Monitoring System** menu, click **Device Statistics**. The **Device Statistics** tab appears.



Figure 174. Device Statistics

- 2 In the **Site** box, select a site.
- 3 In the **Device** box, select a device or select **All** to see all devices.
- 4 In the **Component** box, select a component or select **All** to see all components.
- 5 In the **From Date** and **To Date** boxes, select a date range.
- 6 Click the **View Report**  button.
The device statistics appear.

For example, at a bill dispenser, the system tracks how many bills were dispensed and counts each one as either a successful, impaired or failed attempt. If the device dispensed 6,000 bills, you can see how many were successful. The errors are segregated into system errors, user errors and informational alerts.

From the **Monitoring System** menu, you can view the **Site Device Statistics** report.

Auto Pros Express		1349 Jacobsburg Road Wind Gap, PA 18091						(610) 81		
SITE DEVICE STATISTICS										
Requested By: Wendy On Thursday, October 02, 2014 3:00:52 PM			Site: Auto Pro's Xpress			Page				
V 2.3.0.6			Device: All			Component: All				
Date Range From 9/1/2014 To 10/2/2014										
Group	Device	Transaction(s)						Attempted Qty	Successful Qty	Code
		Total	Good	Sys Impaired	User Impaired	Sys & User Impaired	Good %			
2014		9,943	9,847	9	87	0	99.03 %	9,943	9,943	
January		2,807	2,874	0	13	0	99.55 %	2,807	2,807	
February		2,397	2,343	2	52	0	97.75 %	2,397	2,397	
March		1,434	1,417	7	10	0	98.81 %	1,434	1,434	
April		130	130	0	0	0	100.00 %	130	130	
May		2,795	2,793	0	2	0	99.93 %	2,795	2,795	
June		135	131	0	4	0	97.04 %	135	135	
July		108	104	0	4	0	96.30 %	108	108	
August		57	55	0	2	0	96.49 %	57	57	
8/1/2014		1	1	0	0	0	100.00 %	1	1	
8/4/2014		0	0	0	0	0	0.00 %	0	0	
8/5/2014		12	12	0	0	0	100.00 %	12	12	
8/6/2014		0	0	0	0	0	0.00 %	0	0	
8/7/2014		8	6	0	2	0	75.00 %	8	8	
8/8/2014		4	4	0	0	0	100.00 %	4	4	
8/10/2014		0	0	0	0	0	0.00 %	0	0	
8/11/2014		2	2	0	0	0	100.00 %	2	2	
8/12/2014		12	12	0	0	0	100.00 %	12	12	
8/13/2014		9	9	0	0	0	100.00 %	9	9	
8/14/2014		6	6	0	0	0	100.00 %	6	6	
8/15/2014		3	3	0	0	0	100.00 %	3	3	
Total		9,943	9,847	9	87	0	99.03 %	9,943	9,943	

Figure 175. Site Device Statistics Example



See "View Device Statistics" on page 366.



See "Device Statistics Descriptions" on page 367.

Device Statistics Descriptions

The following table describes each of the columns in the **Device Statistics** tab.

Table 45: Device Statistics Descriptions (sheet 1 of 2)

Column	Description
Group	The device group.
Device	Name of the device.
Transaction(s)	
Total	Total Transactions.
Good	Number of successful transactions for the component.
Sys Impaired	Number of system impaired transactions for the component.

Table 45: Device Statistics Descriptions (sheet 2 of 2)

Column	Description
User Impaired	Number of user impaired transactions for the component.
Sys & User Impaired	Combined total of system and user impaired transactions for the component.
Good %	Percentage of good transactions out of all transactions.
Attempted Quantity	Attempted quantity of transactions.
Successful Quantity	Successful quantity of transactions.
Code	Most reported error codes.



See “View Device Statistics” on page 366.



See “About Device Statistics” on page 365.

About Version History

Version History Report

HELP - What can I do here?

Managers and ICS Technical Support:

- Version history includes a historical upgrade schedule for each hardware and software component at your site.
- Supports ICS technicians with troubleshooting issues.



See “View Version History” on page 369.



See “Version History Descriptions” on page 370.

View Version History

The **Version History** includes a historical upgrade schedule for each hardware and software component at your site. From the **Monitoring System** menu, you can view the **Version History**. Follow these steps:

- 1 From the **Monitoring System** menu, and click **Version History**.
The Version History tab appears.

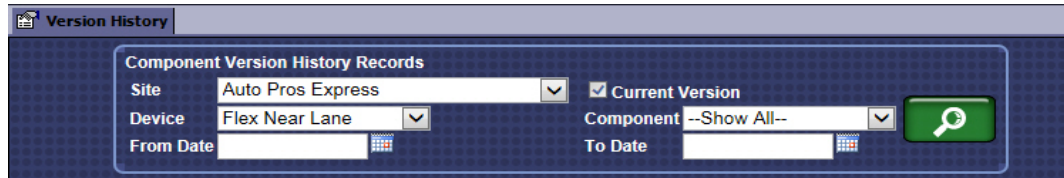

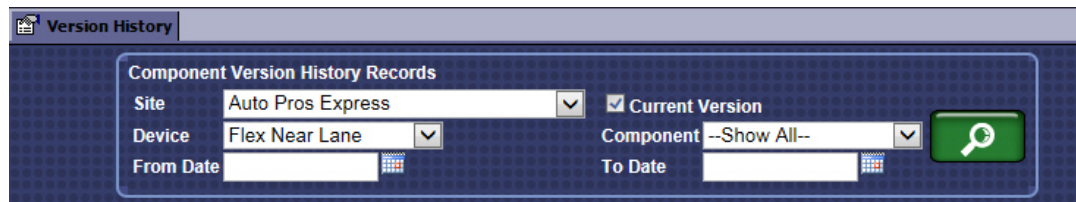


Figure 176. Version History

- 2 In the **Site** box, select a site.
- 3 Click to check the box for Current Version listing only.
- 4 In the **Device** box, select a device or select **--Show All--** to see all devices.
- 5 In the **Component** box, select a component or select **--Show All--** to see all components.
- 6 In the **From Date** and **To Date** boxes, select a date range.
- 7 Click the **Search**  button.
The Version History appears.



Component Name	Component ID	Version	Date Time	Dependent Component
BarcodeScanner	133	: FW-UNI121-00.	7/17/2012 9:19:14 AM	
Bill Acceptor	185	3.54	6/3/2014 11:45:34 AM	
Cage	19	4.0.1.12	6/12/2014 5:49:57 PM	CageCommunication 1.0.0.30
CageCommunication	26	1.0.0.30	6/12/2014 5:49:57 PM	
Coin Acceptor	139	X30	6/14/2012 11:44:34 AM	
CoreGatewayServer	12	2.3.0.13	8/15/2014 2:13:34 PM	ICS.Core 1.3.0.26
DeviceInt	9	2.4.8.24	5/2/2014 4:49:53 PM	
GiftCardDispenser	135	TTCE_D2000_V2.0	2/29/2012 8:12:40 AM	
GiftCardDispenserDll	134	D2000DLL_V2.3	2/29/2012 8:12:39 AM	
ICS.Core	11	1.3.0.26	8/15/2014 2:13:34 PM	
Replication	15	4.2.1.3	12/11/2013 10:45:02 AM	ICS.Core 1.2.1.5
Serial IO Board	228	ICS SIO: V01-4	5/7/2013 12:56:14 PM	
Touch	8	5.2.19.15	7/30/2014 1:34:16 PM	

Figure 177. Version History

See “Version History Descriptions” on page 370.



See “About Version History” on page 368.

Version History Descriptions

The following table describes each of the columns in the **Version History** table.

Table 46: Version History

Column	Description
Component Name	Name of the component.
Component ID	Number. Component ID.
Version	Version of the software associated with the component.
Date Time	Date and time the of the software.
Dependent Component	Name of dependent sub-component, usually software.

The **Version History** includes a historical upgrade schedule for each hardware and software component at your site. For example, you can see each date a firmware version changed. After a firmware upgrade, you can see if the errors for that component went away. The version history also helps ICS technicians troubleshoot issues. Since each site has numerous components, and each component must be synchronized with all the rest, a component that appears to be failing may simply need an upgrade to correct the issue.



See “View Version History” on page 369.



See “About Version History” on page 368.

CHAPTER 9:

CONFIGURATION

The commands in the **Configuration** menu are designed for someone who is a high-level decision maker since these commands often affect all sites within the organizational layout.

The **Configuration** menu includes:

- **Goods and Services**
 - Club Services (Available at Corporate Only)
 - Sales Items
 - Packages
 - Wash Book (Available at Corporate Only)
 - Profiles
 - POS Profiles
 - Promotions (Setup at Corporate Only)
- **Frequency Promotions**
 - Promo Setup (Available at Corporate Only)
 - Promo Receipt Text (Available at Corporate Only)
- **Alerts**
- **Export System Data**
- **Accounting Interface**
 - Manage
 - Import Accounts (Available at Corporate Only)
 - Payment Account (Available at Corporate Only)
 - System Items (Available at Corporate Only)
- **Commissions**

- Positions
- Eligibility Rules
- Schedules

Goods and Services Menu Step By Step Instructions:



See “Edit Sales Item” on page 408.



See “Delete Sales Item” on page 409.



See “Add a Profile with a Base Wash and Extra Service” on page 435.



See “Edit a Profile” on page 440.



See “About Frequency Promotion Packages” on page 340.



See “Add a Club Service” on page 376.



See “Edit a Club Service” on page 382.

Frequency Promotions Step-By-Step Instructions:



See “About Frequency Promotion Packages” on page 340.



See “Add Promo Receipt Text” on page 389.



See “About Alerts” on page 392.



See “Test Alerts” on page 394.

Accounting Interface Step-By-Step Instructions:



See “About Accounting Interface Manage” on page 398.



See “About Payment Account” on page 401.



See “About System Items” on page 403.

Configuration Menu FAQs

Table 47: Configuration Menu FAQs

Question	Answer
Who should look at the Configuration menu?	<p>The commands in the Configuration menu are designed for someone who is a high-level decision maker since these commands often affect all sites within the organizational layout. For example, you can change the wash club services rules, and then transfer those parameters to every participating site.</p> <p>There are three main selections in the Configuration menu. Each selection is focused on a specific activity, such as setting up sales items or club services. Once you have these items set up, you will not need to change the settings very often and will not find yourself visiting this menu group as frequently as the others.</p>
Can I enter new PLUs into the system?	<p>PLUs are managed in the Goods and Services menu group. A product-lookup or PLU is the unique number assigned to a service or item you can sell to a customer. For example, your most basic wash selection might be PLU 1. You can add, edit and delete PLUs. You can set up a 3, 4 or 5-digit PLU coupon code. You can also assign controller services to PLUs. Also, you can create new language settings for a PLU. For example, PLU 1 might be named Exterior Wash for \$5.66 with no extra services. For that PLU, you can instruct the Auto Sentry Flex to display the words “Exterior Wash” in English or its translation in Spanish, French or German. The PLU might be tied to outputs services 1 through 32 on the WBC tunnel controller. You can manage all the information for that PLU on one screen, and then apply those settings to all of your sites at one time.</p>
Can I modify club services for all of my sites?	<p>Clubs are managed in the Club Services from the Configuration Goods and Services menu group. For each club, you can assign club pricing, a billing day, a duration, a grace period and redemption rules. The changes you make to one club can be applied to all participating sites.</p>
When will I receive an alert from the system?	<p>The system can send alerts for almost any contingency it detects, whether your bill dispenser is jammed or replication stopped running at a site. The system will email an alert to each address you set up. You can subscribe to all alerts, general categories of alerts or specific alerts for a particular component.</p>
Will the system interface with my accounting software?	<p><i>Quickbooks, Peachtree, Alere, DataProf and MAS-90</i> accounting software are supported. And import function lets you gather data from your accounting package, and then assign predefined <i>WashConnect®</i> account types to the imported data.</p>



See “Configuration” on page 295.

Managing Clubs

Club Services are managed from **Goods and Services** on the **Configuration** menu from Corporate login.

A wash club typically offers individual customers unlimited washes for a flat monthly fee. You can sell the wash club membership at the Auto Sentry Flex. Customers must use a credit card to purchase their club memberships because the membership fees are billed to a credit card on a recurring basis. Club members are identified with an RFID tag adhered on the inside of the vehicle windshield. The vehicle is identified by the system with the RFID tags preceding pound (#) sign and RFID number. Therefore, the club membership is limited to the vehicle in which the RFID tag is located. One customer can have multiple vehicles join clubs. Each vehicle is billed separately.



See “Clubs Menu” on page 87.

Managing Fleets

Fleets are managed in the Fleet menu group. Fleets are typically designed for corporate customers with a fleet of vehicles. A fleet customer can add as many vehicles as necessary to the fleet account. Fleets can have a monthly invoice can be sent to customer. The vehicle is also identified with an RFID tag or a customer card. A customer card is a magnetic-stripe card that is distinguished in the system with a percentage (%) symbol as apposed to the RFID numbers that begin with a pound (#) sign. Once the system identifies the fleet customer, the Auto Sentry Flex presents the applicable wash selection profile based on the customer or vehicle. Fleet accounts typically limit the wash menu to the most basic wash and can set up a Profile for the customized wash menu.



See “About the Fleet Menu” on page 127.

Goods and Services

From the Goods and Services menu, you can manage Club Services, Sales Items, Packages, Wash Books, Profiles, POS Profiles, and Promotions.



See “About Club Services” on page 299.



See “Add Sales Item” on page 393.



See "About Packages" on page 335.



See "Add Base Wash Sales Item for Wash Book offering" on page 341.



See "About Profiles" on page 346.



See "About POS Profiles" on page 361.



See "About Sale Promotions" on page 363.

About Club Services

Club Service










HELP - What can I do here?

Managers:

- **This is step one in setting up a new wash club:**
 - **Type Name of Wash Club**
 - **Enter Price of Wash Club**
 - For Example, set up three different unlimited wash clubs:
 - Basic Club \$15
 - Deluxe Club \$20
 - Premium Club \$25
 - **Steps for a new wash club: Step Two, see Sales Items to set up wash discounts. Step Three, see Packages. Steps Four and Five, see Profiles.**
 - **Terminate a wash club.**
 - **The club member's credit card will automatically be charged every month for unlimited wash clubs.**
- **Tip: Even out Cash Flow with recurring monthly Wash Club revenue.**



See "Add Sales Item" on page 393.

-  See *"Edit a Club Service"* on page 382.
-  See *"Terminate a Club Service"* on page 383.
-  See *"Reorder Club Service Columns in Ascending/Descending Order"* on page 384.
-  See *"Filter the Club Service List"* on page 385.
-  See *"Filter the Club Service List"* on page 385.
-  See *"Club Rules Examples"* on page 388.
-  See *"Wash Club Customer Experience"* on page 390.
-  See *"Packages"* on page 418.
-  See *"Add a Profile with a Base Wash and Extra Service"* on page 435.

Add a Club Service

This is step one in setting up a club to sell.

NOTE: This command will only appear for users who login at the Corporate level.

To add a club service, follow these steps:

- 1** At WashConnect® Login screen, click to select **Corporate**, and then Login.
- 2** From the **Configuration** menu, click **Goods & Services**, and then click **Club Services**.
The **Club Services** tab appears including a list of all clubs.



PLU #	Name	Price	Video File	BMP File
901	Infinity Club	\$19.95		
902	Econo Club	\$14.15		
903	Xreme Club	\$29.95		
904	The Super Club	\$19.99		SupClu
908	The Super Platte Num	\$39.99		SplatCl
913	60 W Class	\$0.00		
914	230 Z Class	\$0.00		
915	70 A Class	\$0.00		
916	32 B Class	\$0.00		
917	36 Citadis 202	\$0.00		

Figure 178. Club Services Tab

- Click the **Add**  button.
The **Club Service** dialog box appears.

NOTE: The Club Profit Center is automatically acquired. After you click the Save button, a PLU number will automatically be assigned between 900 and 999, and this number cannot be changed.

Club Service

Description

Profit Center	Club		
PLU #		Description 1	<input style="width: 80%;" type="text"/>
*Price	<input style="width: 80%;" type="text"/>	Description 2	<input style="width: 80%;" type="text"/>
*Name	<input style="width: 80%;" type="text"/>	Account ID	Select Account
Taxable	Never <input type="checkbox"/> <input checked="" type="checkbox"/>	Floor Price	<input style="width: 80%;" type="text"/>
Autobill	<input checked="" type="checkbox"/>		

Commission

Greeter Amount Percentage

Eligible for Commissions

Secondary Language Description

Name	<input style="width: 90%;" type="text"/>	Description 1	<input style="width: 80%;" type="text"/>
		Description 2	<input style="width: 80%;" type="text"/>

Media Information

Video File	<input style="width: 95%;" type="text"/>	BMP File	<input style="width: 80%;" type="text"/>
BMP Color	None <input type="checkbox"/> <input checked="" type="checkbox"/>	Fore Color	<input style="width: 80%;" type="text"/>

Bonus Points

Points Awarded	<input style="width: 90%;" type="text"/>	Points To Redeem	<input style="width: 80%;" type="text"/>
----------------	--	------------------	--

Club Rule

Duration	1 <input type="text"/>	month(s)	0 is Unlimited	Wash
Billing Day	FirstDay <input type="text"/>		Per Day	0 <input type="text"/>
Grace Period	0 <input type="text"/>	day(s)	Per Week	0 <input type="text"/>
			Per Month	0 <input type="text"/>
			Per Quarter	0 <input type="text"/>
			Per Six Month	0 <input type="text"/>
			Per Year	0 <input type="text"/>

Figure 179. Add Club Service Dialog Box

To save the club service quickly, complete the following two required fields: **Name** and **Price**.

- 4 In **Price**, type a price for the club. If tax is applicable, the tax amount will be calculated and added to this Price.
- 5 In **Name**, type a wash club name.

- 6 In **Description 1 & 2**, type a description for the wash club.
- 7 In the **Account ID**, click to select the **Select Account** button. The Accounts dialog box appears.
 - Click to select the **Apply account to all sites** box or select an individual site, and then select the Account from the drop-down list.
 - Click **OK**.
- 8 In the **Taxable** drop-down box, select one of the following: Always, Never, Conditional, or Force.
- 9 Prorating Clubs must be able to apply a Floor Price. There is a setting to enable Floor Price. In the **Floor Price**, type a minimum price to be applied as the prorated club purchase price. The Floor Price is the lowest amount that the customer would be charged in the initial month when purchasing a prorated club membership.

NOTE: The prorated amount can be more than the floor price, but not less.



See “Global> GlobalConfiguration > CentralLogServer” on page 515.

- 10 In **Autobill**, click to remove the Autobill check mark if not allowing this club to autobill. Click to mark the Autobill checkbox if allowing this club to autobill.
- 11 In Commission for Greeter, click to select **Amount** or **Percentage**.
 - If Percentage, type numeric percentage.
- 12 In **Secondary Language Description**

This is where you can create secondary language descriptions to appear on the button for an unattended terminal.

 - In **Name**, type the correct sales item name in a secondary language.
 - In **Description 1**, type the correct sales item descriptions in one secondary language.
 - In **Description 2**, type the correct sales item descriptions in one secondary language.
- 13 In **Media Information**, you can add custom videos to be played and custom artwork (bitmaps) for the various buttons that are displayed. In both cases, there are separate videos for English or a second language, just as there are bitmaps for English or a second language. To make these videos and bitmaps accessible for use, they must be placed within the proper folder locations. The following example specifies the required locations for the custom Video File and custom Button (bitmaps):

To play an English **video** named polish.avi it must exist within the \ICS\AVIFiles\Primary\ directory. In Video File, type the file name of the video as polish.

To play a second language **video** named polish.avi it must exist within the \ICS\AVIFiles\Secondary\ directory. In Video File, type the file name of the video as polish.

To display an English **custom button** named polishX.bmp it must exist within the \ICS\BMPFiles\Primary\Custom directory. In BMP File, type the file name as polish.

To display a **second language custom button** named polishX.bmp it must exist within the \ICS\BMPFiles\Secondary\Custom directory. In BMP File, type the file name as polish.

NOTE: When setting up the Media Information in *WashConnect®*, the BMP file names do not include a suffix (e.g., X, L, M or S) or a file extension.

As soon as the videos are saved in the *WashConnect®* directory, they are automatically enabled for any PLU that uses the custom button with the same name.

- In the **BMP File** box, type the file name of the custom button. Do not type the size suffix (e.g., S, M, L or X). Do not type the .bmp file extension. The following BMP example specifies the difference between Primary and Secondary location:

- Saved primary language custom button bitmap files here:
 \ICS\BMPFiles\Primary\Custom
- Saved secondary language custom button bitmap files here:
 \ICS\BMPFiles\Secondary\Custom

For more Custom Button Graphic information, see the Auto Sentry/Touch 'N Clean User Manual or contact Technical Support if you would like the marketing department at ICS to create custom graphics.

NOTE: If selecting a custom graphic .bmp file, the color selections are unnecessary.

- In **BMP Color** drop-down box, select a color for the standard button.
 - In **Fore Color**, select a color from the color swatch chart for the standard button.
- 14** In **Bonus Points** section, set the Bonus Points parameters.
- In **Points Awarded**, set the customer tracking Points to award customer if they purchase this sales item.
 - In **Points to Redeem**, set the customer tracking Points to Redeem this sales item for free.

NOTE: Bonus Points are available for Express, Inbay Auto, and Full Service POS only. This feature does not apply at the Auto Sentry.

15 In **Club Rule** section, set the following club billing parameters:

- In **Duration**, select a number representing how many months to bill the club. For example, an unlimited monthly club will have the duration be 1 month. Type 6 for a prepaid 6 month club which can even be purchased as a gift and then after the 6 months can renew month to month.
- In **Billing Day** drop-down box, select First Day or Sign Up Day
- In **Grace Period**, select a number representing an amount of days that the customer can receive unlimited car washes after a credit card declines. This is the grace period to stay in good standing with your customers until they can work things out with their bank or provide another credit card.
- 0 is Unlimited. Wash.
 - **Unlimited Clubs.** If you type zero (0) in each of the **Wash per** boxes, then the club is not limited. Customers may redeem unlimited washes for the given **Duration**.
 - **Single-Rule Clubs.** Establishing a single rule is the simplest club scenario. For example, in **Wash per Month**, you can type 31. This establishes a monthly limit for club customers. Other limits are not enforced.
 - **Multi-Rule Clubs.** If you want to establish multiple rules (e.g., day, week and month), follow the general guideline of ascending order (e.g., week is greater than day, month is greater than week, quarter is greater than month, etc.).

0 is Unlimited	Wash
Per Day	1
Per Week	4
Per Month	15
Per Quarter	0
Per Six Month	0
Per Year	0

Figure 180. Multi-Rule Clubs

NOTE: The ascending order guideline is not required by the software. Any combination of positive integer values and zeros are valid, whether they are in ascending order or not.

16 Click the **Save** button.
The club is added to the list.

NOTE: The Club Service PLUs are between 900 and 999. The Club Service PLU number is automatically generated for the club. You cannot change the PLU number.



For Step Two in setting up a club, setup up a discount PLU for the wash price, See “Add Sales Item” on page 393.



See “Edit a Club Service” on page 382.



See “Terminate a Club Service” on page 383.



See “Reorder Club Service Columns in Ascending/Descending Order” on page 384.



See “Filter the Club Service List” on page 385.




See “Club Rules Examples” on page 388.



See “Wash Club Customer Experience” on page 390.






Edit a Club Service

To edit a club service, follow these steps:

- 1** From the **Configuration** menu, select **Goods and Services**, and then select **Club Services**.
The **Club Services** tab appears including a list of all clubs.
- 2** Click to select a club service from the list.
The club service is highlighted.
- 3** Click the **Edit**  button.
The **Club Service** dialog box appears.
- 4** Make your changes, and then click **Save**.
The club service is saved.



See “Add Sales Item” on page 316.

-  See *“Terminate a Club Service”* on page 383.
-  See *“Reorder Club Service Columns in Ascending/Descending Order”* on page 384.
-  See *“Filter the Club Service List”* on page 385.
-  See *“Club Rules Examples”* on page 388.
-  See *“Wash Club Customer Experience”* on page 390.

Terminate a Club Service

NOTE: Club must have no members before you can terminate. Move Members to another club before terminating a club.

To terminate a club service, follow these steps:








- 1** From the **Configuration** menu, select **Goods and Services**, and then click **Club Services**.
The **Club Services** tab appears.
- 2** Select a Club Service from the list, and then click the **Delete**  button.
A Confirm warning message appears.



Figure 181. Warning Message

- 3** Click **Yes**.
The Club Service deleted successfully message appears.
- 4** Click **OK**.
The club is terminated.

-  See *“Add Sales Item”* on page 316.
-  See *“Edit a Club Service”* on page 382.

-  See "Reorder Club Service Columns in Ascending/Descending Order" on page 384.
-  See "Filter the Club Service List" on page 385.
-  See "Club Rules Examples" on page 388.
-  See "Wash Club Customer Experience" on page 390.

Reorder Club Service Columns in Ascending/Descending Order

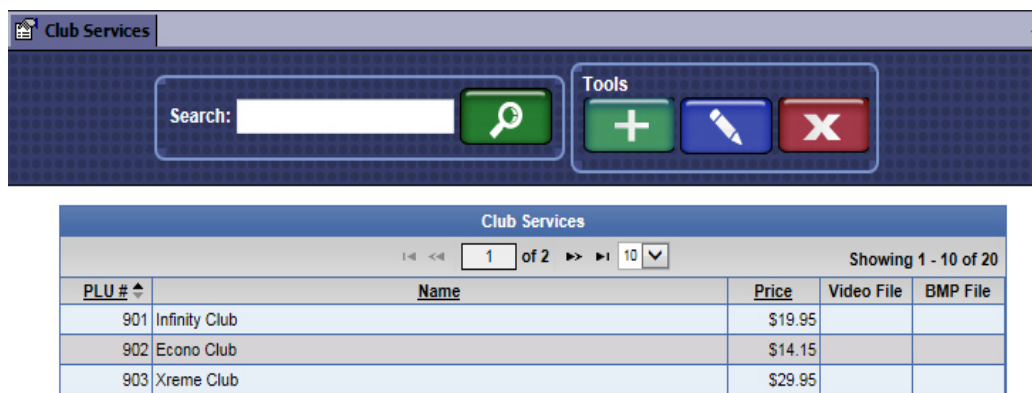



Figure 182. Club Services Columns

To reorder Club Service columns, follow these steps:

- 1 Select **Configuration** menu, select **Goods and Services**, and then click **Club Services**. The **Club Services** tab appears.
- 2 Sort the list in ascending/descending order:
 - Click to select a Column header for ascending order, and click again for descending order.
- 3 Reorder the columns in the list.
 - Click to select a column heading, and then drag the column to the new location in the list.

 See "Add Sales Item" on page 316.

 See "Edit a Club Service" on page 382.

 See "Terminate a Club Service" on page 383.



See “Filter the Club Service List” on page 385.



See “Club Rules Examples” on page 388.



See “Wash Club Customer Experience” on page 390.

Filter the Club Service List

The **Search** can apply a filter to the **Club Service** list to locate a club service. You can filter the report on the PLU and Name fields:

Type a letter or first few letters or a word. For example, filtering with “B” will return clubs whose names begin with “B,” and/ or clubs who have “B” anywhere in the field.

The **Clubs Services** dialog box describes a club service and is similar to the **Sales Item** dialog box. A **Sale Item** is anything that can be sold, whether it is a physical item (e.g., a scented tree) or a description of a service. (e.g., the Unlimited Wash Club). However, all the club services are not set up in the Sales Items dialog box but in the Club Services dialog box. The Club Services automatically applies a PLU from 900 to 999.



See “Add Sales Item” on page 393.



See “Edit a Club Service” on page 382.



See “Terminate a Club Service” on page 383.



See “Reorder Club Service Columns in Ascending/Descending Order” on page 384.



See “Club Rules Examples” on page 388.



See “Wash Club Customer Experience” on page 390.

Club Service Descriptions

The following table describes a **Club Service** dialog box.



See "Add Sales Item" on page 316.

Table 48: Club Service Descriptions

Field	Parameter	Description
Club Service Description		
Profit Center	Informational	Defines various profit centers or income sources for labor tracking income. You cannot change this selection.
PLU	Informational	Product Lookup. Unique numbers used by the ICS system to identify club inventory items. These are assigned automatically, starting at 900 and continuing sequentially whenever a new one is created. You cannot change this selection.
Price	Integer. Max. length is 8.	Price of the service or item.
Name	Alphanumeric. Max. length is 52.	This is the name of the service or item. It is for your reference, and is not displayed to customer.
Description 1	Alphanumeric. Max. length is 50.	Club service description for reporting.
Description 2	Alphanumeric. Max. length is 50.	Club service description for reporting.
Account ID	Integer. Max. 16	Unique Identifier. Account number assigned to PLU# created in a customer supplied accounting package. See "Import Chart of Accounts" on page 507.
Taxable	List	Select Always, Never, Conditional or Force. Always means the service is always taxed. Never means the service is never taxed. Conditional means the service is taxed only if a Forced service is also included in the transaction. Forced means the service is taxed and also forces its tax rate onto any Conditional services included with the transaction.
Floor Price		Minimum price to charge customers if pro-rating club customers initial wash club purchase price.
Taxable	List	Always, Never, Conditional, Force
Autobill	Checkbox	The Autobill check box is to enable or disable autobilling for club members. Check mark enables autobilling for all club members. Remove the check mark to disable autobilling for all club members.
Commission		
Commission Greeter	Numeric	Amount or Percentage of Sales.
Secondary Language Description		

Table 48: Club Service Descriptions

Field	Parameter	Description
Name	Alphanumeric. Max. length is 52.	This is the name of the secondary Language: English, French, German or Spanish. It is for your reference, and is not displayed to the customer.
Description 1	Alphanumeric. Max. length is 50.	Description 1 appears on the button's first line on the touch-screen.
Description 2	Alphanumeric. Max. length is 50.	Description 2 appears on the button's second line on the touch-screen.
Media Information		
Video File	Alphanumeric. Max. length is 50.	Name of video file to load for service. Video file will play on screen. See "About Audio Visual Specifications" on page 403.
BMP Color	List	Background color selection for the sales item or club service button.
BMP File	Alphanumeric. Max. length is 50.	Name of graphic bitmap (.bmp) file to load for button. File will be used on screen.
Fore Color	List	Foreground text color for the sales item or club service button.
Bonus Points		
Points Awarded		Bonus points accumulate from a Sales Item assigned Bonus Points (ONLY for Express, InBay and Full Service washes) and are awarded to customer who purchases sales item with bonus points at a Touch POS terminal.
Points to Redeem		Bonus points can be redeemed from a Sales Item assigned Bonus Points (ONLY for Express, InBay and Full Service washes) against a customer at a Touch POS terminal.
Club Rule Options		
Duration	Numeric	In months. Time period between recurring billing cycles for the club members. Examples of durations are as follows: <ul style="list-style-type: none"> ▪ 1 (monthly billing) ▪ 2 (billing every two months) ▪ 3 (quarterly billing) ▪ 6 (billing every six months) ▪ 12 (annual billing)
Billing Day	List	Automatic billing date. Select FirstDay or SignUp Day . FirstDay is the first of the month. SignUpDay is the club customer sign-up date. Customers will be automatically billed on that day (according to the cycle you select in the Duration list).

Table 48: Club Service Descriptions

Field	Parameter	Description
Grace Period	Numeric	The number of days for which the customer will be allowed to receive club washes after the club expires (e.g., if credit card fails to renew). Grace Period is used as a courtesy to customers whose credit cards fail to clear during the automatic billing process. A Grace Period gives the customer time to provide a new credit card or correct a billing error.
Wash per Day	Numeric List	Maximum number of washes a club customer can redeem in one day.
Wash per Week	Numeric List	Maximum number of washes a club customer can redeem in one week.
Wash per Month	Numeric List	Maximum number of washes a club customer can redeem in one month.
Wash per Quarter	Numeric List	Maximum number of washes a club customer can redeem in one quarter (i.e., within three months).
Wash per Six Month	Numeric List	Maximum number of washes a club customer can redeem in six months (i.e., semi-annual).
Wash per Year	Numeric List	Maximum number of washes a club customer can redeem in one year.



See “Edit a Club Service” on page 382.



See “Terminate a Club Service” on page 383.



See “Reorder Club Service Columns in Ascending/Descending Order” on page 384.



See “Club Rules Examples” on page 388.



See “Wash Club Customer Experience” on page 390.



See “Club Service Descriptions” on page 386.

Club Rules Examples

The following example is club rules specifying 365-washes per year.

- Wash per Day = 0
- Wash per Week = 0
- Wash per Month = 0
- Wash per Quarter = 0

- Wash per 6 Months = 0
- Wash per Year = 365

The following example is club rules specifying 31-washes per month, 365-washes per year:

- Wash per Day = 0
- Wash per Week = 0
- Wash per Month = 31
- Wash per Quarter = 0
- Wash per 6 Months = 0
- Wash per Year = 365

In the previous example, customers may redeem up to 31 washes per month or 365 per year. No limits are imposed for 3- and 6-month intervals. However, if a customer attempted to redeem more than 365 washes in a 3- or 6-month period, he would be denied because it is impossible due to the 31 per month imposed limit.

The following example of club rules specifying seven-washes per week and 31 washes per month:

- Wash per Day = 0
- Wash per Week = 7
- Wash per Month = 31
- Wash per Quarter = 0
- Wash per 6 Months = 0
- Wash per Year = 0

In the previous example, the customer can redeem no more than seven washes per week and no more than 31 washes per month. The wash per day limit is assigned zero, meaning there is no explicit maximum number of washes per day. It is implicitly limited to seven as a consequence of the wash per week limit of seven.



See “Edit a Club Service” on page 382.



See “Terminate a Club Service” on page 383.



See “Reorder Club Service Columns in Ascending/Descending Order” on page 384.



See “Club Rules Examples” on page 388.



See “Wash Club Customer Experience” on page 390.



See “Club Service Descriptions” on page 386.

Wash Club Example

When logged into a corporate location, you can create your entire wash club. This is an example of how to set up your wash club step by step from beginning to end.

- 1 Club Service** - Setup the name of two wash club offerings.
- 2 Sales Items** - Setup Discounts for the free wash.
- 3 Packages** - Create a package for the wash and then the free wash as the customer already paid for the wash by purchasing the wash club.
- 4 Profile** - Create two profiles. Each profile includes the base wash, extras and upsells for each wash club setting up the rules for the club.
- 5 Profile** - Create a Profile for all clubs that applies to Club Sales for the complete list of Wash Clubs to sell.



See “Edit a Club Service” on page 382.



See “Terminate a Club Service” on page 383.



See “Reorder Club Service Columns in Ascending/Descending Order” on page 384.



See “Club Rules Examples” on page 388.



See “Wash Club Customer Experience” on page 390.



See “Club Service Descriptions” on page 386.

Wash Club Customer Experience

The Auto Sentry is fast and easy for the customer when setting up a Club Membership. The Customer Experience is important for word of mouth advertisement.

- 1 When a customer pulls up to the Auto Sentry flex, they can easily select a short video explaining how the unlimited club works.
- 2 If customer is interested, the customer can touch the Join Wash Club button if set up in passive selling, and then the club menu appears.
- 3 From the Join Wash Club menu, the customer can touch a button to select a club: Deluxe Wash club for \$15 per month and Supreme Wash club for \$25 per month, for example.
- 4 The customer is prompted to swipe their credit card, enter their zip code for security, and receive a speedy credit card approval. This card will be charged every month until customer cancels their membership.
- 5 Customer must listen to and accept the terms of the club agreement.
- 6 After receiving the first wash as a club member, the customer presents their receipt to the attendant who applies the RFID tag to the windshield. Tags are secure and become inoperable if tampered with or removed from the windshield.
- 7 The wash club process is now complete for this vehicle.
- 8 If you have more than one location, the customer's data automatically transfers to multiple sites within minutes.
- 9 Unlimited club members may return to any of your car wash sites as many times as they would like for the month without being charged again for the selected wash club services.
- 10 Every time the club member's vehicle pulls up to the Auto Sentry flex, the RFID tag reader verifies the tag number and the system automatically adjusts to the member's club buttons, and if applicable, offering the club member extra services for additional fees.



See "Add a Club Service" on page 376.



See "Edit a Club Service" on page 382.









See "Terminate a Club Service" on page 383.



See "Reorder Club Service Columns in Ascending/Descending Order" on page 384.



See "Filter the Club Service List" on page 385.

-  See "Edit a Club Service" on page 382.
-  See "Terminate a Club Service" on page 383.
-  See "Reorder Club Service Columns in Ascending/Descending Order" on page 384.
-  See "Club Rules Examples" on page 388.
-  See "Wash Club Customer Experience" on page 390.
-  See "Club Service Descriptions" on page 386.

About Sales Items



Sales Items

HELP - What can I do here?

Managers:

- Assign a PLU (Product Look Up) which is the unique number assigned to a service or item you sell to a customer.
- PLUs and Profiles (a specific collection of PLUs) work together to give customers their wash Main choices.
- Update PLUs if you:
 - Change services based on weather.
 - Offer new promotion / discontinue old.
 - Change pricing.
 - Add or remove equipment in tunnel.

WARNING: The following instructions are for WashConnect® only sites. If Tunnel Master software is part of your system, see Sales Items in the Tunnel Master user manual.

-  See "Sort Sales Item List" on page 407.
-  See "Sales Item Search" on page 407.



See “Edit Sales Item” on page 408.



See “Delete Sales Item” on page 409.



See “About Sales Item PLUs and Profiles” on page 410.



See “Sales Item Descriptions” on page 414.



See “Add Sales Item” on page 316.



See “Edit a Club Service” on page 382.



See “Flex / Retail Standard Screen” on page 411.



See “About Extra Advertise Video” on page 407.



See “About Audio Visual Specifications” on page 403.

Add Sales Item

To add a sales item, follow these steps:

- 1 From the **Configuration** menu, select **Goods & Services**, and then click **Sales Items**.
The **Sales Items** tab appears.

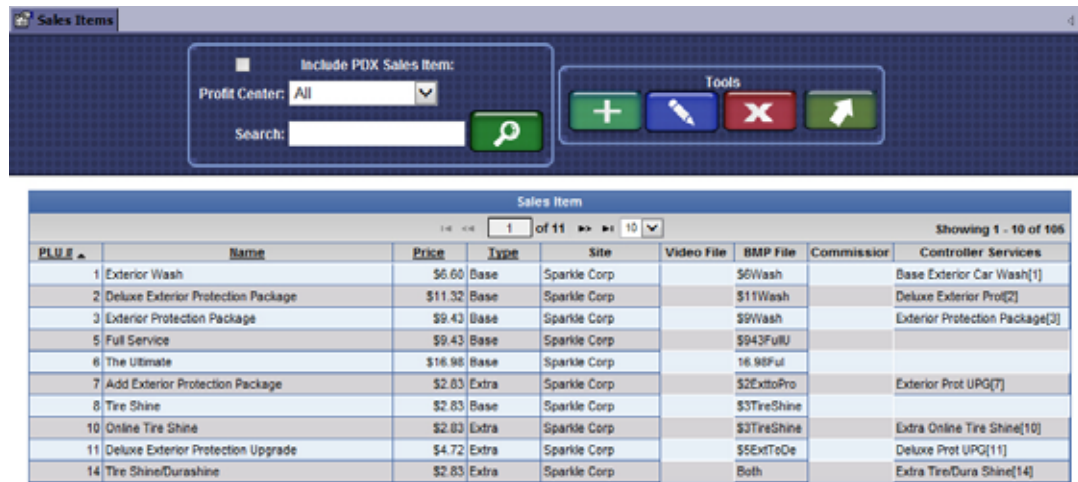


Figure 183. Sales Items tab

2 In the **Profit Center** box, select a profit center:



To set up Profit Centers that appear in the Profit Center list, See “Add Profit Center and description” on page 547.

- All
- Book
- C Store
- Club
- Coupon Books
- Detail
- Express
- Full Service
- Fund Raiser
- Gas Pump
- Gift Card
- Hand Services
- Hand Wash
- Impulse
- InBay Auto
- Lube

- Maintenance
- Propane
- Self Serve
- Vacuum

NOTE: A Profit Center is the income source created for income and labor tracking purposes. Figure 183, “Sales Items tab,” is an example.

- 3** Click the **Add**  button.
The **Sales Item** dialog box appears.

Sales Item

Description

Profit Center	Express	Description 1	
*PLU #		Description 2	
*Price	0	Barcode	
*Name		Account ID	--None--
*Type	Base	Searchable	<input checked="" type="checkbox"/>
Taxable	Never	Department	<input type="checkbox"/>
Item Tax	Select Item Tax		
Extra Service Amount:			

Token to Dispense

Name	Quantity
US One Dollar Token Coin	
Some Token	

Cascade Price

Commission

Greeter Amount Percentage

Secondary Language Description

Name		Description 1	
		Description 2	

Media Information

Video File		BMP File	
BMP Color	None	Fore Color	
Extra Advertised Video File		Icon File	

Bonus Points

Points Awarded		Points To Redeem	
----------------	--	------------------	--

Figure 184. Sales Item Dialog Box

- 4 Type or select the following required information:
 - In the **PLU**, type a positive whole number. You can prepare an organized number system with your accountant. (**Note:** PLU# 900-999 are unavailable as the system uses those numbers to generate Club Service PLUs.)
 - In the **Price**, type a Price before tax, and then press the Tab key or click in another box.

To the right of the Price box, the item price, tax and total for the sales item will display as the price is entered.

- In the **Name**, type the name of the sales item or service.
- In the **Type** drop-down box, select one of the following:
 - Base
 - Extra
 - Discount
 - Other
 - Miscellaneous



See “Coupons - Quick Start” on page 616.

NOTE: PLUs for Coupon Codes can be 3-, 4- or 5-digits in length.

- 5** All other fields are optional, click the **Save** button –or– continue to step number 6.
- 6** In the **Description** section, fill in the following fields if necessary:
 - In **Taxable** drop-down box, select one of the following:
 - Always
 - Never
 - Conditional
 - Force
 - In **Select Item Tax**, click the **Select Item Tax** button, to assign a specific tax to item. (ex: alcohol, cigarettes, etc.)
 - In Site, select the site.
 - Click to select the Item Tax.
 - In **Description 1**, type a correct description for the sales item. This is the description that will appear on button for customers if no custom buttons are present.
 - In **Description 2**, type a second line of the sales item description. This is the description that will appear on button for customer if no custom buttons are present.
 - In **Barcode**, type a barcode for the sales item.

NOTE: The barcode scanner works for presell tickets as well as coupons. Barcode scanners are optional at time of purchase and additional fees may apply.

Three Barcode types that can be read at the Auto Sentry and the Touch POS. The barcode readers incorporate a pound (#) sign prefix and are designed to work Code 93, Code 128, and Code UCC/EAN 128.

- In **Account ID** drop-down box, select an account.

NOTE: Selecting an account is important.

- In **Searchable**, check if you want to be able to search for this item.
- If the sales item type is an extra service, then in the **Extra Services Amount**, type an amount.

NOTE: Some washes track portions of a base price as extra service: Base \$5, Extra Service Amount \$2

- Click to select **Department** check-box if open PLU.
 - From the **Token to Dispense** section, type an amount in the quantity for the following if necessary: US One Dollar Token Coin box, Some Token box, Vacuum, etc.
- 7 If setting up a **Cascade Price** promotion, fill in this section. If not using cascade price, remove all cascade sequences.
 - 8 If setting up a **Variable Price** breaks on extra services, fill in this section. If not using Variable Price, remove all variable price PLU items from this section.
 - 9 In **Commission** section, set up Greeter Commission Amount or Percentage.
 - 10 In **Secondary Language Description**, set up secondary language descriptions to appear on buttons for unattended terminal:
 - In **Name**, type the correct sales item name in a secondary language.
 - In **Description 1**, type the correct sales item descriptions in one secondary language.
 - In **Description 2**, type the correct sales item descriptions in one secondary language.
 - 11 From the **Media Information** section, you can add custom videos to be played and custom artwork (bitmaps) for the various buttons that are displayed. In both cases, there are separate videos for English or a second language, just as there are bitmaps for English or a second language. To make these videos and bitmaps accessible for use, the file must be placed within the proper folder locations. The following example specifies the required locations for the custom Video File and custom Button (bitmaps):

In **Video File** (Info Buttons):

To play a primary **video** named deluxewash.avi it must exist within the \ICS\AVIFiles\Primary\ directory. In Video File, type the file name of the video as polish.

To play a second language **video** named deluxewash.avi it must exist within the \ICS\AVIFiles\Secondary\ directory. In Video File, type the file name of the video as polish.



See “About Audio Visual Specifications” on page 403.

In BMP File:

To display an **Primary custom button** named basewashX.bmp it must exist within the \ICS\BMPFiles\Primary\Custom directory. In BMP File, type the file name as polish.

To display a **Second language custom button** named basewashX.bmp it must exist within the \ICS\BMPFiles\Secondary\ Custom directory. In BMP File, type the file name as polish.

NOTE: When setting up the Media Information in WashConnect®, the BMP file names do not include a suffix (e.g., X, L, M or S) or a file extension.

As soon as the videos are saved in the WashConnect® directory, they are automatically enabled for any PLU that uses the custom button with the same name.

For more Custom Button Graphic information:



See “Custom Button Specs” on page 404.

- See the Auto Sentry/Touch 'N Clean User Manual.
- Contact Technical Support if you would like the Marketing team at ICS to develop custom graphics.



Figure 185. Custom Buttons with Videos Enabled from Auto Sentry flex

NOTE: If selecting a custom graphic .bmp file, the following color selections are unnecessary.

- In **BMP Color** drop-down box, select a color for the standard button.
- In **Fore Color**, select a text color from the color swatch chart for the standard button.
- In **Extra Advertised Video File**, type the name of the Extra Advertised Video Service file without the file extension .avi.
- In Icon File, type the name of the Hand Finished Services icon to display.



See “About Extra Advertise Video” on page 325.

12 In **Bonus Points**, type the **Points Awarded** and then **Points to Redeem** for the bonus point system. The *WashConnect*® customer tracking system automatically tallies all the Promotions for each customer.

NOTE: Before a customer can redeem bonus points, a PLU is created with the amount of bonus points awarded for purchase and the amount of bonus points needed to redeem the sales item for free.

13 In **Assign Controller Services** available at site level, click the drop-down arrow. (Can be available at corporate if all services are created at corporate.)

- From the Controller Services dialog box, select controller service(s) that controls the tunnel equipment for a sales item.

NOTE: Controller services must be set up in *WashConnect*® so they can be assigned to services.



See “About Controller Services” on page 535.

14 Click the **Save** button.
The sales item is added to the list.

You can sort, edit, or delete items.

NOTE: PLUs that are sold or redeemed appear on the Shift Detail Report. See “View a Shift Detail Report”. If a PLU name or price have been edited, the PLU will appear on the Shift Detail Report with two different line entries for the same PLU number. This is a safety feature to alert you that some user with privileges has made a change to the PLU name or price.

PLU#	Name	Price	Type	Site	Video File	BMP File	Commission	Controller Service
20	EXT PROMO	\$5.00	Base	Main Corp				
70	Buy One Get half price	\$7.00	Base	Main Corp				
99	SCHOOL WASH	\$12.00	Base	Main Corp				
120	Sports Club	\$14.00	Base	Main Corp				
121	Tuesday Special	\$10.00	Base	Main Corp				
122	School Fundraiser	\$14.00	Base	Main Corp				
123	Free Vac Tuesday	\$14.00	Base	Main Corp				
125	Vacuum Token	\$0.00	Extra	Main Corp				
126	Happy Hour Wash	\$7.00	Base	Main Corp				

Figure 186. Sales Items List

Sales Items are anything that can be sold, whether it is a physical item (e.g., a scented tree) or a description of a service (e.g., the Base Wash).

NOTE: Exception: While Wash Clubs are services to sell, Wash Clubs PLUs are set up separately from Sales Items or set up separately in Club Services. From the Club Services command, you can create a wash club sales item and then the PLU number automatically generates between 900-999. Wash Clubs will not appear in the Sales Items list even though they are sales items.



See "About Variable Pricing" on page 405.



For more information, see "About Club Services" on page 375.



See "About Sales Items" on page 392.



See "About Audio Visual Specifications" on page 403.

Set Up Gift Card

Gift Cards need to be set up as a sales item before customers can purchase them at the Auto Sentry or Touch POS.

To add a sales item, follow these steps:

- 1 From the **Configuration** menu, select **Goods & Services**, and then click **Sales Items**.
The **Sales Items** tab appears.

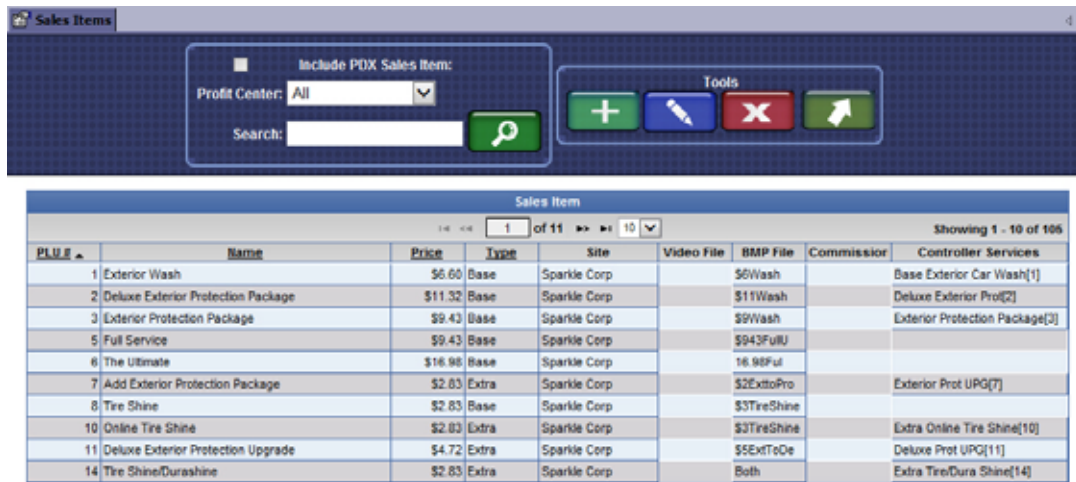


Figure 187. Sales Items tab

2 In the **Profit Center** box, select a profit center:

- Gift Card

NOTE: A Profit Center is the income source created for income and labor tracking purposes.



To set up Profit Centers that appear in the Profit Center list, See “Add Profit Center and description” on page 547.

3 Click the **Add**  button. The **Gift Card** dialog box appears.

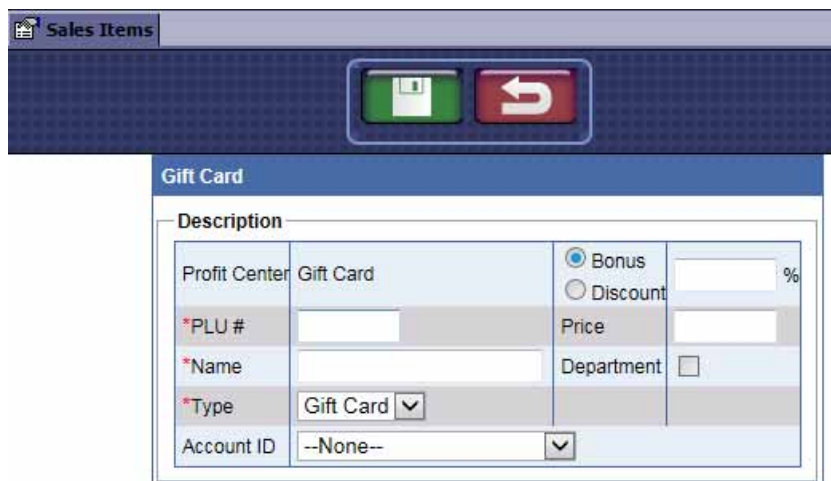



Figure 188. Gift Card Dialog Box

4 Type or select the following required information:

- In the **PLU**, type a positive whole number. You can prepare an organized number system with your accountant. (**Note:** PLU# 900-999 are unavailable as the system uses those numbers to generate Club Service PLUs.)
 - In the **Price**, type a Price before tax, and then press the Tab key or click in another box.
 - In the **Name**, type the name of the gift card.
 - In the **Type** drop-down box, select Gift Card.
- 5 In **Account ID** drop-down box, select an account.
 - 6 Selecting an **Account ID** is important.
 - 7 If offering a promotion, select either **Bonus** or **Discount**, and type in an amount.
 - 8 Click to select **Department** check-box if open PLU.
 - 9 Contact Technical Support if you would like the Marketing team at ICS to develop custom graphics for your gift cards.
- 10 Click the **Save**  button.
The Gift Card item is added to the list.

About Audio Visual Specifications

Video Dimensions:

Large - 989 x 649
Small - 352- x288
Club - 575 x 649

Video Specs:

A video clip must be saved with a file name of 8 characters in the audio-video interleave (.avi) format and the following specifications:

- Codec: Microsoft® MPEG – 4 Video Codec V3
- Frame Rate: 29.97 (NTSC)
- Pixel Aspect Ratio: Square Pixels (1.0)
- Field Order: Lower Field First

Audio:

- MP3 Codec: MPEG Layer – 3 (MPEG – 2 Layer 3)
- Sample Rate: 44100 (our manual says 22050 but we've been using 44100 and haven't been having any problems)
- Channel: Mono

- Bit Depth: 32 kBits/s
- Bitrate: 128

Custom Button Specs

Extra-large-1.55 in. x.767 in. / 465 pixels x230 pixels.

Large-1.55 in. x .5 in. / 465 pixels x 150 pixels.

Medium-1.55 in. x .333 in. / 465 pixels x 100 pixels.

Small-1.55 in. x .27 in. / 465 pixels x 81 pixels.

All of these are 300 pixels per inch. (All measurements are included.)

Size of buttons depend on how many buttons:

1 or 2 buttons- Extra-Large

3 buttons- Large

4 buttons- Medium

5 or 6 buttons- Small

Naming Convention

File names can only be 8 characters long and the last letter must be uppercase and must be either X, L, M or S to correspond with the size of the button (X-extra-large, L-large, M-medium, S-small.) These buttons will need to be in bitmap (.bmp) format.

Please include both English and Spanish versions of the buttons if the site offers Spanish or plans to in the future.



See "About Sales Items" on page 392.



See "Edit a Club Service" on page 382.



See "Terminate a Club Service" on page 383.



See "Reorder Club Service Columns in Ascending/Descending Order" on page 384.



See "Club Rules Examples" on page 388.



See "Wash Club Customer Experience" on page 390.



See "Club Service Descriptions" on page 386.

About Variable Pricing

Variable Pricing automatically adjusts the pricing for additional extra services based on the extra service(s) that the customer has already selected. If customer purchases an extra service, the prices are reduced to encourage customers to purchase more extra services. The extra services prices vary and adjust automatically on the screen based on what was already selected. You can configure Variable Pricing for extra services based on the A La Carte selection from Goods and Services Sales Items tab for any type that Extra is selected.



Extra Services without Variable Pricing.

Extra Services with Variable Pricing.

Figure 189. Variable Pricing on Auto Sentry screen example

Apply Variable Pricing to Sales Item

- 1 From the **Configuration** menu, select **Goods & Services**, and then click **Sales Items**.

The **Sales Items** tab appears.

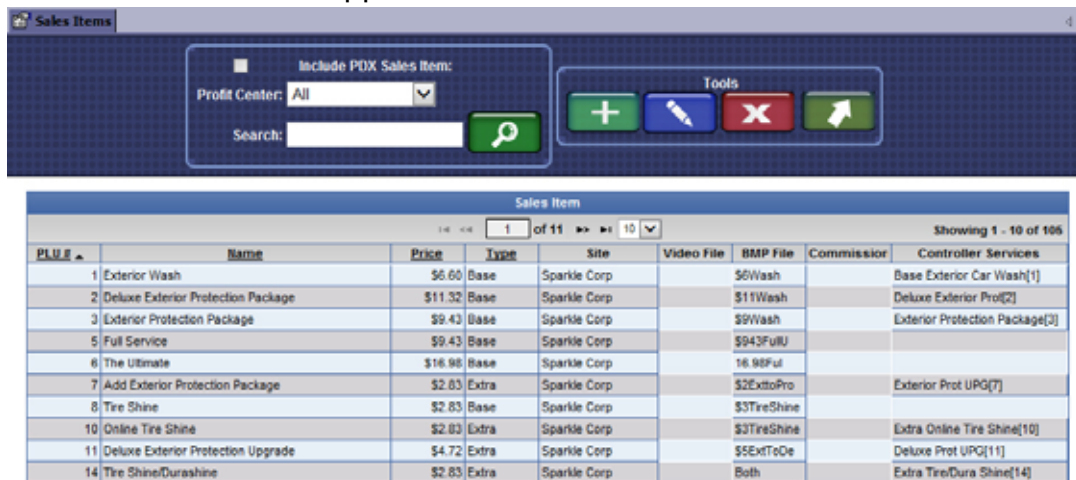


Figure 190. Sales Items tab

- 2 Search for a Sales Item with the type selected as Extra, and then click to select.

The Extra sales item is highlighted.

- 3 Click the **Edit Sales Item**  button. The **Sales Item** dialog box appears.



The screenshot shows the 'Sales Item' dialog box. At the top, there are 'Save' and 'Back' buttons. The main area is divided into sections: 'Description' and 'Variable Price'.

Description Section:




- Profit Center: Express
- *PLU #: 166
- *Price: 1.79
- *Name: Always 1.79
- *Type: Extra
- Taxable: Always
- Token to Dispense: 14 Dollar Token
- Description 1: Always 1.79
- Description 2: (empty)
- Barcode: (empty)
- Account ID: --None--
- Searchable:
- Department:

Variable Price Section:

Buttons: **Add** (green), **Remove** (red)

	PLU(s) When Purchased With	Price	Name	BMP File
1	172,167,173	1.22	1.79 Reduced 1.22	
2	167,168,169	1.23	Always 1.79 Reduced 1.2	

Figure 191. Sales Items Variable Price

- 4 Click the **Add**  button from the Variable Price section.
- 5 In **PLU(s) When Purchased With**, select one or more check boxes from the Purchased with PLU(s) dialog window.
- 6 Click the **Add**  button.
- 7 In **Price**, type the reduced price.
- 8 In **Name**, type a name for the reduced variable price.
- 9 In **BMP File**, type the file name for the image associated with this reduction.
- 10 Click the **Save**  button. The Information Sales item saved successfully message appears.



See "About Sales Items" on page 392.

About Custom Advertise Video

If active, the Custom Advertise Video will automatically begin to play when the customer pulls up to the Auto Sentry terminal. This video can play while the system searches for the club member's information if applicable. The Custom Advertise Video takes up the entire Auto Sentry screen and has a **Skip** button at the bottom. To

activate the video, the video must be an **AVI** formatted file of 720 by 480 pixels and placed in the following directory \ICS\AVIFiles

As soon as the Custom Advertise Video is saved in the *WashConnect®* directory, it is automatically enabled and will play until you remove or replace the file from the directory.

NOTE: There is no setting for the Custom Advertise Video in *WashConnect®*.



See “About Sales Items” on page 392.

About Extra Advertise Video

The Welcome Video (Custom Advertise Video) automatically plays as you pull up to the Auto Sentry. The Upgrade Video (Custom Extra Advertise Video) plays between the wash and upgrade screen. The video plays in pop up screen that covers 3/4 of the Auto Sentry screen. When the customer adds extra services for the wash, this video will play. The video must be an **AVI** formatted file of 352 by 288 pixels. The customer can minimize window by pressing **Minimize**, reducing the video to the small (normal) video size window.



See “About Sales Items” on page 392.

Sort Sales Item List

You can sort the **Sales Item** list.

- Double-click to select an underlined column header in the **Sales Items** list. The list is sorted on that column in ascending order.
- Click to select the column header again. The list is sorted in descending order.



See “About Sales Items” on page 392.




See “Edit Sales Item” on page 408.



See “Sales Item Search” on page 407.

Sales Item Search

To search for a sales item from the list, follow these steps:

- 1 From the **Configuration** menu, select **Goods & Services**, and then click **Sales Item**.
The **Sales Items** tab appears.
- 2 In **Profit Center**, select a profit center if necessary.
- 3 In **Search**, type text to further refine your search.
- 4 Click the **Search**  button.
The search results appear in the Sales Item list.



See "About Sales Items" on page 392.



See "Flex / Retail Standard Screen" on page 411.



See "Sort Sales Item List" on page 407.



See "Edit Sales Item" on page 408.



See "Delete Sales Item" on page 409.




See "About Sales Item PLUs and Profiles" on page 410.



See "Sales Item Descriptions" on page 414.

Edit Sales Item

To edit a sales item, follow these steps:

- 1 From the **Configuration** menu, select **Goods & Services**, and then click **Sales Item**.
The **Sales Items** tab appears.
- 2 Select a sales item, and then click the **Edit**  button.
The **Sales Items** dialog box appears.
- 3 Type your changes, and then click the **Save** button.
The **Sales Item** is saved.




See "About Sales Items" on page 392.

 See "Flex / Retail Standard Screen" on page 411.

 See "Sort Sales Item List" on page 407.


 See "Delete Sales Item" on page 409.

 See "About Sales Item PLUs and Profiles" on page 410.

 See "Sales Item Descriptions" on page 414.

Delete Sales Item

To delete a sales item, follow these steps:

- 1** From the **Configuration** menu, select **Goods & Services**, and then click **Sales Item**.
The **Sales Item** tab appears.
- 2** Select a sales item, and then click the **Delete**  button.
A termination warning appears.
- 3** Click **Yes**.
The sales item is deleted.

 See "About Sales Items" on page 392.

 See "Flex / Retail Standard Screen" on page 411.

 See "Sort Sales Item List" on page 407.

 See "Edit Sales Item" on page 408.

 See "About Sales Item PLUs and Profiles" on page 410.

 See "Sales Item Descriptions" on page 414.

About Sales Item PLUs and Profiles

PLU (Product Look Up) is the unique number assigned to a service or item that can be sold to a customer.

Profile can consist of one or more PLUs applied under various conditions.

PLUs and profiles work together to give customers their wash menu choices. In most cases, you create a standard set of PLUs for your basic washes which are used during normal operations. If you have four washes to sell, then a PLUs need to be created for each wash. The time and specific upgrades for each of these washes can be setup in the Retail Profile.

The screenshot displays the WashConnect configuration interface. At the top, a 'Sales Item' table lists four items: PLU # 50 (\$5.00, Straight), 51 (\$7.00, Flush), 53 (\$9.00, Straight Flush), and 54 (\$11.00, Royal Flush). Below this, a 'Service' table lists the same four items with their respective prices and tax amounts. At the bottom, a 'Schedule' table shows the items are available 'All Days' starting '9/11/2012' from '12:00 AM' to '12:00 AM' for 'Normal' vehicle height, and they 'Apply To' the 'Retail' profile.

PLU #	Price	Name	Type	Site
50	\$5.00	Straight	Base	Main Corp
51	\$7.00	Flush	Base	Main Corp
53	\$9.00	Straight Flush	Base	Main Corp
54	\$11.00	Royal Flush	Base	Main Corp

Retail Wash Menu	Main Corp	InBay 1
Retail-Bay3	Ultimate Car Wash	
Standard Profile	Main Corp	
test	Main Corp	
Test	Main Corp	
TNC	Main Corp	TNC Bay 1

Schedule						
Day of Week	Start Date	End Date	Start Time	End Time	Vehicle Height	Applies To
All Days	9/11/2012		12:00 AM	12:00 AM	Normal	Retail

Figure 192. Sales Items & Profile for Retail menu Wash Options Example

 See "About Sales Items" on page 392.

 See "Flex / Retail Standard Screen" on page 411.

 See "Sort Sales Item List" on page 407.

 See "Edit Sales Item" on page 408.

 See "Delete Sales Item" on page 409.

 See "Sales Item Descriptions" on page 414.

Flex / Retail Standard Screen



Figure 193. Additional Standard Screen Flex / Retail Buttons

This additional screen is used for washes that have both a valid exterior wash offering menu as well as a full-service wash offering menu.

The additional screen appears after a customer selects the Buy Wash button. Sometimes called the two buttons screen appears with two buttons: Retail (profile) and Flex (profile).

The Retail profile is used for your main wash offerings. The Retail profile must be turned on and then the Flex profile appears for customers.

- 1 Set up the Retail profile for the exterior wash offerings.
- 2 Set up the Flex profile for the full-service wash offerings.

WARNING: When Retail profile hours turn off, this two button extra standard screen automatically turns off as well.

NOTE: Set up your wash offerings that have the longest hours as your **Retail** (profile). When the Retail menu turns off, the Flex menu will not appear either.

Therefore, set up the Flex (profile) with additional offerings that offer **Flexible** hours during Retail hours.



See “About Sales Items” on page 392.

Activate additional Standard Screen (Flex / Retail) button

Allows site to offer two different Standard (flex/retail) profiles based on user selection.

- 1 From **Configuration > Goods and Services > Sales Items**, add a PLU for any needed base wash or extra services.
- 2 Select **Configuration > Goods and Services > Profiles**.
- 3 Setup a profile (Retail) for all exterior wash offerings and extra services. Setup a schedule and select **Retail** from Applies To drop-down.
- 4 Setup a profile (Flex) to include all full-service wash offerings. Setup a schedule and select **Flex** from Applies To drop-down.

NOTE: As long as the two profile schedules are valid for the Flex and Retail profiles, the two button screen will be available for customers.

- 5 In Profile text box, type **Full Service Car Wash**. Full-Service Car Wash will appear on the button. You can type any name in here but it will not appear on the button.

NOTE: If you want a custom name to appear on your button, contact your ICS support technician and discuss placing an order with ICS for custom buttons. ICS has a dedicated in-house graphic design team to fulfill your custom needs. Custom graphics are optional and additional fees apply.

- 6 After setting up the Profile, click the **Add** button under the Schedule section to set up the profile’s **Schedule**.
- 7 Select the Day or Days of Week. Note: Currently there is no way to select every other week.
- 8 Select the time of day to start and stop the full-service wash offerings considering your staff.
- 9 From the Vehicle Height, select **Normal** –or– **High Vehicle**.

NOTE: If you select HVP, the High Vehicle Sensor is required for this feature. The High Vehicle Sensor is optional and available to purchase for an additional cost. For more information, contact ICS technical support at 800-246-3469.

10 In Applies To, select **Flex** from the drop-down list.

11 To add multiple schedules, click the Add button and set up another schedule.

NOTE: Rule for overlapping time period Schedules: the most recent start date takes priority.

12 Click **OK**.

Profiles are live for customers to see immediately. As soon as you complete steps 1-12, your new buttons and menu items will appear for your next customer. During full-service car wash hours, select Buy Wash. Your customers are now directed to a second menu with two buttons on it for the Retail and Flex profiles. The buttons are Exterior Car Wash (Retail) and Full-Service Car Wash (Flex). You now have the ability to separate your Exterior Wash Offerings from your Full-service Wash Offerings with two different screens. If its outside of your Full-service hours, the Buy Wash button will immediately direct your customer to the Exterior (Retail) Car Wash offerings. But now, during the Full Service hours, a screen will appear with the two buttons: Exterior Car Wash buttons or Full Service Car Wash.

- If a customer selects the Full-Service Car Wash button, then the next screen will be the Full-Service Wash Offerings menu.
- If a customer selects the Exterior Car Wash button, then the next screen will be the Exterior Wash Offerings that were set up in the Retail profile.

Services in different profiles are not mutually exclusive. Services can be assigned to one or more profiles. You can change your PLUs and profiles in the **Sales Items** and **Profiles** commands, if necessary. The following are just a few reasons you might need to update or change PLUs and Profiles:

- If you change services based on weather conditions.
- If you offer new promotions or discontinue old ones.
- If you change pricing.
- If you add or remove equipment in the tunnel.

The **Sales Items**, **Packages**, and **Profiles** commands make it easy to edit your list of PLUs. See which PLUs or Profiles are currently active for a specific site, create packages for combining PLUs, or schedule profiles for time/date related operating conditions.



See "About Sales Items" on page 392.

Sensing a High Vehicle Profile

Customers with high vehicle profiles (HVP), such as trucks, cargo and conversion vans, can receive a different wash menu at the Auto Sentry flex.

NOTE: Optional hardware must be installed may incur additional fees. A High Vehicle Sensor is necessary to enable the high vehicle profile. Setup the High Vehicle wash PLUs, and then setup a Retail Profile for the High Vehicles PLUs. From the Retail Profile’s Schedule dialog box, select High Vehicle from the Vehicle Height drop-down, and this is how HVP profiles are enabled. The following example shows the wash menu for a high vehicle that has triggered the sensor.



See “About Sales Items” on page 392.

Sales Item Descriptions

The following table describes the **Sales Items** dialog box.

Table 49: Sales Item Descriptions

Field	Parameter	Description
Description		
Profit Center	List	Defines various profit centers or income sources for income labor tracking.
PLU	Integer. Assigned Number.	Price or Product Lookup. Unique numbers used by the ICS system to identify a type of inventory item or wash service.

Table 49: Sales Item Descriptions

Field	Parameter	Description
Price	Integer. Max. length is 8.	Price of the service or item.
Name	Alphanumeric. Max. length is 52.	This is the name of the service or item. It is for your reference, and is not displayed to customer.
Type	List	The type of inventory item you want to add: Base, Extra, Discount, Other, and Miscellaneous.
Taxable	List	Available Sales Tax selections: Always, Never, Conditional or Force.
Extra Service Amount	Numeric	Extra Service amount. Can be part of the base service amount.
Description 1	Alphanumeric. Max. length is 50.	Wash service description for reporting.
Description 2	Alphanumeric. Max. length is 50.	Wash service description for reporting.
Barcode	Alphanumeric. Max. length is 50.	Barcode number associated with PLU. This is where you can add a coupon barcode number. The barcode types compatible with a pound (#) sign prefix are as follows: Code 93, Code 128, and Code UCC/EAN 128. Barcodes are only read by Barcode Readers that are optional and additional at time of purchase.
Account ID	List	Account associated with PLU.
Searchable	Checkbox	Check to enable searches for item.
Department	Checkbox	May create an open price PLU.
Token to Dispense		
US One Dollar token Coin	Integer. Max length is 8.	Quantity.
Some Token	Integer. Max length is 8.	Quantity.
Secondary Language Description		
Secondary Language Name	Text	Type the correct sales item name in a secondary language.
Description 1	Alphanumeric. Max. length is 50.	Description 1 appears on the button's first line on the touch-screen. Type the correct sales item description in a secondary language.

Table 49: Sales Item Descriptions

Field	Parameter	Description
Description 2	Alphanumeric. Max. length is 50.	Description 2 appears on the button's second line on the touch-screen. type the correct sales item description in a secondary language.
Media Information		
Video File	Alphanumeric. Max. length is 50.	Name of video file to load for service. Video file will play on screen. For more information on videos, See "About Audio Visual Specifications" on page 403. Also, see the User Manual for the TouchNClean.
BMP File	Alphanumeric. Max. length is 50.	Name of graphic bitmap (.bmp) file to load for button. File will be used on screen.
BMP Color	List	Background color selection for the inventory item button.
Fore Color	List	Foreground text color for the inventory item button.
Extra Advertised Service Video File	Alphanumeric. Max. length is 50.	Name of video file to load after the base wash is purchased. Video file will automatically play on screen. For more information on Extra Advertised Services Videos, see the Auto Sentry user manual.
Bonus Points		
Points Awarded	Numeric	The number of points credited to customer's vehicle when item is purchased.
Points to Redeem	Numeric	The number of points required for a customer's vehicle to be eligible to receive this service for free.
Assign Controller Services		
Controller Services	List	Applies to Base, Retract and Extra services under Express, Full Services and In-bay profit centers. See "About Controller Services" on page 535.



See "About Sales Items" on page 392.



See "Flex / Retail Standard Screen" on page 411.



See "Sort Sales Item List" on page 407.



See "Edit Sales Item" on page 408.



See "Delete Sales Item" on page 409.



See "About Sales Item PLUs and Profiles" on page 410.



See "Sales Item Descriptions" on page 414.

About Packages

Packages

HELP - What can I do here?

Managers:


- A package is a new sales item PLU that links several PLUs in one package price.
- Setup Package wash specials, customer will see their money saved on the receipt:
 - Cascading Price Promotions
 - Rainy Day discounts
 - Coupons
 - Fundraisers
- This is Step Three in setting up a new wash club offering. Step One, see Sales Items. Step Two, see Club Services. Step Four, see Profiles.
- Set up a package for each wash club:
 - Add Sales Item: base wash PLU
 - Add Sales Item: the free base wash PLU
 - Add Sales Item: add any other PLU that is included in the wash club. Extra service offerings are added in Profiles for each wash club.
- Setup a package PLU for selling a taxable PLU and a non-taxable PLU items. (i.e., recycling)



See "Packages" on page 335.



See "Create a Package" on page 336.

 See “Edit a Package” on page 421.

 See “Create an Upsell Package” on page 422.


 See “About Frequency Promotion Packages” on page 423.

Packages

Packages are ideal to offer customers discounts. For showing the customer the benefits of purchasing package specials. By setting up package washes, the customer’s receipt displays all of the services in the package, including the price of the PLU, and the discount.

Another use for Packages is to provide a method of selling one item that includes both a taxable and non-taxable item. Many states charge a recycling redemption value for cans and bottles. The retailer must collect these redemption amounts which are not taxed but the product being sold is.

Packages are used to set up cascading pricing promotions, Rainy Day discounts, coupons, fund-raisers, frequency promotions, clubs and profiles. You will need to create a package for each wash club.

 See “Create a Package” on page 418.

 See “Coupon Codes - Quick Start” on page 783.

Create a Package

NOTE: When setting up promotions, WashConnect® can set up the rounding for you. For Item Rounding, See “Global > GlobalConfiguration > Global” on page 686.

- 1 It is first necessary to set up all of the individual services and discounts that will be in the package before setting up the package itself.
- 2 From the **Configuration** menu, click **Goods & Services**, and then click **Packages**.



Figure 194. Packages Tab

- 3 Click the **Add Package**  button.

- 4 In **Profit Center**, select a profit center tab on the POS for this package to appear.
- 5 In **PLU**, type a PLU number for the new package.

NOTE: If a warning icon appears, hover over the warning symbol. If the warning message **Another PLU exists** appears, then select another PLU number.

- 6 In **Name**, type a name for the new package.
- 7 Fill in the other optional fields, if necessary.



See "Sales Item Descriptions" on page 332.

- 8 In Sales Items in Package section, click to select the **Add Sales Item** button. The Add Sales Item dialog box appears.
- 9 In **Profit Center** drop-down box, select a profit center. The profit center sales items appear.
- 10 Click to select the sales item(s) to add to the Package.

Package

Price

Profit Center	Express	Description 1	
Price	0 + tax 0	Description 2	
*PLU #		Account ID	--None--
*Name			
Barcode			

Secondary Language Description

Name		Description 1	
		Description 2	

Media Information

Video File		BMP File	
BMP Color	None	Fore Color	
Extra Advertised Video File			

Bonus Points

Points Awarded		Points To Redeem	
----------------	--	------------------	--

Sales Items in Package

[Add Sales Item](#)

Sales Item			
PLU #	Name	Price	Type

Figure 195. Package setup



See "Edit a Package" on page 421.



See "Create an Upsell Package" on page 422.




See "About Promotions" on page 454.



See "About Packages" on page 417.

Delete a Package

You can delete a package.

- 1 From the **Configuration** menu, click **Goods & Services**, and then click **Packages**.
- 2 Click to select the package.
- 3 To delete the package, click the **Delete**  button.
The Package no longer appears in the list and is permanently deleted.



See "Create a Package" on page 418.





See "Edit a Package" on page 421.



See "About Packages" on page 417.

Edit a Package

You can edit a package.

- 1 From the **Configuration** menu, click **Goods & Services**, and then click **Packages**.
- 2 Click to select the package you would like to edit.
- 3 To delete a sales item in the sales package, select the **Edit Package**  button.
The **Package** dialog box appears.
- 4 Make any necessary edits.
- 5 From the Sales Items in Package section, click the delete X button for the Sales Item PLU to remove from the sales package.
This will delete the sales item from the package, but the sales item itself will remain available to use again and the Package remains.
- 6 Click the **Save**  button.



See "Delete Sales Item" on page 409.



See "Create an Upsell Package" on page 422.



See "About Promotions" on page 454.



See "About Packages" on page 417.



Create an Upsell Package

If you want to upsell your club customer to a different wash at the payment terminal, you can for the current visit, this does not change the club membership. Follow these instructions:

NOTE: To allow upsell, **Clubs_Express** setting must be set to **False**, from System Setup > Devices > Settings.



See "Auto Sentry > Clubs" on page 658.

Offer a club customer the opportunity to upgrade their club wash to another wash to increase revenue. The customer would still remain in their original club but they can try out the more expensive wash by purchasing an upsell wash just for this one time visit. Upsells can also be confusing for the customer. The customer could understand the upsell to be a permanent move to the more expensive wash club for the upsell price, and then they could become frustrated to learn that it's just for that one wash.

You can offer extra services as a another way to earn extra income.





See "Flex / Retail Standard Screen" on page 411.

After you have set up your club service, setup the upsell package and add it to the wash club Profile. The upsell will have a button that appears with the Extra Services buttons. For example: The Flush Club is the basic or first level wash club and has a Package including the Flush base wash PLU for \$7 and then a Flush wash discount PLU for -\$7. This package is in your Flush Club Profile. Next, you will create a new package for the upsell:

Packages for two clubs and one Upsell				
	Packages	Base Wash Price	Base Wash Discount	Package Price
1	Flush Club Package	\$7.00	- \$7.00	= \$0.00
2	Flush Club Upsell Package	\$11.00	- \$7.00	= \$4.00
3	Royal Flush Club Package	\$11.00	- \$11.00	= \$0.00

- 1 From the **Configuration > Goods and Services** menu, select the **Packages** command.

- 2 Click the **Add**  button to create a new Package.
- 3 In **Profit Center**, click to select a profit center from the drop-down list.
- 4 Type a new PLU.
- 5 Type a new name for the Upsell.
- 6 Add the Sales Items: The Base Wash PLU for the Royal Flush Club and the Base discount wash for the Flush Club.
- 7 The *WashConnect*® system rounds up the numbers and totals the package for you.
- 8 Click the **Save**  button.
- 9 From the Flush Club Profile, add the Package along with any other extra services to sell for the Flush Club.



See "Edit a Package" on page 421.



See "About Frequency Promotion Packages" on page 423.



See "About Packages" on page 417.

About Frequency Promotion Packages

Set up a promotion package to offer your customers special promotional pricing on various services and products. While setting up the PLU, be certain to select the correct Profit Center for each promotional service, product or discount. The system automatically applies discounts for promotions sold in the wash Profit Center.

Promotions include: Frequent Customer and Car, Anniversary, Birthday, and Cascading Prices, as well as from the sale of services to customers who are members of Promotion PLUs.

There are two submenu items from Frequency Promotion:

- Promo Setup
- Promo Receipt Text



See "About Promo Setup" on page 379.



See "About Promo Receipt Text" on page 389.

About Wash Books

Wash Books

HELP - What can I do here?

Managers and Owners:

- This feature allows any customer to purchase a group of washes at a discount price, typically paying for X number of washes while getting Y number of free washes.
 - Both X and Y are fully configurable.
 - Example: Buy 15 get 3 Free = 18 washes
- Customers can purchase and redeem Wash Books at an Auto Sentry or Touch POS.
- Wash Books are sold and loaded on magnetic-stripe cards and can also be tracked by barcoded receipts.
- Multiple wash books can be loaded on a single card.
- Upsell wash books at the Auto Sentry or Touch POS.

NOTE: An Auto Sentry can dispense only one type of card: either Gift Cards or Customer Cards (Wash Book).



See "Add Base Wash Sales Item for Wash Book offering" on page 425.



See "Add Wash Book as a Sales Item" on page 426.



See "Purchase Wash Books at the Auto Sentry" on page 428.



See "Redeem Wash Book at Auto Sentry" on page 430.



See "View Wash Books in Shift Detail Report" on page 431.




See “Email Wash Book Receipt” on page 432.

Add Base Wash Sales Item for Wash Book offering

- 1 After receiving the custom customer magnetic-stripe cards with eleven digits preceded with a % percentage sign, contact technical support to have them set up Wash Book Cards in *WashConnect*®.
- 2 Login to *WashConnect* Corporate.
- 3 From the **Configuration** menu, select **Goods and Services** and then select **Sales Item**.
- 4 If your base washes were set up at Corporate, you may skip this section and go to Add Wash Book.
- 5 In **Profit Center**, select the Profit Center for the base wash. i.e., **Express**.
- 6 In **PLU**, type a base wash PLU number.
- 7 In **Price**, type a price of the base wash.

- 8 Click the **Save**  button.

NOTE: You cannot add a controller service from Corporate, so you will have to go to the Site level in *WashConnect* and add the controller service to the PLU.

- 9 Login to *WashConnect* at the site level.
- 10 From the **Configuration** menu, select **Goods and Services** and then select **Sales Items**.
- 11 Search for base wash PLU that you created at the corporate level in steps 1-8.
- 12 In **Assign Controller Services** section, from the drop-down click to select the base wash services.
- 13 Click the **Save**  button.
The Sales Item is now ready to configure in a Wash Book.




See “Add Wash Book as a Sales Item” on page 342.





See “About Sales Items” on page 392. See “Add Base Wash Sales Item for Wash Book offering” on page 425.



See “Purchase Wash Books at the Auto Sentry” on page 428.

 See "Redeem Wash Book at Auto Sentry" on page 430.

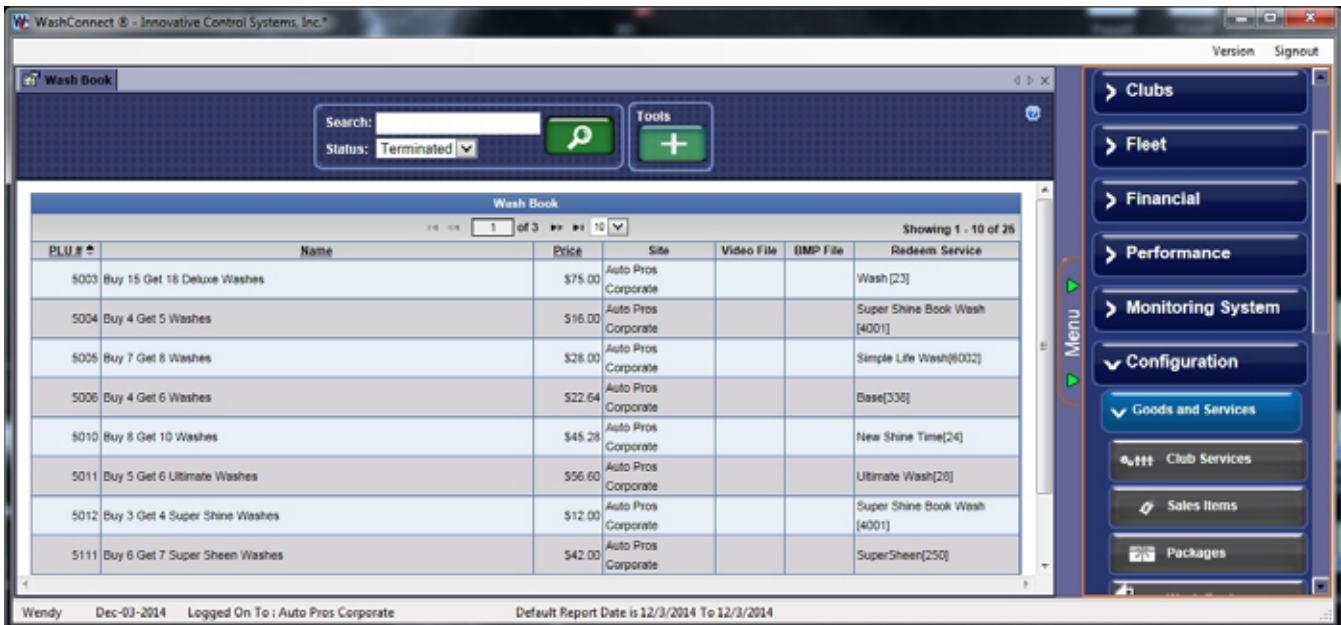
 See "View Wash Books in Shift Detail Report" on page 431.

 See "Email Wash Book Receipt" on page 432.

Add Wash Book as a Sales Item

For each Wash Book offering, set up a Wash Book PLU Sales Item.

- 1 After setting up the Base Wash at Corporate, you can now setup your Wash Book offering.
- 2 Login to WashConnect® Corporate.
- 3 From the **Configuration** menu, select **Goods and Services** and then select **Wash Book**.



PLU #	Name	Price	Site	Video File	BMP File	Redeem Service
5003	Buy 15 Get 15 Deluxe Washes	\$75.00	Auto Pros Corporate			Wash [23]
5004	Buy 4 Get 5 Washes	\$16.00	Auto Pros Corporate			Super Shine Book Wash [4001]
5005	Buy 7 Get 8 Washes	\$28.00	Auto Pros Corporate			Simple Life Wash[6002]
5006	Buy 4 Get 6 Washes	\$22.64	Auto Pros Corporate			Base[336]
5010	Buy 8 Get 10 Washes	\$45.28	Auto Pros Corporate			New Shine Time[24]
5011	Buy 5 Get 6 Ultimate Washes	\$56.60	Auto Pros Corporate			Ultimate Wash[20]
5012	Buy 3 Get 4 Super Shine Washes	\$12.00	Auto Pros Corporate			Super Shine Book Wash [4001]
5111	Buy 6 Get 7 Super Sheen Washes	\$42.00	Auto Pros Corporate			SuperSheen[250]

Figure 196. Wash Book tab

- 4 Click the **Add**  button.

In Description section:

- 5 In **PLU**, type a PLU number between 5001-5999.
- 6 In **Price**, this amount is automatically calculated and filled in after the **Quantity**, **Free** and **Redeem Sales Items** are selected.
- 7 In **Description 1 and 2**, type a description for the Wash Book.

- 8 In **Quantity**, type the amount of base washes that customer will purchase with this Wash Book.
- 9 In **Free**, type amount of base washes to customer will redeem at no cost with this Wash Book.
Total automatically adds the Quantity of washes purchased as well as the Free washes for the Wash Book.
- 10 In **Alert**, type the amount of washes when the system will alert customer with a message to inform them that their wash balance is getting low, and ask if they want to recharge Wash Book Card.
- 11 In **Name**, type a name for the Wash Book PLU offer. For example, **Buy 8 Get 10**.
- 12 In **Barcode**, type a barcode number for Wash Book.
- 13 In **Account ID**, click the **Select Account** button to select a general ledger account number for this PLU.

Figure 197. Add new Wash Book

In Redeem Sales Item section:

- 14 In **Redeem Sales Item**, select a Sales Item PLU from the drop-down that will be used to redeem wash from wash book.



See “Add Base Wash Sales Item for Wash Book offering” on page 425.

- 15** Click the **Save**  button.

If you already have set up your Base Wash at Corporate, then your Wash Book is ready to sell on the Touch POS. If selling on Auto Sentry, you still need to build a Profile for Wash Books.



See “About Sales Items” on page 392.



See “Add Base Wash Sales Item for Wash Book offering” on page 425.



See “Add Wash Book as a Sales Item” on page 426.



See “Purchase Wash Books at the Auto Sentry” on page 428.



See “Redeem Wash Book at Auto Sentry” on page 430.



See “View Wash Books in Shift Detail Report” on page 431.



See “Email Wash Book Receipt” on page 432.

Purchase Wash Books at the Auto Sentry

NOTE: Only one type of card can be dispensed from the Auto Sentry: Wash Books or Gift Cards.

Wash Books are purchased like a prepaid card of specific washes. At the POS or Auto Sentry, the washes are purchased and loaded to a Wash Book Card by the use of a magnetic-stripe card number in the traditional format (%xxx) with 11 digits maximum due to barcode limitation on receipt. If more than one book is attached to the Wash Book Card, the book of washes will be redeemed in the order they were purchased. There is never a physical book, it’s all tracked in the system and on the magnetic-stripe cards and / or the printed receipt.

- 1 When a customer pulls up to the Auto Sentry, the Wash Book can be presented in Active or Passive selling style.

- 2 Select the Purchase Wash Book button.
- 3 From the Wash Book package options, select a wash book package. The magnetic-stripe card is dispensed for the Wash Book.
- 4 At time of Wash Book purchase, Customer is instructed to swipe the Wash Book Card to load and activate. At this time, the amount of PLU base services purchased is now attached to the Wash Book Card. Card is now available at all sites.
- 5 Transaction receipt will print with the remaining balance of base services available on the Wash Book. Depending on your settings, the receipt can print with the wash book barcode number. Also, you can email receipt to customer based on settings. Customer can return with either the bar coded receipt or magnetic-stripe card to redeem a wash. When Book Card get to configurable amount of washes remaining, Auto Sentry offers to recharge the card.



See "About Sales Items" on page 392.



See "Add Base Wash Sales Item for Wash Book offering" on page 425.



See "Add Wash Book as a Sales Item" on page 426.



See "Purchase Wash Books at the Auto Sentry" on page 428.



See "Redeem Wash Book at Auto Sentry" on page 430.



See "View Wash Books in Shift Detail Report" on page 431.



See "Email Wash Book Receipt" on page 432.

Recharge Wash Book at Auto Sentry

Customer can be prompted to recharge or reload when balance of washes remaining is low (configurable amount).

- 1 At Auto Sentry or POS, swipe Wash Book (card) or scan receipt to redeem wash. If configured, customer can select the Redeem Book button from the main options.



See “Auto Sentry > Main Options” on page 673.

- 2 Auto Sentry prompts customer with a list of wash book package options to purchase.
- 3 Customer makes selection.
- 4 The Wash Book selection gets added to the end of the previous washes on the Wash Book.
- 5 The transaction receipts prints with the new total remaining and the Wash Book barcode if set up as well as email receipt.



See “Auto Sentry > Receipt” on page 677.



See “Add Base Wash Sales Item for Wash Book offering” on page 425.



See “Add Wash Book as a Sales Item” on page 426.



See “Purchase Wash Books at the Auto Sentry” on page 428.



See “Redeem Wash Book at Auto Sentry” on page 430.



See “View Wash Books in Shift Detail Report” on page 431.



See “Email Wash Book Receipt” on page 432.

Redeem Wash Book at Auto Sentry

Customer can redeem wash book at the Auto Sentry with a barcode or customer magnetic-stripe card.

- 1 Customer can scan barcode or swipe the magnetic-stripe card.
- 2 Depending on your setup, customer can purchase extra services. Receipt prints with the barcode for the Wash Book Card number.
- 3 If WashConnect® is using low wash alert setting, when the balance is low, customer will be alerted and can recharge the wash book at the Auto Sentry. If WashConnect was setup to use barcoded receipts, every time customer uses a wash, a new receipt will print with the barcode on it.



See "About Sales Items" on page 392.



See "Add Base Wash Sales Item for Wash Book offering" on page 425.



See "Add Wash Book as a Sales Item" on page 426.



See "Purchase Wash Books at the Auto Sentry" on page 428.



See "Redeem Wash Book at Auto Sentry" on page 430.



See "View Wash Books in Shift Detail Report" on page 431.



See "Email Wash Book Receipt" on page 432.

View Wash Books in Shift Detail Report

You may run a Shift Detail report to retrieve detailed Wash Book information for each use at each site.

NOTE: If a fleet customer purchased a wash book, the rule is the wash will be charged to the fleet account and the wash book will not be used.



See "About Sales Items" on page 392.



See "Add Base Wash Sales Item for Wash Book offering" on page 425.



See "Add Wash Book as a Sales Item" on page 426.



See "Purchase Wash Books at the Auto Sentry" on page 428.



See "Redeem Wash Book at Auto Sentry" on page 430.



See "View Wash Books in Shift Detail Report" on page 431.



See “Email Wash Book Receipt” on page 432.

Email Wash Book Receipt

You can configure POS or Auto Sentry Wash Book sale transactions to automatically email book receipt when it is purchased.

NOTE: To Email an automatic receipt to customer, it is required to have previously established an email address on file in WashConnect®.

- 1 From the **Customer** menu, select **Manage**.
- 2 Search for a customer.
- 3 In **Primary Email**, type Customer email address.
- 4 Optional, in **Secondary Email**, type second email address for customer.
- 5 Click to mark the **Receive email receipts** check box.



To enable and set up the email receipt, the following System Setup Device Settings must be set to True. Settings > CoreGatewayConfiguration > Email Server Settings > EnableEmailReceipt. (Default is True)



See “About Sales Items” on page 392.



See “Add Base Wash Sales Item for Wash Book offering” on page 425.



See “Add Wash Book as a Sales Item” on page 426.



See “Purchase Wash Books at the Auto Sentry” on page 428.



See “Redeem Wash Book at Auto Sentry” on page 430.



See “View Wash Books in Shift Detail Report” on page 431.



See “Email Wash Book Receipt” on page 432.

Sell Wash Books at Convenience Stores

At WashConnect® Corporate, create Wash Book Cards that are pre-assigned to specific Wash Books and can be sold at all your locations, convenience stores or other businesses.

Book is purchased at C-Store and when the first time customer redeems the Wash Book on the Auto Sentry, the customer is replicated down to other sites.



See "About Sales Items" on page 392.



See "Add Base Wash Sales Item for Wash Book offering" on page 425.



See "Add Wash Book as a Sales Item" on page 426.



See "Purchase Wash Books at the Auto Sentry" on page 428.



See "Redeem Wash Book at Auto Sentry" on page 430.



See "View Wash Books in Shift Detail Report" on page 431.



See "Email Wash Book Receipt" on page 432.

About Profiles

Profiles

HELP - What can I do here?

Managers:

- A Profile is a collection of wash choices and extra services all of which have their own unique PLU. (For more information, see Sales Items.)
- For example, create a standard retail Profile with three base wash offerings and apply to Retail with a schedule on all days from 6 a.m. to 10 p.m.
- Profiles are used to set up each Wash Club Offering. You can add up to 6 wash clubs. Add the extra services for each club. In Schedule, select Club from Applies To.
- Profiles are also used in setting up a Wash Club menu. Create another profile that includes all of the individual clubs you offer to customers. In Schedule, select Club Sales from Applies To.
- Create a profile for each corporate customer that has a fleet of vehicles to wash under one fleet account.

A profile is a collection of wash choices and extra services. When you add a profile, you can assign base washes and extra services to that profile, and then schedule the profile to activate with certain day and time restrictions.



See "Add a Profile with a Base Wash and Extra Service" on page 435.



See "Edit a Profile" on page 440.



See "About Schedules" on page 441.



See "Edit Schedule" on page 445.



See “Delete Schedule” on page 446.



See “Profile and Schedule Descriptions” on page 442.



See “Add Wash Book as a Sales Item” on page 426.



See “About Sales Items” on page 392.

Add a Profile with a Base Wash and Extra Service

You can use **Profiles** to enable or disable wash selections at your unattended terminals. After you add all the Sales Items for the Base Washes and Extra Service items, you can set up a retail profile for the main Wash menu. Profiles are also used to set up club services.



See “About Sales Items” on page 392.

- 1 Login to WashConnect® at Corporate.

- From the **Configuration** menu, click **Goods & Services**, and then click the **Profile** tab.



Figure 198. Profile Tab



- In the **Profile** area, click the **Add**  button. The **Profile** dialog box appears.



Figure 199. Profile Dialog Box

- In the **Profile** box, type a name for the profile.

- 5 In the **Device Type** box, select a device type.
- 6 In the **Device** box, select one or more devices.
- 7 In **Service type**, select **Wash Service**.
- 8 Click the **Add Base Service**  button.
The **Base** dialog box appears.


Base						
	PLU	Name	Type	Price	Profit Center	Site
<input type="checkbox"/>	64	Straight	Base	\$5.00	Express	Main Corp
<input type="checkbox"/>	65	Flush	Base	\$6.60	Express	Main Corp
<input type="checkbox"/>	66	Straight Flush	Base	\$8.49	Express	Main Corp
<input type="checkbox"/>	67	Royal Flush	Base	\$10.38	Express	Main Corp
<input type="checkbox"/>	70	Buy One Get half price	Base	\$7.00	Inbay Auto	Main Corp
<input type="checkbox"/>	99	SCHOOL WASH	Base	\$12.00	Inbay Auto	Main Corp
<input type="checkbox"/>	106	Good Wash	Base	\$10.00	Express	Main Corp
<input type="checkbox"/>	108	Test Package	Package	\$9.55		Main Corp
<input type="checkbox"/>	110	Full Service	Base	\$15.00	Full Service	Main Corp
<input type="checkbox"/>	120	Sports Club	Base	\$14.00	Inbay Auto	Main Corp
<input type="checkbox"/>	121	Tuesday Special	Base	\$10.00	Inbay Auto	Main Corp
<input type="checkbox"/>	122	School Fundraiser	Base	\$14.00	Inbay Auto	Main Corp
<input type="checkbox"/>	123	Free Vac Tuesday	Base	\$14.00	Inbay Auto	Main Corp
<input type="checkbox"/>	126	Happy Hour Wash	Base	\$7.00	Inbay Auto	Main Corp
<input type="checkbox"/>	127	Happy Hour Wash 2	Base	\$6.00	Inbay Auto	Main Corp

Figure 200. Base Dialog Box

- 9 In the **Base** dialog box, select between one and six base washes, and then click **OK**.
The base washes are assigned to the new profile.

NOTE: Six base washes is the maximum for an Auto Sentry Profile.

 See "Add Extra Services to a Profile" on page 438.

 See "Edit a Profile" on page 440.

 See "About Schedules" on page 441.

 See "Edit Schedule" on page 445.

 See "Delete Schedule" on page 446.




See “Profile and Schedule Descriptions” on page 442.

Enable Profile

After you have set up the profile and have added a valid schedule, you still need to Enable your profile to make it available to customers.

NOTE: This feature is not available at Corporate.

- 1 Log in to WashConnect® at your Car Wash site level.
- 2 In the **Configuration menu**, click **Goods & Services**, and then click **Profile**. The **Profile** tab appears.
- 3 Click to select a Profile. The profile is highlighted.
- 4 If the status of the profile is disabled, click the **Enable**  button. The profile is now Enabled.

NOTE: A valid schedule for the profile must be set up before the profile will be available.




See “Profile and Schedule Descriptions” on page 442.



See “About Schedules” on page 441.

Add Extra Services to a Profile

You can offer extra services to your customers. These extra services are linked to each base wash in the profile. For example, a \$6.00 basic wash club might not include extra services. Therefore, you might want to offer triple foam, wax and tire dressing. You can configure these extra service offerings in the profile.

- 1 From the **Configuration** menu, click **Goods & Services**, and then click the **Profile** tab.
- 2 In the **Profile** area, click to select or highlight the Profile.
- 3 Click the **Edit** button. The **Profile** dialog box appears.
- 4 From the **Wash Service** area, click to select or highlight a base wash.
- 5 Click the **Add Extra Service**  button. The **Extra** dialog box appears.

Extra						
	PLU	Name	Type	Price	Profit Center	Site
<input checked="" type="checkbox"/>	7	Dura Shine	Extra	\$1.89	Express	Main Corp
<input checked="" type="checkbox"/>	8	Tire Shine	Base	\$2.83	Hand Services	Main Corp
<input checked="" type="checkbox"/>	9	RainX	Extra	\$3.00	Express	Main Corp
<input type="checkbox"/>	10	Online Tire Shine	Extra	\$1.89	Express	Main Corp
<input type="checkbox"/>	11	RainX / Tire Shine	Extra	\$5.00	Express	Main Corp
<input type="checkbox"/>	12	Tri Foam	Extra	\$3.00	Express	Main Corp
<input type="checkbox"/>	14	Tire Shine/Durashine	Extra	\$3.77	Express	Main Corp
<input type="checkbox"/>	17	Ultimate Wash	Extra	\$16.98	Hand Services	Main Corp
<input type="checkbox"/>	18	Add Vac Charge	Base	\$0.94	Hand Services	Main Corp
<input type="checkbox"/>	24	Express Wax Package	Base	\$13.20	Hand Services	Main Corp
<input type="checkbox"/>	31	Towel Exchange	Base	\$2.83	Impulse	Main Corp
<input type="checkbox"/>	32	MOTORCYCLES	Base	\$9.43	Hand Services	Main Corp
<input type="checkbox"/>	33	FULL HAND WASH	Base	\$20.75	Hand Services	Main Corp
<input type="checkbox"/>	34	ULTIMATE HAND WASH	Base	\$33.02	Hand Services	Main Corp
<input type="checkbox"/>	35	Large Vehicle Charge	Extra	\$4.72	Hand Services	Main Corp

Ok

Figure 201. Extra Dialog Box



- 6 From the **Extra** list, select between one and six extra services in the list, and then click **OK**.
The extra services are assigned to the base wash. The customer will be able to view these options from the Extra Services screen that appears immediately after the customer selects the respective base wash.
- 7 From Wash Service section, you can reorder the Wash Services list.
 - Click to select the wash service or extra service, and then click to select the **Move Up**  button or **Move Down**  buttons to reorder the list.




Figure 202. Profile with Base Washes and Extra Services

- 8 In the **Profile** area, click the **Save**  button when you are finished. The profile, base washes and extra services are added to the list.

 See “Add a Profile with a Base Wash and Extra Service” on page 435.


 See “Add Extra Services to a Profile” on page 438.

 See “Edit a Profile” on page 440.

 See “About Schedules” on page 441.

 See “Edit Schedule” on page 445.



 See “Delete Schedule” on page 446.

 See “Profile and Schedule Descriptions” on page 442.

Edit a Profile

You can edit the profile name, base washes and extra services assigned to a profile.

To edit a profile, follow these steps:

- 1 In the **Configuration** menu, and click **Goods & Services**, and then click **Profile**. The **Profile** tab appears.
- 2 Select a profile in the list, and then click the **Edit**  button. The **Profile** dialog box appears.
- 3 Click the **Enable**  button to enable the profile. Click again to disable, and the profile will immediately be disabled. The Status column displays if the profile is enabled or disabled.

NOTE: Along with selecting the Enable button, the Profile must also have a valid schedule to be completely enabled.

- 4 You can edit the profile in the following ways:
 - Type a new name in the **Profile** box.
 - You cannot select a different **Device Type**.

- In the **Device** box, select or remove devices.
- You cannot select a different **Service Type**.
- Add and remove base washes and extra services.
- Re-order the **Wash Service** list.

5 Click the **Save**  button.



See “Add Extra Services to a Profile” on page 438.



See “Edit a Profile” on page 440.



See “About Schedules” on page 441.



See “Edit Schedule” on page 445.



See “Delete Schedule” on page 446.



See “Profile and Schedule Descriptions” on page 442.

About Schedules

Profile time Schedules determine when the profile is available for customers at the Auto Sentry. You can add one or more schedules to a profile. For example, you might create a Standard profile with three wash choices. For that Standard profile, you can create a schedule that enables it on all days from 6 a.m. to 10 p.m.

NOTE: Along with a valid schedule, the profile needs to be Enabled.



See “About Profiles” on page 434.



See “Profile and Schedule Descriptions” on page 442.

Profile and Schedule Descriptions

The following table describes each of the fields in the **Schedule** dialog box.

Table 50: Profiles and Schedule Descriptions

Report	Type	Description
Profiles		
Profile		Profile name that has already been added.
Created At		This is the Site at which the profile was created.
Devices		This describes the Devices that the profile will be available.
Services		
Services		Services selected for the Profile.
Extra Service Check Box		Extra Services selected for the Profile.
Schedule		
Day	List	One or more of the following describes the days that the profile is valid and available. All Days, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday. Example: If your Exterior Club Member profile is available seven day a week, select All Days in the Day field.
Start Date	Date format	This is the date selected that the valid profile begins.
End Date	Date format	This is the date selected that the valid profile will end.
Start Time	Time format	This is the earliest time the valid profile is available on the selected days. Example: If your Exterior Club Member profile is available during operating hours of the car wash, from 8:00am to 8:00pm, type 8:00:00 AM in the Start Time field.
End Time	Time format	This is the latest time the valid profile is available on the selected days.

Table 50: Profiles and Schedule Descriptions

Report	Type	Description
Vehicle	List	<p>Normal or High Vehicle.</p> <p>Normal—Standard size vehicles or All Vehicles if there is no High Vehicle Sensor.</p> <p>High Vehicle—(i.e., the optional high vehicle sensor must be activated). You might use the high vehicle setting for a schedule that includes increased pricing for tall vehicles or for services that include retracts. You can create alternate high vehicle schedules for each of your Normal schedules.</p>
Applies To	List	<p>Select one of the following that applies to the profile:</p> <ul style="list-style-type: none"> ▪ Retail Default transaction type. This is used to list the regular wash offerings. ▪ Club is used for the club redemptions. ▪ Paid Ticket that are already paid, like a fuel wash code. ▪ Open Ticket still needs to be paid, like a frequency promotion. Open tickets are unpaid like tickets generated from a Presell. ▪ Coupon is used for the coupon codes. ▪ Club Sales is used for club purchases. The list can include up to 6 clubs for customers to purchase. ▪ Gift Sales is used to sell Gift Cards. ▪ Flex is the second screen if you need an additional retail wash offering list. ▪ Fleet is used for the Fleet Profiles. ▪ BookSales is used for Wash Books. ▪ Customer Group is used to offer certain customers special prices based on their group association
Rule	List	These are the restrictions that pertains the to the Club or Fleet.



See "Add Extra Services to a Profile" on page 438.



See "Edit a Profile" on page 440.



See "About Schedules" on page 441.



See "Edit Schedule" on page 445.




See "Delete Schedule" on page 446.



See “Profile and Schedule Descriptions” on page 442.

Add Profile Schedule

To add a schedule to a profile, follow these steps:



- 1 In the **Configuration** menu, click **Goods & Services**, and then click the **Profile** tab.
- 2 Select a profile in the list.
This is the profile to which you will assign the schedule.
- 3 In the **Schedule** area, click the **Add**  button.
The **Schedule** dialog box appears.
- 4 Select an item for each of the fields relating to time.

Day	Start Date	End Date	Start Time	End Time	Vehicle	Applies To	Rule
All Days	08/22/2014		9:00 am	6:00 pm	Normal	Customer Group	Regular

Figure 203. Schedule Dialog Box


- 5 In **Vehicle Height**, select Normal or High Vehicle.
- 6 In **Applies To**, select a category this Profile applies to:
 - Retail
 - Club
 - Paid Ticket
 - Open Ticket
 - Coupon
 - Club Sales
 - Gift Sales
 - Flex
 - Fleet
 - BookSales
 - Customer Group
- 7 In **Rule**, if available, select a rule from the drop-down box that has been set up prior to setting the schedule.

NOTE: Rules apply to clubs and fleets accounts.

- 8 Click the **Save**  button.
The schedule is assigned to the profile.
- 9 Click the **Enable**  button, if necessary.
If the Status column displays Enabled and the profile has a valid schedule, then the profile will be completely enabled.

NOTE: Click the Enable button again to disable.

 See "Add Extra Services to a Profile" on page 438.

 See "Edit a Profile" on page 440.

 See "About Schedules" on page 441.



 See "Edit Schedule" on page 445.

 See "Delete Schedule" on page 446.

 See "Profile and Schedule Descriptions" on page 442.

Edit Schedule

You can edit a schedule that has been assigned to a profile.

- 1 From the **Configuration menu**, click **Goods & Services**, and then click the **Profile** tab.
- 2 Select a profile in the list.
The schedule for that profile appears.
- 3 Select a schedule, and then click **Edit**  button in the **Schedule** area.
The **Schedule** dialog box appears.
- 4 Edit each of the fields, and then click the **Save**  button.
The schedule is edited.

 See "Add Extra Services to a Profile" on page 438.



See “Edit a Profile” on page 440.



See “About Schedules” on page 441.



See “Edit Schedule” on page 445.




See “Delete Schedule” on page 446.



See “Profile and Schedule Descriptions” on page 442.

Delete Schedule

You can delete a schedule that has been assigned to a profile, by following these steps:

- 1 From the **Configuration menu**, click **Profile**.
The **Profile** tab appears.
- 2 From the profile list, select a profile.
The schedule for that profile appears.
- 3 Click to select the profile’s schedule.
- 4 From the **Schedule** area, click the **Delete**  button.
A warning message appears.
- 5 Select **Yes** or **No** to confirm deletion.
- 6 Click **OK**.
The schedule is deleted.



See “Add Extra Services to a Profile” on page 438.



See “Edit a Profile” on page 440.




See “About Schedules” on page 441.



See “Edit Schedule” on page 445.



See “Delete Schedule” on page 446.

 See "Profile and Schedule Descriptions" on page 442.

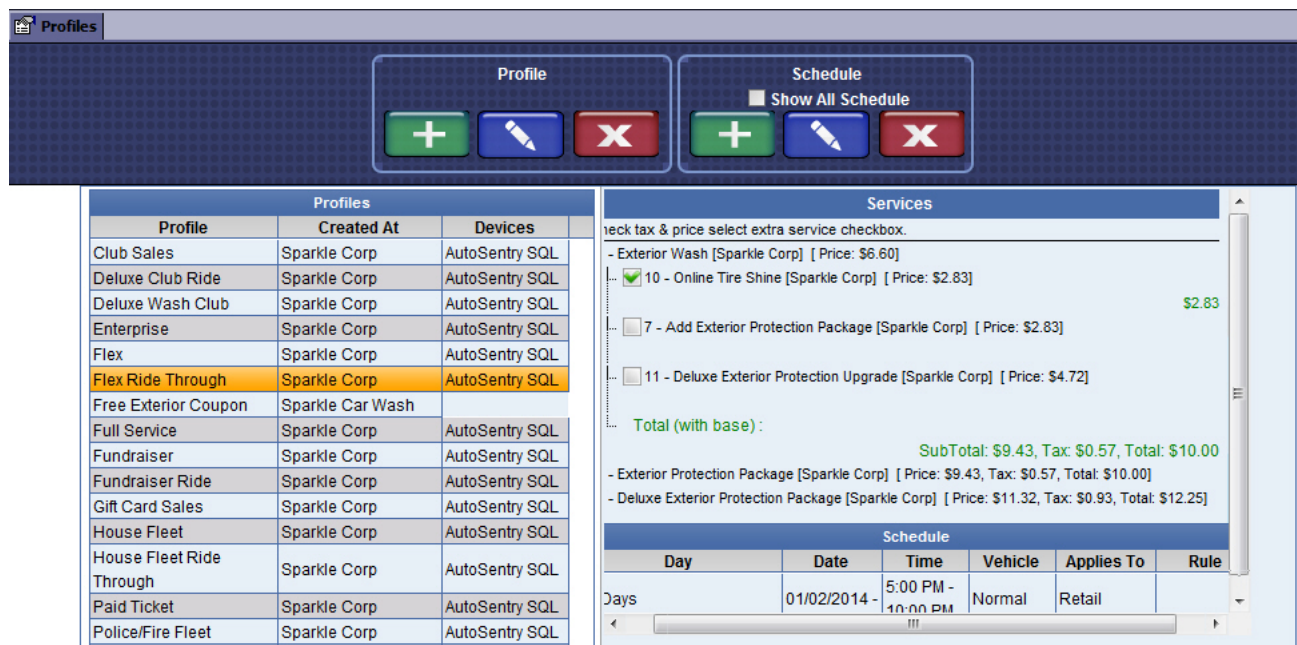
 See "Add a Profile with a Base Wash and Extra Service" on page 435.

Add a Wash Book Profile with Base Washes and Extra Services

 See "About Wash Books" on page 340.

After you added your Base Washes, Extra Services if necessary, and Wash Book Sales Items at Corporate, you can setup a Profile to sell Wash Books at your Auto Sentry. After you setup a valid schedule for the Wash Book profile, the Buy Wash Book button will appear on the Main Options wash menu.

- 1 At your Car Wash site level, Log in to *WashConnect*®.
- 2 From the **Configuration** menu, click **Goods & Services**, and then click **Profiles**. The **Profiles** tab appears.



The screenshot displays the 'Profiles' tab in the WashConnect software. At the top, there are two main sections: 'Profile' and 'Schedule'. Each section contains three buttons: a green '+' button for adding, a blue pencil icon for editing, and a red 'X' button for deleting. Below these are two main panels. The left panel is a table of profiles, and the right panel shows a service selection interface with a list of services and a summary of the total price.

Profiles		
Profile	Created At	Devices
Club Sales	Sparkle Corp	AutoSentry SQL
Deluxe Club Ride	Sparkle Corp	AutoSentry SQL
Deluxe Wash Club	Sparkle Corp	AutoSentry SQL
Enterprise	Sparkle Corp	AutoSentry SQL
Flex	Sparkle Corp	AutoSentry SQL
Flex Ride Through	Sparkle Corp	AutoSentry SQL
Free Exterior Coupon	Sparkle Car Wash	
Full Service	Sparkle Corp	AutoSentry SQL
Fundraiser	Sparkle Corp	AutoSentry SQL
Fundraiser Ride	Sparkle Corp	AutoSentry SQL
Gift Card Sales	Sparkle Corp	AutoSentry SQL
House Fleet	Sparkle Corp	AutoSentry SQL
House Fleet Ride Through	Sparkle Corp	AutoSentry SQL
Paid Ticket	Sparkle Corp	AutoSentry SQL
Police/Fire Fleet	Sparkle Corp	AutoSentry SQL

The right panel shows a service selection interface. It includes a 'check tax & price select extra service checkbox.' and a list of services with their prices. The total price is displayed as \$10.00.


Services					
Day	Date	Time	Vehicle	Applies To	Rule
Days	01/02/2014	5:00 PM - 10:00 PM	Normal	Retail	

Figure 204. Profile Tab

- 3 From the **Profiles** section, click the **Add** button. The **Profile** dialog box appears.



Figure 205. Profile Dialog Box

- 4 In the **Profile** box, type a name for the Wash Book profile.
- 5 In the **Device Type** box, select device(s) type. i.e., Auto Sentry.
- 6 In the **Device** box, select one or more devices.
- 7 Click the **Add Base Service**  button.
- 8 In **Service Type** box, select **Book**.
The **Base** dialog box appears.

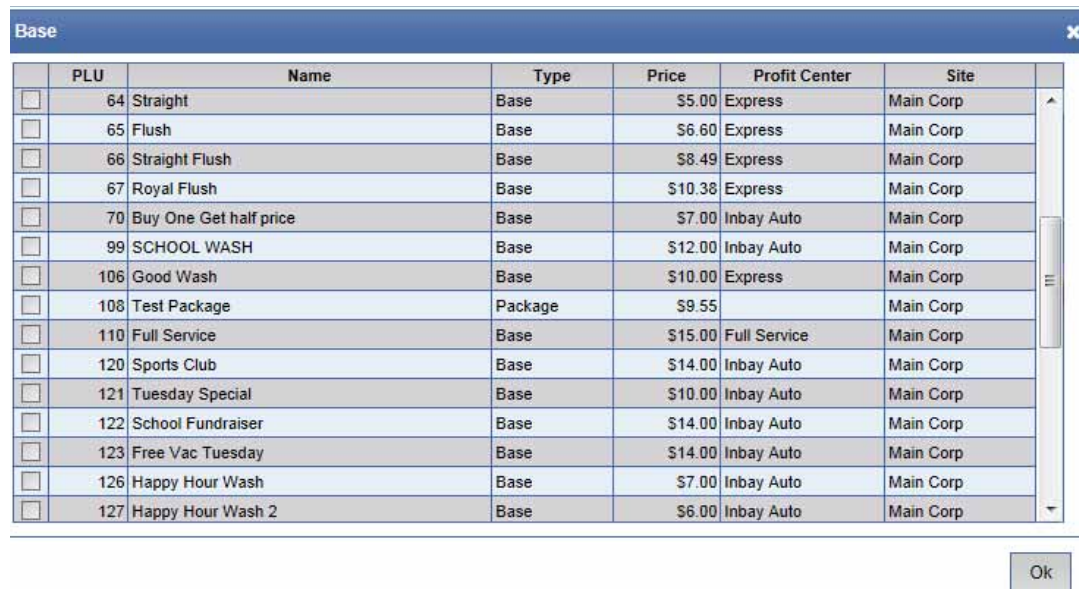




Figure 206. Base Dialog Box

- 9 In the **Base** dialog box, select between one and six base washes for the Wash Books, and then click **OK**.
The base washes are assigned to the new profile.

NOTE: Six base washes maximum for Auto Sentry Profiles.



Reorder Wash Book Selection:

- 10** You can change the order of the Wash Book Offerings as they appear on the Auto Sentry by selecting the wash, and then click **Move Down**  button or **Move Up**  button.

Add Extra Services for Wash Book Base Wash:


- 11** From Wash Service, select the base Wash, and then, if necessary, click the **Add Extra Service** button to set up an extra service selection screen for the Wash Book's base wash. You can add up to six extra services.

Remove Service from Wash Book's Profile:

- 12** If necessary, you can remove services from the Wash Service list by selecting the Wash Service and then clicking the **Remove Service**  button.
- 13** Click **OK**.
- 14** Click the **Save**  button.
The message **Profile saved successfully** appears.
- 15** Click **OK**.


 See "About Wash Books" on page 340.

 See "Schedule a Wash Book Profile" on page 359.

 See "Profile and Schedule Descriptions" on page 442.


Schedule a Wash Book Profile

To add a schedule to a Wash Book profile, follow these steps:

- 1** At your Car Wash site level, Log in to WashConnect®.
- 2** In the **Configuration menu**, click **Goods & Services**, and then click **Profile**. The **Profile** tab appears.
- 3** Click to select a profile in the list.
The profile is highlighted.
- 4** In the **Schedule** area, click the **Add**  button.
The **Schedule** dialog box appears.

Day	Start Date	End Date	Start Time	End Time	Vehicle	Applies To	Rule
All Days	08/22/2014		9:00 am	6:00 pm	Normal	Customer Group	Regular

Figure 207. Schedule Dialog Box

- 5 In **Day of Week** drop-down box, select All Days or the individual day(s).
- 6 In **Start Date**, select a start date.
- 7 In **End Date**, select an end date if necessary.
- 8 In Start Time and End Time, select a specific time, if necessary.
- 9 In **Vehicle Height**, select Normal or High Vehicle.
- 10 In **Applies To**, select **Book Sales**.
- 11 Click **OK**.
- 12 Click **OK**.
- 13 Click the **Save**  button.
The schedule is assigned to the wash book profile.

NOTE: Upon the valid schedule, the **Buy Wash Book** button is available on the Auto Sentry's main menu. If customer is redeeming a wash book wash, a Welcome Video can present the instructions for the Wash Book customer to swipe the Wash Book Card (Customer Card).



See "About Wash Books" on page 340.



See "Add a Wash Book Profile with Base Washes and Extra Services" on page 356.



See "Profile and Schedule Descriptions" on page 442.

About POS Profiles

POS Profiles

HELP - What can I do here?

Managers and Owners:

- Quickly deactivate an entire profit center from being sold at the POS.
- **Example:** If hand finished services is closed, you can close the hand finished services profit center so it can't be sold at the POS.
- Activate or deactivate specific profit centers based on time and date ranges.
- Activate or deactivate specific PLUs at the POS based on time and date ranges.



See "Add a POS Profile" on page 362.



See "Add a POS Profile Schedule" on page 362.



Profiles			Schedule		
Profile	Created At	Devices	Day	Date	Time
Front Lobby	Auto Pros Express	TouchPOS Front Lobby, TouchPOS Side Lobby	All Days	7/11/2014 -	12:00 AM - 11:00 PM
Presell	Auto Pros Express	Touch PreSell Side			
Side Lobby	Auto Pros Express	TouchPOS Side Lobby			

Figure 208. POS Profiles

POS Profiles allows a user with privileges to activate or deactivate specific Profit Centers or PLUs at the POS based on Time and Date Ranges. i.e., If hand finished services closes before your tunnel, you would be able deactivate the hand finished services profit center so hand finished services cannot be sold at the Touch POS during the scheduled time and date range. First, Add a POS Profile, and then set up the Schedule for the POS Profile.

Add a POS Profile

The POS Profile is used to turn off any sales items to be sold during a specific time or to turn off a specific Profit Center such as Hand Finished Services. This will adjust the sales items that can be sold at the Touch POS or Presell terminals.

- 1 From **Configuration** menu, select **Goods and Services**, and then select **POS Profiles**.
The list of all existing POS Profiles appears.
- 2 Click the **Add**  button.
- 3 In **Profile**, type the name of the new POS Profile.
- 4 In **Device Type**, select either POS or Presell.
- 5 In **Device**, click the drop-down button and then select one or more devices that apply.
- 6 Expand the **Assign Sales Item** node. All Sales Items are selected by default, and you can deselect the entire Profit Center or specific PLU Sales Items by their PLU number.
- 7 Click **OK**.
- 8 Click the **Save**  button.
The message **Profile saved successfully** appears.
However, the Profile needs a valid schedule before it will take effect.




See "Add a POS Profile" on page 452.



See "Add a POS Profile Schedule" on page 452.

Add a POS Profile Schedule

After adding a POS Profile, you need to add a schedule to activate it.

- 1 From **Configuration** menu, select **Goods and Services**, and then select **POS Profiles**.
The list of all existing POS Profiles appears.
- 2 Click to select a POS Profile.
The selected POS Profile is highlighted.
- 3 From Schedule, click the **Add**  button.

The Schedule Dialog appears.

Day of Week	Start Date	End Date	Start Time	End Time
All Days	7/11/2014		12:00 AM	11:00 PM

Ok

Figure 209. Schedule POS Profile

- 4 In **Day of Week**, click to select All Days or one or more individual days.
- 5 In **Start Date**, make certain the date is correct.
- 6 In **End Date**, select a date if there is actually a date to end this POS Profile.
- 7 In **Start Time**, select a valid time.
- 8 In **End Time**, select a valid time.
- 9 Click **OK**.
The message **Schedule Save Successfully** appears.



See "Add a POS Profile" on page 362.



See "About POS Profiles" on page 361.

About Promotions

Promotions

HELP - What can I do here?

Managers and Owners:

- Redeem at Touch POS only at Inbays, Express, and Full Service. (Promotions does not track Auto Sentry sales.)
- Configure at Corporate.
- Increase customer loyalty and repeat business
- WashConnect tracks all available Promotions for designated customers. Before sale is finalized, the available Promotions screen appears with the promotions attained and redeemable:
 - point
 - Punch Card
 - Cascade Pricing
 - Customer Date
 - Calendar Date
 - Frequent Car
 - Frequent Customer

NOTE: Set the Customer Tracking Global setting to True if using any of the following promotions.

- See “Global > GlobalConfiguration > Global” on page 686.
- “Add Bonus Point Promotion”
- “About Punch Card”
- “Cascade Pricing”
- “Customer Date”
- “Calendar Date”
- “Frequent Car”
- “Frequent Customer”

NOTE: Redeem one promotion per transaction. Customer can select from a list of available promotions which one they would like to use with the transaction.

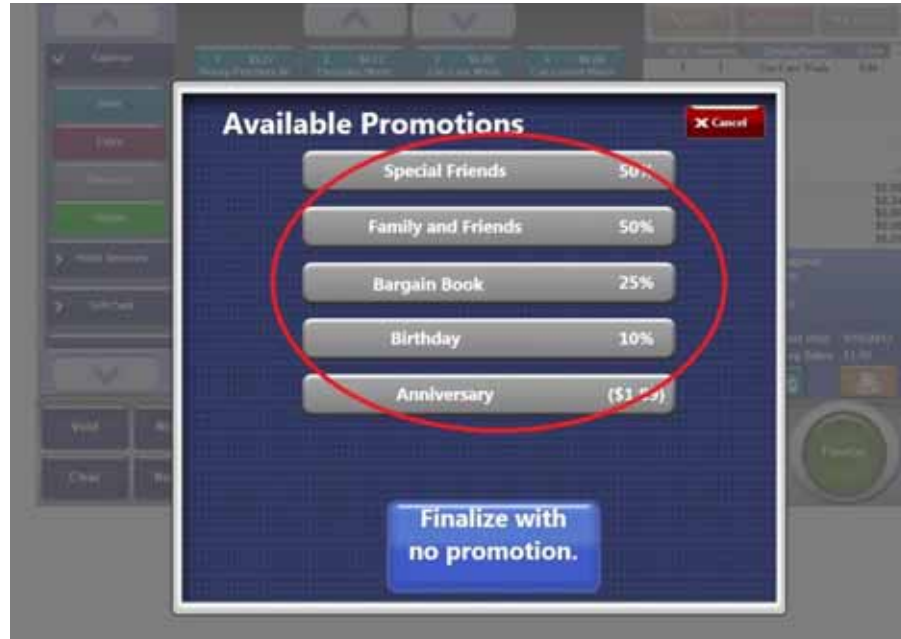


Figure 210. Available Promotions Example

WashConnect® promotions can be configured at Corporate and redeemed at Touch POS terminals only. These customer tracking promotions are available to increase customer loyalty and customer repeat business for the Touch POS at Inbays, Express and Full Service. *WashConnect®* keeps track of the customers' available promotions and before finalizing the sale, a Available Promotions screen appears with the promotions that the customer has attained and can redeem. Setup the promotions that you want and the system does the rest for you.

About Bonus Points

WashConnect® offers two Bonus Point systems. Both are automatic customer tracking systems:

- 1 "Add Bonus Point Promotion"
Configuration > Goods and Services > Promotions > Bonus Points per dollar.
- 2 "Bonus Points Specific to PLU"
Configuration > Goods and Services > Sales Items > Bonus Points that are PLU specific.


NOTE: The Bonus Point Promotion super cedes the Bonus Point Specific to PLU.



See "Add Bonus Point Promotion" on page 456.

 See "Enable Promotion" on page 458.

 See "Bonus Point SALE Promotion" on page 365.

 See "Bonus Points Specific to PLU" on page 366.

 See "About Promotions" on page 454.

 See "View Bonus Points" on page 462.

Add Bonus Point Promotion

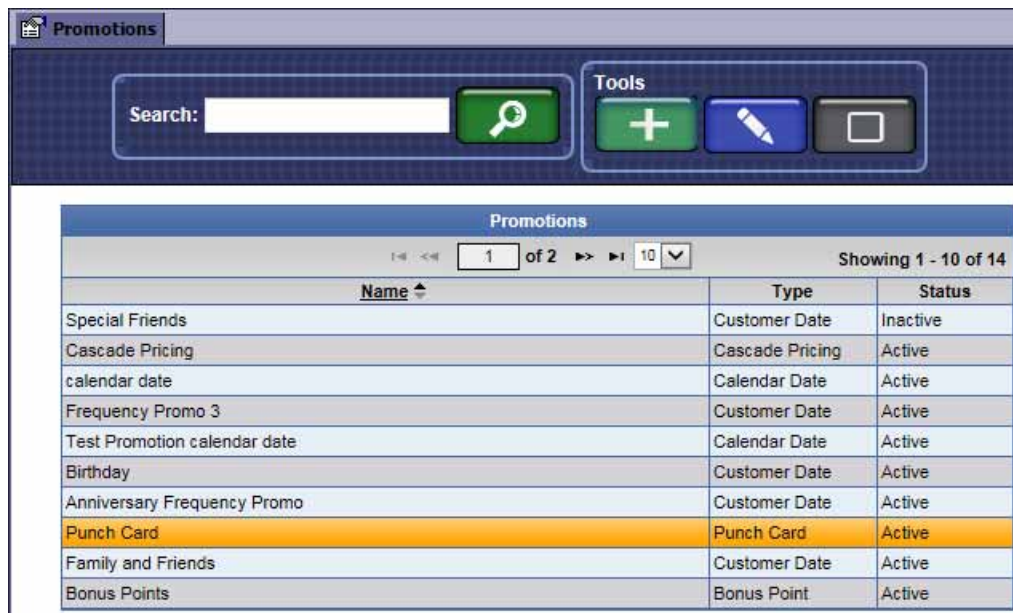
Bonus Point is a customer tracking system that tracks all vehicles from the vehicle's license plate number that is assumed to be captured by the greeter/service technician or cashier.

NOTE: Only applicable for available with Express, Inbay Auto and Full Service profit centers.

The Bonus Point program awards a certain amount of points per dollar of services or items purchased. Redeem free services or items with the bonus points on Touch POS. This can be configured in Promotion.

- 1 From **Configuration** menu, select **Goods and Services**, and then select **Promotions**.

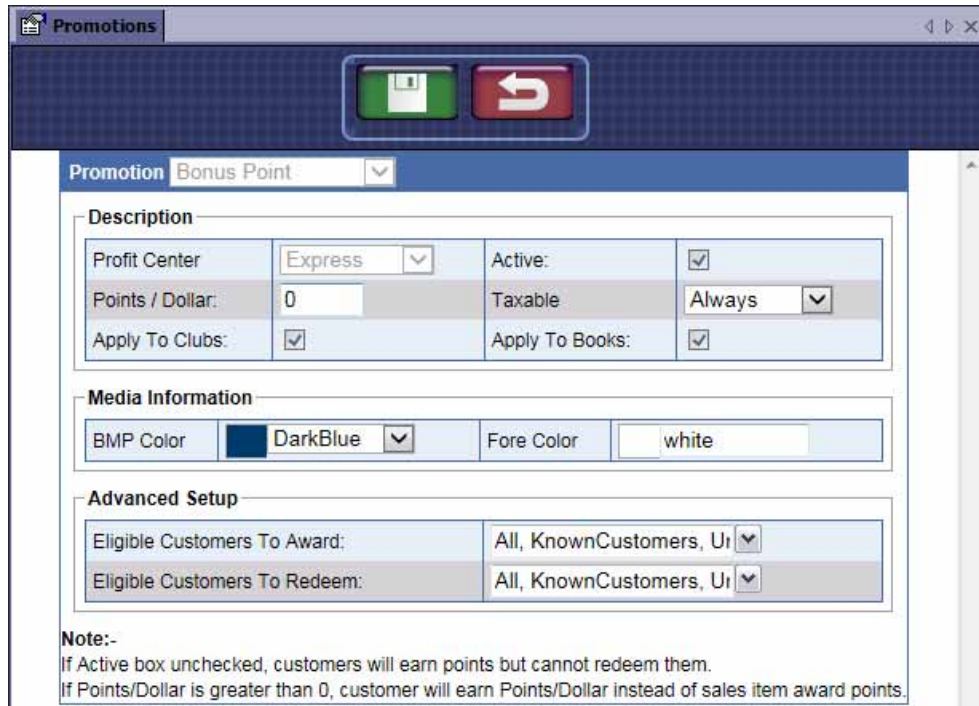
The Promotions list appears.



Promotions		
Name	Type	Status
Special Friends	Customer Date	Inactive
Cascade Pricing	Cascade Pricing	Active
calendar date	Calendar Date	Active
Frequency Promo 3	Customer Date	Active
Test Promotion calendar date	Calendar Date	Active
Birthday	Customer Date	Active
Anniversary Frequency Promo	Customer Date	Active
Punch Card	Punch Card	Active
Family and Friends	Customer Date	Active
Bonus Points	Bonus Point	Active

Figure 211. Promotions list

- 2 Click the **Add**  button.
- 3 In **Promotion**, select **Bonus Point**.



Promotion Bonus Point

Description

Profit Center	Express	Active:	<input checked="" type="checkbox"/>
Points / Dollar:	0	Taxable	Always
Apply To Clubs:	<input checked="" type="checkbox"/>	Apply To Books:	<input checked="" type="checkbox"/>

Media Information

BMP Color	DarkBlue	Fore Color	white
-----------	----------	------------	-------

Advanced Setup

Eligible Customers To Award:	All, KnownCustomers, U
Eligible Customers To Redeem:	All, KnownCustomers, U

Note:-
 If Active box unchecked, customers will earn points but cannot redeem them.
 If Points/Dollar is greater than 0, customer will earn Points/Dollar instead of sales item award points.

Figure 212. Promotion - Bonus Point

NOTE: This bonus point tracking system super cedes the PLU specific bonus points awarded and redeemed.

Description section:

- 4 In **Points / Dollar**, type a number. This is the number of points to award per dollar across all your sales items super ceding any bonus points set up individually from the Sales Item settings. If Points/Dollar is greater than 0, customer will earn Points/Dollar instead of Sales Item award points.
- 5 In **Active** checkbox, remain unchecked for customer's to earn points but cannot redeem points.
- 6 In Taxable drop-down box, select one of the following:
 - Never
 - Always
 - Conditional
 - Force
- 7 Click to mark the **Apply to Clubs** check box if necessary.
- 8 Click to mark the **Apply to Books** check box if necessary.

Media Information section:

- 9 From the Media Information section, select a BMP Color and Fore Color, if necessary.

Advanced Setup section:

- 10 From the **Advanced Setup** section, select all the Eligible Customers from the drop-down list of customers. Select both **Eligible Customers to Award** and **Eligible Customers to Redeem**.

- 11 Click the **Save**  button.
The promotion is set up to award points per dollar.

 See "Add Bonus Point Promotion" on page 456.

 See "Enable Promotion" on page 458.

 See "Bonus Point SALE Promotion" on page 365.

 See "Bonus Points Specific to PLU" on page 366.

 See "About Promotions" on page 454.

 See "View Bonus Points" on page 462.


Enable Promotion

After you have set up the promotion, you can quickly enable the promotion to make it available to the eligible customers.

 See "About Promotions" on page 454.

NOTE: This feature is only available at Corporate.

- 1 Log in to *WashConnect*® at Corporate.
- 2 In the **Configuration menu**, click **Goods & Services**, and then click **Promotions**. The **Promotions** tab appears.
- 3 Click to select a Promotion.
The promotion is highlighted.

- 4 If the status of the promotion is Inactive, click the **Enable**  button.
The promotion status is now Active.
A Confirm Are you sure you want to enable this promotion? message appears.
- 5 Click **Yes**.



See "Profile and Schedule Descriptions" on page 442.



See "About Schedules" on page 441.3




See "View Bonus Points" on page 462.

Disable Promotion

After you have set up the promotion, you can quickly disable or make the promotion inactive for the eligible customers.

NOTE: This feature is only available at Corporate.

- 1 Log in to *WashConnect*® at Corporate.
- 2 In the **Configuration menu**, click **Goods & Services**, and then click **Promotions**.
The **Promotions** tab appears.
- 3 Click to select a Promotion.
The promotion is highlighted.
- 4 If the status of the promotion is Active, click the **Disable**  button.
The promotion status is now Inactive.
A Confirm Are you sure you want to disable this promotion? message appears.
- 5 Click **Yes**.



See "Profile and Schedule Descriptions" on page 442.




See "About Schedules" on page 441.

Terminate Promotion

After a promotion has been added, you can easily terminate the promotion permanently.

NOTE: This feature is only available at Corporate.

- 1 Log in to *WashConnect*® at Corporate.

- 2 In the **Configuration menu**, click **Goods & Services**, and then click **Promotions**. The **Promotions** tab appears.
- 3 Click to select a Promotion.
The promotion is highlighted.
- 4 If the status of the promotion is Inactive or Active, click the **Delete**  button.
The promotion is deleted.
A Confirm Are you sure you want to delete this promotion? message appears.
- 5 Click **Yes**.



See "Add Bonus Point Promotion" on page 456.



See "Enable Promotion" on page 458.



See "Bonus Point SALE Promotion" on page 365.



See "Bonus Points Specific to PLU" on page 366.



See "About Promotions" on page 454.



See "View Bonus Points" on page 462.

Bonus Points Specific to PLU

NOTE: Bonus Points Specific to PLU customer tracking system is only applicable for available with Express, Inbay Auto and Full Service profit centers.

The Bonus Point program awards points for the purchase of items as well as allows you to redeem free services or items with the bonus points. This can be configured in Promotion.

- 1 From *WashConnect®*, Login at Corporate (must be Corporate level).

- From the **Configuration** menu, select **Goods and Services**, and then **Sales Items**.

The screenshot shows the 'Sales Item' configuration form. At the top, there are two buttons: a green 'Save' button and a red 'Back' button. The form is divided into several sections:

- Description:** This section is circled in red. It contains fields for Profit Center (Express), *PLU (1001), *Price (6.99), *Name (The Basics), *Type (Base), and Variable (Never).
- Token to Dispense:** A table with columns for Name and Qty. It lists 'US One Dollar Token Coin', 'Some Token', 'vacuum', and 'Bob'.
- Commission:** Includes a 'Greeter' field and radio buttons for 'Amount' (selected) and 'Percentage'.
- Secondary Language Description:** Fields for Name, Description 1, and Description 2.
- Media Information:** Fields for Video File, BMP File, BMP Color (None), and Fore Color.
- Bonus Points:** This section is also circled in red. It contains 'Points Awarded' (5) and 'Points To Redeem' (30).

Figure 213. Sales Item Bonus Points Example

- Search, edit or add a new Sales Item.



See "Add Sales Item" on page 393.

- From Bonus Points section, in **Points Awarded**, type the amount of bonus points to award customer if customer purchases this Sales Item at a Touch POS only.
- From Bonus Points section, in **Points To Redeem**, type the amount of bonus points to redeem if customer has been awarded enough points to Redeem this Sales Item for Free at a Touch POS.

NOTE: Promotion Bonus Point super cedes the PLU specific Points Awarded and Point to Redeem.

- Click the **Save**  button.

- The bonus points will now be awarded every time customers purchase the service as well as they can redeem them if they have enough points. The Available Promotions screen will appear for the cashier to view the eligible points.



See "Bonus Point SALE Promotion" on page 365.

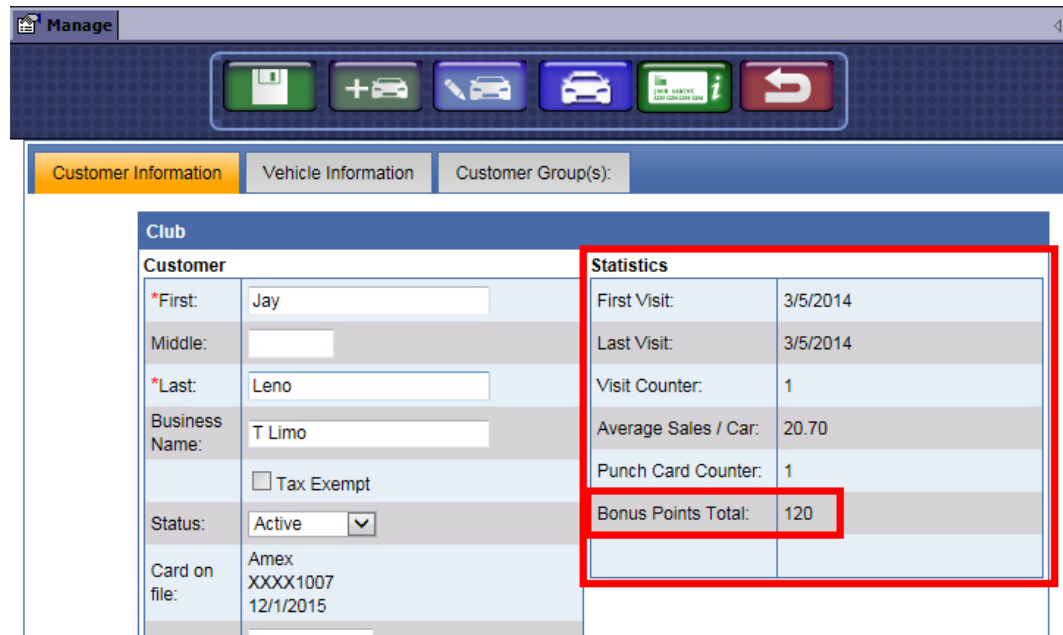


See "About Promotions" on page 454.

View Bonus Points

The system tracks the bonus points for each customer in the Touch POS. Follow these steps to view a customers' bonus points:

- From the **Customer** menu, select **Manage**.
- Search for a customer.
- Edit the customer.
- From the Customer Information tab, you can view **Bonus Points Total** from the Statistics section.





Edit Bonus Point Counts

You can edit Bonus Points Counts with permission in POS during an Open Shift.

NOTE: Every edit to bonus points and/or punch cards will be tracked on Shift Detail Report.

- Open a Touch POS shift in WashConnect®.

- 2 Sign in as a greeter. Greeter must have permission to edit the Bonus Points counts.
- 3 Click to select **Vehicle History**  button.
- 4 Search and select a customer.
- 5 Click to select **Vehicle History**  button again. The Vehicle History screen appears.

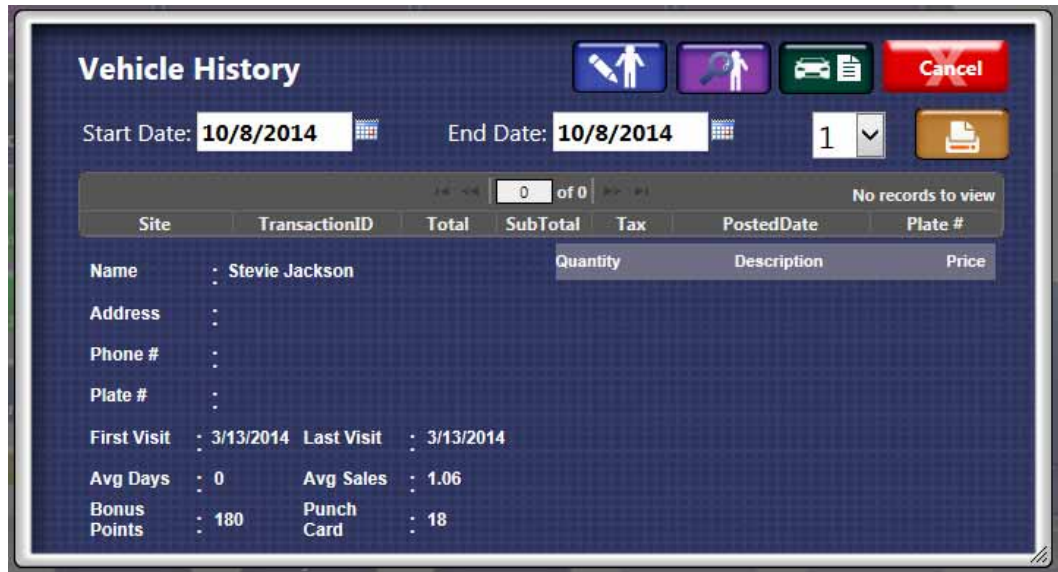



Figure 214. Vehicle History

- 6 Click to select the **Edit Customer**  button. The Update Customer Information dialog appears.

NOTE: The Login screen appears if greeter does not have permission.

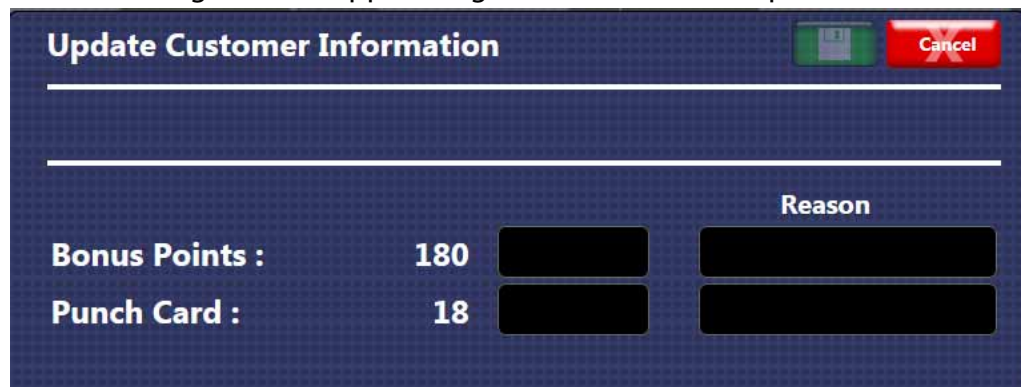
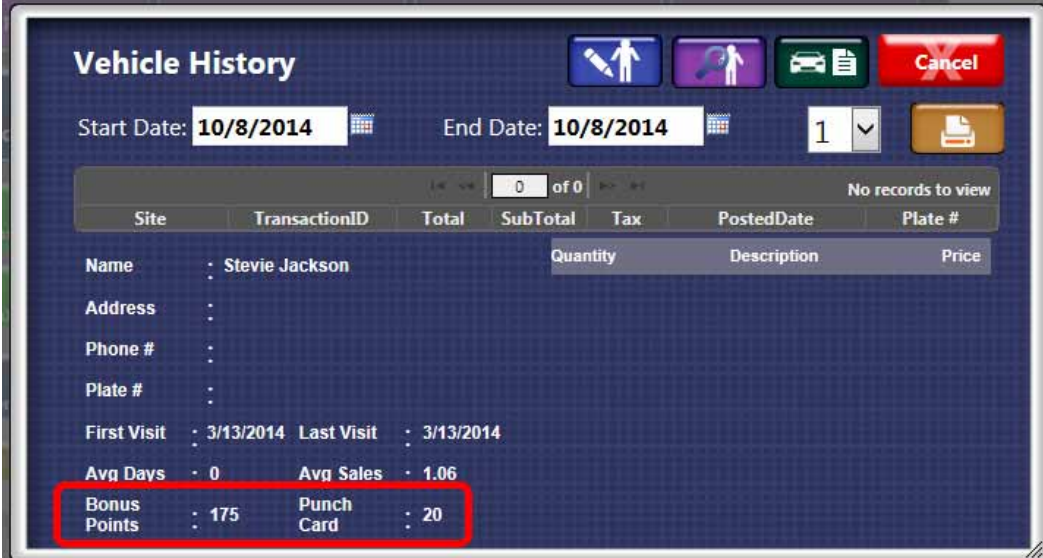


Figure 215. Update Customer Information Bonus Points

- 7 You can change the customers Bonus Points amount, you can type a new number in the box next to the amount to be changed.
- 8 Type in a reason for the change.

- 9 Click the **Save**  button.
The Changes are saved immediately.



Vehicle History

Start Date: **10/8/2014** End Date: **10/8/2014** 1

No records to view

Site	TransactionID	Total	SubTotal	Tax	PostedDate	Plate #
Name	Stevie Jackson		Quantity	Description	Price	
Address						
Phone #						
Plate #						
First Visit	3/13/2014	Last Visit	3/13/2014			
Avg Days	0	Avg Sales	1.06			
Bonus Points	175	Punch Card	20			



See "View History of Punch Card Edits" on page 474.



See "About Bonus Points" on page 455.

View History of Bonus Points Edits

To view the edit history of Bonus Points amounts from the Customers Manage menu, follow these steps:

- 1 From the **Customers** menu, select **Manage**.
- 2 Search for customer.
- 3 Click to highlight customer.
- 4 From the Search buttons, select the **Customer Notes** button.

NOTE: Customer notes are not editable: cannot change or delete any line item.

Customer Notes for the Customer appears. If any edits were made to the Bonus Points, you can view the reason for the change and the date and time stamp along with the amounts that were changed.

Customer Notes for Stevie Jackson		
Seq.	Created On	Note
1	10/8/2014 10:55:46 AM	Punch card changed from 18 to 20. Reason : Customer was irate and offered consolation points.
2	10/8/2014 10:55:46 AM	Bonus point changed from 180 to 175. Reason : Customer voided last transaction.
3	10/7/2014 1:48:40 PM	Punch card changed from 17 to 18. Reason : Didn't get previous credit
4	10/7/2014 1:48:40 PM	Bonus point changed from 160 to 180. Reason : Didn't get credit for a wash

Figure 216. Customer Notes for Customer's Bonus Points Edits



See "About Bonus Points" on page 455.



See "Edit Bonus Point Counts" on page 462.

Cascade Pricing

NOTE: This Cascade Pricing customer tracking system feature is only applicable for Express, Inbay Auto and Full Service profit centers.

Enhance the frequency of the customer's visits to the car wash by offering cascade pricing. Cascade Pricing increases the discounts on each visit to the car wash as long as the customer purchases each wash within a predetermined time period.

Configure your Cascade Pricing from Promotions. The Promotions Cascade Pricing is redeemable against a customer's wash at a POS terminal. This customer tracking system is not available at the Auto Sentry.



For Auto Sentry Cascading Price discounts, See "About Frequency Promotion Packages" on page 340.



To configure cascading price discounts for Express, Inbay Auto, and Full Service profit centers, See "Configure Cascade Pricing" on page 368.



See "About Promotions" on page 454.



See "Cascade Pricing Example" on page 466.

Cascade Pricing Example

The regular price of the Base Wash is \$6 in this example. The customer will receive a \$1 discount if they return within a 5 day period. To entice the customer to visit again within 5 days, a \$2 discount will be offered. Finally, a \$3 discount is offered to the customer if they want, they can return within a 5 day period. After the \$3 discount wash is purchased the cycle starts again. See the following image for visual diagram.




Figure 217. Cascade Pricing Discount Visual Diagram

Configure Cascade Pricing

The instructions will provide a step by step process to set up a Frequency Program for a car wash that wishes to offer and increasing amount of discounts for each consecutive visit returning in a set amount of days.

- 1 From *WashConnect®*, Login at Corporate (must be Corporate level).
- 2 From the **Configuration** menu, select **Goods and Services**, and then **Promotions**.
- 3 In Tools, select the **Add Promotion** button.

The screenshot shows the 'Promotions' configuration window. At the top, there are two buttons: a green 'Save' button and a red 'Back' button. Below these is a dropdown menu for 'Promotion' set to 'Cascade Pricing'. The form is divided into three sections: 'Description', 'Media Information', and 'Advanced Setup'. In the 'Description' section, 'Profit Center' is set to 'Express', 'Taxable' is set to 'Never', 'Active' is unchecked, and 'Repeatable' is checked. In the 'Media Information' section, 'BMP Color' is set to 'Fuschia' and 'Fore Color' is empty. In the 'Advanced Setup' section, 'Eligible Customers To Award' is set to 'KnownCustomers'.

- 4 In Promotion, select **Cascade Pricing**.
- 5 In Profit Center, select a **Profit Center**.
- 6 In Taxable, select a setting.
- 7 In Media Information, select BMP Color and Fore Color if necessary.
- 8 In Advanced Setup, select one or more Customer Groups or All groups from the Eligible Customers to Award drop-down list.
- 9 Click the **Save**  button.
The system now allows Cascade Pricing settings for the Sales Item setting.



See "Apply Cascade Pricing Sales Item" on page 369.

Apply Cascade Pricing Sales Item

Cascade Pricing can be set up for one or more PLU Sales Items. Enable Cascade Pricing from Promotions.



See "Configure Cascade Pricing" on page 368.

- 1 From the **Configuration** menu, select **Goods and Services**, and then **Sales Items**.

Sales Item

Description

Profit Center: Express

*PLU: 1

*Price: 5.66

*Name: Basic Wash

*Type: Base

Taxable: Always

Extra Service Amount: 0.00

Token to Dispense:

Name	Qty.
US One Dollar Token Coin	
vacuum Token	

Account ID: **Select Account**


Searchable:

Department:

Cascade Price

Add Seq. **Remove Seq.**

Seq.	Visit	Discount	Visit within (days)
1	1	\$.94	5
2	2	\$ 1.88	5

- 2 Locate the Sales Item PLU or Add PLU to apply the Cascade Pricing.
Figure 218. Cascade Price for Express Basic Wash example
- 3 In **Sales Items**, expand the Cascade Price section.
- 4 Click **Add Seq.** button.
- 5 In **Visit**, type visit number to receive the discount offer.
- 6 In **Discount**, type the dollar discount customer can receive in the offer.
- 7 In **Visit within (days)** box, type the amount of days customer needs to return to be awarded the discount.
- 8 Click the **Save**  button.
The Sales Item is now set up to offer cascade price discounts and *WashConnect* keeps track of it all for you.
- 9 When Customer returns within 5 days to POS to purchase wash, the Available Promotions screen appears.
- 10 Select the Cascade Pricing to receive the discount.

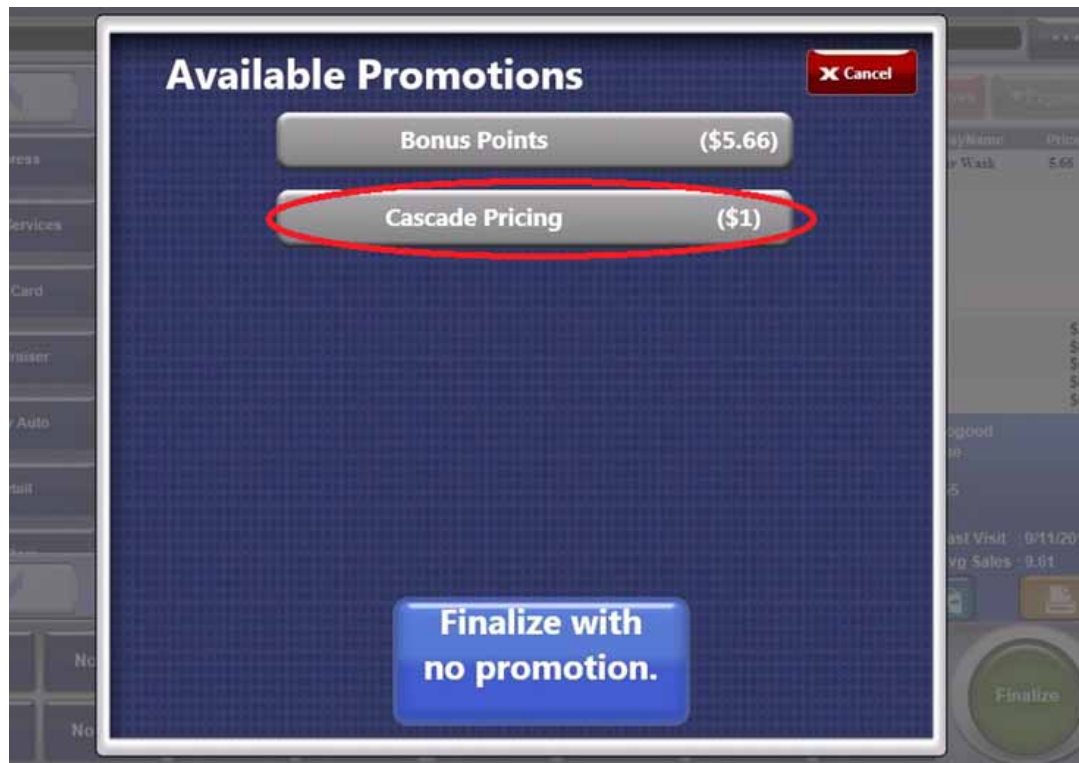


Figure 219. Available Promotions screen with Cascade Pricing example



See "About Promotions" on page 454.

About Punch Card

NOTE: Punch Card is available for Express, Inbay Auto, and Full Service profit centers.

Like Bonus Points, Punch Cards can be set up with a minimum number of wash visits and then customer is eligible to receive a promotion amount due (percentage or dollar amount). The Punch Card program can be created and configured in Promotions, and then set up to award and redeem in the Sales Items screen.

NOTE: There is no physical punch card. The punch card promotion is electronically tracked in the system. When customer is purchasing sales items at the POS, the system automatically suggests the available promotional offers for the customer before the sale is final.



See "Add a Punch Card Promotion" on page 470.



See "View Punch Card Statistics" on page 471.



See “Edit Punch Card Counts” on page 472.

Add a Punch Card Promotion

- 1 From **Configuration** menu, select **Goods and Services**, and then select **Promotions**.
- 2 In **Promotion**, select **Punch Card**.

The screenshot shows the 'Promotions' configuration interface. At the top, there are 'Save' and 'Back' buttons. Below them is a dropdown menu for 'Promotion' set to 'Punch Card'. The form is divided into three sections: 'Description', 'Media Information', and 'Advanced Setup'.
 - **Description:** Profit Center: Express; Active: ; *Name: Punch Card; Taxable: Never; Minimum Wash Amount: 5.00; Purchase: 10 washes and receive % or \$ 3.00 off.
 - **Media Information:** BMP Color: LightGreen; Fore Color: .
 - **Advanced Setup:** Eligible Customers To Award: All.





Figure 220. Promotions - Punch Card

- 3 In **Name**, type a name for the promotion. Example: Punch Card.
 - 4 In **Minimum Wash Amount**, type a minimum dollar amount.
- NOTE:** Minimum wash amount should be the least amount the customer pays to have a wash count on their punch card. If customer pays less than this amount, the wash will not count towards their punch card.
- 5 In **Purchase**, type the amount of washes to purchase, for the minimum amount or higher to be awarded the dollar or percentage amount off their next wash.
 - 6 In **and receive %**, type a percentage off to give the customer on their next wash after they purchased x amount of washes.
 –or–
 In **dollar \$ off** amount, type an amount to give the customer on their next wash after they purchased x amount of washes.
 - 7 In **Media Information**, select BMP Color and Fore Color if necessary.
 - 8 From the **Advanced Setup** section, select all the Eligible Customers from the drop-down list of customers. Select **Eligible Customers to Award**.
 - 9 Click the **Save** button.

The punch card promotion is now configured for all Eligible Customers. The WashConnect® system tracks the customers Promotions and Purchases, and the system will advise if available promotions exist for customer before transaction is finalized.



Figure 221. Available Promotions at POS

-  See "About Promotions" on page 454.
-  See "View Punch Card Statistics" on page 471.
-  See "Edit Punch Card Counts" on page 472.
-  See "View History of Punch Card Edits" on page 474.

View Punch Card Statistics

If you have Promotions set up, you can view your customer's points by following these steps:

- 1 From **Customers**, select **Manage**.
- 2 Search for the customer.
- 3 Make the customer edits.
- 4 From Customer Information tab, you can view the Punch Card Counter from the Statistics section.

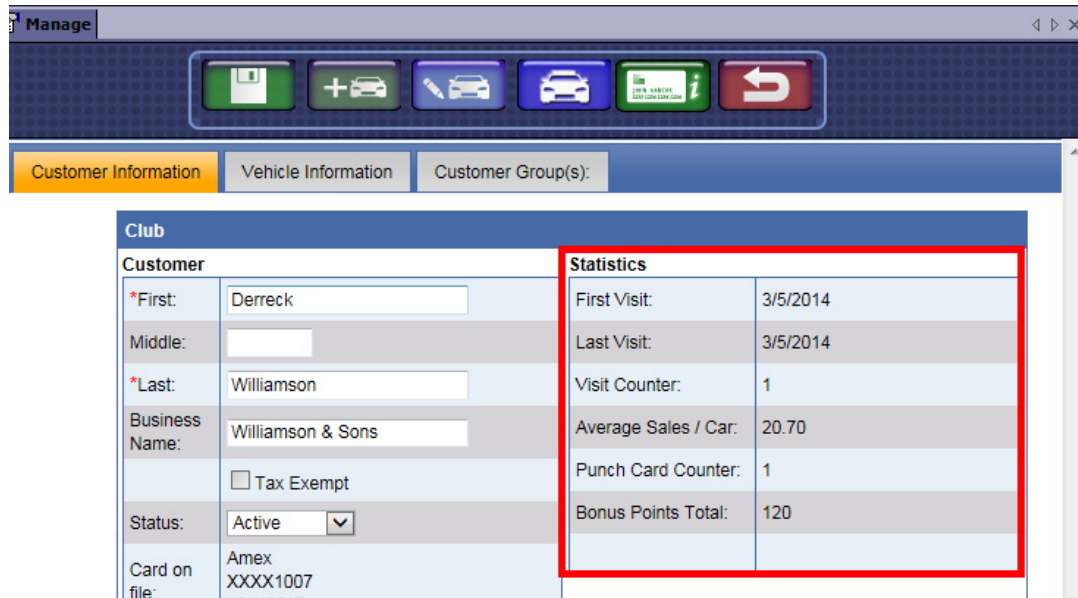




Figure 222. Customers Manage Punch Card Counter



See "About Punch Card" on page 469.

Edit Punch Card Counts

You can edit Punch Card Counts with permission in POS during an Open Shift.

- 1 Open a Touch POS shift in WashConnect®.
- 2 Sign in as a greeter. Greeter must have permission to edit the punch card counts.
- 3 Click to select **Vehicle History**  button.
- 4 Search and select a customer.
- 5 Click to select **Vehicle History**  button.

The Vehicle History screen appears.

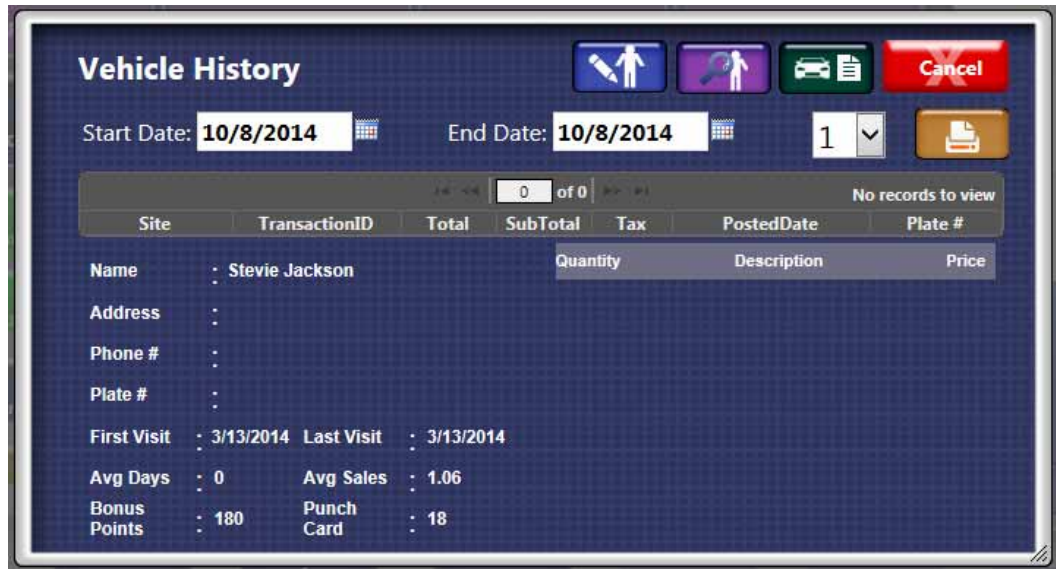



Figure 223. Vehicle History

- 6 Click to select the **Edit Customer**  button. The Update Customer Information dialog appears.

NOTE: The Login screen appears if greeter does not have permission.

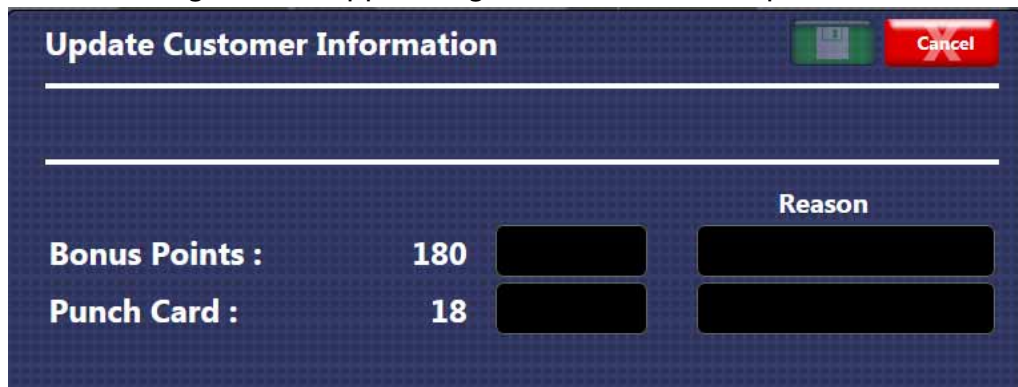

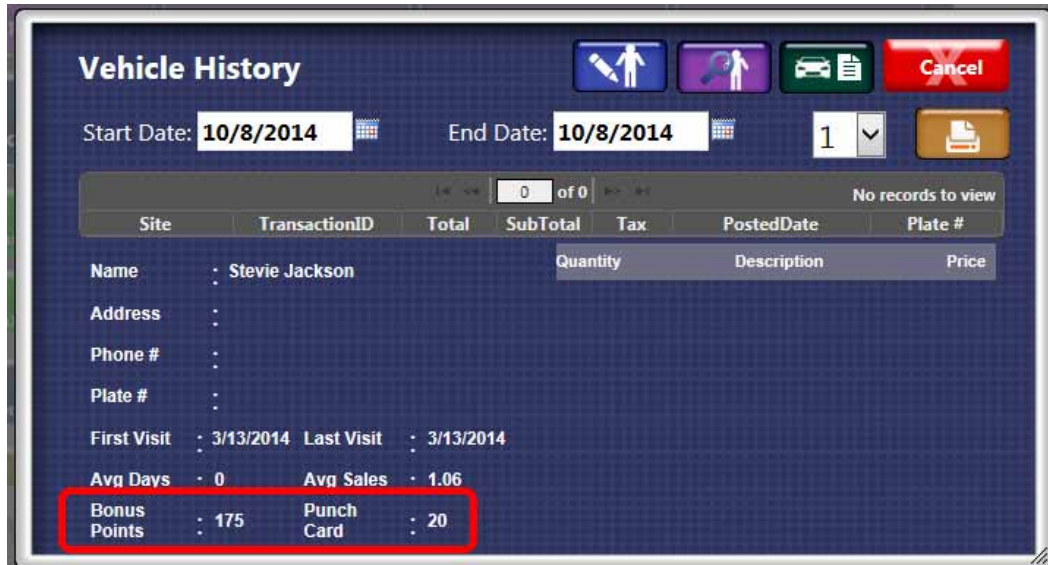


Figure 224. Update Customer Information Punch Card

- 7 You can change the customers Punch Card amount, you can type a new number in the box next to the amount to be changed.
- 8 Type in a reason for the change.
- 9 Click the **Save**  button.

The Changes are saved immediately.




See "View History of Punch Card Edits" on page 474.



See "About Punch Card" on page 469.

View History of Punch Card Edits

To view the edit history of Punch Card amounts from the Customers Manage menu, follow these steps:

- 1 From the **Customers** menu, select **Manage**.
- 2 Search for customer.
- 3 Click to highlight customer.
- 4 From the Tools, select the **Customer Notes**  button.

Customer Notes for the Customer appears. If any edits were made to the Punch Card, you can view the reason for the change and the date and time stamp along with the amounts that were changed.

Customer Notes for Stevie Jackson		
Seq.	Created On	Note
1	10/8/2014 10:55:46 AM	Punch card changed from 18 to 20. Reason : Customer was irate and offered consolation points.
2	10/8/2014 10:55:46 AM	Bonus point changed from 180 to 175. Reason : Customer voided last transaction.
3	10/7/2014 1:48:40 PM	Punch card changed from 17 to 18. Reason : Didn't get previous credit
4	10/7/2014 1:48:40 PM	Bonus point changed from 160 to 180. Reason : Didn't get credit for a wash

Figure 225. Customer Notes for Customer's Punch Card Edits

NOTE: Customer notes are not editable. You cannot delete any line item in Customer Notes.



See "About Punch Card" on page 469.




See "Edit Punch Card Counts" on page 472.

Customer Date

Set up a loyalty program for Customers based on a date specific to the customer. Customer Date promotion can be set up with as multiple promotions. i.e., Birthday, Anniversary, etc.

NOTE: Names need to be unique. Even a space between the words will not be enough for it to be recognized as unique. (i.e. Birthday Program is the same name as BirthdayProgram.)

- 1 From **Configuration** menu, select **Goods and Services**, and then select **Promotions**.
- 2 Click the **Add**  button.

3 In **Promotion**, select **Customer Date**.

The screenshot shows a software interface for configuring a promotion. At the top, there are 'Promotions' and 'Customer Date' tabs. Below the tabs are two buttons: a green 'Save' button and a red 'Back' button. The main form is titled 'Promotion Customer Date'. It is divided into three sections: 'Description', 'Media Information', and 'Advanced Setup'. In the 'Description' section, 'Profit Center' is set to 'Full Service', 'Active' is checked, 'Name' is 'Birthday', 'Taxable' is 'Never', and 'Visit within' is '10 days and receive' with a dropdown for '% or \$ 1.00 off'. The 'Media Information' section has 'BMP Color' set to 'None' and 'Fore Color' is empty. The 'Advanced Setup' section has 'Eligible Customers To Award' set to 'All'.

Figure 226. Promotions Customer Date

- 4 In **Name**, type the name of the Promotion i.e., **Birthday**.
- 5 In **Visit within**, type a number of days (before and after the customer's birthday or anniversary) to participate in this Promotion.
- 6 In **and receive %**, type a percentage off to give the customer if they purchase a wash within X days of their Birthday, etc.
–or–
- 7 In **dollar \$ off** amount, type an amount to give the customer if they purchase a wash within X days of their Birthday, etc.
- 8 In **Media Information**, select BMP Color and Fore Color if necessary.
- 9 From the **Advanced Setup** section, select all the Eligible Customers from the drop-down list of customers. Select **Eligible Customers to Award**.
The birthday Promotion is set up in the system for the eligible customers.

NOTE: The customer's birthday must be entered Customer Information order for this promotion to apply.



See "Add a Customer" on page 67.

Manage < >

Customer Information
Vehicle Information
Customer Group(s):

Club

Customer	Statistics
*First: <input type="text" value="Derreck"/>	First Visit: 3/5/2014
Middle: <input type="text"/>	Last Visit: 3/5/2014
*Last: <input type="text" value="Williamson"/>	Visit Counter: 1
Business Name: <input type="text" value="Williamson & Sons"/>	Average Sales / Car: 20.70
<input type="checkbox"/> Tax Exempt	Punch Card Counter: 1
Status: <input type="text" value="Active"/> <input type="button" value="v"/>	Bonus Points Total: 120
Card on file: Amex XXXX1007 12/1/2015	
Billing Zip: <input type="text"/>	
Site: <input type="text" value="Auto Pros Express"/> <input type="button" value="v"/>	

Promotions

Special Friends	<input type="text"/>		
Birthday	03/11/1967		
Family and Friends	<input type="text"/>		
Anniversary	<input type="text"/>		

Address

Address1:	<input type="text"/>	City:	<input type="text"/>
Address2:	<input type="text"/>	State:	PA <input type="button" value="v"/>
Address3:	<input type="text"/>	Zip:	<input type="text"/>

Contact Information

Home Phone:	<input type="text"/>	Alternate Phone:	<input type="text"/>
Business Phone:	<input type="text"/>	Mobile Phone:	<input type="text"/>
Fax Number:	<input type="text"/>		
Primary Email:	<input type="text"/>	Secondary Email:	<input type="text"/>
<input checked="" type="checkbox"/> Receive email receipts			


Figure 227. Customer Information, Promotions, Birthday Example

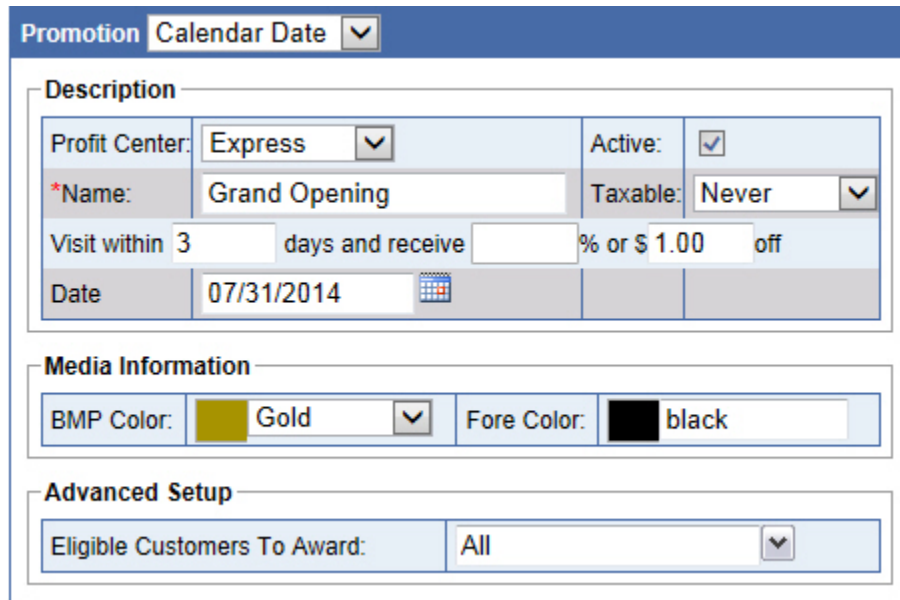


See "About Promotions" on page 454.

Calendar Date

Set up a promotion for groups of customers to be eligible to receive if they visit the car wash on or close to a specific date. Calendar Date promotion can be set up with as multiple promotions.


- 1 From **Configuration** menu, select **Goods and Services**, and then select **Promotions**.
- 2 Click the **Add**  button.
- 3 In **Promotion**, select **Calendar Date**.



Promotion		Calendar Date
Description		
Profit Center:	Express	Active: <input checked="" type="checkbox"/>
*Name:	Grand Opening	Taxable: Never
Visit within	3 days and receive	% or \$ 1.00 off
Date	07/31/2014	
Media Information		
BMP Color:	Gold	Fore Color: black
Advanced Setup		
Eligible Customers To Award:	All	


Figure 228. Promotions Calendar Date

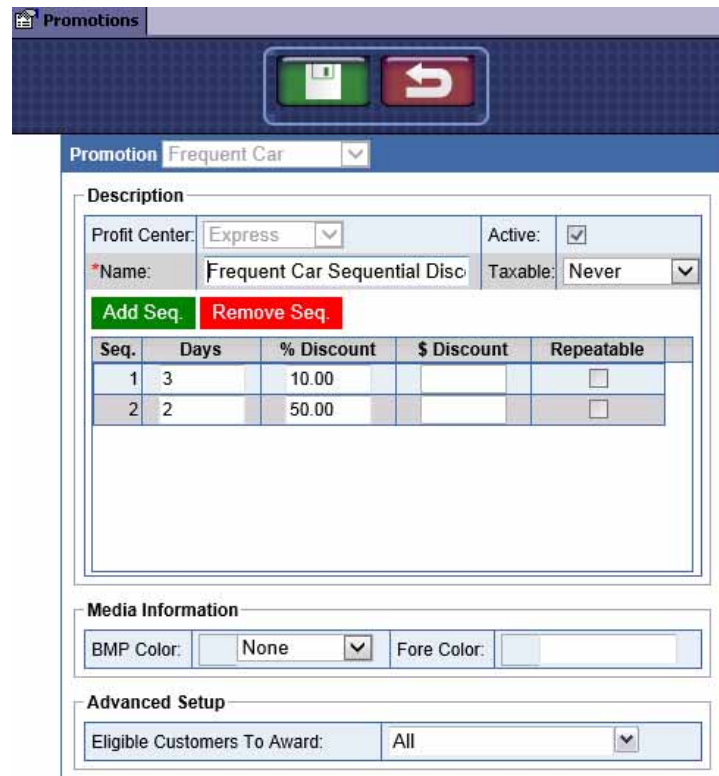
- 4 In **Name**, type the name of the Promotion i.e., **Grand Opening**.
- 5 In **Visit within**, type a number of days (before and after) the calendar date to participate in this Promotion.
- 6 In **and receive %**, type a percentage off to give the customer if they purchase a wash within X days of their Birthday, etc.
–or–
- 7 In **dollar \$ off** amount, type an amount to give the customer if they purchase a wash within X days of their Birthday, etc.
- 8 In **Date**, select a Calendar Date to award this promotion.
- 9 In **Media Information**, select BMP Color and Fore Color to appear on the Touch POS Available Promotions screen.
- 10 From the **Advanced Setup** section, select all the Eligible Customers from the drop-down list of customers. Select **Eligible Customers to Award**.

- 11 Click the **Save**  button.
- 12 From the Promotion saved successfully message, click **OK**.
The Promotion is now setup in the system for the eligible customers.

Frequent Car

Customer can join the frequent car program for a nominal fee and receive discounts tracking by license plate. Customers buy into loyalty with this Promotion. Frequent Car is set up one time only as its single promotion.

- 1 From **Configuration** menu, select **Goods and Services**, and then select **Promotions**.
- 2 Click the **Add**  button.



Promotions

Promotion: Frequent Car

Description

Profit Center: Express Active:

*Name: Frequent Car Sequential Disc Taxable: Never

Add Seq. Remove Seq.

Seq.	Days	% Discount	\$ Discount	Repeatable
1	3	10.00		<input type="checkbox"/>
2	2	50.00		<input type="checkbox"/>

Media Information


BMP Color: None Fore Color:

Advanced Setup

Eligible Customers To Award: All

Figure 229. Promotions Frequent Car

- 3 In **Promotion**, select **Frequent Car**.
- 4 In **Name**, type the name of the Promotion i.e., **Grand Opening**.
- 5 Click the **Add Seq.** button.
- 6 In **Days**, type the amount of days for the car to return to be eligible for this promotion.

- 7 In **and receive %**, type a percentage off to give the customer if they purchase a wash within X days of their Birthday, etc.
–or–
- 8 In **dollar \$ off** amount, type an amount to give the customer if they purchase a wash within X days of their Birthday, etc.
- 9 In **Repeatable**, click to mark the checkbox to make this frequent car promotion available again within the X amount of days.
- 10 Click the **Add Sequence** button, if you would like to offer a second discount for the same vehicle to return within X amount of days.
- 11 In **Media Information**, select BMP Color and Fore Color to appear on the Touch POS Available Promotions screen.
- 12 From the **Advanced Setup** section, select all the Eligible Customers from the drop-down list of customers. Select **Eligible Customers to Award**.
- 13 Click the **Save**  button.
- 14 From the Promotion saved successfully message, click **OK**.
The Promotion is now setup in the POS system for the eligible customers. If customer is eligible to receive the promotion, upon finalizing sale, an Available Promotions screen appears to select which promotion customer wishes to participate.

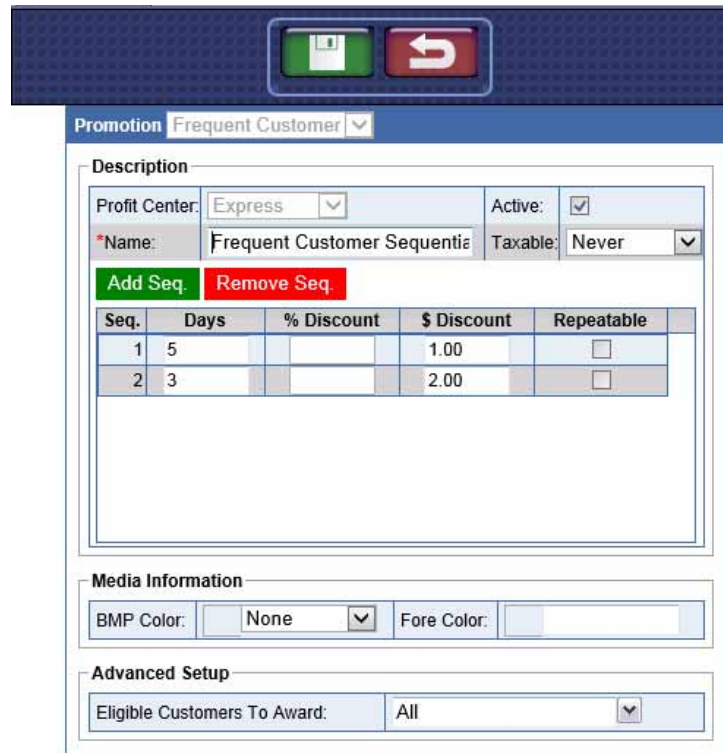
NOTE: Only one promotion is allowed per transaction.



See “About Promotions” on page 454.

Frequent Customer

Customer can join the frequent customer program for a nominal fee and receive discounts. Customers buy into loyalty with this Promotion. Frequent Customer is set up one time only as its a single promotion.



Promotion: Frequent Customer

Description

Profit Center: Express Active:

*Name: Frequent Customer Sequential Taxable: Never

Add Seq. Remove Seq.

Seq.	Days	% Discount	\$ Discount	Repeatable
1	5		1.00	<input type="checkbox"/>
2	3		2.00	<input type="checkbox"/>

Media Information

BMP Color: None Fore Color:

Advanced Setup

Eligible Customers To Award: All

Figure 230. Frequent Customer Promotion



See "About Promotions" on page 454.

Discount Price List Promotion

NOTE: This promotion is for Fleet Accounts only.

This promotion must be created at Corporate and then can be assigned to selected fleet accounts through the Fleet/Accounts tab at local sites. Assign specific PLU discounts within selected Fleet Accounts.

The Promotion menu is only available at local sites to manage the Discount Price List Promotion and allow configuration of local PLUs.

Within the Discount Price List promotion, specific PLU numbers can be selected and three types of discounts can be assigned to the PLU. These include changing the actual price, granting a percentage discount, and getting a specified amount discounted off the price.

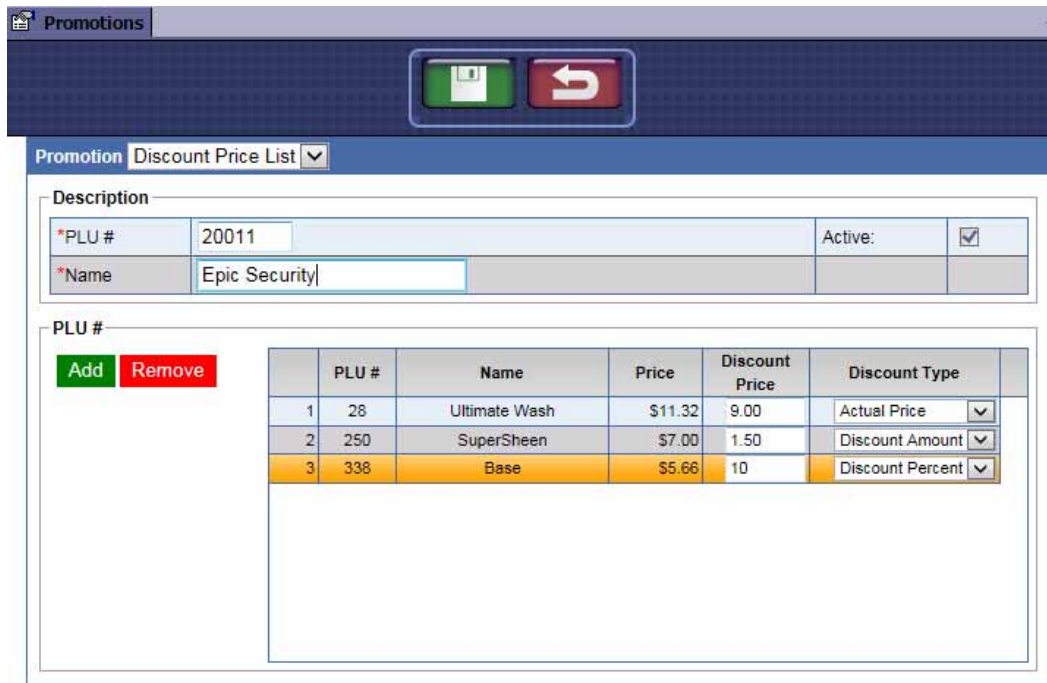


Figure 231. Discount Price List example of discount Types

About Promo Setup

HELP - What can I do here?

Managers:

- Promotions offer a special pricing event for your customers.
- After creating necessary PLUs for the promotion, and also a Package PLU, you can set up the promotion.
- Prepare your Promo Receipt text first. See Promo Receipt Text.



See "About Packages" on page 417.



See "Packages" on page 418.



See "Setup a Frequency Promotion" on page 483.



See "About Promo Receipt Text" on page 492.



Setup a Frequency Promotion

Encourage loyalty by rewarding customers who buy services on a regular basis with price reductions on each return visit. If the customer keeps buying a service within a predetermined time period, the discount can increase with each visit. You can add a personal touch to your computer by changing the frequency promotion text and wash code prints at the bottom of customer's receipt.

- 1 From the **Configuration** menu, select **Frequency Promotions**, and then select **Promo Setup**.
The Promo Setup tab appears with the list of all the PLUs.
- 2 Page through to locate the base wash PLU for the Frequency Promotion.
 - Click the column header to reorder the column to ascending or click again for descending order.
 - From the top of the Frequency Promotions, you can select the amount of PLUs to view on one page: **20, 40 or 60**.
- 3 In **Promotion PLU**, type promotion Package PLU number.

NOTE: Create a package PLU for each cascading discount promotion from Packages assuming the base and discount PLU are already created from Sales Items.

- 4 In **Expires**, type the number of days the promotion will expire unless used. This is the amount of days from the date of purchase.
- 5 In **Active**, click to mark the check box to enable the promotion.

NOTE: To disable the promotion, click in the Active box again to remove the check mark.

- 6 In **Receipt Text**, select the Name of the Receipt Text from the drop-down list which was previously created in Promo Receipt Text.
If a customer purchases the base wash for this promotion, the customer's receipt will print the promotional text at the bottom.
- 7 Click the **Save** –or– **Cancel** button.



See "Add Promo Receipt Text" on page 389.




See "Frequency Promotions - Quick Start" on page 622.


 See "About Sales Items" on page 315.


 See "About Packages" on page 335.


Edit and Activate a Frequency Promotion

You can edit a Frequency Promotion from Promo Setup.

- 1 From the **Configuration** menu, select **Frequency Promotions**, and then select **Promo Setup**.
- 2 Locate the line with the necessary Service Name or PLU.
- 3 Make any necessary changes.
- 4 In **Active**, click to select the check mark.
- 5 Click the **Save**  button.
The edits are saved and active.

 See "Disable a Frequency Promotion" on page 381.

 See "Add Promo Receipt Text" on page 389.

 See "Frequency Promotions - Quick Start" on page 622.

 See "About Sales Items" on page 315.

 See "About Packages" on page 335.

 See "Setup a Frequency Promotion" on page 380.

Disable a Frequency Promotion

You can disable a Frequency Promotion.

- 1 From the **Configuration** menu, select **Frequency Promotions**, and then select **Promo Setup**.

NOTE: Click the **Cancel** button to undo changes and revert to saved Promo Setups.

- 2 Locate the line with the necessary Service Name or PLU.
- 3 In **Active**, click the check box to remove the check mark.

4 Click the **Save** button.

The PLU remains in the Frequency Promotion list with all the settings selected but the promotion remains disabled until you activate it.

NOTE: To remove a PLU from appearing in the Frequency Promotions list, delete the Sales Item PLU.



See "Delete Sales Item" on page 327.



See "Disable a Frequency Promotion" on page 381.



See "Frequency Promotions - Quick Start" on page 622.



See "About Sales Items" on page 315.



See "About Packages" on page 335.



See "Add Promo Receipt Text" on page 389.



See "Setup a Frequency Promotion" on page 380.

Frequency Promotion Package

There are five menu items to complete to set up this Frequency Promotion. See the example that follows.



See "About Sales Items" on page 315.



See "Packages" on page 335.



See "Setup a Frequency Promotion" on page 380.



See "About Promo Receipt Text" on page 389.



See "Auto Sentry Main Options" on page 507.

Frequency Promotion Example

In this example, the regular price of the Base wash is \$10. The customer will receive a receipt with the appropriate discount instructions printed on the bottom of their receipt along with the wash code. Receive a \$1 discount if they return within a 5 day period. After the customer receives the \$1 discount, encourage the customer to visit again within the next 5 days, a \$2 discount will be offered. After the customer receives the \$2 discount, finally offer a \$3 discount to the customer if they return again within a 5 day period. After the \$3 discount wash is purchased the cycle starts again.

Step #1 Sales Items

- 1 From the **Configuration** menu, select **Goods & Services** and then select **Sales Items**.
- 2 Add a PLU for each Discount and one for the Base Wash.

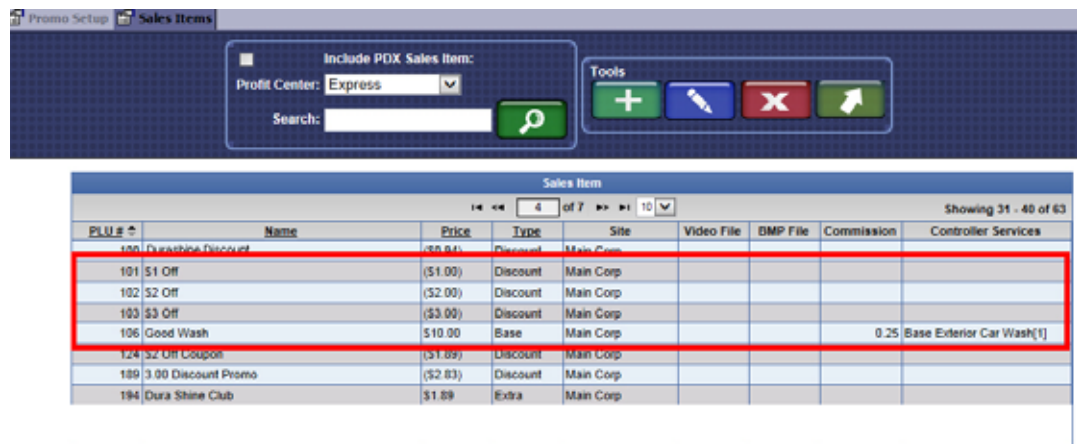


Figure 232. Sales Items Cascading Pricing Promo example

- PLU 106 - Base Wash. Determine which Base Wash to use for the Promotion. Royal Flush is \$10.00
- PLU 101 - (**\$1 Discount**) This discount is used for the first time customer returns with Wash Code receipt, discount base wash by \$1.00.
- PLU 102 - (**\$2.00 Discount**) This discount is used when the customer has already used the first discount and is returning for the second time, discount base wash by \$2.00.
- PLU 103 - (**\$3.00 Discount**) This discount is used when the customer used the 2nd discount and is returning for the third time, discount base wash by \$3.00.
- Another Suggested Discount: You could also add a free wash. PLU 104 - (**\$10.00 Discount**) This discount is used when the customer has already used the third discount, and is returning for the fourth and final wash, completely discount the base wash and make it free. Good Wash free discount is -\$10.00.



See "See "Flex / Retail Standard Screen" on page 329." on page 316.

Step #2 Packages

Set up the package which includes the base wash and the discount applied.

- 1 For this example, the following graphic displays one of the three Packages that need to be set up for the base wash and discount.

Package

Price

Profit Center:	Express	Description 1:	1st Frequency Promotion
Price:	\$8.49 + tax 0.51	Description 2:	
*PLU:	112	Account ID:	Select Account
*Name:	Good Wash Freq Promo		
Barcode:			

Secondary Language Description

Name:		Description 1:	
		Description 2:	

Media Information

Video File:		BMP File:	
BMP Color:	None	Fore Color:	
Extra Advertised Video File:			

Bonus Points

Points Awarded:	1	Points To Redeem:	10
-----------------	---	-------------------	----

Sales Items in Package

Add Sales Item

Sales Item				
PLU	Name	Price	Type	
101	\$1 Off	-0.94	Discount	X
106	Good Wash	9.43	Base	X

Figure 233. Package tab for Frequency Promotion Discount

- It is necessary to create a package for each discount. So in this example, you would need to complete three separate package PLUs: 112, 113, and 114.

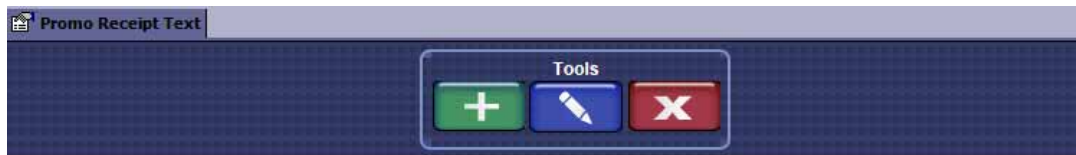


See "About Packages" on page 335.

Step #3 - Promo Receipt Text

You can add a personal touch to the Receipt for each frequency promotion.

- 1 Type a name for each wash receipt.
- 2 You can set up the ten lines of text that print at the bottom of each wash receipt.
- 3 Starting with your base wash, you will need to set up the promotion text to print at the bottom of each receipt. This example has 3 receipts.



Frequency Promotion Receipt Text	
Receipt Name ↕	Receipt Text
1st Cascading Price Discount Good Wash	Come back in 5 days with receipt and receive \$1 off the Good Wash. Upon return, touch Wash Code button. Type in Wash Code found on receipt.
2nd Royal Flush Wash Cascade Price Promo	Come back in one week with receipt and receive \$2 off Royal Flush wash. Upon return, touch Wash Code button. Type Wash Code from receipt.
3rd Cascading Price Discount Good Wash	Come back in 5 days and receive \$3 off Good Wash. Upon return, touch Wash Code and type in wash code found on receipt.
A Promo Receipt for BOGO	Buy one wash, Get one wash FREE!
First Royal Flush Wash Cascade Price Promo	Come back in one week with receipt and receive \$1 off Royal Flush wash. Upon return, touch Wash Code button. Type wash code from this receipt.
Rainy Day Promo	Come back in one Week and get a second Basic Wash For Half Off!!!!!!!!!!!!!!
Rainy Day Promo	Come back in one week and get a second Basic Wash For Half Off!!!!
Second Cascading Price Discount Good Wash	Come back in 5 days and receive with receipt and receive \$2 off Good Wash Upon return, type wash code found on receipt.
Third Royal Flush Wash Cascade Price Promo	Come back in one week with receipt and receive \$3 off Royal Flush wash. Upon return, touch Wash Code button, and then type Wash Code from this wash receipt.
Z Final Royal Flush Wash Cascade Price Promo	Come back in one week with receipt and receive Royal Flush wash FREE! Upon return, touch Wash Code button. And then type Wash Code from this receipt. Thank you for your loyalty to our car wash!

Figure 234. Frequency Promotion Receipt Text example



See "About Promo Receipt Text" on page 389.

Step #4 - Promo Setup

- From the Frequency Promotion list, you can find all the PLUs that you created in the system. Locate the PLUs, setup the expiration of the wash code offer, activate it, select the name of the Receipt text, and click Save.



Figure 235. Promo Setup for cascading price promo example

- For example, in base wash PLU, select the 1st package discount PLU number, select the amount of days to Expire, select the promotional receipt text, and then Save.

After completing steps 1-4, the system is setup and now you are able to reward your repeat customers with a frequency promotion price break.



See "Setup a Frequency Promotion" on page 380.

Step #5 Allow Wash Code

After the frequency price package is set up, the last thing to confirm is that your Auto Sentry is able to accept Wash Codes.

- From **System Setup** menu, select **Devices** and then **Settings**, set up the **Main Options** for the Auto Sentry.
- From the **Allow Code**, click the drop-down list to select **True**.

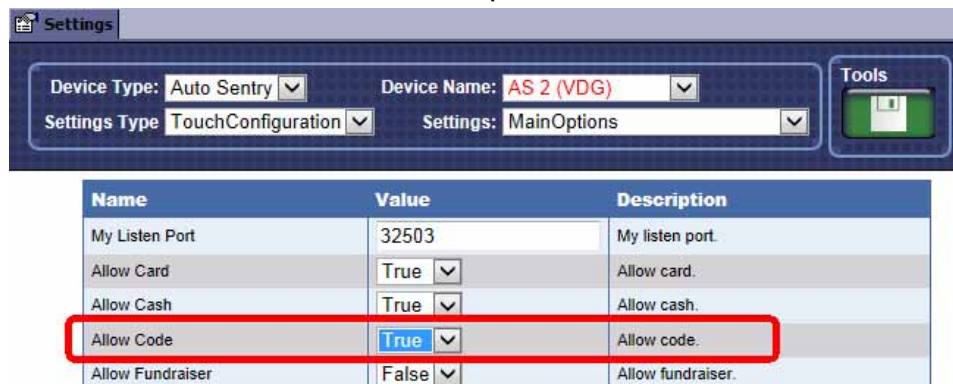












Figure 236. Settings to allow cascading pricing discount wash codes

-  See "Delete Sales Item" on page 327.
-  See "Disable a Frequency Promotion" on page 381.
-  See "Frequency Promotions - Quick Start" on page 622.
-  See "About Sales Items" on page 315.
-  See "About Packages" on page 335.
-  See "About Promo Setup" on page 482.
-  See "Add Promo Receipt Text" on page 389.
-  See "Setup a Frequency Promotion" on page 380.
-  See "Auto Sentry > Main Options" on page 673.
-  See "About Promo Setup" on page 482.

Disable a Frequency Promotion











You can disable a Frequency Promotion.

- 1** From the **Configuration** menu, select **Frequency Promotions**, and then select **Promo Setup**.

NOTE: Click the **Cancel** button to undo changes and revert to saved Promo Setups.





- 2** Locate the line with the necessary Service Name or PLU.
- 3** In **Active**, click the check box to remove the check mark.
- 4** Click the **Save** button.
The PLU remains in the Frequency Promotion list with all the settings selected but the promotion remains disabled until you activate it.

NOTE: To remove a PLU from appearing in the Frequency Promotions list, delete the Sales Item PLU.

-  See *"Delete Sales Item"* on page 409.
-  See *"Disable a Frequency Promotion"* on page 381.
-  See *"Frequency Promotions - Quick Start"* on page 622.
-  See *"About Sales Items"* on page 315.
-  See *"About Packages"* on page 335.
-  See *"About Promo Setup"* on page 482.
-  See *"Add Promo Receipt Text"* on page 389.
-  See *"Setup a Frequency Promotion"* on page 380.
-  See *"Auto Sentry > Main Options"* on page 673.
-  See *"About Promo Setup"* on page 482.

Frequency Promotion Package

There are five menu items to complete to set up this Frequency Promotion.

-  See *"About Sales Items"* on page 315.
-  See *"Packages"* on page 335.
-  See *"Setup a Frequency Promotion"* on page 380.
-  See *"About Promo Receipt Text"* on page 389.



See “Auto Sentry Main Options” on page 507.

About Promo Receipt Text

Promo Receipt Text

HELP - What can I do here?

Managers:

- Create promotional text to appear at the bottom of a customer's promotional receipt.
- Type a name for the Promotional text, and then type the lines of text to appear on the promo receipt.
- During Promo setup, you will then select the Receipt Text Name.



See “Add Promo Receipt Text” on page 492.




See “Edit Promo Receipt Text” on page 494.



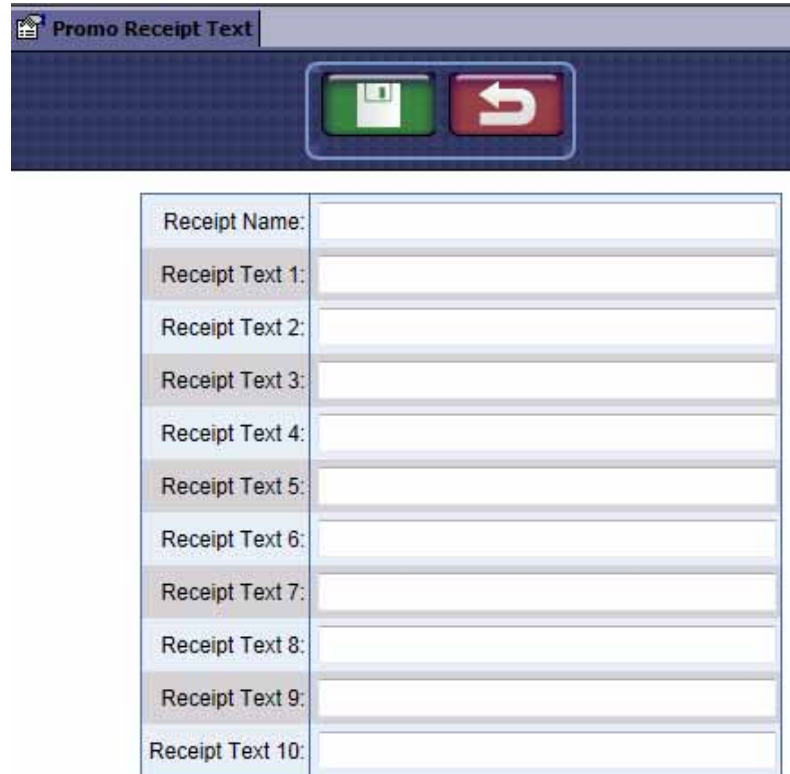
See “Delete a Frequency Promotion Receipt Text” on page 495.

Add Promo Receipt Text

After setting up the promotional packages, this would be the next step. You can prepare 10 lines of text to print on the receipt for each corresponding promotional package.

- 1 From the Configuration menu, select Frequency Promotions menu, and then select **Promo Receipt Text**.
The Promo Receipt Text tab appears.
- 2 Click the **Add**  button.
- 3 In **Receipt Name**, type a name for the promotional receipt text.
- 4 In **Receipt Text 1**, type the first line of text up to 36 characters.
- 5 In **Receipt Text 2**, type the second line of text up to 36 characters.
- 6 In **Receipt Text 3**, type the third line of text up to 36 characters.
- 7 In **Receipt Text 4**, type the fourth line of text up to 36 characters.

- 8 In **Receipt Text 5**, type the fifth line of text up to 36 characters.
- 9 In **Receipt Text 6**, type the sixth line of text up to 36 characters.
- 10 In **Receipt Text 7**, type the seventh line of text up to 36 characters.
- 11 In **Receipt Text 8**, type the eighth line of text up to 36 characters.
- 12 In **Receipt Text 9**, type the ninth line of text up to 36 characters.
- 13 In **Receipt Text 10**, type the tenth line of text up to 36 characters.
- 14 Click the **Save** button.




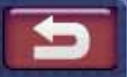
Promo Receipt Text	
	 
Receipt Name:	<input type="text"/>
Receipt Text 1:	<input type="text"/>
Receipt Text 2:	<input type="text"/>
Receipt Text 3:	<input type="text"/>
Receipt Text 4:	<input type="text"/>
Receipt Text 5:	<input type="text"/>
Receipt Text 6:	<input type="text"/>
Receipt Text 7:	<input type="text"/>
Receipt Text 8:	<input type="text"/>
Receipt Text 9:	<input type="text"/>
Receipt Text 10:	<input type="text"/>

Figure 237. Promo Receipt Text New Receipt Example



See *"Delete Sales Item"* on page 409.



See *"Disable a Frequency Promotion"* on page 381.



See *"Frequency Promotions - Quick Start"* on page 622.



See *"About Sales Items"* on page 315.



See "About Packages" on page 335.



See "About Promo Setup" on page 482.



See "Add Promo Receipt Text" on page 389.



See "Setup a Frequency Promotion" on page 380.







See "Auto Sentry > Main Options" on page 673.



See "About Promo Setup" on page 482.

Edit Promo Receipt Text

Search for receipt text name and edit the text.

- 1 From the **Configuration** menu, select **Frequency Promotion**, and then select **Promo Receipt Text**.
The Promo Receipt Text tab appears.
- 2 Click the column header  button to reorder the column to ascending order or click again for descending order.
The arrow will appear in the column header indicating which column has been reordered and it points up for ascending and down for descending order.
- 3 Click to select a **Promo Receipt Text** name.
The line is highlighted.
- 4 Click the **Edit**  button.
- 5 Make any necessary changes.
- 6 Click the **Save**  button, or the **Cancel**  button.



See "Delete Sales Item" on page 409.



See "Disable a Frequency Promotion" on page 381.




See "Frequency Promotions - Quick Start" on page 622.


 See "About Sales Items" on page 315.

 See "About Packages" on page 335.

 See "About Promo Setup" on page 482.

 See "Add Promo Receipt Text" on page 389.


 See "Setup a Frequency Promotion" on page 380.

 See "Auto Sentry > Main Options" on page 673.


 See "About Promo Setup" on page 482.

Delete a Frequency Promotion Receipt Text








To delete the promo text, first you need to remove the text name from the Promo Setup.

- 1 From the **Configuration** menu, select **Frequency Promotions** menu, select **Promo Receipt Text**.
The Promo Receipt Text tab appears.
- 2 Click to select the Frequency Promotion Receipt text.
The Frequency Promotion Receipt Text is highlighted.
- 3 Click the **Delete**  button.
The message Receipt Text Successfully Deleted appears.
–or–
Message appears that the text is already in use by a frequency promotion.
 - From the Promo Setup tab, deselect the Receipt Text name from drop-down list, and then Go back to step 2.

 See "Delete Sales Item" on page 327.

 See "Disable a Frequency Promotion" on page 381.

 See "Frequency Promotions - Quick Start" on page 622.

-  See "About Sales Items" on page 315.
-  See "About Packages" on page 335.
-  See "About Promo Setup" on page 482.
-  See "Add Promo Receipt Text" on page 389.
-  See "Setup a Frequency Promotion" on page 380.
-  See "Auto Sentry > Main Options" on page 673.
-  See "About Promo Setup" on page 482.




About Alerts

Alert

HELP - What can I do here?

Managers:

- Enter email addresses to set up specific alert messages.
- System will email an alert to each address you set up.
- Subscribe to receive email alerts as necessary: all alerts; general categories of alerts; or specific alerts for a particular component.
- The system can send alerts for almost any contingency it detects, whether your bill dispenser is jammed or replication stopped running at a site.

-  See "Subscribe to Email Alerts" on page 497.
-  See "Alert Configuration Example" on page 499.
-  See "Test Alerts" on page 498.



See “Send a Test Alert” on page 499.

Subscribe to Email Alerts

To configure email alerts, follow these steps:

- 1 Select **Configuration**, and then click **Alerts**.
The **Alerts** tab appears.

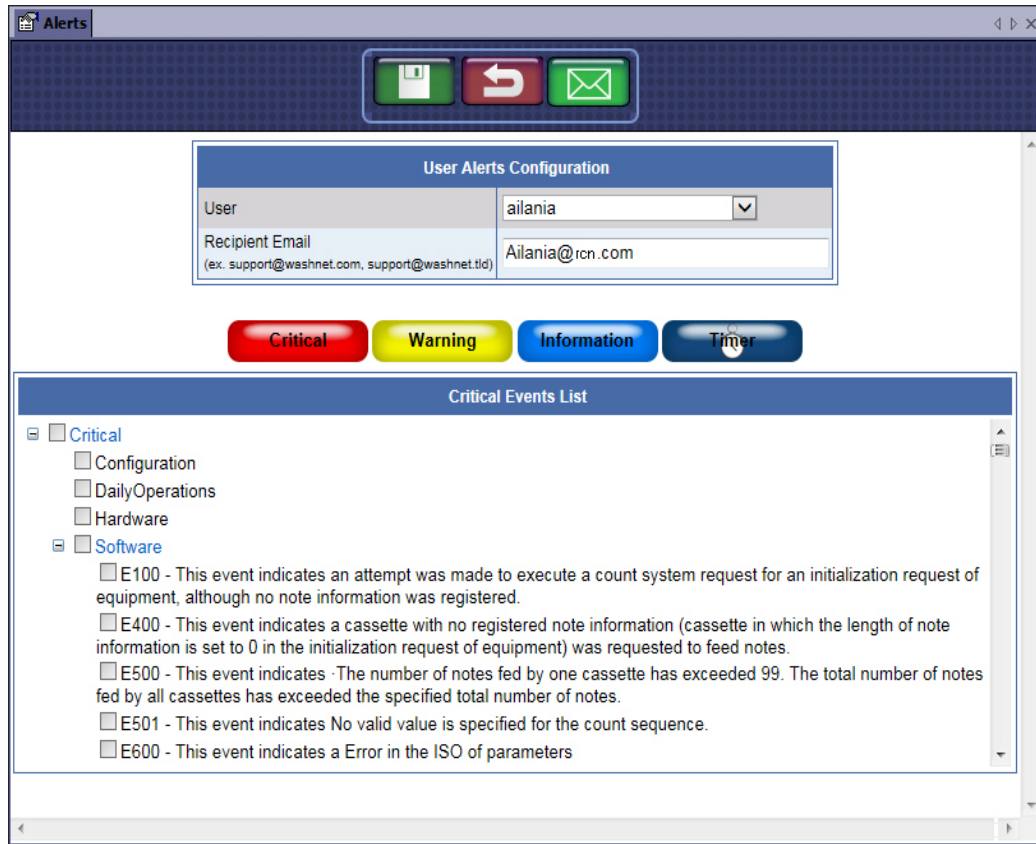



Figure 238. Alerts tab

- 2 From the **User** drop-down list, select a user.
- 3 In the **Recipient Email** box, type an email address to receive alerts.
- 4 From the **Component selection at corporate** drop-down list, click to select or click again to remove the component check mark.
The **Critical Events List** is filtered based on the components you select.
- 5 Click an event type button: **Critical**, **Warning**, **Information** or **Timer**. The **Information Events** list is filtered again, based on the **Component Type** and event type button you clicked.
- 6 Check or clear the boxes in the **Information Events List**.
The user and email is subscribed to the events you selected.

- 7 Repeat the previous two steps to work through each event type. Each time you click a button, a new list appears. You can subscribe to events in each list.
- 8 Click the **Save**  button when you are finished. The alert settings are saved.



See “Subscribe to Email Alerts” on page 497.



See “Alert Configuration Example” on page 499.



See “Send a Test Alert” on page 499.

Test Alerts

You can test an alert for a user.

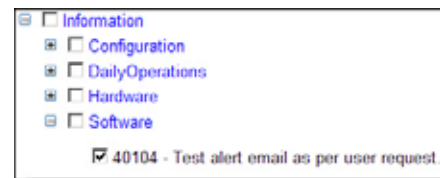


Figure 239. Alert Email Test

You can type one or more email addresses into the **Alert Email Test** box. Alerts will be sent to those addresses.

Additionally, any user who is subscribed to the test alert event (#40104) will receive the test message.

NOTE: The alert notification service must be running for an alert to be sent. If you do not receive the email alert, contact ICS Support to check the status of the alert notification service.



See “Subscribe to Email Alerts” on page 497.



See “Alert Configuration Example” on page 499.



See “Test Alerts” on page 498.



See “Send a Test Alert” on page 499.

Send a Test Alert

- 1 From the **Configuration** menu, click **Alerts**.
The **Alerts** tab appears.
- 2 Click the **Test Alert Email**  button.
The **Alert Email Test** dialog box appears.
- 3 In the **Alert Email Test** box, type an email address, and then click the **Send Email**  button.
The email is sent to the address. The email is also sent to any user who subscribes to the test alert event #40104.

Alert Configuration Example


When configuring alerts, filter the list first, and then select alerts.

For example:

To add a club service, follow these steps:

- 1 Open *WashConnect*.
- 2 In Region, select **Corporate**, and then **Login**.
- 3 From the **Configuration** menu, click **Alerts**.
The **Alerts** tab appears.
- 4 In **Component selection at corporate** box, select **Bill Acceptor**.

NOTE: This command will only appear for users who logon at the Corporate level.

- 5 Click the **Critical**  button.
This will filter the list of available alerts to show only critical alerts pertaining to the bill acceptor.
- 6 Check and clear the boxes to subscribe to specific ones.

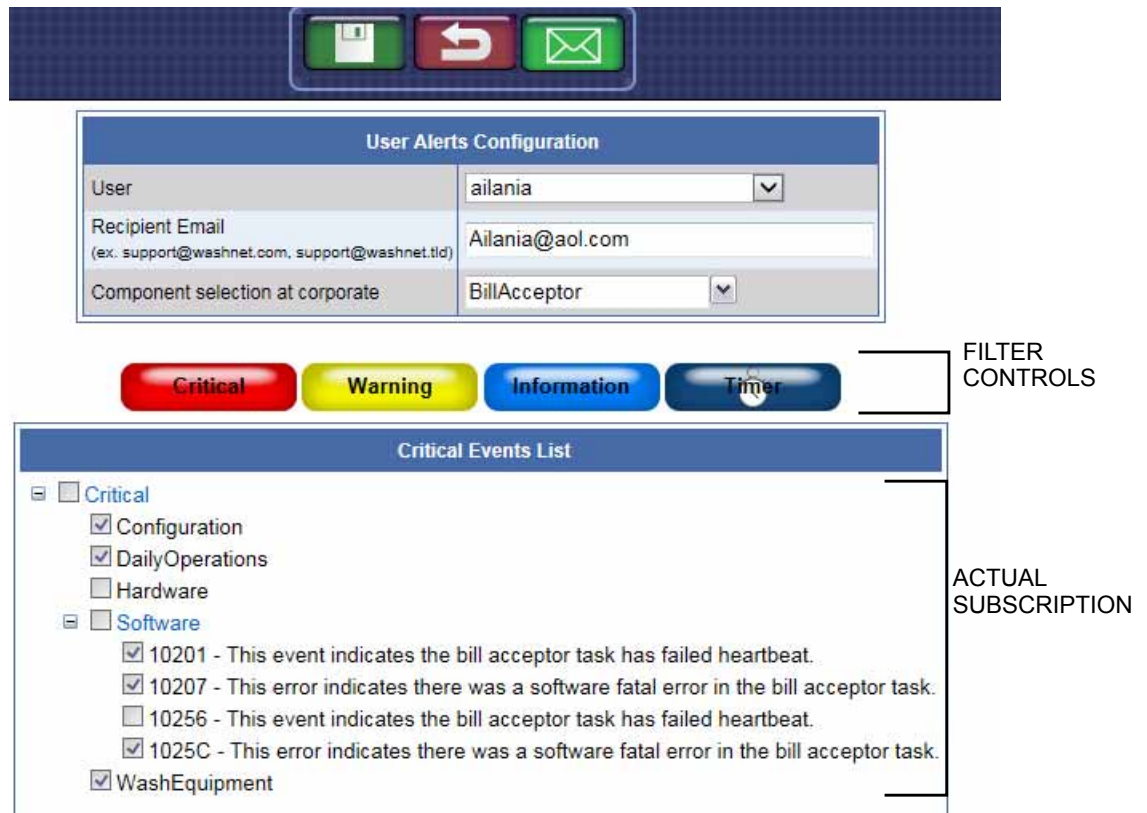





Figure 240. Alert Configuration Dialog Box at Corporate Login

 See "Subscribe to Email Alerts" on page 497.

 See "Send a Test Alert" on page 499.

 See "Send a Test Alert" on page 499.

Alert Configuration Dialog Box field descriptions

The following table describes the fields in the **Alert Configuration** dialog box.

Table 1: Alert Configuration Dialog Box

Field	Description
User	Select a user in the list. This is the user who subscribes to the alerts.

Table 1: Alert Configuration Dialog Box

Field	Description
Recipient Email	Email address of the user who will receive the alerts.
Component selection at corporate	(Available at Corporate only.) Select one or more components for which the user will receive alerts. This will filter the alerts list. Component selection at corporate and Message Type work together to filter the list.
Message Types	Critical, Warning, Information, or Timer. Select a message type to filter the alerts list. Message Type and Component selection at corporate work together to filter the list.



See “Subscribe to Email Alerts” on page 497.



See “Alert Configuration Example” on page 499.



See “Test Alerts” on page 498.



See “Send a Test Alert” on page 499.

About Export System Data

The Export System Data tab appears from the Configuration menu. It allows a customer to export specific data out of the database using one of three output file types: .csv, .txt., and .xml. There are three main types of data that can be exported, which include Configuration data, Customer data, and Shift/Transactional data. Upon exporting, a zip file is created and named ICSDDataExport.zip.

NOTE: From the **Users** menu, select **Security Roles**, and then select **Export Data** to allow access to this screen.

Export System Data

Export Data

Export To: Comma Separated Values (.csv) ▼

Configuration Data

Site Information Device Information

Profit Centers

Customer Data

Customer Vehicle

Club/Fleet Membership

Shift/Transactional Data

Date Range: -

Shift Shift Journals

Transactions Transaction Sales Items

Transaction Payments Transaction Taxes

Figure 241. Export System Data tab

- 1** From the **Configuration** menu, select **Export System Data**.
- 2** Select one of the following file types to export the data:
 - Comma Separated Values (.csv)
 - Tab Delimited Text (.txt)
 - XML Data Sheet (.xml)
- 3** From the **Configuration Data** section, click to select one or more of the following check boxes:
 - Site Information
 - Device Information
 - Profit Centers
- 4** From the **Customer Data** section, click to select one or more of the following check boxes:
 - Customer
 - Vehicle

- Club/Fleet Membership
- 5 From the **Shift/Transactional Data** section, select a date range.
 - 6 From the **Shift/Transactional Data** section, click to select one or more of the following check boxes:
 - Shift
 - Shift Journals
 - Transactions
 - Transaction Sales Items
 - Transaction Payments
 - Transaction Taxes
 - 7 Click to select the **Export Data** button.
 - 8 From the File Download dialog box, click **Open** to view the data, **Save** to save the data file, or **Cancel**.
Upon exporting, a zip file is created and named ICSDataExport.zip.



See "About Reports" on page 61.



See "Subscribe to Email Alerts" on page 392.

About the Accounting Interface

From the site level, you can manage your accounts from the Accounting Interface.



See "About Payment Account" on page 509.

Accounting Interface has four sections available at Corporate:

- Manage (Site Login)
- Import Accounts (Corporate Login)
- Payment Account (Corporate Login)
- System Items (Corporate Login)

From Import Accounts, you can import your pre-existing Chart of Accounts. Chart of Accounts is a list of expense and sales categories that are defined to calculate the profit and loss of a business.



See "About Import Accounts" on page 507.



See "About Payment Account" on page 509.



See "About System Items" on page 511.

About Manage Accounts

Manage Accounts

HELP - What can I do here?

Managers:

- Assign account number and name after you have imported the company's accounts.
- Add an Account.
- Terminate an Account.



See "Add an Account" on page 504.



See "Terminate an Account" on page 505.



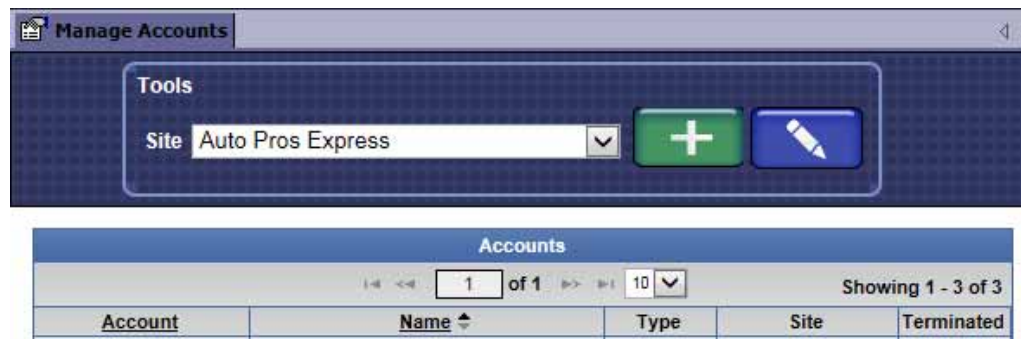
See "Reactivate an Account" on page 506.


Add an Account

To assign an account number and name, follow these steps:


- 1 From the **Configuration** menu, select **Accounting Interface**, and then click **Manage**.

The **Manage Accounts** tab appears.





- 2 Click the **Add**  button.
The Account dialog box appears.
- 3 In **Account**, type an account number (alpha and/or numeric).
- 4 In **Account Name**, type an account name.
- 5 In **Is Payout** box, click to select a check mark if this account will be available for Payouts –or– click again to remove check mark.


NOTE: The payout check box is a setting to prevent all accounts from being available from the Touch POS when selecting a payout. Predetermining which accounts will appear on the Payout list will also prevent errors of coding Office Supplies accidentally to a Long Term Liability account.

- 6 In **Over Under**, **Bank Offset** or **Deposit** check box, click to select.
- 7 Click **OK**.
- 8 Click the **Save**  button.
The account types are assigned and display in the Accounts list.

 See "About the Accounting Interface" on page 503.


 See "Terminate an Account" on page 505.

 See "Reactivate an Account" on page 506.

 See "About Payment Account" on page 509.

Terminate an Account

You can terminate and reactive accounts.

- 1 From the **Configuration** menu, select **Accounting Interface**, and then click **Manage**.
The **Manage Accounts** tab appears.
- 2 From the Accounts list, click to select an account.
The selected Account is highlighted.
- 3 Click the **Terminate**  button.
The Confirm message Are you sure you want to terminate selected Account appears.
- 4 Click **Yes** (or **No**).
The Information message Account is disabled successfully appears.
- 5 Click **OK**.



See "About the Accounting Interface" on page 503.



See "Add an Account" on page 504.





See "Reactivate an Account" on page 506.



See "About Payment Account" on page 509.

Reactivate an Account

If an account has been terminated, you can reactivate it.

- 1 From the **Configuration** menu, select **Accounting Interface**, and then select **Manage**.
The **Manage** tab appears.
- 2 Click the **Delete**  button.
The Confirm message Are you sure you want to terminate selected Account appears.
- 3 Click to select the necessary Account.
- 4 Click the **Reactivate**  button.
The Confirm message Are you sure you want to make the Terminated account to Active appears.
- 5 Click **Yes** (or **No**).
The Information message Account is enabled successfully appears.

6 Click **OK**.

See "Terminate an Account" on page 505.



See "Add an Account" on page 504.



See "About the Accounting Interface" on page 503.



See "About Payment Account" on page 509.

About Import Accounts

You can define which account to post a particular sales or expense item. *Quickbooks*, *Peachtree*, *MAS-90*, *Alere*, and *ProfData* are different accounting package interfaces which allow for the importing of a pre-existing Chart of Accounts. Import the Chart of Accounts to the *WashConnect*® system so that sales and expense items can be quickly posted into the accounting package.

WARNING: Your Accounting software must be installed, such as *Peachtree*, *MAS 90*, or *Quickbooks*. If not, the import function will fail.



See "Import Chart of Accounts" on page 507.



See "About Payment Account" on page 509.



See "About Payment Account" on page 509.



See "About System Items" on page 403.

Chart of Accounts is a list of expense and sales categories that are defined in order to calculate the profit and loss of a business.

Import Chart of Accounts

To import company's accounts, follow these steps:

WARNING: Your Accounting software must be installed, such as *Peachtree*, *MAS 90*, or *Quickbooks*. If not, the import function will fail.

- 1 Login to *WashConnect*® at **Corporate**.
- 2 From the **System Setup** menu, select **Accounting Interface**, and then select **Import Accounts**.
The **Import Accounts** tab appears.
- 3 In **Accounting Type**, select one of the following:
 - MAS90
- 4 In **Accounts File**, click the browse button and select a tab separated accounts file.
Example default location: **c:\ProgramFiles\Sage\PeachTree\Company**.
The company list is loaded.
The company's accounts information is imported.
Once the chart of accounts has been imported, identify which accounts the Account for the ReWash and Free Wash, Sales Tax, and even over/short dollars for the day.
Example: Management may want all of the Free Washes or ReWashes to go into a discount account or they may go against a sales account. It will depend on how the Chart of Accounts is setup in the accounting package.



See "About Payment Account" on page 509.



See "About Payment Account" on page 509.



See "About System Items" on page 403.



See "About Import Accounts" on page 507.

About Payment Account

Payment Account

HELP - What can I do here?

Accountant or Manager:

- **Assign or Edit general ledger accounts to your various payment options.**
- **Payment Methods are setup at initial installation.**

NOTE: Call technical support if adding or deleting Payment Methods.

Manage Payment Accounts: assign general ledger accounts to your various payment options.

Also, you can view Payment Accounts, if you need to identify an account number for a payment method.

NOTE: Payment Methods are setup at initial installation. It's necessary to call technical support if adding, deleting, or changing a Payment Method.



See "Edit Payment Account" on page 401.


Edit Payment Account

Assign a general account name and number to the payment methods that are in the WashConnect system. Follow these steps:

- 1 From the **Configuration** menu, select **Accounting Interface**, and then click **Payment Account**.
The **Payment Account** tab appears.



Figure 242. Accounting Interface Payment Account

- 2 In **Site** drop-down box, select **All Sites** or the individual Site.
- 3 From the Payment Method list, click to select a payment method.
- 4 Click the **Edit** button.
The Payment Type dialog box appears.
- 5 In **Account**, click to select a general ledger account from the drop-down list.
- 6 Click the **Save**  button.
The message Payment Type saved successfully appears.
- 7 Click **OK**.
The Payment general ledger account is now assigned.



See "About the Accounting Interface" on page 503.

Table 2: Payment Account Field Descriptions

Field	Description
Payment	Number assigned in the system and is not editable.
Name	Payment Method: Cash, Check, Debit Card, Credit Card, Account (Fleet), Fuel Sales, Gift Card, Token, Lube Sales, ExternalPOSSales, Visa/MC, Discover, Amex, Diners Club, Carte Blanche, Interac, and JCB, Other, Visa, and Master.
Site	Sites assigned.
Account	General Ledger account number and name.

About System Items

System Items

HELP - What can I do here?

Accountants and Managers:

- **Standard PLUs that are assigned negative numbers and delivered automatically to every site using WashConnect:**
 - ROA
 - ReWash
 - Promotion
- **Assign a General Ledger Account to each of these standard PLUs and then can be included within Accounting Exports.**

System Items are standard required PLUs that are delivered automatically to every site using *WashConnect*® (ie. ROA, Rewash, Promotion). System Items are assigned negative PLUs which prevent them from being able to be edited. The System Items tab exists so a General Ledger Account can be assigned to each of these standard PLUs at each individual site, if necessary, so they may be included within accounting exports.




See "Search for a System Service" on page 403.



See "Edit System Service Items" on page 404.

Search for a System Service

Search for a System Service PLU name or number.

- 1 From **Configuration** menu, select **Goods and Services**, and then select **System Items**.
- 2 In **Search** box, type a PLU number or type a PLU description name.
- 3 Click the **Search**  button.
The System Services list appears.



The screenshot shows the 'System Items' search interface. At the top, there is a search bar with a magnifying glass icon and a pencil icon. Below the search bar is a table titled 'System Services' with the following data:

PLU #	Name	Type	Profit Center
-201	Free Wash	FreeWash	Express
-121	Book Generation Discount	Discount	Book
-110	Credit card surcharge		Express
-109	PAY ATTENDED	Others	Express
-102	GIFT SOLD	Others	Express
-17	Gift Card Free	Gift Card Free Liability	Gift Card
-14	Fleet Discount	Charge Discount	Express
-13	Rewash	ReWash	Express
-10	ROA	Received On Account	Express
-9	Gift Card Add Value	Gift Card	Gift Card

Figure 243. System Services List



See "Edit System Service Items" on page 404.



See "About System Items" on page 403.

Edit System Service Items

Assign general ledger account numbers to system items.

- 1 From **Configuration** menu, select **Goods and Services**, and then select **System Items**.
- 2 From the **System Services** list, select a service item.

- 3 Click the **Edit**  button.
The Accounts dialog box appears.

Accounts		
<input type="checkbox"/> Apply account to all sites.		
Seq.	Site	Account
1	Car Wash Downtown	--None--
2	Car Wash on Rt 78	4710-1-ST-CW-WA [Free Wash - Stbg - Wash Base]
3	Car Wash on the Bay	--None--


Figure 244. Accounts (System Service)

- 4 If necessary, click to check mark the **Apply account to all sites** box.
- From the Account drop-down list, select the **Account**.
All sites automatically apply the same general ledger account number.



See "About Accounting Interface Manage" on page 398.

- 5 From each **Site**, click to select from the **Account** drop-down list.

- 6 Click the **Save**  button.
The System service saved successfully message appears.

- 7 Click **OK**.



See "Search for a System Service" on page 403.



See "About System Items" on page 403.

About Commissions

Setup commissions from the Commissions menu: 1. Positions, 2. Eligibility Rules, and 3. Schedules. Commissions can be set up based on PLUs and/or Straight Commission. The following must be completed in the following order for commissions to be paid:

- Designate a Schedule.




See "About Commissions Schedules" on page 406.


- Create Eligibility Rules.

 See "About Commissions Eligibility Rules" on page 409.

- Set up Positions.

 See "About Commissions Positions" on page 413.

- Assign Commission Position to user.
- User Must Clock In
- User must sign in as greeter.
- Greeter must sell commissioned items
- Review Sales Commission Report.

 See "Sales Commission - Quick Start" on page 627.

About Commissions Positions

Set up Positions that are commissioned. Both Commission Schedules and Straight Commissions can be set up at the same time or independently.

Add Commission Position

- 1 From **Configuration** menu, select **Commissions**, and then select **Positions**.

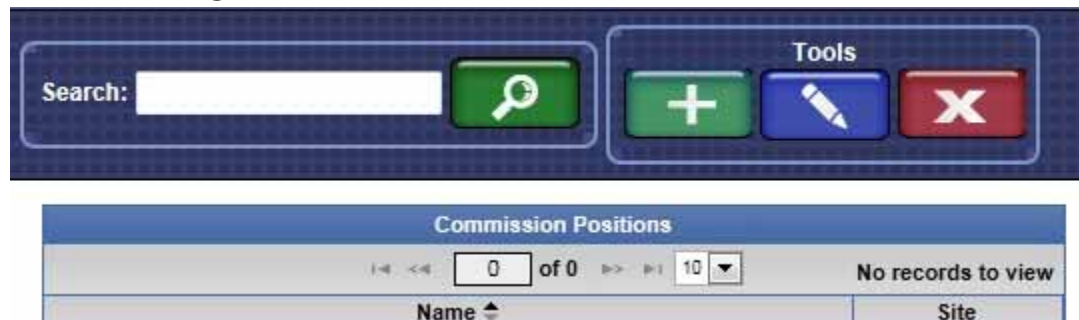


Figure 245. Commission Positions

- 2 Click the **Add**  button.

Commission Position

Description

*Name Pusher

Commission Schedules

Add Entry Remove Selected Entries

	Schedule	Eligibility Rule
	Extra Sales	Extra Sales

Straight Commissions

Add Entry Remove Selected Entries

	PLU	Eligibility Rule
		Always

Figure 246. Commission Position

- In **Name**, type a name for the Commission Position. (This can be a different name or the same Name that you used for Schedules and Eligibility Rules.)

Commission Schedule

Next, set up a Commission Schedule and Eligibility Rule for Commission Position.

- Click the **Add Entry** Add Entry button.
A new Commission Schedule line appears.
- In **Schedule** drop-down box, select a Schedule previously set up.



See "About Commissions Schedules" on page 406.

- In **Eligibility Rule** drop-down box, select an Eligibility Rule previously set up.



See "About Commissions Eligibility Rules" on page 409.

- Click the **Save** button.

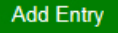

- 8 If you need to enter a straight Commission item, go to step #10.
- 9 If you do not need to enter a straight commission item, go to **Manage Users**, locate the **User**, and click the **wages** button to select the Commission Position:



See “Manage Users” on page 541.

Straight Commission

Setup Straight Commission for a Commission Position.

- 1 Click the **Add Entry**  button.
A new Straight Commissions line appears.
- 2 In **PLU**, type a PLU to apply the Straight Commission.
- 3 In **Eligibility Rule** drop-down box, select an Eligibility Rule.
- 4 Click the **Save**  button.
- 5 Go to **Manage Users**, locate the **User**, and click the wages button to select the **Commission Position**:



See “Manage Users” on page 541.

About Commissions Eligibility Rules

Complete the following three sections to set up Sales Commissions.

- “Add a Sales Commission Schedule”
- “Add Eligibility Rules for a Commission”
- “Add Commission Position”

Eligibility Rules can be added and removed for a commission:



See “Add Eligibility Rules for a Commission” on page 409.



See “Remove Eligibility Rules” on page 411.

Add Eligibility Rules for a Commission

Eligibility Rules can be added for a commission schedule and position. You can use the same Name as you used for the Schedule.

- 1 From **Configuration** menu, select **Commissions**, and then select **Eligibility Rules**.

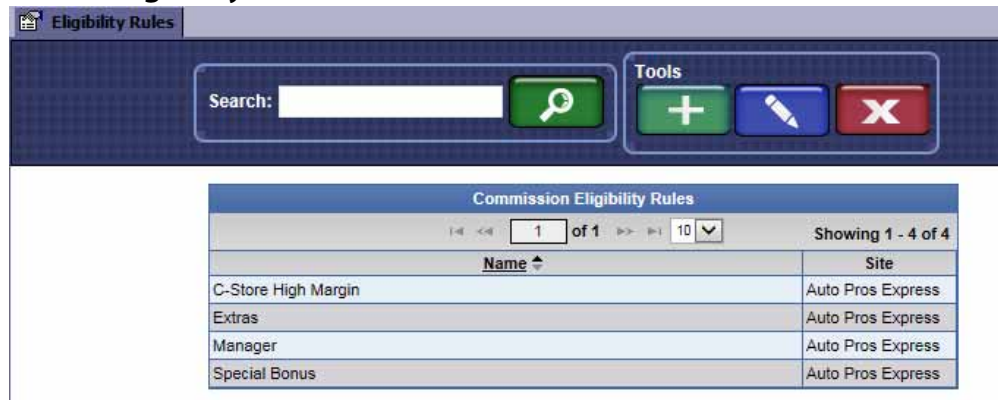




Figure 247. Commission Eligibility Rules

- 2 Click the **Add**  button.
- 3 In **Name**, type a name for the schedule. (This can be the same or different name that you used for Schedules and Positions.)
- 4 In **Profit Centers** drop-down box, select one or more profit centers.
- 5 Click the **Add Entry**  button.
- 6 From **Base Field** drop-down box, select a field that commissions will be based on.
 - **Cars Sold** - The total number of cars sold with any kind of service.
 - **Sales per Car** - Total Dollars per car within the selected profit center.
 - **Cars Buying Extras** - Relates to the physical number of cars, which have purchased and extra service.
 - **Extras Sales** - The total amount of dollars in extra service sales.
 - **Extra Sales per Car** - The total number of dollars in extra services sales divided by the total number of cars processed.
 - **% Extra Sales** - The percentage of sales dollars as it is compared to total sales dollars within the selected profit center.
 - **% Buying Extras** - Relates to the percentage of Cars which have purchased extra service. PLUs or services which contain an amount entered into the Extra Service field in the service table.
- 7 In **Operator** drop-down box, select one of the following:
 - = (equals)
 - ≠ (does not equal)
 - < (less than)



- ≤ (equal to or less than)
- > (greater than)
- ≥ (equal to or greater than)

8 In **Value** drop-down box, type an amount.

NOTE: For Advanced Eligibility Rules, see Figure , “Advanced Eligibility Rules,”

9 If necessary, add another entry.

NOTE: To delete entries: Click to select an Eligibility Rule from the list, and then click the **Remove Selected Entries** button.

10 If you have more than one eligibility rule, you can reorder them with the **Move Up**  button and **Move Down**  button.

11 Click the **Save**  button.



Figure 248. Eligibility Rule

12 Next, complete the Commissions Positions for this Eligibility Rule.

 See “About Commissions Positions” on page 413.

 See “About Commissions Eligibility Rules” on page 409.

 See “About Commissions Schedules” on page 406.

Remove Eligibility Rules

Eligibility Rules can be removed for a commission schedule and position.

Tip You can create a new name or use the same Schedule Name for ease of use.

- 1 From **Configuration** menu, select **Commissions**, and then select **Eligibility Rules**.
- 2 Click to select an **Eligibility Rule** from the list.
The Eligibility Rule is highlighted.
- 3 Click the **Remove** button.



See "Add Eligibility Rules for a Commission" on page 409.



See "About Commissions Schedules" on page 406.





See "About Commissions Eligibility Rules" on page 409.



See "About Commissions Positions" on page 413.

Advanced Eligibility Rules

On the Eligibility page, you can add another condition to be met for an Eligibility rule by using parentheses and using and/or statements.

- 1 From **Configuration** menu, select **Commissions**, and then select **Eligibility Rules**.
- 2 Click to select an **Eligibility Rule** from the list.
The Eligibility Rule is highlighted.
- 3 Click the **Edit**  button.
- 4 Click the **Add**  button.
A new Entry line appears.
- 5 If you are adding only two lines, click the double parenthesis to open the first line and then the single to close the first line.
- 6 On the second line, open the line with the single parentheses and close with the double-parentheses.
- 7 For the first line, you can select **And** or **Or**.

8 Click the **Save**  button.



<input type="checkbox"/>		Base Field	Operator	Value		And/Or
<input checked="" type="checkbox"/>	((Extra Sales	≠	1)	And
<input checked="" type="checkbox"/>	(Sales	>	3)	

Figure 249. Advanced Eligibility Rules



See “Add Eligibility Rules for a Commission” on page 409.



See “About Commissions Schedules” on page 406.



See “About Commissions Eligibility Rules” on page 409.




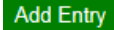
See “About Commissions Positions” on page 413.

About Commissions Schedules

This is the first step in setting up Sales Commission. Add Commission Schedules with a name and base field. After setting up the commission schedule, set up Eligibility Rules and then Commission Position.

Add a Sales Commission Schedule

- 1 From **Configuration** menu, select **Commissions**, and then select **Schedules**.
- 2 Click the **Add**  button.
- 3 In **Name**, type a name for the new schedule.
- 4 From the Base Field drop-down box, select one of the following base fields:

- **Cars Sold** - The total number of cars sold with any kind of service.
 - **Sales per Car** - Total Dollars per car within the selected profit center.
 - **Cars Buying Extras** - Relates to the physical number of cars, which have purchased and extra service.
 - **Extras Sales** - The total amount of dollars in extra service sales.
 - **Extra Sales per Car** - The total number of dollars in extra services sales divided by the total number of cars processed.
 - **% Extra Sales** - The percentage of sales dollars as it is compared to total sales dollars within the selected profit center.
 - **% Buying Extras** - Relates to the percentage of Cars which have purchased extra service. PLUs or services which contain an amount entered into the Extra Service field in the service table.
- 5 If necessary, click the **Add Entry**  button.
 - 6 In **Value** and **Commission** boxes, type an amount.
 - 7 From **Operator Field** drop-down box, select a value.



Commission Schedule

Description

*Name: Extra Sales *Base Field: Extra Sales

Schedule Entries


Add Entry **Remove Selected Entries**


	Value	Commission	Operator	Operator Field
<input type="checkbox"/>	1	.10		Extra Sales

Figure 250. Commission Schedule Example

- 8 Click the **Save**  button.
- 9 Next, setup **Eligibility Rules** for this schedule.

 See "About Commissions Eligibility Rules" on page 409.

 See "Edit a Sales Commission Schedule" on page 407.

 See "Delete a Sales Commission Schedule" on page 408.

Edit a Sales Commission Schedule

You can edit an existing Sales Commission Schedule. After you save, employee must Log out and Log back in for the changes to be effective.







- 1 From **Configuration** menu, select **Commissions**, and then select **Schedules**.
- 2 Select the Commission Schedule.
- 3 Click the **Edit**  button.
- 4 Make necessary edits.
- 5 If necessary, you can remove the schedule entry by selecting the selecting at least one schedule entry, and then select the **Remove Selected Entries**  button..




Figure 251. Commission Schedule Example

- 6 Click the **Save**  button.
- 7 Next, setup **Commissions Positions** for this schedule.

-  See "About Commissions Positions" on page 413.
-  See "Add a Sales Commission Schedule" on page 406.
-  See "Delete a Sales Commission Schedule" on page 408.
-  See "About Commissions" on page 405.

Delete a Sales Commission Schedule

You can delete an existing Sales Commission Schedule.

- 1 From **Configuration** menu, select **Commissions**, and then select **Schedules**.
- 2 Click to select a Commission Schedule from the list.
- 3 Click the **Delete**  button.
A message **Are you sure you wish to terminate this record? Please use caution, this action cannot be reversed.** appears.

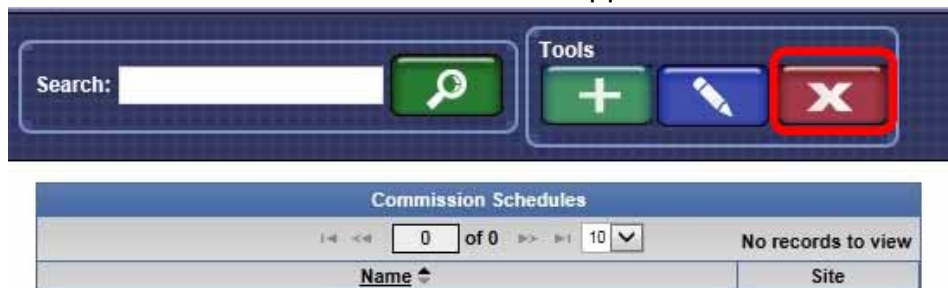






Figure 252. Commission Schedule Delete Example

- 4 Click the **Yes** button.
A message **Commission Schedule terminated successfully** appears.
- 5 Click **OK**.

-  See "About Commissions Positions" on page 413.
-  See "Add a Sales Commission Schedule" on page 406.
-  See "Edit a Sales Commission Schedule" on page 407.
-  See "About Commissions" on page 405.

Sales Commission Example

If a site would like to give their greeters 5% commission based on either sales or sales per car in a specific profit center, they should be creating an Eligibility Rule stating that 5% commission is based on either the sales or sales per car.

There are three section to complete the set up for Sales Commission.

- Positions
 - Eligibility Rules
 - Schedules
- 1 From the **Configuration** menu, select **Commissions** and then **Eligibility Rules**.
 - 2 From the tools, click the **Add** button.
 - 3 In **Name**, type a name for the Eligibility Rule.
 - 4 In **Profit Centers**, select one or more profit centers.
 - 5 In Rule Entries, make the following entry for this sales commission example:
 - 6

CHAPTER 10:

USERS

Users

HELP - What can I do here?

Manager:

- Create user logon IDs and passwords for *WashConnect®*.
- Create user logon IDs for *WashConnect®* Mobile which is an optional feature that requires further set-up requirements.
- After you have set up a security role from the security roles command, you can assign users to that role.
- Menu selections will be available for each user based on their selected security roles.



See "Security Roles" on page 529.(Corporate Only)



See "About Manage Users" on page 541.



See "Manage Users Example" on page 526.

Users Menu FAQs

Table 3: Users Menu FAQs

Question	Answer
Who should look at the Users menu?	The commands in the Users menu are designed for someone who administers access privileges to the system. You can create user logon IDs, assign access privileges to those IDs, and then restrict the menu selections for each one.
What are user security roles?	A security role is a specific set of functions you create for a group in your organizational layout. For example, you might create the Mid Atlantic Controller role and the Mid Atlantic Manager role. One security role is for reporting and the other is for administration yet both apply only to the Mid Atlantic group in your organizational layout.
Why should I assign security roles to users?	After you create a role, you can assign users to that role. Multiple users can be assigned to a single security role. Once a security role is assigned to a user, his access to menu items and commands is limited based on the settings in the role. For example, if you do not want the controller to have access to administrative commands, you can make them unavailable to him.
Can users be prevented from seeing sensitive data?	With user group settings, you can filter sensitive data in another way. You can prevent users from logging on at a specific group in the organizational layout. For example, if you do not want your Mid-Atlantic controller to see data from the Tri-State region, you can prevent him from logging on there.



See “Manage Users” on page 541.

Manage Users Example

Assign the privileges to a security role, and then add a new user and assign the Security role for that user. In Figure 259, “Privileges for Two Security Roles,” Employee 1 User has two security roles assigned and Employee 2 User has one security role assigned.

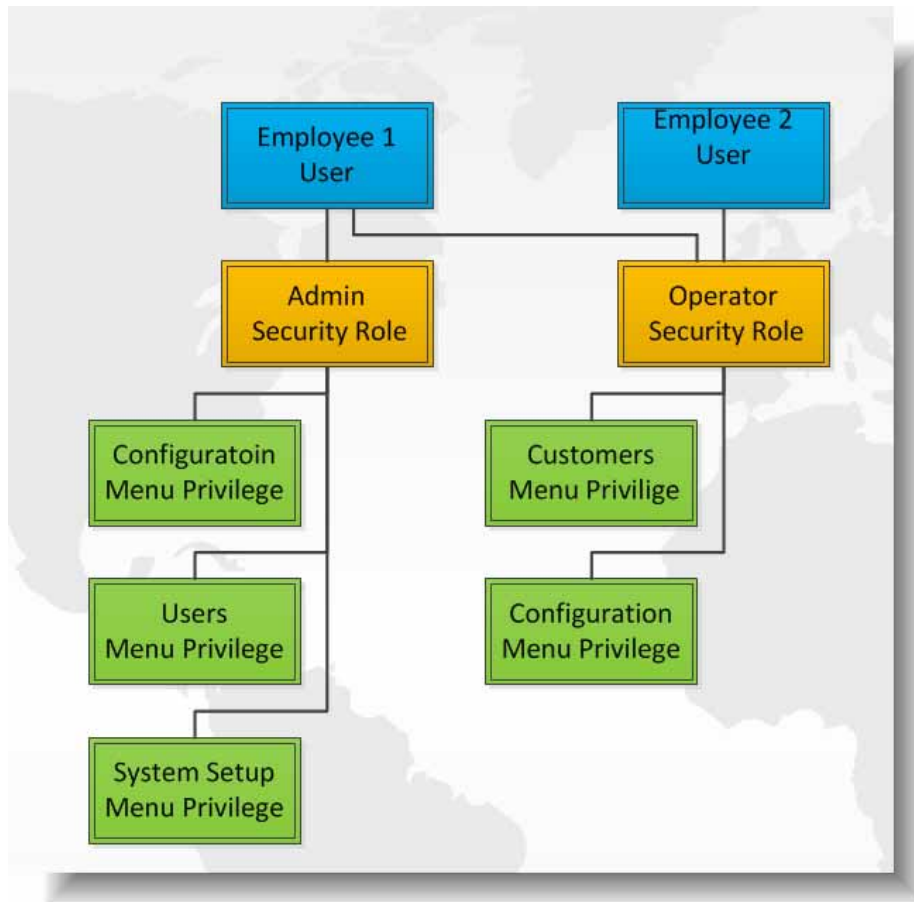







Figure 253. Manage Users Example

User Menu Step-By-Step Instructions

For step-by-step instructions on the User menu:

-  See "Add User Security Role" on page 531.
-  See "Delete User" on page 551.
-  See "Add User Security Role" on page 531.
-  See "Edit User" on page 549.
-  See "Delete Security Role" on page 534.

About Security Roles

Security Roles

HELP - What can I do here?

Managers or Administrators:

NOTE: Security Roles command only appears when logged on at Corporate level.

- A security role is a certain operation or set of operations allowing the user that is assigned that security role access to the different levels of data in WashConnect®.
- Security roles are created for various job functions by selecting appropriate privileges in WashConnect.
 - For example, set up a cashier security role and select the respective privileges a cashier would need to access.
- After you create a security role, you can assign user(s) to that security role(s) from the Manage Users command.
- Users are not assigned permissions directly, but only acquire permissions by applying roles to the user.
- Once a role is assigned to a user, his access to menu items and commands are limited based on the privileges of the security role.
 - For example, if you do not want the controller to have access to administrative commands, you can make them unavailable to him by creating or editing a controller security role.
 - For example, set up a role for a Mid-Atlantic manager with access to menu items relating to administration. Set up another role for a Mid-Atlantic controller who has access to the reporting. Both apply only to the Mid-Atlantic group in your organizational layout so that they don't have access to the Northeast region data.



See "Add User Security Role" on page 531.



See “Security Roles” on page 529.



See “About Manage Users” on page 541.

Security Roles

Security Roles

HELP - What can I do here?

Owners and Managers:

- Add Security Role to Users to limit their privileges in WashConnect.
- Create a security role and then select the WashConnect privileges needed for that role.
 - Admin Role, Manager Role, Cashier Role, etc.

A **Security Role** is specific function you create for a group in your organizational layout. For example, you might create the Mid Atlantic Controller role and the Mid Atlantic Manager role. One is for reporting and the other is for administration. Both apply only to the Mid Atlantic group in your organizational layout. Next, add the security role to the User.

The screenshot shows the 'Role' dialog box with the following details:

- Title:** Role
- *Name:** Admin
- Entity:** --Please Select--
- Level:** Corporate
- Description:** Admin Role
- Select Privileges:**
 - Clubs
 - Advance Club Expiration
 - Reports
 - Autobill Revenue Distribution
 - Club Summary
 - Club Usage
 - Credit Card Expiration
 - Declined Payment
 - Profitability
 - Renewal Termination
 - Revenue Distribution
 - Vehicle History
 - Configuration
 - Accounting Interface
 - Account Import
 - Manage
 - Payment Account
 - System Sales Item
 - Alerts
 - Commissions
 - Commission Eligibility Rules
 - Commission Positions
 - Commission Schedules

Figure 254. Roles Dialog Box



For detailed examples of how **Roles** are created for **Organizational Layout Levels**, along with example users, see “Example for Users and Roles” on page 534.



See “Add User Security Role” on page 531.



See “Edit Security Role” on page 532.




See “Delete Security Role” on page 534.

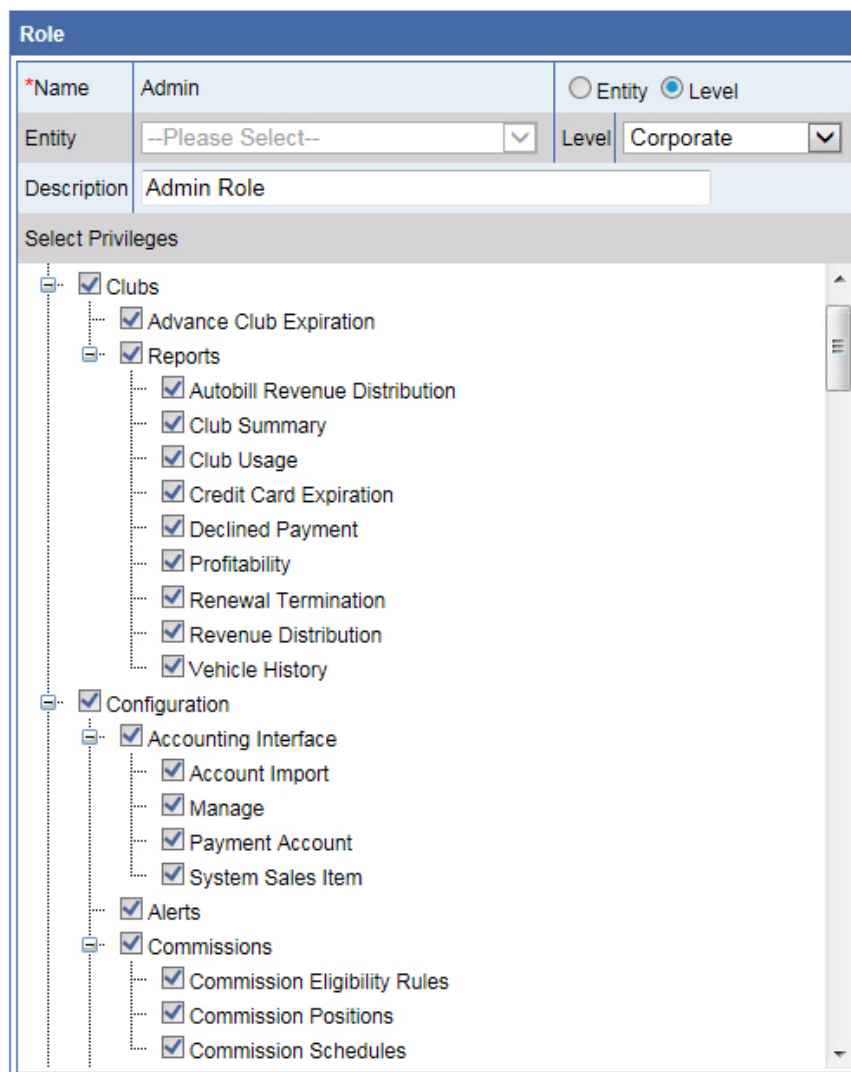


See “Manage Users” on page 541.

Add User Security Role

You can assign Users a Security Role(s) that already has assigned access privileges. When the User logs in, the menu button availability is based on the assigned security role.


- 7 From the **Users** menu, click **Security Roles**.
The **Security Roles** tab appears.
- 8 Click the **Add**  button.
The **Security Roles** dialog box appears.



*Name		Entity		Level	
Admin		--Please Select--		Corporate	
Description: Admin Role					
Select Privileges					
<input checked="" type="checkbox"/>	Clubs	<input checked="" type="checkbox"/>	Advance Club Expiration	<input checked="" type="checkbox"/>	Reports
		<input checked="" type="checkbox"/>	Autobill Revenue Distribution	<input checked="" type="checkbox"/>	Club Summary
		<input checked="" type="checkbox"/>	Club Usage	<input checked="" type="checkbox"/>	Credit Card Expiration
		<input checked="" type="checkbox"/>	Declined Payment	<input checked="" type="checkbox"/>	Profitability
		<input checked="" type="checkbox"/>	Renewal Termination	<input checked="" type="checkbox"/>	Revenue Distribution
		<input checked="" type="checkbox"/>	Vehicle History		
<input checked="" type="checkbox"/>	Configuration	<input checked="" type="checkbox"/>	Accounting Interface	<input checked="" type="checkbox"/>	Account Import
		<input checked="" type="checkbox"/>	Manage	<input checked="" type="checkbox"/>	Payment Account
		<input checked="" type="checkbox"/>	System Sales Item		
<input checked="" type="checkbox"/>	Alerts				
<input checked="" type="checkbox"/>	Commissions	<input checked="" type="checkbox"/>	Commission Eligibility Rules	<input checked="" type="checkbox"/>	Commission Positions
		<input checked="" type="checkbox"/>	Commission Schedules		

Figure 255. Regional Manager Role

- 9 In the **Name** box, type a name for the role.
- 10 Do one of the following:

- Click **Entity** to create the role for a specific group in the organizational layout.
–or–
 - Click **Level** to create the role for a specific level in the organizational layout.
- 11** Optional: In the **Description** box, type a description for the role.
- 12** In the **Select Privileges** list, select the items for which you want this role to have permissions.
- 13** Click **Save**  when you are finished.
The Security Role is saved.



See “Edit Security Role” on page 532.



See “Delete Security Role” on page 534.



See “Manage Users” on page 541.

Edit Security Role

To edit a Security Role, follow these steps:


- 1** Logon to WashConnect from **Corporate**.
- 2** From the **Users** menu, select **Security Roles**.
The **Security Roles** tab appears.
- 3** Select a Role, and then click the **Edit**  button.
The **Security Role** dialog box appears.

Figure 256. Regional Manager Role Example

- 4 In the **Name** box, you cannot edit the name for the security role.
- 5 Do one of the following:
- 6 Click to select **Entity** or **Level**.
 - If you have selected **Entity**, you can create the role for a specifically named level or site in the organizational layout.
 - If you have selected **Level**, you can create the role for a certain level in the organizational layout.
- 7 Optional: In the **Description** box, type a description for the security role.
- 8 In the **Select Privileges list**, edit the items for which you want this security role to have permissions.
- 9 Click the **Save** button when you are finished.
The security role is edited.



See “Add User Security Role” on page 531.



See “Edit Security Role” on page 532.




See “Delete Security Role” on page 534.



See “Manage Users” on page 541.

Delete Security Role

To delete a role, follow these steps:

- 1 From the **Users** menu, click **Security Roles**. The **Security Roles** tab appears.
- 2 Select a role, and then click **Delete**  button. A warning appears.
- 3 Click **OK**. The role is deleted.

NOTE: You cannot delete the **Admin** role. It is a default role assigned to the **Corporate** group.



See “Add User Security Role” on page 531.



See “Edit Security Role” on page 532.



See “Delete Security Role” on page 534.



See “Manage Users” on page 541.

Example for Users and Roles

Before you create users and security roles, the **Levels** and **Organizational Layout** must be understood.

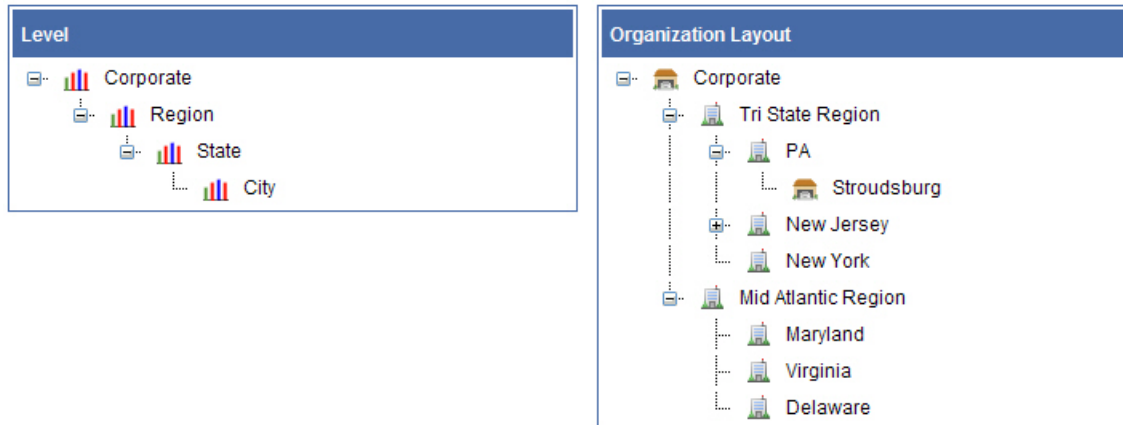


Figure 257. Example Levels and Organizational Layout

In the Figure 257, “Example Levels and Organizational Layout,”:

- **Levels** are **Corporate, Region, State** and **City**.
- **Organizational Layout** includes **Tri State Region** and **Mid Atlantic Region**.
 - Under **Tri State Region** is **PA, New Jersey** and **New York**.
 - Under **Mid Atlantic Region** is **Maryland, Virginia** and **Delaware**.

Next we will consider **Security Roles**.

Name	Description	Entity	Level
Admin	Admin Role		Corporate
Mid Atlantic Controller	For Mid Atlantic Reporting	Mid Atlantic Region	
Mid Atlantic Manager	For Mid Atlantic Administration	Mid Atlantic Region	
Regional VP	For Regional Reporting and Management		Corporate
Tri-State Controller	For Tri-State Reporting	Tri State Region	
Tri-State Manager	For Tri-State Administration	Tri State Region	

Figure 258. Security Roles

In Figure 258, “Security Roles,” six security roles have been created. The default **Admin** security role is listed first.

- The first two roles, **Mid Atlantic Controller** and **Mid Atlantic Manager**, are for reporting and administration of the **Mid Atlantic Region** group.
- **Regional VP** is for reporting and administration across both regions.
- The last two roles, **Tri-State Controller** and **Tri-State Manager**, are for reporting and administration of the **Tri-State Region** group.

Notice how four of the security roles are assigned to **Entities**. One, **Regional VP**, is assigned to the **Corporate** level. A security role can be assigned to either an **Entity** or a **Level**, but not both.

With all this in place, we can look at the privileges assigned to each **Role**.

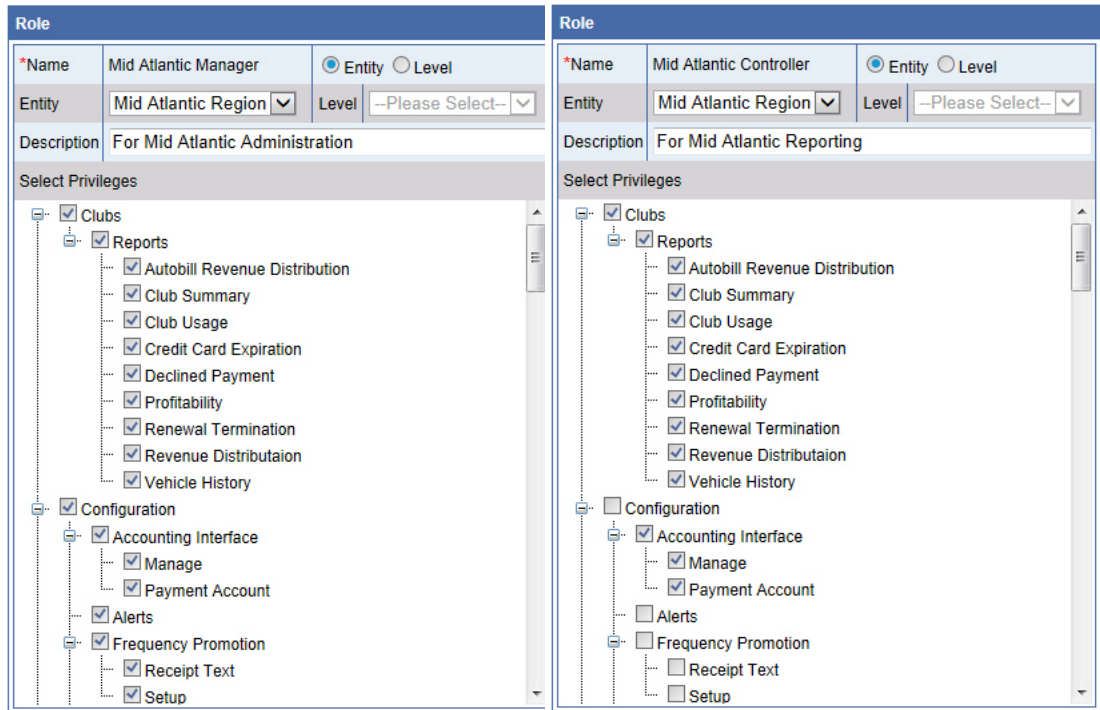


Figure 259. Privileges for Two Security Roles

In the illustration, two roles are shown, **Mid Atlantic Manager** and **Mid Atlantic Controller**.

- **Mid Atlantic Manager** is given permission to all activities in the following menus: **Clubs** and **Configuration**.
- **Mid Atlantic Controller** is given permission to all activities in the **Reports** menu.

If we were to look at the privileges for the remaining roles, we would see that the **Tri-State Manager** and **Controller** roles follow the same strategy as the **Mid Atlantic Manager** and **Controller**. The manager role has access to administrative tasks, while the controller role has access to reporting tasks.

The privileges for the **Regional VP** role could include access to all menu items, both administrative and reporting.

When we look at the **User** dialog boxes, we can put all the pieces together.

Figure 260. Two Users with Different Security Roles

In Figure 260, “Two Users with Different Security Roles,” the users are **RAYCOUNTERMAN[1004]** and **MITHCOUNTERMAN[1010]**.

- Ray is assigned to the **Mid State Controller** role from **Mid State Region**.
- Mitch is assigned to the **Mid State Manager** role from **Mid State Region**.

When you actually assign roles to each user, the **Role** table is generated for you based on what you select in the **Group** box. For example, if you select **Mid Atlantic Region** in the **Group** box, the **Role** table shows three options: **Mid Atlantic Controller**, **Mid Atlantic Manager**, and **Regional VP**.

Finally, we can look at the user assigned to the **Regional VP** role.

User			
*User Name	DEBCOUNTERMAN[1001]	Password	••••••••
*First Name	Debra	*Last Name	Counterman
Address 1			
Address 2			
Address 3			
City		Home Phone	
State	--Please Select--	Mobile Phone	
Zip Code			
Email		Pin	
Status	Normal	Group	Mid Atlantic Region
	<input type="checkbox"/> Allow Mobile Access	Payroll ID	
Admin Card	1454648	Admin Card Status	Normal
Cash Access (TNC)	1454648	Cash Access Status	Normal

Role	Description	Level Name	Entity Name
<input type="checkbox"/> Mid Atlantic Controller	For Mid Atlantic Reporting		Mid Atlantic Region
<input type="checkbox"/> Mid Atlantic Manager	For Mid Atlantic Administration		Mid Atlantic Region
<input checked="" type="checkbox"/> Regional VP	For Regional Reporting and Management		Mid Atlantic Region

Figure 261. Regional VP User

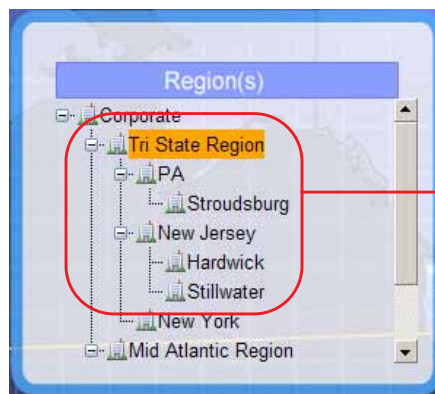
In this illustration, **DEBCOUNTERMAN[1001]** is assigned to **Regional VP** role from the **Mid Atlantic Region** group.

The list of the three example users appears in the **Manage Users** tab.

User					
1 of 10					Showing 1 - 3 of 3
User ID	User Name	Last Name	First Name	E-Mail	Admin Card
3	DEBCOUNTERMAN[1001]	Counterman	Debra		1454648
6	RAYCOUNTERMAN[1004]	Counterman	Raymondo		115446456, 1145456
12	MITHCOUNTERMAN[1010]	Counterman	Mitch		16548546

Figure 262. List of Users

Logon selections are restricted on the logon screen.



VALID LOGON LOCATIONS FOR RAYCOUNTERMAN[1001]

Figure 263. Invalid and Valid Login Locations

In the illustration, **Ray** attempted to log on at the **Corporate Region**. The error message says **Not authorized to logon to Corporate**. Valid selections include **Tri State Region** and all child locations beneath it.

Menu items are restricted for each user.

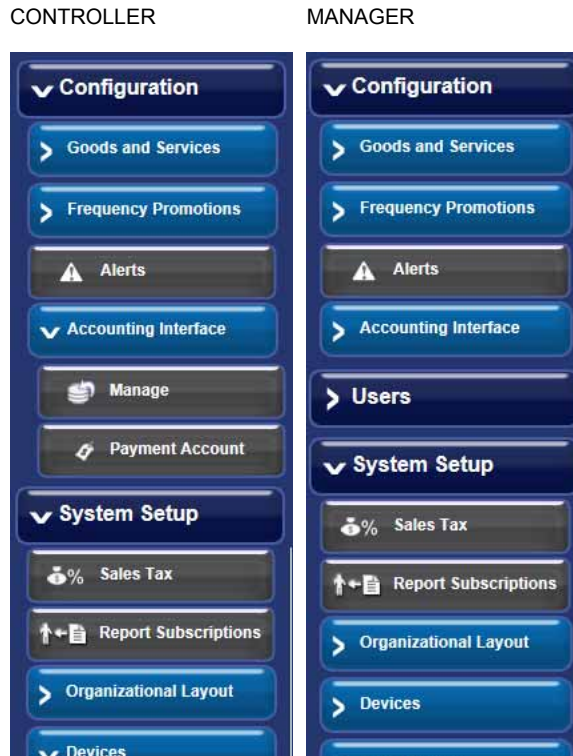


Figure 264. Two Differently configured User Menus

In the illustration, the first menu appears for users who log on with the role of **Tri State Controller** or **Mid Atlantic Controller**. The second menu appears for **Tri State Manager** or **Mid Atlantic Manager**.

The user **RAYCOUNTERMAN[1004]** is a controller. His **Role** is **Tri-State Controller**. He can log on at the **Tri State Region** group, and he has access to reporting menu items. Therefore, Ray would see a **Configuration** menu similar to the one shown in the first example.

The user **MITHCOUNTERMAN[1010]** is a manager. His **Role** is **Tri-State Manger**. He can log on at the **Tri State Region** group, and he has access to administrative menu items. Therefore, Mitch would see a **Configuration** menu similar to the one shown in the second example.



See "Add User Security Role" on page 531.



See "Edit Security Role" on page 532.



See "Delete Security Role" on page 534.



See “Manage Users” on page 541.

[Back to top](#)

About Manage Users

Users

HELP - What can I do here?

Manager:

- Create user logon IDs and passwords for *WashConnect®*.
- Create user logon IDs for *WashConnect®* Mobile which is an optional feature that requires further set-up requirements.
- After you have set up a security role from the security roles command, you can assign users to that role.
- Menu selections will be available for each user based on their selected security roles.



See “Manage Users” on page 541.



See “Add User Security Role” on page 531.



See “Delete User” on page 551.



See “Edit User” on page 549.



See “Add User Security Role” on page 531.



See “Delete Security Role” on page 534.

Manage Users

You can Manage Users and their Security Role(s). After a security role has been created, you can assign a security role to a User. Multiple users can be assigned to one security role. Once a role is assigned to a user, his access to menu items and

commands is limited based on the settings in the role. For example, if you do not want the controller to have access to administrative commands, you can make them unavailable to him by adjusting his security role privileges.

You can create security roles for levels. **Admin** is a default role at the **Corporate** level.



The screenshot shows a web browser window titled "Manage Users". At the top, there are three icons: a green save icon, a red back arrow icon, and a blue refresh/undo icon with a dollar sign. Below the icons is a "User" form with the following fields:

*User Name	<input type="text"/>	*Password	<input type="text"/>
*First Name	<input type="text"/>	*Last Name	<input type="text"/>
Address 1	<input type="text"/>		
Address 2	<input type="text"/>		
Address 3	<input type="text"/>		
City	<input type="text"/>	Home Phone	<input type="text"/>
State	--Please Select-- <input type="button" value="v"/>	Mobile Phone	<input type="text"/>
Zip Code	<input type="text"/>		
Email	<input type="text"/>	Pin	<input type="text"/>
Status	Normal <input type="button" value="v"/>	Group	--Please Select-- <input type="button" value="v"/>
	<input type="checkbox"/> Allow Mobile Access	Payroll ID	<input type="text"/>
Admin Card	<input type="text"/>	Admin Card Status	Normal <input type="button" value="v"/>
Cash Access (TNC)	<input type="text"/>	Cash Access Status	Normal <input type="button" value="v"/>

Please select entity.

Figure 265. Manage Users



See "Add User Security Role" on page 531.



See "Delete User" on page 551.



See "Edit User" on page 549.



See "Add User Security Role" on page 531.



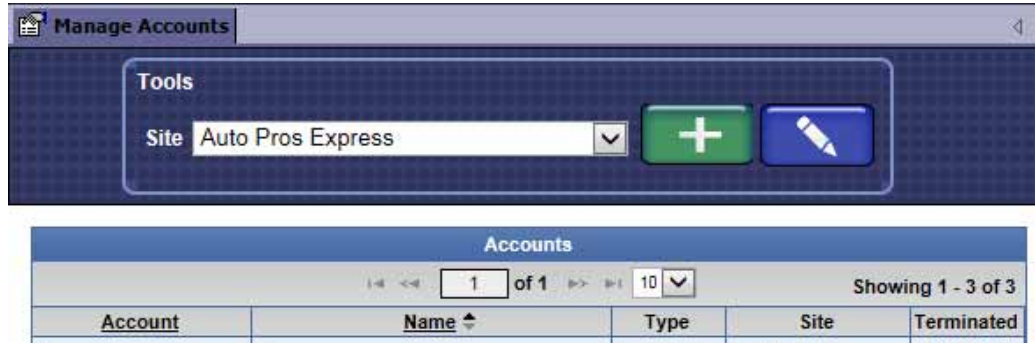
See "Delete Security Role" on page 534.

Add User

A user with the administrative security role privileges (rights) can set another users' passwords. Follow these steps to add a user:

NOTE: Setup Security Roles first, and then add a User and you will be able to select security role(s).

- 1 From the **Users** menu, select **Manage Users**.
The **Manage Users** tab appears.



- 2 Click the **Add**  button.
The **User** dialog box appears.

NOTE: The Roles table does not appear until a Group is selected.

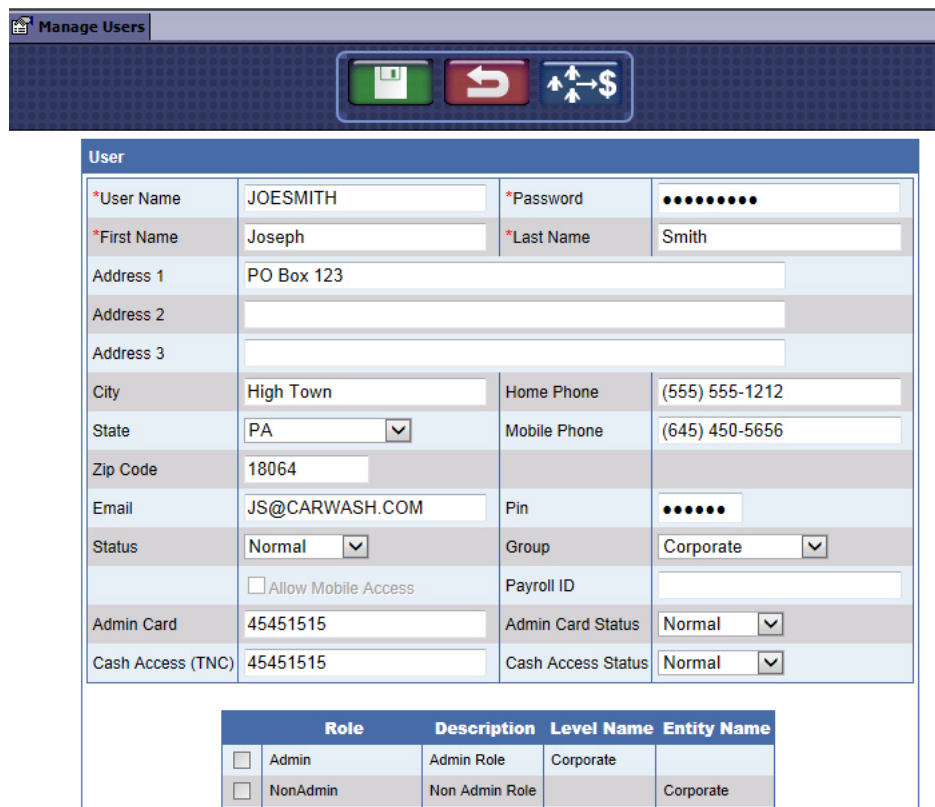


Figure 266. Add User

3 In **User Name**, type the user's name.

NOTE: User types in User Name in User ID at *WashConnect*® Log In.

4 In Password, type a **password** for the User to login to *WashConnect*.

NOTE: Password must be at least 6 characters long with at least one uppercase and one numeric digit.

5 In each of the user fields, type user's personal information if available.

6 In the **Group** drop-down list, select the highest level group necessary for this user.
The Role table appears under the User Dialog box.

NOTE: Roles are determined by the **Group** you select for the user.

7 From the **Role** table, click to select the Role check box(es) for the user.

8 The Mobile Access feature is optional and additional set up is required.

- If available, click to select or deselect the **Allow Mobile Access** check box. The user will now be able to connect to *WashConnect* from a mobile device. The Mobile Account Information box appears.

9 In Payroll ID, type the payroll number for this employee received from your payroll company or manager.

10 In the **Admin Card** field, type the User's Admin Card number.
Contact Technical Support for Multiple Admin Cards.

11 In Cash Access (TNC), type the User's Admin Card number.

NOTE: Multiple Admin Cards are only available with *WashConnect*, and are not available with TunnelMaster POS systems. The Admin Cards can be used for RFID overrides.

12 Click the **Save** button when you are finished.
The user is added to the list.



See "Add User's Fingerprints" on page 552.








See "Delete User" on page 551.



See "Edit User" on page 549.









See "Add User Security Role" on page 531.

-  See “Delete Security Role” on page 534.
-  See “Manage Users” on page 541.
-  See “Add User Security Role” on page 531.
-  See “Manage User Field Descriptions” on page 546.
-  See “Add or Edit Wages for a User” on page 547.

Search for Users

To search for a user, follow these steps:

- 1** From the Users menu, select **Manage Users**.
The **Manage Users** tab appears.
- 2** In the **Search**  box, type a search term.
- 3** From **Status** drop-down box, select **Normal** to filter active users and **Terminated** to filter inactive users.
- 4** Click **Search**.
The search results are shown.
- 5** To return to the full list, clear the search term in the box, and then click **Search**.
The full user list appears.

-  See “Delete User” on page 551.
-  See “Edit User” on page 549.
-  See “Add User’s Fingerprints” on page 552.
-  See “Add User Security Role” on page 531.
-  See “Delete Security Role” on page 534.



See “Manage Users” on page 541.



See “Add User Security Role” on page 531.



See “Manage User Field Descriptions” on page 546.

Manage User Field Descriptions

When you add or edit a user, you can provide information for each of the user fields. The following table describes each of the fields in the **Manage Users** dialog box.

Table 4: User Field Descriptions

Field	Parameter	Description
User Name	Alphanumeric	User ID log in name used for <i>WashConnect</i> ® login.
Password	Alphanumeric	User log in password. Must be 6 characters long with at least one uppercase and one numeric digit.
First Name	Alphanumeric	User first name.
Last Name	Alphanumeric	User last name.
Address1,2,3	Alphanumeric	User home address.
City	Alpha	User city.
State	Alpha	User state.
Zip Code	Numeric	Zip code of User.
Home Phone	Numeric	User home phone.
Mobile Phone	Numeric	User mobile phone.
Email	Alphanumeric	User email address.
Pin	Numeric	User Pin number to use Admin Card and Cash Access card.
Status	List	Normal or Terminated . Normal means active. Terminated means inactive.
Group	Numeric	The group or entity in the organization layout to which the user will have logon rights and privileges. Select the upper most level of your corporate tree structure where your user is permitted.
Payroll ID	Numeric	Payroll identification for User.
Admin Card	Numeric	Admin card (manager card) can have more than one user. Swipe admin card for RFID override, enter RFID number and transaction goes through.

Table 4: User Field Descriptions (Continued)

Field	Parameter	Description
Cash Access (TNC)	Numeric	Cash access card for the TouchNClean per user.
Admin Card Status	List	Normal or Terminated. Select Normal if Admin Card is active.
Cash Access Status	List	Normal or Terminated. Select Normal if Admin Card is active.

 See "Add User Security Role" on page 531.

 See "Delete User" on page 551.

 See "Edit User" on page 549.

 See "Add User Security Role" on page 531.

 See "Delete Security Role" on page 534.

 See "Manage Users" on page 541.

 See "Add User's Fingerprints" on page 552.

 See "Add User Security Role" on page 531.

 See "Add User's Fingerprints" on page 552.

Add or Edit Wages for a User

Users must have wages assigned or attached to use the Time Clock menu. Follow these steps to add an hourly rate to a user from the Manage Users menu.

- 1 First, save the user with security role(s).
- 2 Login to Corporate.
- 3 From the **Users** menu, select **Manage Users**.

- 4 Double-click to select the User or employee from the User list.

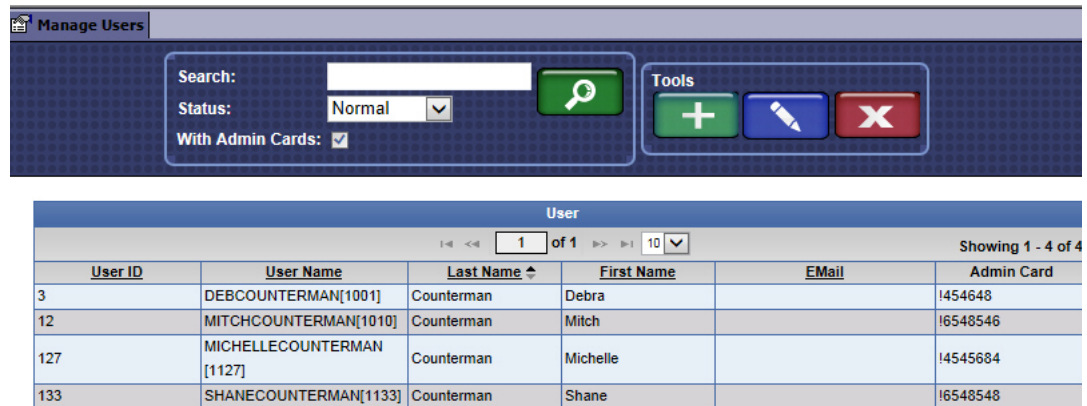


Figure 267. Manage Users employee list
The User dialog box appears.

- 5 Click the **Wages**  button.
The User Wages table appears for that user.



Figure 268. User Wages screen

- 6 In Wages, type hourly rate(s) for the User (employee) for each applicable Profit Center.

NOTE: Select an hourly wage first before you can access the Default column.

- 7 In Default, click to select a **default Profit Center**.
- 8 From Corporate Login, in Commission Position, click **Select Position**, and then select Commission Position for each site or Apply position to all sites.

–or–

From the Site level login, select a **Commission Position** from the Commission Position drop-down box.

- 9 Click **OK**, and then click the **Save** button.
- 10 Click the next **Save** button.
The User is now eligible for the Time Clock menu.

 See "Delete User" on page 551.

 See "Edit User" on page 549.

 See "Add User Security Role" on page 531.

 See "Delete Security Role" on page 534.

 See "Manage Users" on page 541.

 See "Add User Security Role" on page 531.

 See "Manage User Field Descriptions" on page 546.


 See "Add User's Fingerprints" on page 552.

 See "Add User's Fingerprints" on page 552.

Edit User

You can edit the information for a user. For example, to change a user's password, you can edit the user, and then change the **Pin** field.

To edit a user, follow these steps:

- 1 Select the **Users > Manage Users**.
The **Manage Users** tab appears.
- 2 Select a user in the list, and then click **Edit**  button.
The **User** dialog box appears.

The screenshot shows the 'Manage Users' interface with a 'User' form. The form contains the following fields and values:

*User Name	JOESMITH[1789]	Password	*****
*First Name	Joseph	*Last Name	Smith
Address 1	PO Box 123		
Address 2			
Address 3			
City	High Town	Home Phone	(555) 555-1212
State	PA	Mobile Phone	
Zip Code	18000		
Email		Pin	
Status	Normal	Group	Corporate
	<input type="checkbox"/> Allow Mobile Access	Payroll ID	
Admin Card		Admin Card Status	Normal
Cash Access (TNC)		Cash Access Status	Normal

Role	Description	Level Name	Entity Name
<input checked="" type="checkbox"/> Admin	Admin Role	Corporate	
<input type="checkbox"/> NonAdmin	Non Admin Role		Corporate

Figure 269. Edit User

- 3 Edit the fields, and then click the **Save** button.
The user's edits are saved.

NOTE: You cannot edit the **User Name** field. **User Name** is made permanent when the user is first created and cannot be changed. To change **User Name**, you can add a new user with the **User Name** you want.



See "Delete User" on page 551.



See "Add User Security Role" on page 531.



See "Delete Security Role" on page 534.



See "Manage Users" on page 541.




See "Add User Security Role" on page 531.



See "Manage User Field Descriptions" on page 546.


 See "Add or Edit Wages for a User" on page 547.

 See "Add User's Fingerprints" on page 552.

Delete User

You can delete a user in the system. Deleting a user is the same as terminating a user. The data is maintained in the database, but the user is no longer able to log on with that User Name and password. If any fingerprints are on file for that User, they will be permanently removed from the system. If user is hired again, the fingerprints will need to be registered again.

To terminate a user, follow these steps:

- 1 From the **Users** menu, click **Manage Users**.
The Manage Users tab appears.
- 2 Select a user in the list, and then click the **Delete**  button.
A warning appears.
- 3 Click **OK**.
The user is terminated.

 See "Add User Security Role" on page 531.

 See "Edit User" on page 549.

 See "Add User Security Role" on page 531.

 See "Delete Security Role" on page 534.

 See "Manage Users" on page 541.

 See "Add User Security Role" on page 531.

 See "Manage User Field Descriptions" on page 546.

 See "Add or Edit Wages for a User" on page 547.




See “Add User’s Fingerprints” on page 552.

Add User’s Fingerprints

NOTE: Fingerprint readers are optional but are necessary if adding fingerprinting abilities for users in *WashConnect*®.

You can add user’s fingerprint as a valid authentication type to verify the identity of the User for login to *WashConnect*® and the TimeClock. You also have the ability to force use of finger print reader for time clock operations. The system prevents the same fingerprint from being assigned to multiple users. Follow these steps to capture a Fingerprint for a user:

- 1 From the **Users** menu, click **Manage Users**.
The **Manage Users** tab appears.
- 2 Click to select a User from the User list.
The User is highlighted.
- 3 Click the **Fingerprint**  button. (Button will only appear if valid fingerprint scanner is connected and enabled.)
The User Fingerprints section appears.



User		
User Name:	JohnD	
First Name:	John	Last Name: Dengler
User Fingerprints		
Finger	Capture Fingerprint	Delete Fingerprint
Right Thumb	Register Fingerprint	
Right Index Finger	Register Fingerprint	
Right Middle Finger	Register Fingerprint	
Right Ring Finger	Register Fingerprint	
Right Pinky Finger	Register Fingerprint	
Left Thumb	Register Fingerprint	
Left Index Finger	Register Fingerprint	
Left Middle Finger	Register Fingerprint	
Left Ring Finger	Register Fingerprint	
Left Pinky Finger	Register Fingerprint	

Figure 270. User Fingerprints

- 4 From the Finger that you want, and then click the Register Fingerprint link.
The Capture Print dialog box appears.

NOTE: One fingerprint is necessary but you can set up more than one fingerprint from User Fingerprints.

Register Fingerprint Capture Print message appears.

- 5 Place the User’s selected finger on the reader.

User			
User Name:	JohnD		
First Name:	John	Last Name:	Dengler
User Fingerprints			
Finger	Capture Fingerprint	Delete Fingerprint	
Right Thumb	Register Fingerprint		
Right Index Finger	Register Fingerprint		
Right Middle Finger	Register Fingerprint		
<div style="border: 1px solid black; padding: 5px;"> <p>Capture Print x</p> <p>Please place your Right Index Finger on the reader. You will need to do this between 4 and 8 times to correctly capture your fingerprint. 0</p> <p>Left Pinky Finger Register Fingerprint</p> </div>			

A Message **Fingerprint captured successfully** appears.


Capture Print		x
Fingerprint captured successfully. Please place your Right Index Finger on the reader again.		1

Figure 271. Fingerprint Captured Print message

- 6 Lift finger and repeat as many times as *WashConnect®* prompts you to.

Capture Print		x
Fingerprint for your Right Index Finger successfully registered!		
		OK

Figure 272. Capture Print successfully registered message

- 7 When message appears that finger was registered, click OK.
- 8 Click the **Save**  button.
The fingerprint scans are saved. You can now log in to *WashConnect®* and use the Time Clock feature with a scan of the user's registered fingerprint.
- 9 From the User Fingerprints section, you can view the Fingerprints that are registered and those that can be registered from the Capture Fingerprint column.



User		
User Name:	JohnD	
First Name:	John	Last Name: Dengler

User Fingerprints		
Finger	Capture Fingerprint	Delete Fingerprint
Right Thumb	Register Fingerprint	
Right Index Finger	Fingerprint Registered	Delete
Right Middle Finger	Register Fingerprint	
Right Ring Finger	Register Fingerprint	
Right Pinky Finger	Register Fingerprint	
Left Thumb	Register Fingerprint	
Left Index Finger	Register Fingerprint	
Left Middle Finger	Register Fingerprint	
Left Ring Finger	Register Fingerprint	
Left Pinky Finger	Register Fingerprint	

Figure 273. User - Capture Fingerprints



See “Delete a Fingerprint” on page 554.



See “Manage Users” on page 541.

Delete a Fingerprint

You can delete fingerprints from the User.


- 1 From the **Users** menu, click **Manage Users**.
The **Manage Users** tab appears.
- 2 Click to select a User from the User list.
The User is highlighted.
- 3 Click the **Fingerprint**  button.

The User Fingerprints section appears.



User		
User Name:	JohnD	
First Name:	John	Last Name: Dengler
User Fingerprints		
Finger	Capture Fingerprint	Delete Fingerprint
Right Thumb	Register Fingerprint	
Right Index Finger	Fingerprint Registered	Delete
Right Middle Finger	Register Fingerprint	
Right Ring Finger	Register Fingerprint	
Right Pinky Finger	Register Fingerprint	

Figure 274. Delete User Fingerprints

- 4 In Delete Fingerprint column, click the **Delete** link for the respective Finger.
- 5 A message **Are you sure you want to delete the fingerprint? Click Yes or No** appears.
The fingerprint is deleted.
- 6 Click the **Save**  button.



See "Add User's Fingerprints" on page 552.



See "Add User" on page 543.

CHAPTER 11:

TOUCH POS

The Touch POS (Point Of Sale) is an electronic cash register, allowing user who has rights to Open or Close a Touch POS device. The **Touch POS** menu includes the following commands:

NOTE: The Commands in the Touch POS menu are designed for a user who has rights to Open or Close a Touch POS device.

- "Open Shift"
- "About Add / Remove from POS"
- "Close Shift" (available after shift is opened)
- "Purchase new club membership (for the first vehicle)"
- "Enter a New Sales Transaction at Touch POS"
- "Remove Sales Items"
- "About Touch POS Sales Entry"
- "About Refunds"
- "About Voids"
- "Free Wash or ReWash"
- "ROA (Received on Account)"
- "Payout"
- "Ticket Generation for 6-digit Wash Codes"
- "Ticket Generation for 6-digit Wash Codes"
- "Add Customer Information"

After the shift is open, the menu on the left of the transaction screen is a list of the profit center items buttons, in this scenario, Express, Hand Services, Gift Card, Inbay

Auto, Club, Impulse, and Packages. From the Express menu, there are four submenus: Base, Extra, Discount, Package, and Others.



Figure 275. Touch POS Screen

NOTE: The commands in the **TOUCH POS** menu are designed for a user who has rights to Open or Close a Touch POS device.

Open Shift

Touch POS Open Shift	HELP - What can I do here?
	Cashiers: <ul style="list-style-type: none">• Must Open Shift before Sales screen can appear.• Change greeter without having to Close shift.• Open Shift requires the amount of cash that will open the shift in the drawer:<ul style="list-style-type: none">• Type quantity of bills and coins.• -or-• Type total amount in Cash Express box to get the drawer open quickly.

Open Shift

At the beginning of each shift, it is necessary to Open the Point of Sale. User must have security privilege to Open Shift.

If a safe is not set up with WashConnect, follow these instructions to open a POS shift:

- 1 From the **Touch POS** menu, select **Open Shift**.
The Open Shift tab appears.

NOTE: If midnight passed and the prior shift was not closed, the system will Close Shift before Open Shift is possible.

Denomination	Qty.	Amt.	Add Qty.
1¢ (Penny)		\$0.00	
5¢ (Nickel)		\$0.00	
10¢ (Dime)		\$0.00	
25¢ (Quarter)		\$0.00	
\$1.00 (Bill)		\$0.00	100
\$1.00 (Coin)		\$0.00	
\$5.00		\$0.00	20
\$10.00		\$0.00	10
\$20.00		\$0.00	
\$50.00		\$0.00	
\$100.00		\$0.00	

Bills \$300.00
Coins \$0.00
Total \$300.00

Cash Express
Cash \$0.0

Open Shift Open Shift With Report

Figure 276. Open Shift tab

- 2 In **Cashier**, select a cashier name from the drop-down box. The cashier list is pre determined by users who are logged in.
- 3 In **Manager**, select a name from the drop-down box.
- 4 Type amounts in the denomination boxes that you are taking from the safe and to place in the drawer to open. The total amount of cash appears in **Total**.
–or–
Alternatively, type a single amount in the **Cash Express (lump sum)** box. Only use this box if you do not type amounts in the denomination boxes. The total amount in the drawer appears on the **Total** line.

Tip Be sure that shifts are opened and closed accurately to assure cash accountability.

- 5 Click **Open Shift**.
The POS Entry screen appears and the shift is opened. An add journal entry is automatically made in WashConnect.
–or–
Click **Open Shift with Report**.

A report receipt prints, the **POS Entry** screen appears, and the shift is opened. An add journal entry is automatically made in WashConnect.

NOTE: This note refers to a POS that is not using the safe. When the amount you are trying to open with does not match the amount the register was closed from the previous shift, the message If the Bank Discrepancy message appears, double check the amounts entered in the denomination or the Cash Express boxes and the actual amount in the drawer. This message appears

- **NO SAFE:** When you chose not to use a Safe, deposit an amount to the Bank and leave so much in the drawer.
- **USING SAFE:** When using a Safe, all money is supposed to be removed so it always closes with zero, therefore, any amount to open is OK.

Tip Verify your cash movements as soon as possible. It is possible to edit most shift information after a shift has been closed. However, it is faster and easier to enter accurate information during the shift. Verify!

NOTE: There is a setting to span midnight one time. See “POS > TouchPOSConfiguration > General” on page 694. If the shift is left open and a second midnight is reached, the system will force a closure of the open shift and a start of a new shift.



See “TOUCH POS” on page 557.



See “About Journals” on page 272.



See “About Touch POS Sales Entry” on page 579.

About Add / Remove from POS

Touch POS
Add or Remove

HELP - What can I do here?

Cashiers:

- First, the shift must be open. See Open Shift.
- Change greeter as necessary.
- Add - add money to the drawer during the shift.
- Remove - take money out of drawer to deposit or exchange for other denominations.

Electronically track the Add / Remove money in the system from the Touch POS Register Shift

After the Shift is already Open, you can add or remove money to / from the Touch POS drawer and track it in the system. The Remove feature is to prevent too many bills in the POS drawer, leaving your cash vulnerable to theft.

NOTE: The Add / Remove option will not be available on the Touch POS menu if a shift is not Open. User must have privileges to add or remove money.

- 1 From the **Touch POS** menu, click **Add/Remove**.
The Add/Remove tab appears.
- 2 From the Add/Remove section, select a **Cashier**.
- 3 Select a Manager.
- 4 Type the quantity of denominations that you intend to Add or Remove.
-or-
Type the total amount in the **Cash Express** to Add or Remove.
- 5 Click the **Add** button or click the **Remove** button.

- 6 Physically count the money out of the drawer or into the drawer.

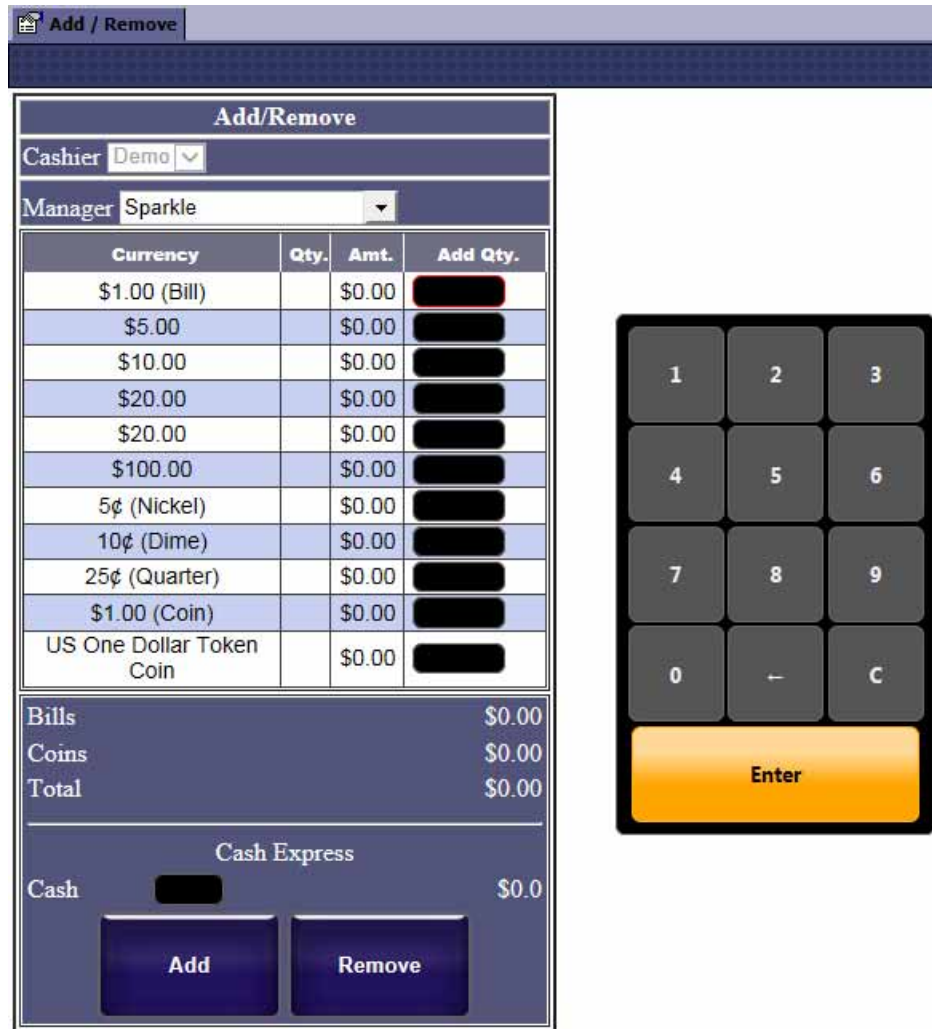


Figure 277. Add / Remove tab

- 7 The drawer opens and a journal receipt prints.
- 8 You can close the Add/Remove tab.



See "TOUCH POS" on page 557.

Close Shift

Touch POS Close Shift

HELP - What can I do here?

Cashiers:

- At the end of each shift, it is necessary to close the POS (Point of Sale).
- This provides for an exact cutoff for each cashier, ensuring accountability in your cash control.
- Close shift requires the amount of cash that will close the shift in the drawer:
 - Type quantity of bills and coins.
 - -or-
 - Type total amount in Cash Express box to get the drawer open quickly.

NOTE: The Close Register Shift option will not be available on the Touch POS menu if a shift is not currently open.

Close Shift

At the end of each shift, it is necessary for the Greeter to close the register shift at the Point of Sale in order to track cash over/short. The completion of this process provides for an exact cutoff for each cashier, thus ensuring accountability in your cash control. Follow these steps to close a shift:

- 1 From the **Touch POS** menu, click **Close Shift**.
The message Are you certain you want to close the shift? appears.
- 2 Click **Yes**.

The Close Shift tab appears.

The screenshot shows the 'Open Shift' screen with the 'Close Shift' tab selected. The screen is divided into two main sections: 'Deposit to Safe' and 'Ending Bank'. Each section has a table for entering denominations and a summary table at the bottom. A numeric keypad with an 'Enter' button is shown to the right.

Deposit to Safe				Ending Bank			
Currency	Qty.	Amt.	Add Qty.	Currency	Qty.	Amt.	Add Qty.
\$1.00 (Bill)		\$0.00	<input type="text"/>	\$1.00 (Bill)		\$0.00	<input type="text"/>
\$5.00		\$0.00	<input type="text"/>	\$5.00		\$0.00	<input type="text"/>
\$10.00		\$0.00	<input type="text"/>	\$10.00		\$0.00	<input type="text"/>
\$20.00		\$0.00	<input type="text"/>	\$20.00		\$0.00	<input type="text"/>
\$20.00		\$0.00	<input type="text"/>	\$20.00		\$0.00	<input type="text"/>
\$100.00		\$0.00	<input type="text"/>	\$100.00		\$0.00	<input type="text"/>
5¢ (Nickel)		\$0.00	<input type="text"/>	5¢ (Nickel)		\$0.00	<input type="text"/>
10¢ (Dime)		\$0.00	<input type="text"/>	10¢ (Dime)		\$0.00	<input type="text"/>
25¢ (Quarter)		\$0.00	<input type="text"/>	25¢ (Quarter)		\$0.00	<input type="text"/>
\$1.00 (Coin)		\$0.00	<input type="text"/>	\$1.00 (Coin)		\$0.00	<input type="text"/>
US One Dollar Token Coin		\$0.00	<input type="text"/>	US One Dollar Token Coin		\$0.00	<input type="text"/>
Bills		\$0.00		Bills		\$0.0	
Coins		\$0.00		Coins		\$0.0	
Total		\$0.00		Total		\$0.0	
Checks		0.00					
Total		\$0.0					
Express Deposit				Express Close			
Cash	<input type="text"/>	\$0.0		Cash	<input type="text"/>	\$0.0	

At the bottom of the screen, there are three buttons: 'Close Shift', 'Close Shift With Report', and 'Quick Close Shift'. To the right of the screen is a numeric keypad with buttons for digits 1-9, 0, a back arrow, and a yellow 'Enter' button.

Figure 278. Close Shift tab

In the **Deposit to Bank** area, type amounts in the denomination boxes. Checks are automatically tallied from the shift and the check total appears. The Bank Total appears on the **Total** line. This is the amount to be deposited at the bank.

NOTE: Optional: Type an amount in the **Express Deposit** box. Do this only, if you do not type amounts in the denomination boxes. Therefore, use one or the other not both Express Deposit and Express Close boxes.

- In the **Ending Bank** area, type amounts in the denomination boxes. The total appears on the **Total** line. This is the amount to leave in the POS terminal after closing the shift.
(**Optional**) Type an amount in the Express Close box. Do this only, if you do not type amounts in the denomination boxes.

The **Ending Bank Total** you enter here will become the total required to open the Beginning Bank the next time a POS Register Shift is opened. In this example, the next register shift will need to be opened with \$122.50.

- After typing all quantities, select one of the following:
Click the **Close Shift** button to close without a printed report receipt.
–or–
Click the **Close Shift With Report** button to close shift and print a journal receipt on the POS receipt printer.

–or–

Click the **Quick Close Shift** button to close the unverified shift so that you can verify or edit using Journal Verify.

You will be returned to the Main Menu, the shift is closed and a new shift can be started right away.

It is possible to edit most shift information after a shift has been closed; however, it is much easier to have accurate information inputted during the shift. Editing closing monies is done in the Journal Editor.



See "TOUCH POS" on page 557.



See "About Journals" on page 272.

PreSell Terminal

A Presell Terminal does not have a cash drawer. The Presell Terminal is typically used at a full-service car wash. It's designed to enter your customer's wash selections and printout on a presell ticket. Customer walks the presell ticket to the POS Cashier when they can pay for their selections.

NOTE: If adding a 2nd vehicle club membership to be charged to the same customer, do not enter a Presell ticket. Instead, send the customer to the cashier who must ring entire sale at the Touch POS.

Enter a new presell ticket

- 1 From the Presell terminal, open *WashConnect*®. Presell automatically opens.

NOTE: If Presell does not automatically open upon logon, see system settings for TouchPresellConfiguration.

- 2 From the Touch POS menu, Open **Touch POS** sales screen. The Presell Terminal's sales screen appears in the TouchPreSell tab.
- 3 From **Greeter**, type greeter's name. By default, the system will retain the last greeter selected.

NOTE: To post a sale in POS or post a ticket in Presell, user must be clocked in from the *WashConnect* Time Clock menu and a shift must be opened. The system will retain the last greeter clocked in by default. An ROA is the only excep-

tion if Greeter is not clocked in. Time Clock options are now configurable settings.



See “Time Clock” on page 753.

- 4 In **Plate**, type customer’s license plate number. If car has been there before, select the customer.
The customer’s name and plate number appear next to the **Customer** button.
–or–
If customer is new, select the **New Customer** button. You can enter customer information here, or just click the **Done** button if you are busy. POS Cashier can edit vehicle information.

- 5 Click to select Sale Item button(s). All of the Sales Item buttons (PLU numbers) appear initially. If you don’t know the PLU number, you can search by doing one of the following:
 - From the PLU/SKU/Coupon, type the sales item number to search by PLU number.
 - or–
 - Select a profit center button from the left-side, and then a sub menu appears with the sales item buttons available from the selected profit center.

NOTE: Profit Center names from the menu items on the left will vary based on the names you selected when you set up your profit centers from System Setup. Submenu buttons are designated during the configuration of the Sales Items and by selecting a Type such as Base, Extra, or Discount.
The sales item(s) appears on the virtual receipt.

NOTE: If you need to remove a Sales Item:

- Click the **Remove** button to remove the selected item from the virtual receipt.
- Click the **Clear** button to clear the entire transaction screen and start over.


- 6 Click the **Finalize**  button.
The PreSell ticket prints with a barcode and then the customer takes to cashier to scan.



Figure 279. Touch PreSell Sales Screen

Point of Sale with PreSell and without RFID

With this full-service business model, there is a PreSell terminal at the entrance of tunnel and a cashier at a Point of Sale somewhere else on site where the customer walks to while their vehicle goes through the tunnel. In this business model, if a customer purchases a club, they are identified by their license plate (not the RFID or club card number).




See "Purchase new club membership (for the first vehicle)" on page 568.

Purchase new club membership (for the first vehicle)

NOTE: The instructions assume you are using the an on-site safe with the virtual safe setting enabled, recommended by ICS.

After Customer brings Presell ticket to the POS, follow these instructions:

- 1 Customer needs to fill out and sign the Wash Club Sign Up Contract.
- 2 At the Touch POS, scan the barcode on the Presell ticket.
The club and the club wash redemption appear in the virtual receipt.
- 3 Click the **Finalize**  button.
- 4 If necessary and available, you can select extra service(s) for the wash today.

- 5 Click the **Finalize**  button.
- 6 In Payment, customer may select any type of payment.

NOTE: Customer must pay with credit card for automatic monthly billing.

- 7 From the Customers -> Manage menu, you can enter customer's information later since all of their information is recorded on the Wash Club Sign Up Contract that they fill out at time of purchase.
-OR-
Add Customer Information at a later time since customer has filled out the Wash Club Sign Up Contract.



"Add Customer Information"



"Available Promotions"



See "TOUCH POS" on page 557.

Renew Club Membership

NOTE: The instructions assume you are using the an on-site safe with the virtual safe setting enabled, recommended by ICS.

If the club membership expires, the Touch POS will recognize this and ask you to confirm.

- 1 Open Touch POS sales entry screen.
- 2 In **Plate**, type customer's license plate number.
- 3 From the search results on the right-side, locate and then click to select customer. The customer's information fills in the lower section of the virtual receipt. The message **Your club has expired. Do you want to renew it?** appears.

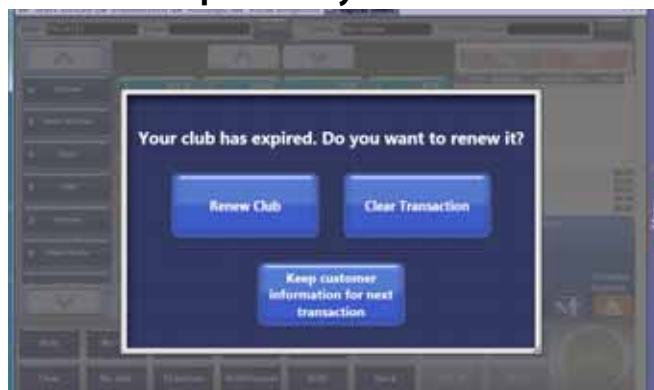


Figure 280. Club Expired Dialog box

4 Click **Renew/Change Club** button.

NOTE: If customer does not want to renew club, select **Keep customer information for next transaction** and then customer can buy a wash.

5 Select a payment.

6 If using a credit card, three payment buttons appear, select one:

7

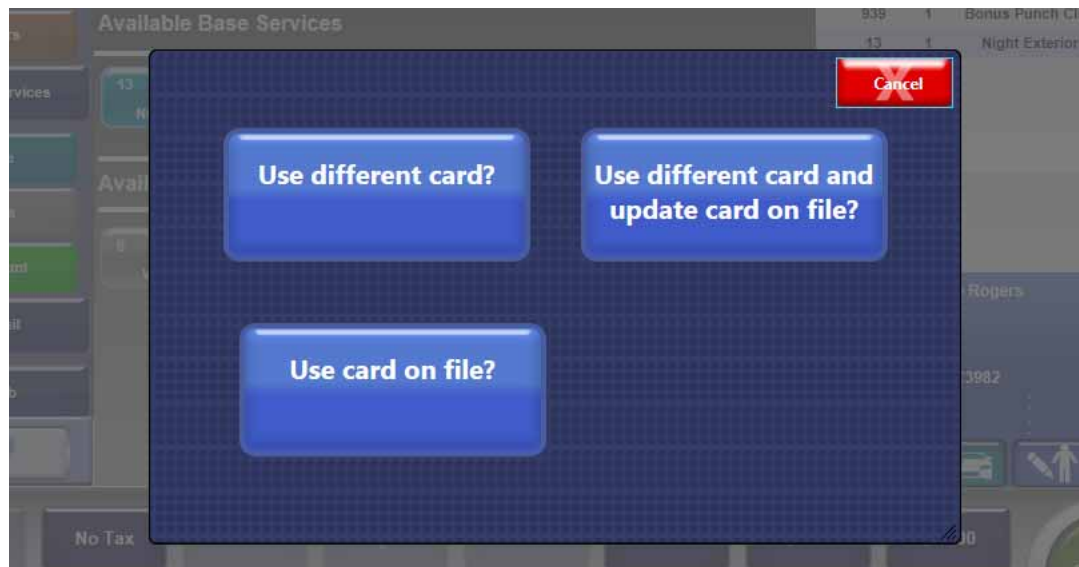


Figure 281. Renew Club Credit Card Renewal Options

8 If using a credit card, three payment buttons appear, select one of the following:

- **Use different card?** - Customer can pay for club with a different card than the one they have on file in WashConnect (One time club renewal).
- **Use different card and update card on file?** - Customer can use a different card than the one they have on file in WashConnect to pay for their club and also update the credit card on file.
- **Use card on file?** - As long as the credit card on file in WashConnect is valid the club will be renewed with that card.

The customer's club is now renewed and the customer can receive a club wash.



"Add Customer Information"




"Available Promotions"




See "TOUCH POS" on page 557.

Add Customer Information



After the customer purchases the Club, you will need to enter the customer's information to complete the club setup.

- 1 From the **Customers** menu, select **Manage**.
- 2 Click to select the **All Customer** check box.
- 3 In **Search** box, type the customer's License Plate number.
- 4 From the **In Field** list, select **License**.
- 5 Click the **View**  button.

NOTE: If License column is not viewable, click the **Select Columns**  button.

- 6 Double-click to select the customer.
-OR-

Select the vehicle, and press the **Edit Customer**  button.

- 7 **Required:** type customer's **First Name** and **Last Name**. All other customer information is optional.
 - 8 Click to select the **Vehicle Information** tab.
 - 9 Double-click to select the vehicle.
-OR-
- Select the vehicle, and press the **Edit Vehicle**  button.
- 10 Add all other vehicle information that is available.
 - 11 Click the **OK** button, and then click the **Save**  button.
 - 12 Click the **OK** button.

NOTE: DO NOT CHANGE THE EXPIRATION DATE.

Club setup is now complete and billing approves overnight. Customer's credit card will be billed monthly until customer cancels membership.







See "TOUCH POS" on page 557.

Purchase Club Membership for a 2nd Vehicle (for an Existing Customer)

When a customer does NOT have a presell ticket to scan...

- 1 From the **Customers** menu, select **Manage**.
- 2 Search for the existing customer.

- 3 From the **In Field** list, select **Customer**.
- 4 In **Search** box, type the customer's name.
- 5 Click the **View**  button.
- 6 Double-click to select the customer.
-OR-
Select a customer, and click the
Edit Customer  button.
- 7 Click the **Add Vehicle**  button.
- 8 In **Plate No**, type the 2nd vehicle's plate number.
- 9 In **Club**, select a club for the 2nd vehicle.
- 10 In **Expiration Date**, type in today's date so that customer is billed overnight.
- 11 In **Billing Status**, select **Active** or **Bill** from the list.
- 12 **Optional:** Fill in all other available Vehicle Information.
- 13 Click **OK**.
- 14 The message Vehicle Saved Successfully appears, click **OK**.
- 15 Click the **Save**  button.

Club setup is now complete and billing approves overnight.
No receipt will print for customer.



"Purchase new club membership (for the first vehicle)"



See "TOUCH POS" on page 557.

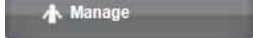
Terminate or Suspend Vehicles but NOT Customer

Terminate or Suspend the vehicle(s) but NOT the customer.

IMPORTANT:

- Terminating vehicles does not delete credit card information.
- Suspended vehicles can reactivate their membership without resubmitting a credit card.

- 1 Open *WashConnect*®

- 2 From the **Customers** menu, select the **Manage**  button.
- 3 Search for a Customer.




See "Add Customer Information" on page 571.

- 4 In Search box, type in customer's plate number.
- 5 From the **In Field** drop down list, select **License**.

- 6 Click the **View**  button.

- 7 Double-click the customer.
-OR-

Select an active customer and, click the **Edit Customer**  button.

- 8 Click to select **Vehicle Information** tab.
- 9 Double-click to select the vehicle.
- 10 In Billing Status, select **Terminated** or **Suspended**.
- 11 Click **OK**.
- 12 Repeat steps 7-9 to terminate or suspend other vehicles.

- 13 Click the **Save**  button.
The message Customer Saved Successfully appears.

- 14 Click **OK**.
Termination or suspension will be effective immediately.



See "TOUCH POS" on page 557.

Terminate or Suspend Customer and All Vehicles

Terminate a Club Customer or Fleet Customer and all Vehicles.


NOTE: For security, WashConnect does not store credit card data but stores a credit card recurring ID that the credit card processor uses to access the credit card data at TransFirst® or APAY®.

IMPORTANT: If terminating customer, any related credit card information on file is permanently deleted immediately at both the current location and at corporate. Even though terminated, the club is still valid until the expiration date, unless you alter the date to today to make the change effective immediately. Upon expiration, all vehicles will automatically be terminated.

-OR-

Suspend a Club Customer or Fleet Customer and all Vehicles

IMPORTANT: Suspending will deactivate customer and retain credit card on file.

- 1 Open WashConnect.
- 2 From the **Customers** menu, select **Manage**.
-OR- From the **Fleet** menu, select **Accounts**.
- 3 Double-click the customer.
-OR-
Click to select the active customer, and then click **Edit Customer**  button.
- 4 In Status, select **Terminated** or **Suspended**.
- 5 Click the **Save** button.
- 6 Click **OK**.

NOTE: A fleet termination or suspension will be effective when the expiration date is reached.

RFID is Not Working

This is the procedure to follow if the Customer's RFID tag is not working or not being read at the Auto Sentry.

- 1 From Auto Sentry touch screen, press the **Cancel** button.
The cancel button will force the RFID Reader to attempt to read the RFID tag again.
- 2 If the message **No RFID Tags Found**, then the RFID tag was not read or is defective.
- 3 Swipe an **RFID Admin Card**.
The keypad appears on the touch screen.

NOTE: If you receive the message **Admin Card Not in Database** after you swipe your RFID Admin Card, then in WashConnect, on the menu to the right, go to **Users > Manage Users** and edit the User tied to the **RFID Admin Card**. In **Admin Card** field, type the ID number located on the back of the RFID Admin Card, for example: !654321, and **Save** the entry.

- 4 From the on-screen numeric keypad, enter the RFID Tag ID located on the vehicle's windshield, and then press Enter.
- 5 If the customer's RFID tag number is valid, the transaction will process and a receipt will print.
-OR-

If the customer's RFID tag number is not a valid number, the message RFID is Not in Database appears, and they will need to purchase a wash or club membership.

- 6 Remove the defective RFID tag and adhere a new RFID tag to the customer's windshield. Ensure the new RFID tag is updated in the customer's vehicle information in WashConnect.


Available Promotions

NOTE: Promotions can only be setup from Corporate.

The WashConnect® system automatically tracks the customer information and advises cashier with an Available Promotions screen when promotions are available for the customer.



To set up the promotions from the Available Promotions screen, See "About Promotions" on page 454.

- 1 Open Touch POS.
- 2 Locate customer.
- 3 Add a Sales Item PLU.
- 4 Select the **Finalize**  button, if the customer qualifies for one or more promotions, the Available Promotions screen appears.

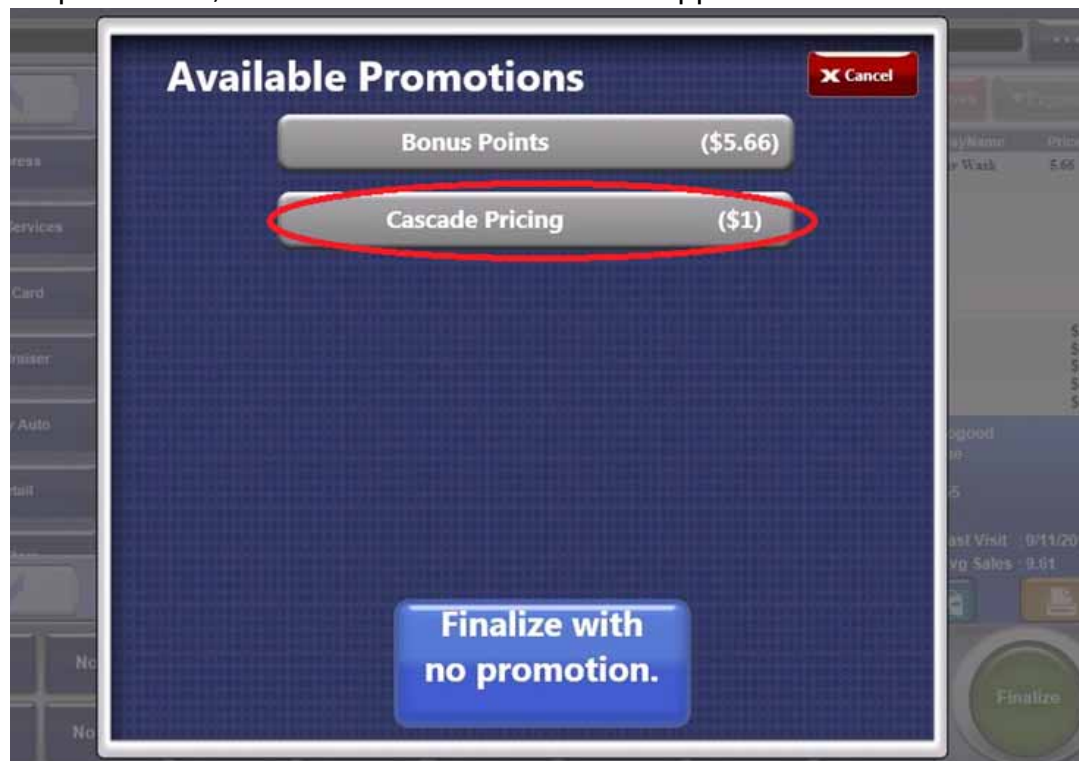



Figure 282. Available Promotions screen example

- 5 Select one available promotion per transaction.
–or–
Click the **Finalize with no promotion** button.
The transaction finalizes and receipt prints.

 See "Purchase new club membership (for the first vehicle)" on page 568.

 See "Available Promotions" on page 575.

 See "TOUCH POS" on page 557.

Recharge Wash Books

On the Touch POS, the system alerts you that its time to recharge a customer's wash book.

- 1 Open **Touch POS**.
- 2 Locate customer.
If Wash Book needs to be recharged, a **Recharge My Wash Books** button appears.
- 3 Click the **Recharge My Wash Books** button.

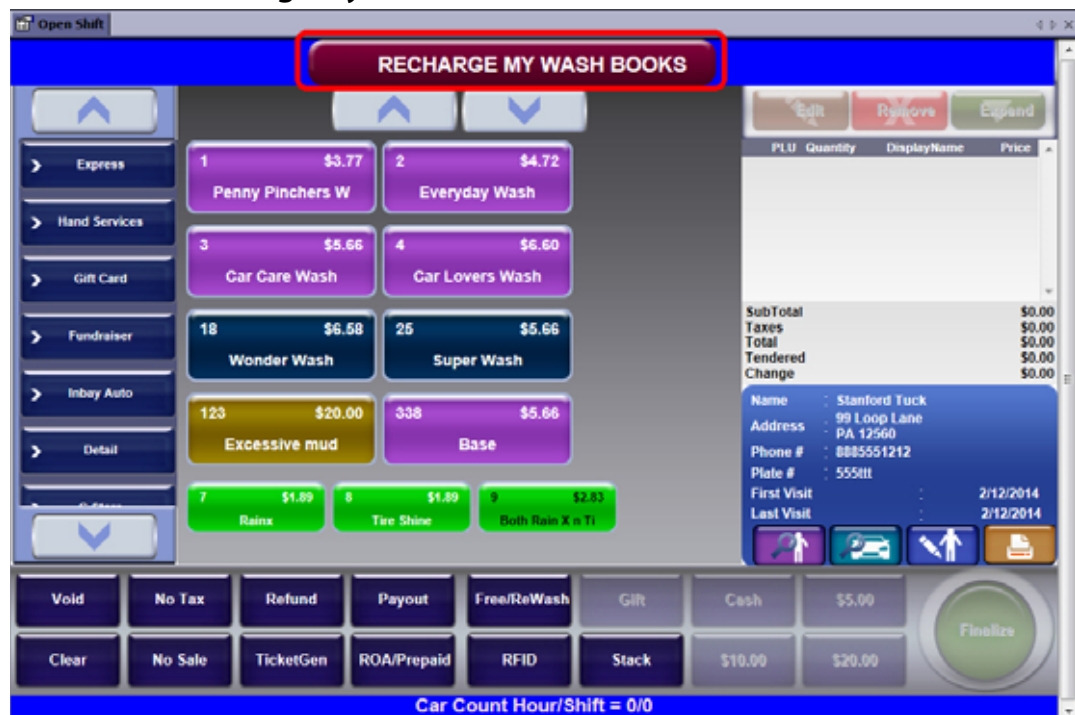


Figure 283. Open Shift - Recharge My Wash Books button

- 4 Scroll down or up to find the available washes.



Figure 284. Available Recharge Washes screen

- 5 From Available Recharge Washes, select to recharge wash book. (You can recharge wash book with different and multiple wash books, but the washes redeemed will be used first in first out, or in other words, they will be redeemed in the consecutive purchase order.)
- 6 Click **Done with Recharge** button.
The Wash Book appears on your virtual receipt.

About Touch POS Sales Entry

Touch POS
Sales Screen

HELP - What can I do here?

Cashiers:

- **Must Open Shift before Touch Point of Sales screen can appear.**
- **Sales Entry**
- **Return Payment**
- **Enter Club Customers and Vehicle Information**
- **Refunds and Voids**

NOTE: Greeter must punch in Time Clock before opening Touch POS.
To view the POS Sales screen, a shift must be opened first.



See "About Voids" on page 591.



See "About Refunds" on page 594.



See "Free Wash or ReWash" on page 596.



See "ROA (Received on Account)" on page 598.










See "Payout" on page 601.



See "Ticket Generation for 6-digit Wash Codes" on page 605.



See "Enter a New Sales Transaction at Touch POS" on page 582.

-  See *"Remove Sales Items"* on page 586.
-  See *"Clear Sales Items"* on page 587.
-  See *"Purchase a Club Membership at the Auto Sentry terminal"* on page 588.
-  See *"Purchase a Club Membership with a Gift Card at Touch POS"* on page 589.
-  See *"Split Payments"* on page 590.
-  See *"Search for a Sales Transaction in Touch POS"* on page 590.
-  See *"About Stack"* on page 607.

About POS and Presell Service Buttons

There are two different ways to change the size of the Service buttons at the POS and Presell terminals. When sorting by PLU, you can choose all buttons to either be Regular, Medium, or Large. Or when sorting by Sales Item Category, it supports different size buttons for different types of services (base, extra, by profit center).

Just drop the correct buttons files in the Images/TouchPOS/invbuttons.



Figure 285. Touch POS Service Color grouped buttons



See "POS > TouchPOSConfiguration > General" on page 694.



See "POS > TouchPOSConfiguration > ProfitCenterDescriptionColor" on page 698.

Create different size buttons according to service type example:

- 1 From the **System Setup**, select **Devices**, and then **Settings**.
- 2 In Device Type, select **POS**.
- 3 In Device Name, select the device name.
- 4 In Settings Type, select **TouchPOSConfiguration**.
- 5 In Settings, select **General**.
- 6 In the setting SortPOSServices, select **SalesItemCategory**.
- 7 In the setting FonSizeForServices, select a font size (default is 11).
- 8 In Tools, select the **Save** button.
- 9 In Settings, select **ProfitCenterDescriptionColor**.

NOTE: Add color grouping to organize the Profit Center Description Color configuration to simplify the screen appearance into different types of services.

- 10** Adjust settings as necessary from this settings dialog.
- 11** In Tools, select the **Save** button.
- 12** As long as the correct button files are located in Images/TouchPOS/invbuttons, then the buttons will be available for customers.



See “About Touch POS Sales Entry” on page 579.

Enter a New Sales Transaction at Touch POS

NOTE: Greeter must punch in Time Clock before opening Touch POS.

- 1** To view the POS Sales screen, a shift must be opened first.
- 2** From Touch POS, select **Open Shift**.
- 3** After the shift is opened, the **Touch POS** sales screen appears in the Open Shift tab.
- 4** From Greeter, type greeter’s name who will complete the sales transaction. The system will retain the last greeter selected by default.

NOTE: A Greeter must be logged in from the Time Clock menu, before you can select the greeter from the Touch POS sales screen. If a different greeter needs to make a new sales transaction, that greeter needs to be logged in, and then they can select their name from the Greeter list.



See “Time Clock” on page 753.

- 5** Scroll to select a Profit Center.

NOTE: Profit Center names will vary based on the names you set up for your profit centers from System Setup. Sub menu buttons are designated during the configuration of the sales items by selecting a Type. All of the Sales Item buttons (PLU numbers) appear initially. If you don not know the PLU number, do one of the following:

- Select a profit center from the left-side, and view the sales item buttons from that profit center.

In Figure 286, “Touch POS Sales entry screen,” you can see the profit center button with Express listed first. If you select the Profit Center, only the sales items configured for the Express Profit Center will appear.



Figure 286. Touch POS Sales entry screen

–Or–


- From the PLU/SKU/Coupon, type the sales item number to search by PLU number, and then press enter. The Inventory Search window appears. You can scroll to locate the sales item, if necessary.

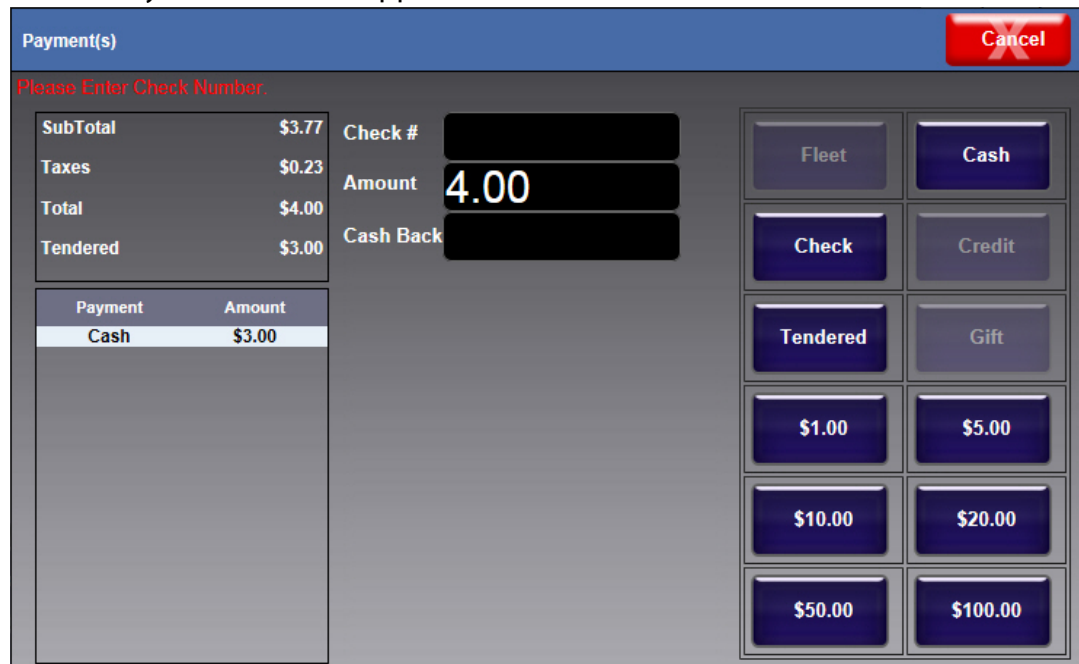


Figure 287. Inventory Search

- 6 Select the sales item button(s).
The sales item(s) appears in the virtual receipt.

NOTE: Click the **Remove** button to clear the selected item from the receipt. Click the **Clear** button, to clear the entire transaction screen and start over.

- 7 Click the **Finalize**  button.
The Payment(s) screen appears.



Payment(s) Cancel

Please Enter Check Number

SubTotal	\$3.77	Check #	<input type="text"/>
Taxes	\$0.23	Amount	4.00
Total	\$4.00	Cash Back	<input type="text"/>
Tendered	\$3.00		

Payment	Amount
Cash	\$3.00

Fleet

Cash

Check

Credit

Tendered

Gift

\$1.00

\$5.00

\$10.00

\$20.00

\$50.00

\$100.00

Figure 288. Payment(s) Touch POS screen

NOTE: Club Memberships can be purchased with any form of payment. If your club is set up to Autobill, then a credit card can be added at a later time (you will have the customer's club information on the Club Membership Contract that the customer signs.)

- 8 Swipe credit card or type payment.
- 9 In **Amount** box, type the payment that the customer gives you.
- 10 Click to select a Form of Payment:
 - **Fleet.** Enter amount and then in Account, type customer number, and select Account from list.
 - **Cash.** If pressing this, the system assumes customer is paying with the exact cash amount needed for the transaction.
 - **Check.** Type the customer's check number in the **Check #** box and the amount of the check in the amount box.
 - **Credit.** [Cage PA DSS needs to running.]

- **Tendered.** Type in the amount of cash customer gives to cashier.
- **Gift.**
- **\$1.00, \$5.00, \$10.00, \$20.00, \$50.00, and \$100.00** are quick entry buttons for the amount the customer may give you.

The virtual receipt calculates the sale, the amount tendered, the change if needed, and the balance due remains.

11 Swipe a different card:

- Cannot be the same type as the first card swiped.
- Cannot use two gift cards in one transaction.
- Cannot use two credit cards in one transaction.
- For Wash Club membership, credit card is only accepted.

–or–

- Use cash or check for remaining balance due.

When the amount of the sale is tendered, the drawer will open and receipt will print out.

Touch POS is now ready for the next customer.

NOTE: At the bottom of the POS screen, you can find the Car Count Hour/Shift = x/y. This line always appears with current hourly totals.

x = car count for the current hour

y = car count for the shift



See “Reprint a Customer’s Receipt” on page 246.



See “Remove Sales Items” on page 586.



See “Clear Sales Items” on page 587.



See “Purchase a Club Membership at the Auto Sentry terminal” on page 588.



See “Purchase a Club Membership with a Gift Card at Touch POS” on page 589.




See “Split Payments” on page 590.



See “Search for a Sales Transaction in Touch POS” on page 590.

Paying with a credit card (3rd party credit card provider)

If you do not use ICS CAGE PA DSS but use a 3rd party credit card service provider, then follow these payment instructions.

- 1 In POS, add items in a transaction.
- 2 Click the **Finalize**  button.
- 3 In **Payment(s)**, select the Credit button.

NOTE: Customer must pay with credit card for recurring billing.

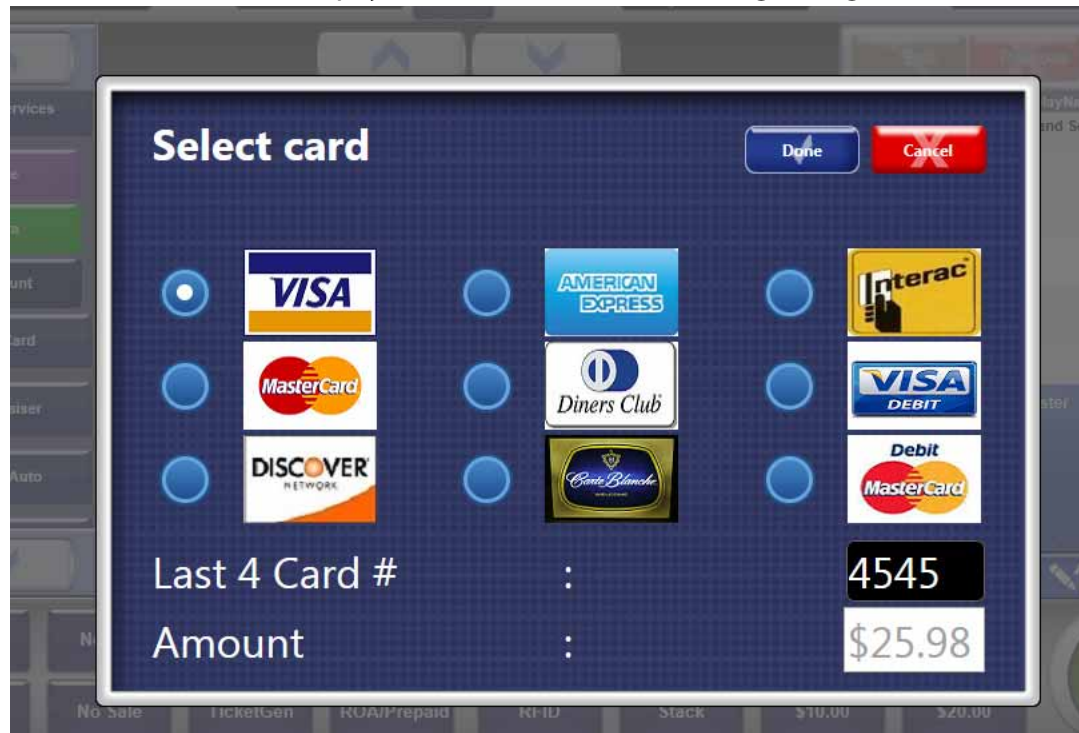


Figure 289. 3rd Party Credit Card - Select Card screen

- 4 In **Select Card**, select a credit card.
- 5 In **Last 4 Card #**, type in last four digits of credit card.
- 6 In **Amount**, type in the total amount of the transaction. (This amount will be tracked in WashConnect and be available in Reports.)
- 7 Credit card must be swiped on external credit card box. (This device is not provided by ICS.)
- 8 Click the **Done** button.

Remove Sales Items

Follow these steps to remove sales items from the list on your screen:

- 1 Click to select the item.

- 2 Click the **Remove** button.
The message Do you want to delete the selected item? appears.
- 3 Click **OK**.
The item is removed from the Virtual Receipt.



See “Enter a New Sales Transaction at Touch POS” on page 582.



See “Clear Sales Items” on page 587.



See “Purchase a Club Membership at the Auto Sentry terminal” on page 588.



See “Purchase a Club Membership with a Gift Card at Touch POS” on page 589.



See “Split Payments” on page 590.



See “Search for a Sales Transaction in Touch POS” on page 590.

Clear Sales Items

To remove the all sales items from the Touch POS screen virtual receipt.

- Click the **Clear**  button.

All sales items are removed and the Touch POS is ready for a new transaction.

Add RFID tag number and customer information for a new club member who signed up at the Auto Sentry.



See “Enter a New Sales Transaction at Touch POS” on page 582.



See “Remove Sales Items” on page 586.



See “Purchase a Club Membership at the Auto Sentry terminal” on page 588.



See “Purchase a Club Membership with a Gift Card at Touch POS” on page 589.




See “Split Payments” on page 590.



See “Search for a Sales Transaction in Touch POS” on page 590.

Purchase a Club Membership at the Auto Sentry terminal

After the customer purchases a club membership at the Auto Sentry, the only information in the system is the credit card number from the sale of the club membership. The Auto Sentry alerts the customer to see a cashier/greeter to receive their RFID tag and provide customer information to complete the club membership.

- 1 From the **Customers** menu, select the **Manage** command.
- 2 At the bottom of the new club member’s receipt, find a wash code to enter.
- 3 From the **In Field** drop-down box, select **RFID**.
- 4 In **Search** box, type the customer’s temporary **RFID** number which is located at the bottom of the customer’s receipt as the Reference #, and then click the **View**  button –or– press the ENTER key. The customer appears in the Membership list.
- 5 Click to select the Customer, and then select the **Edit** button. From the Customer Information tab, the Club section appears.
- 6 Click to select the **Vehicle Information** tab. The Vehicle information appears.
- 7 Click to select the temporary RFID number, and then click the **Edit Vehicle** button.

NOTE: The tilde (~) symbol signifies that the RFID number is temporary and not valid. The customer needs to receive a valid RFID tag number. Customers with a tilde (~) prefix in the RFID column have signed up and paid for a club at the Auto Sentry, but did not complete the membership process.

- 8 In **RFID Tag**, type the new RFID tag number.
- 9 In **Plate No**, type customer’s license plate number.
- 10 In the other fields, type as much information as possible like the customer’s name and address for the credit card billing, etc.
- 11 Adhere the RFID tag to your customer’s windshield.



See “Enter a New Sales Transaction at Touch POS” on page 582.



See “Remove Sales Items” on page 586.



See “Clear Sales Items” on page 587.



See “Purchase a Club Membership at the Auto Sentry terminal” on page 588.



See “Purchase a Club Membership with a Gift Card at Touch POS” on page 589.



See “Split Payments” on page 590.



See “Search for a Sales Transaction in Touch POS” on page 590.


Purchase a Club Membership with a Gift Card at Touch POS

NOTE: This feature is not available at the Auto Sentry.

Customers can purchase a club membership with a gift card at the Touch POS.

- Customers cannot purchase an unlimited wash club with monthly recurring billing with a gift card.
- Customer can purchase a 6- or 12-month wash club with a gift card and also a split payment is acceptable. For example, you can use the balance of your gift card to pay for a portion of a six month club and the remaining balance with another form of payment such as cash or a credit card.

1 From the Touch POS, select a club to purchase.

2 Click the **Finalize**  button.
The Payment(s) screen appears.

3 Type the amount to be removed from the gift card to purchase the club.

4 Select the **Gift** button.
The message Is Card Present appears.

5 Click **Yes**.
The message Swipe Card appears.

6 Swipe the customer’s gift card.

7 If balance still remains, customer may pay cash or credit but cannot use another gift card.

NOTE: **Split Payments** are allowed. However, customer cannot use two of the same card types. For example, if customer used a gift card and still has a balance due, customer may not use another gift card but must select another form of payment.



See "Split Payments" on page 590.

Split Payments

Customer is able to split total of transaction with two different forms of payment.

Recurring club membership such as Unlimited Monthly Wash Club Membership is excluded from split payments and only can accept credit card for form of payment.

Customer is not allowed to use two of the same forms of payment. For example:

Acceptable

- 1 Gift Card and 1 Credit Card in one transaction.
- 2 Credit Cards in one transaction.

Unacceptable

- 2 Gift Cards in one transaction.



See "Enter a New Sales Transaction at Touch POS" on page 582.



See "Remove Sales Items" on page 586.



See "Clear Sales Items" on page 587.



See "Purchase a Club Membership at the Auto Sentry terminal" on page 588.



See "Purchase a Club Membership with a Gift Card at Touch POS" on page 589.



See "Split Payments" on page 590.




See "Search for a Sales Transaction in Touch POS" on page 590.

Search for a Sales Transaction in Touch POS

Voids and refunds are two reasons you would possibly need to search for a completed sales transaction. Voids can only be issued during the same shift the items were originally purchased. If you closed the shift, then you will have to issue a refund. Voids can be entered manually. Voids are never counted as actual cars washed.

Follow these steps to Search for a Sales Transaction:

- 1 Open Touch POS.
- 2 In **Ticket** box, you can type or scan the Wash Code that is printed on the customer's receipt. The wash code is the ticket number.
- 3 Click the **Find Ticket**  button –or– press the **ENTER key**.



See "About Voids" on page 591.



See "Enter a New Sales Transaction at Touch POS" on page 582.



See "Remove Sales Items" on page 586.



See "Clear Sales Items" on page 587.



See "Purchase a Club Membership at the Auto Sentry terminal" on page 588.



See "Purchase a Club Membership with a Gift Card at Touch POS" on page 589.



See "Split Payments" on page 590.



See "Search for a Sales Transaction in Touch POS" on page 590.

About Voids

NOTE: Gift cards cannot be voided, but instead, need to be Refunded.



See "About Refunds" on page 594.

A sales transaction can be voided only during the same shift. If a customer changed their mind about the car wash or a particular purchase, and the sales transaction has already been finalized at the Point of Sale, it will be necessary to Void the transaction. Voids can only be performed during the same shift they were originally purchased

and before Close Shift. After a shift is closed, then that transaction will need to be a Refund.



See “Void Sales Transaction” on page 592.



See “About Touch POS Sales Entry” on page 579.

NOTE: The Void Button can be hidden if unwanted. Settings -> TouchPosConfiguration -> Hide POS Buttons -> DisableVoid

Void Sales Transaction


Void transaction with receipt. You can only Void a sales transaction that was purchased from the current Point of Sale shift.

NOTE: Use Refund if no receipt is present, or purchased during previous shift, different location, or different device, such as Auto Sentry® or other POS.



See “About Refunds” on page 594.

NOTE: Only Users with assigned Void For TouchPOS privileges from Security Roles, and then from Manage Users select a role, and then Open POS can Void a Transaction.

- 1 From the Touch POS sales screen, select a Greeter.
- 2 Click the **Void**  button.

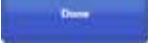
The Void Transaction screen appears.



Figure 290. Void Transaction screen

- 3 From the customer's receipt, type the **CTN** number in **Enter CTN Number to Void a Transaction**.

NOTE: The Control Number or CTN number can be found on the top right of the receipt you want to Void.

- 4 Click the **Done**  button.
The message **Are you certain you want to void a transaction for the amount...** appears.
- 5 Click **Yes**.
- 6 If necessary, add customer **Phone #** and **Reason** for Void.
Receipt prints.

A success message appears that you have successfully voided the transaction. Attach the void receipt to the original receipt and retain for accounting purposes.

- 7 Click **OK**.



See "Reprint a Customer's Receipt" on page 246.



See "About Refunds" on page 594.



See “About Touch POS Sales Entry” on page 579.

About Refunds

You can issue a refund for a sales item or wash service with or without a customer’s receipt. You can enter the card manually for the refund.

NOTE: Voids can be performed during the same shift. If a new shift is open, you select Refund instead of Void.



See “Refund with a Receipt” on page 594.



See “Refund without a Receipt” on page 595.



See “About Touch POS Sales Entry” on page 579.

NOTE: The Refund Button can be hidden if unwanted. Settings -> TouchPosConfiguration -> Hide POS Buttons -> DisableRefund

Refund with a Receipt


NOTE: Use **Void** if purchased in the current shift.

Refund is used to give the customer back their money paid from a sales transaction during prior shifts or different locations. Use Void to refund a transaction from the current shift.

- 1 From the Touch POS sales screen, click the **Refund** button.
The Warning message **Do you have a receipt? Yes** or **No** buttons appear.
- 2 Click **Yes**.
The Refund Transaction dialog box appears.

NOTE: Refund privileges are setup from the Users menu, and then Manage Users by selecting a role that has selected the TouchPOS the **Refund for Touch POS** privilege.

- 3 From the Refund Transaction dialog box, type or select a device from the **Please Select a Device to Refund a Transaction from:** drop-down box.
- 4 From the customer’s receipt, type the **CTN** number in **Enter CTN Number to Refund a Transaction**.

- 5 From **Verify these are the items to be refunded** area, deselect any item(s) NOT to be refunded. (System default: All Items are selected from the transaction for refund.)
- 6 Click the **Done**  button.
A message **Are you certain you want to refund...** appears.
- 7 Click **Yes**.
Item(s) are refunded in the system, drawer opens, and receipt prints.
The Touch POS is ready for a new transaction.



See “Refund without a Receipt” on page 595.



See “About Refunds” on page 594.





See “About Touch POS Sales Entry” on page 579.

Refund without a Receipt

NOTE: Use **Void** to refund a transaction from the current shift.

Refund is used to give the customer back their money paid from a sales transaction during prior shifts or different locations. Refund privileges are setup from Users > Manage Users by selecting a role and then by allowing TouchPOS the **Refund for TouchPOS** privilege.

- 1 From the Touch POS sales screen, click the **Refund** button.
The Warning message **Do you have a receipt?** appears.
- 2 Click **No**.
You are directed back to POS Screen. A message **Refund in Progress. Please select services for refund** appears.
- 3 From POS Screen, select items to be refunded.
- 4 Click the **Finalize**  button.
If configured, Refund Customer Information dialog box appears.
- 5 From Customer Search, select the Search for a customer or to add a new customer if not configured, skip to #8.
- 6 Type in customer **Phone #** and **Reason** for the Refund.
- 7 Click the **Done**  button.

8 A message **Are you certain you want to refund the selected services with the Amount** appears.

9 Click **Yes**.

The message **Successfully refunded the transaction** appears. The item(s) are refunded in the system, the drawer opens, a receipt prints, and the Touch POS is ready for a new transaction.



See "Refund with a Receipt" on page 594.



See "About Refunds" on page 594.



See "About Voids" on page 591.



See "About Touch POS Sales Entry" on page 579.

Free Wash or ReWash

A FREE Wash or Rewash may be authorized by management for a customer in order to wash the vehicle without charging the dissatisfied customer again.

Management personnel may give a free wash or complimentary wash ticket for promotional purposes. To rewash a vehicle or send a wash through the tunnel as a free wash, the process is the same.

Be prepared to know how your management would like to handle an unhappy customer in advance. Free or Rewash buttons are available to quickly take care of the customer.

NOTE: You could also have a Package with a wash service plus a discount sales item named specifically for dissatisfied customers.

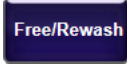
Free Wash / ReWash


A FREE wash for dissatisfied customers.

These instructions are for a customer who has paid for a wash and received the wash but was dissatisfied with the wash, and management would like customer to come back for a FREE or REWASH.

- A Free Wash could be selected for an unhappy customer that wants to come back a different day.
- A ReWash would be used if the customer wanted to go through the wash again immediately. Customer may demand a refund because he so disappointed, see "About Refunds" on page 594.

NOTE: Free/ReWash privileges for the User need to be selected from the Users menu Security Roles.

- 1 Click the **Free/ReWash**  button.
- 2 From the **Choose your Option** box, select:
Free Wash to come back for Free wash another day.
–or–
ReWash to receive free wash immediately.
- 3 From the TouchPOS sales screen, select the base wash PLU and any extra services PLUs that the customer will receive for Free.

- 4 Click the **Finalize**  button.
- 5 If settings are enabled, type in Free Wash/Rewash information. (Customer Name, phone number, Reason for ReWash). Approved By, and Greeter are automatically filled in based on who is logged into WashConnect as the cashier and manager. The receipt prints out. If configured, receipt will display wash code for future wash.

NOTE: If customer insists and prefers to receive a full Refund for their dissatisfaction, you can refund the customer's payment:

- Use **Void** if transaction is from current shift.
- Use **Refund** if transaction is from a prior shift or different site location.

NOTE: User must have Free privileges which are setup from Users > Security Roles. Select a role and then select Free/ReWash from the **TouchPOS** privilege tree.



See "Free Wash / ReWash" on page 596.



See "Void Sales Transaction" on page 592.



See "About Refunds" on page 594.



See "Tracking Rewash or Free Washes" on page 598.



See "About Touch POS Sales Entry" on page 579.

Tracking Rewash or Free Washes

Individual sites determine if they want to keep track of rewash or free washes.

The following settings will turn off the required fields to enter customer data during a rewash, free wash, refund, or using a club customer.

- 1 From the System Setup menu, click **Devices**.
- 2 Click to select **Settings**.
- 3 From Device Type, select **POS**.
- 4 From Device Name, select the device.
- 5 From Settings Type, select **TouchPOSConfiguration**.
- 6 In Settings box, select **Prompt Settings**.
- 7 Set up the **Prompt Settings** as follows:

Prompt Settings:

The following settings disable the prompt to enter customer information such as phone number and reason for free wash, re-wash, refunds and clubs:

FreewashCustomerInformationPrompt = False

RewashCustomerInformationPrompt = False

RefundsCustomerInformationPrompt = False

ClubCustomerInformationPrompt = False

NOTE: True enables the setting.



See "Free Wash / ReWash" on page 596.



See "About Touch POS Sales Entry" on page 579.

ROA (Received on Account)

NOTE: The ROA Button can be hidden if unwanted. Settings ->
TouchPosConfiguration -> Hide POS Buttons -> DisableROA

If customer has a fleet account, and wants to make a payment, use the ROA button.

Payment on Recived on Account



- 1 Click the **ROA** button.

A message **Do you have an Invoice Number?** appears.

Warning: All invoice payments posted to an account will reflect in the customer balance. Any unapplied payments will be displayed in the Business name section of the Invoice tab.

(If **YES**):

NOTE: If using an invoice number, entire invoice must be paid. To make a partial payment, go back to step #1 and then select NO.

- 2 Click **Yes, I have an Invoice Number.**
The ROA Payment(s) screen appears.

 A screenshot of a mobile application dialog box titled "ROA". At the top right, there are two buttons: "Done" (blue) and "Cancel" (red). Below the title bar, there are several input fields: "Invoice #:" followed by a black text box; "Balance:" followed by a colon; "Invoice Amount Due:" followed by a colon; "Unapplied ROA(s):" followed by a colon; and "Amount:" followed by a black text box. The background of the dialog box is a dark blue grid pattern.

Figure 291. ROA dialog box

- 3 In **Invoice #**, type invoice number.

NOTE: Even though typing in the Invoice number, the ROA balance is applied to the oldest invoice and any balance surplus is applied to the next oldest invoice.

- 4 In **Amount**, the open balance automatically appears.

- 5 Click the **Done** button.

- 6 The payment screen appears, select Payment Type button: check, cash, etc.

The payment is posted.

(If **NO**):

- 1 Click **No, I don't have an Invoice Number.**

The Payment(s) screen appears.

Figure 292. ROA Payment Screen without an invoice number

- 2 In **Account**, begin typing the first few letters of the fleet account name, and then select the account from the list.

Figure 293. ROA Payment(s) screen check example

- 3 In **Amount**, type amount that customer wants to pay.
- 4 In **Check #**, type a check number, if necessary.
- 5 In **Cash Back**, type an amount, if necessary.
- 6 Select Payment Type button: **check**, cash, etc.
- 7 Click **Done**.
The payment is posted to the oldest open balance first.



See "TOUCH POS" on page 557.



See "About Touch POS Sales Entry" on page 579.

Payout

NOTE: The Payout Button can be hidden if unwanted. Settings -> TouchPosConfiguration -> Hide POS Buttons -> DisablePayout

Payouts are made anytime that cash is taken from the cash drawer. A cash payout could be made for parts or supplies. The payout slip that prints on the POS receipt printer, should always be attached to a store receipt, and placed in the cash drawer as a record.

Example: Whenever the car wash purchases merchandise using cash from the cash drawer, it will be necessary to make a Payout for that exact amount to balance the drawer at the end of the shift.

WARNING: Make certain you select the exact amount for the payout because if the payout was too much, there is no Add In drawer feature available to make the adjustment.

Follow these steps to make a cash Payout:

- 1 From the Touch POS, select a **Greeter** with Payout privileges.

NOTE: Payout privileges are setup from Manage Users by selecting a role, and then allowing **Payout for TouchPOS** privilege.

Figure 294. PayOuts screen

- 2 Select the **Payout** button.
- 3 In **Amount**, type amount to remove from the cash drawer.
- 4 In **Description**, type a description.
- 5 From **Accounts**, type Account ID.

NOTE: Review with the manager or owner what the policies are in regard to when, by who, and how much can be applied towards a cash Payout.



See "TOUCH POS" on page 557.



See "About Touch POS Sales Entry" on page 579.

About Ticket Generation

You can generate paid or unpaid fuel 5-digit wash codes, also known as wash tickets, and generate unpaid 6-digit wash codes.

Wash Ticket, or Wash Code, is a 5- or 6-digit number and/or barcode that appears on the wash ticket sales receipt. This number must be entered into the Input Terminal to start the wash process.



See "Ticket Generation for 5-digit Wash Codes" on page 602.



See "Ticket Generation for 6-digit Wash Codes" on page 605.

Ticket Generation for 5-digit Wash Codes

At the site level login, you can generate paid tickets or paid fuel tickets, and the tickets will be 5-digit wash codes, available at all of your sites.

If your facility is tied to a gasoline station, you may be configured to have customers pay for their wash at the pump. The ICS WashConnect® management system can be linked to most gasoline pump controller systems, regardless of fuel branding, so that a car wash can be purchased at the pump, and processed through the car wash using a 5-digit wash code or also called a prepaid wash ticket.

Follow these steps at the POS site level, to generate 5-digit wash codes or tickets:

NOTE: Ticket numbers or wash codes are unique, and once used, they cannot be used again.

- 1 From *WashConnect*®, log in site.
- 2 From the **Touch POS** menu, select **TicketGen** button.

- 3 Select the **TicketGen**  button.

- 4 Select a base wash service for ticket generation.

- 5 Select the **Generate**  button.
The Generate Ticket dialog box appears.

- 6 Select the **Random Ticket** check box for random wash code numbers.

NOTE: If Random Ticket is checked, the Start box will not appear. If Random Ticket box is not selected, type the first ticket wash code number in the Start box, and then the wash codes will generate in a sequential order. Type any number between (100,000 and 999,999).

- 7 In **How Many Tickets**, type amount of paid tickets necessary, and press the ENTER key.
- 8 In **Number of Days Ticket is Valid For** box, type the number of days the wash codes will remain valid from the date of ticket generation. Maximum is 999 days. The default is 3 days. Then press the ENTER key.
- 9 In **Type of Ticket** drop-down box, select Unpaid or Paid. (You can only select Unpaid at Corporate because there is no money drawer available.) Global wash codes are always paid tickets.
- 10 Click the **Generate Tickets** button.

PLU	Quantity	DisplayName	Price
1	1	Basic Wash	5.66

Figure 295. Ticket Generation screen

WARNING: A warning message appears restating how many tickets are going to print as well as days to expiration.

- 11 Click **OK**.
A message **Tickets successfully generated** appears.
- 12 If correct, click **OK**.
- 13 Do you want to open or save report? Click **Open**.

Microsoft® Excel opens with the generated wash codes available for use immediately.

- 14 In Microsoft® Excel, click the **File** menu, and then select the **Save As** button.
- 15 Customers cannot redeem 5-digit wash codes at the Auto Sentry until you adjust the Auto Sentry settings.



See "Setup your Auto Sentry to Redeem Wash Codes" on page 604.



See "Ticket Generation for 5-digit Wash Codes" on page 602.



See "About Touch POS Sales Entry" on page 579.



See "About Ticket Generation" on page 602.



See "Ticket Generation for 6-digit Wash Codes" on page 605.



See "About Touch POS Sales Entry" on page 579.

Setup your Auto Sentry to Redeem Wash Codes

Follow these steps to setup your Auto Sentry for 5- or 6-digit Wash Code redemption:

- 1 From **System Setup** menu, select **Devices** and then select **Settings**.
- 2 In **Device Type**, select **Auto Sentry**.
- 3 In **Device Name**, select the device **Name**.
- 4 In **Settings Type**, select **TouchConfiguration**.
- 5 In **Settings**, select **Control**.
- 6 In **Control5DigitWashCodeTimeout**, type a value for how many seconds to wait, for example, **5**.
While the customer types in the first five numbers, the Auto Sentry will wait an additional 5 seconds to give customer the opportunity to add a 6th digit.
- 7 Click the **Save** button.
- 8 In **Settings**, select **MainOptions**.
- 9 In **Allow Code**, select **True**.
- 10 Click the **Save** button.

Now your Auto Sentry will display the Enter Wash Code button on your main options screen.



See "TOUCH POS" on page 557.



See "Ticket Generation for 6-digit Wash Code Example" on page 607.



See "About Touch POS Sales Entry" on page 579.



See "Ticket Generation for 5-digit Wash Codes" on page 602.



See "TOUCH POS" on page 557.



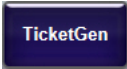
See "About Touch POS Sales Entry" on page 579.

Ticket Generation for 6-digit Wash Codes

NOTE: The 6-digit wash code feature is only available from Corporate login.

Ticket Generation from Corporate login, always generates unpaid 6-digit global wash codes.

NOTE: Ticket numbers or wash codes are unique, and once used, they cannot be used again.

- 1 At WashConnect® Login, select **Corporate**.
- 2 From the **Touch POS** menu, select **Ticket Generation**.
- 3 Select the **TicketGen**  button.
- 4 Select a base wash service for ticket generation.
- 5 Select the **Generate** button.
The Generate Ticket dialog box appears.
- 6 Click to select the Random Ticket button for random wash code numbers.

NOTE: If Random Ticket is checked, the Start box will not appear. If Random Ticket box is not selected, type the first ticket wash code number in the Start box, and then the wash codes will generate in a sequential order. Type any number between (100,000 and 999,999).

- 7 In **How Many Tickets**, type amount of paid tickets necessary.

- 8 In **Number of Days Ticket is Valid For** box, type the number of days the wash codes will remain valid from the date of ticket generation. The default is 3 days. Maximum amount is 999 days.
- 9 In **Type of Ticket** drop-down box, select Unpaid or Paid. (You can only select Unpaid at Corporate because no money drawer is available.) Global wash codes are always paid tickets.
- 10 Click the **Generate Tickets** button.

PLU	Quantity	DisplayName	Price
1	1	Basic Wash	5.66

Figure 296. Ticket Generation screen

WARNING: A warning message appears restating how many tickets are going to print as well as days to expiration.

- 11 Click **OK**.
A message **Tickets successfully generated** appears.
- 12 If correct, click **OK**.
- 13 Do you want to open or save report? Click **Open**.
Microsoft® Excel opens with the generated wash codes available for use immediately.
- 14 In Microsoft® Excel, click the **File** menu, and then select the **Save As** button.
- 15 Customers cannot redeem 6-digit wash codes at the Auto Sentry until you adjust the Auto Sentry settings.



See "Setup your Auto Sentry to Redeem Wash Codes" on page 604.



See *"Ticket Generation for 5-digit Wash Codes"* on page 602.

Ticket Generation for 6-digit Wash Code Example

You can give out 1,000 paid or unpaid wash codes, Groupons or postcards for your customer's fund raiser or the customer can disburse them however they want to with their patrons. When the customer returns to the wash, at the payment terminal, they can select the Wash Code button first, and then redeem the wash by typing in the Wash Code. The wash codes can be set up with a fixed amount of days to expiration and an expiration time of 11:59:59 PM.

If the wash code was already used to wash a vehicle 30 days ago or less, the message **Already washed on 'date' 'time'** appears replacing **Invalid Code** message.



See *"TOUCH POS"* on page 557.



See *"Setup your Auto Sentry to Redeem Wash Codes"* on page 604.



See *"Ticket Generation for 5-digit Wash Codes"* on page 602.

About Stack

The Stack feature in Touch POS allows you to edit cars from the Touch POS. You can change a vehicle's base wash, add or remove extra services, and add or remove retract services.

NOTE: You cannot reorder the cars on Stack from TouchPOS, but you can from the StackNControl menu.



See *"Edit the Order of the Stack"* on page 736.



See *"Edit Vehicle in Stack"* on page 608.



Edit Vehicle in Stack


After the customer purchases a wash, you can change the base wash, add or remove extra services, and add or remove retract services as long as the vehicle has not reached the point of service in the tunnel.

- 1 From the Touch POS menu, select the **Stack**  button.



Figure 297. Open Shift Stack button

- 2 From the Stack, click to select the car icon that is to be modified.
- 3 Click the **Edit**  button.
The virtual receipt displays purchased services, credit for those services, and the total sale as zero dollars.
- 4 From the virtual receipt, you can view the change(s) as you make them:
 - **Base wash** – Select a new base wash, and the message **Are you sure you want to remove the existing base and add the new base?** appears. Select Yes, and the existing base will be removed and the new base wash will be added to the vehicle, and these changes will be reflected on the virtual receipt.
 - **Remove Extra Service** – On the virtual receipt, click to select the Extra Service item to remove, and then select the **Remove** button.
 - **Add Extra Service** – Select an Extra service from the menu on the left-side. The service will be added to the vehicle.
 - **Add Retract Service** – From the Retract Service menu on the left-side, select the necessary retract button to add the retract to the vehicle.
 - **Remove Retract Service** – On the virtual receipt, select a retract service button, and then select the **Remove**  button.

- 5 When all edits to the vehicle are complete, select the **Finalize**  button to save the edits to the vehicle.
- 6 If an amount is owed for the new services, the payment window appears and can be cashed out like a normal sale. If you owe the customer, the drawer will open and you can refund the customer the amount due.

NOTE: Verify the stack order is correct. To reorder the cars on stack, go to Stack Management from the StackNControl menu on the right side of the touch screen.



See “Edit the Order of the Stack” on page 736.



See “About Stack” on page 607.

About Generated Books

You can view generated wash books from Corporate only.

- 1 At WashConnect® Login, select **Corporate**.
- 2 From the Touch POS menu, select **Generated Books**.
- 3 In **Books Generated Between**, select a begin date.
- 4 In **And**, select an end date.
- 5 In **PLU**, select a specific wash book PLU number.
- 6 Click the **Search** button.
The Generated Wash Book list populates with your search results.




See “About Wash Books” on page 424.

CHAPTER 12: SYSTEM SETUP

The **System Setup** group includes commands to help you manage sales tax, the organizational layout, devices, and profit centers.

 *"About Sales Tax"*

 *"About the Organizational Layout"*

 *"About Report Subscriptions"*

 *"Devices"*

 *"Profit Centers"*

System Setup Step-by-Step Instructions:

 See *"About Create Levels"* on page 631.

 See *"About Manage Sites"* on page 634.

 See *"Assign Sites"* on page 638.

 See *"About Define Tokens"* on page 644.

 See *"About Device Groups"* on page 647.



See "About Settings" on page 654.



See "About Controller Services" on page 708.



See "About TouchNClean Outputs" on page 710.



See "About My Devices" on page 717.



See "Assign Denominations" on page 719.



See "About Manage Profit Centers" on page 721.



See "About Performance Indicator" on page 731.



See "Set Req. Man Hours" on page 732.

System Setup FAQs

Table 5: System Setup FAQs

Question	Answer
Who should look at the System Setup menu?	<p>The commands in the System Setup menu, like the Configuration menu, is for someone who is a high-level decision maker since these commands often affect all sites within the organizational layout.</p> <p>There are four main selections in the System Setup menu. Each selection is focused on a specific activity, such as setting sales tax rules or naming the profit centers for each site. Once you complete a task, you will not need to go back and change the settings very often. So you may not find yourself visiting this menu group as frequently as the others.</p>

Table 5: System Setup FAQs

Question	Answer
Why should I define my organizational layout?	In the System Setup menu group, you can set up the organizational layout just as you would create an organizational chart. The layout starts with a corporate location, and then you can build your structure beneath it, up to 10 levels deep. At each level, you can create groups, which represent business units or locations within your organization. At the lowest level, you can add the actual car wash sites that collect customer data and process transactions. Data is replicated up from sites to the corporate location at the top of your organizational layout. The groups you create in between are important for two reasons. First, they enable you to aggregate data, and then display it that way in reports. Second, the groups enable you to enforce logon security. The benefit of this, from a business perspective, is that you can organize your sites in whatever manner makes sense to you. For example, if you have regional managers, you can create regions, and restrict the logon privileges at those regions to accept only regional managers and their superiors. This kind of flexibility and control for multi-site management is unique to the car wash industry. No other software system offers this advantage.
What is a profit center?	Profit centers or income sources are defined to track income and labor. These are managed in the Profit Centers menu group. A profit center is a part of the car wash that can be treated as a distinct area where revenues and expenses are determined separately and profitability is measured. For example, you might look at the Conveyor as a profit center separate from Hand Finish Services. Profit centers typically roll up to Facility Totals. By managing profit centers, you can select them in reports to help determine which areas of the car wash are operating efficiently, and which ones are lagging in terms of sales objectives and labor performance.
Can I see the settings for all of my devices?	Devices are managed in the Devices menu group. You can view the settings for every device at every site, as long as that site is assigned to a group in your organizational layout and the device is communicating on the local network. You can also create a virtual device with the default settings you want for that device family. For example, say you have a bay of five Touch 'N Clean devices. If you create a virtual Touch 'N Clean device, you can apply its settings to every Touch 'N Clean in all five bays. You do not need to configure each one separately. You can create numerous virtual devices for both the Touch 'N Clean family and the Auto Sentry Flex family of devices. For customers with 30 sites, for example, this functionality greatly simplifies they way you deliver promotions to your customers. Imagine creating a special holiday promotion once, and then applying that promotion to 60 Auto Sentry Flex devices with one command.



See “System Setup” on page 611.

About the System Setup Menu

The commands in the **System Setup** menu, are for someone who is a high-level decision maker since these commands often affect all sites within the organizational layout.

There are four main selections in the **System Setup** menu. Each selection is focused on a specific activity, such as setting sales tax rules or naming the profit centers for each site. Once you complete a task, you will not need to go back and change the settings very often. So you may not find yourself visiting this menu group as frequently as the others.

System Setup Step-by-Step Instructions:

See “Add Sales Tax” on page 618. (Corporate Only)

See “About Report Subscriptions” on page 621.

Organizational Layout:

See “About the Organizational Layout” on page 625.

See “About Create Levels” on page 631.

See “About Manage Sites” on page 634.

See “Assign Sites” on page 638.

Devices:

See “About Define Tokens” on page 644.

See “About Device Groups” on page 647.

See “About Settings” on page 654.

See “About Controller Services” on page 708.

See “About TouchNClean Outputs” on page 710.

See “About My Devices” on page 717.

See “Assign Denominations” on page 719.

Profit Centers:

See “About Manage Profit Centers” on page 721.

See “Profit Center Order” on page 728.






See “Performance Indicator” on page 730.

See “Set Req. Man Hours” on page 732.

Organizational Layout

From the **System Setup** menu group, select Organizational Layout. You can set up the organizational layout just as you would create an organizational chart. The

layout starts with a corporate location, and then you can build your structure beneath it, up to 10 levels deep. At each level, can represent business units or locations within your organization. At the lowest level, you can add the actual car wash sites that collect customer data and process transactions. Data is replicated up from sites to the corporate location at the top of your organizational layout. The groups you create in between are important for two reasons. First, they enable you to aggregate data, and then display it that way in reports. Second, the groups enable you to enforce logon security. The benefit of this, from a business perspective, is that you can organize your sites in whatever manner makes sense to you. For example, if you have regional managers, you can create regions, and restrict the logon privileges at those regions to accept only regional managers and their superiors. This kind of flexibility and control for multi-site management is unique to the car wash industry. No other software system offers this advantage.

-  [*"About Create Levels"*](#)
-  [*"About Manage Sites"*](#)
-  [*"Assign Sites"*](#)
-  [*"About My Devices"*](#)
-  [*"About Manage Profit Centers"*](#)

Devices

Devices are managed in the Devices menu group. You can view the settings for every device at every site, as long as that site is assigned to a group in your organizational layout and the device is communicating on the local network. You can also create a virtual device with the default settings you want for that device family. For example, say you have a bay of five Touch 'N Clean devices. If you create a virtual Touch 'N Clean device, you can apply its settings to every Touch 'N Clean in all five bays. You do not need to configure each one separately. You can create numerous virtual devices for both the Touch 'N Clean family and the Auto Sentry Flex family of devices. For customers with 30 sites, for example, this functionality greatly simplifies they way you deliver promotions to your customers. Imagine creating a special holiday promotion once, and then applying that promotion to 60 Auto Sentry Flex devices with one command.

-  [*See "About the Organizational Layout" on page 625.*](#)



"About Manage Profit Centers"

Profit Centers

Profit centers are managed in the **Profit Centers** menu group. A profit center is a part of the car wash that can be treated as a distinct area where revenues and expenses are determined separately and profitability is measured. For example, you might look at the Conveyor as a profit center separate from Hand Finish Services. Profit centers typically roll up to Facility Totals. By managing profit centers, you can select them in reports to help determine which areas of the car wash are operating efficiently, and which ones are lagging in terms of sales objectives and labor performance.



"About My Devices"



"About Manage Profit Centers"

About Sales Tax

Sales Tax

HELP - What can I do here?

Managers:

- Assign or edit a sales tax rate to a site.
- Assign a different sales tax rate to another site.

See "Add Sales Tax" on page 618.

See "Edit a Sales Tax" on page 619.

See "Assign Inventory to Item Tax Only" on page 620.



Figure 298. Sales Tax

Add Sales Tax

Sales tax is charged per transaction. Sales Tax can be set to automatically round.



Enable Global setting for Item Rounding, See "Global > GlobalConfiguration > Global" on page 686.

Global settings apply to all of your wash sites.

To add a new sales tax rate to one or more sites, follow these steps:

- 1 Select **System Setup** menu, then select **Sales Tax**.
The **Sales Tax** tab appears.
- 2 Click the **Add**  button.
The **Sales Tax** dialog box appears.



Figure 299. Sales Tax Dialog Box

- 3 In the **Name** box, type a name for the sales tax.
- 4 In the **Parent** box, select a parent for the sales tax.

- 5 In the **Tax Rate** box, type a tax rate for the sales tax.
- 6 In the **Begin Date** box, type a beginning date for the sales tax.
- 7 In the **End Date** box, type an end date for the sales tax. Leave the box empty if there is no end date.
- 8 Check **Item Tax** if the tax applies only to specific items, not services.



See "Assign Inventory to Item Tax Only" on page 620.

NOTE: Some states have item taxes that are different from tax for services.

- 9 In Account ID, click the **Select Account** button to assign an account number.


Seq.	Site	Account
1	Auto Pros Corporate	--None--
2	Auto Pros Express	--None--
3	Auto Pros Touchless	--None--

Figure 300. Sales Tax Accounts Dialog box example

- 10 In the Accounts dialog box, select an account from the drop-down list.



See "About Manage Accounts" on page 504.

- 11 Click **OK**.
- 12 In the **Site** box, select a site in the list. Do this only if the **Item Tax** checkbox is cleared.
- 13 Click the **Save**  button.
The sales tax is added to the list and assigned to the sites you selected.



See "Edit a Sales Tax" on page 619.

Edit a Sales Tax

To edit a sales tax, follow these steps:



Figure 301. Sales Tax Dialog Box

- 1 In the **Name** box, type a name for the sales tax.
- 2 In the **Parent** box, select a parent for the sales tax.
- 3 In the **Tax Rate** box, type a tax rate for the sales tax.
- 4 In the **Begin Date** box, type a beginning date for the sales tax.
- 5 In the **End Date** box, type an end date for the sales tax. Leave the box empty if there is no end date.
- 6 Check **Item Tax** if the tax applies only to items, not services.
- 7 In the **Site** box, select a site in the list. Do this only if the **Item Tax** checkbox is cleared.
- 8 Click **Save**. The sales tax is edited.




See "Add Sales Tax" on page 618.

Assign Inventory to Item Tax Only

This is a special tax assessed on certain items.

NOTE: The Item Type check box must be marked when setting up a Sales Tax.

- 1 Select **System Setup** menu, and then select **Sales Tax**.
The Sales Tax tab appears.
- 2 Select an Item Tax in the list, and then click **Assign Inventory to item tax only**  button.
The **Assign Sales Item** dialog box appears.
- 3 Click to assign one or more the Sales Item(s) to the Item Tax.

- 4 From the Site box, select Corporate or the Site where the item tax will be applied.
- 5 Click the **Save and Close** button.



See "About Sales Tax" on page 617.

About Define Payment Types

NOTE: This is available from Corporate only.

About Report Subscriptions

Time Saver: Report Subscriptions does all the work for you.

Report
Subscription

HELP - What can I do here?

Managers:

- Schedule a Report to be run and emailed.
- Send to a group of email addresses.
- A large selection of reports are available.
- Schedule the reports to run hourly, daily, weekly, and/or monthly.



See "Schedule Report to be sent via Email" on page 621.



See "Edit a Report Email Subscription" on page 623.



See "Delete a Report Email Subscription" on page 624.

For more information on Reporting:



See "Financial" on page 173.



See "Performance" on page 305.

Schedule Report to be sent via Email

Email a report on a regular basis to an individual or group from Report Subscriptions. Follow these steps:

1 From the **System Setup** menu, select **Report Subscriptions**.

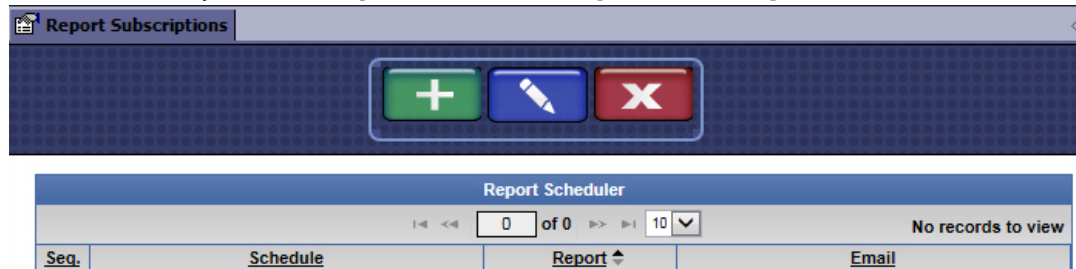


Figure 302. Report Subscription tab

2 Click the **Add** button.

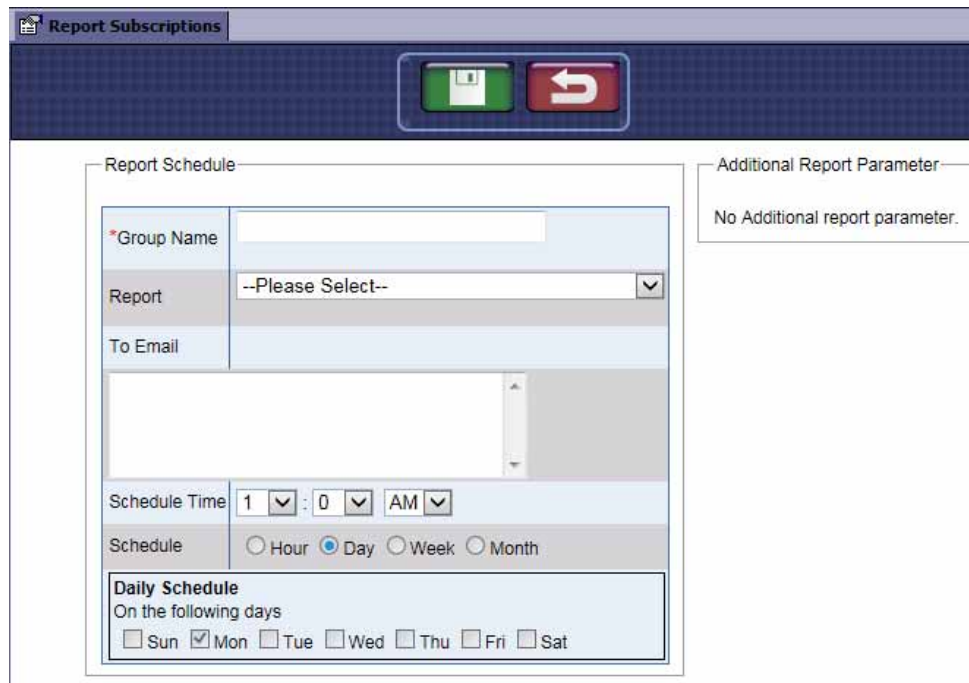


Figure 303. Report Subscriptions tab

3 Type a Group Name.

4 In **Report**, select a report from the drop-down list.

NOTE: You can only add one report per Group Name.

5 From the Additional Report Parameter section, make any necessary selections such as SiteID, Device Type, or Device.

6 Type the email addresses followed by a semicolon (;) and a space to separate the individual addresses.

7 In **Schedule Time**, select a scheduled time for the selected report to be sent via email.

8 In **Schedule**, you can schedule it to happen hourly, daily, weekly and/or monthly.

- **Hourly:** You can schedule the report to be run and sent at an exact increment of every X hour and X minutes.

- **Daily:** You can schedule the report to be sent on any day of the week. Click to select one or more boxes.
 - **Weekly:** You can repeat the amount of weeks until the next report will be run and emailed in the Repeat after, click to select the amount of weeks to run the report and send it again with refreshed date. In ON day(s), you can also select the day of the week to receive the selected weekly report.
 - **Monthly:** You can schedule report to be run and emailed on a monthly basis or select certain months. Select the months to schedule and send the report. In the **On week of month**, select 1st, 2nd, 3rd, 4th, or last to be the week of the month the report should be run and emailed. In **On day of week**, click to select day(s) of the week to run and email this report.
- 9 Click the **Save** button.
The email(s) is now set up to be deliver the report on the selected schedule.
When the email arrives, it comes from MyReports@host1.washconnect.com.
- 10 From your email application, add MyReports@host1.washconnect.com to your Address book so it is delivered to your Inbox and not your Spam folder.
- 11 From your Inbox, click to open the report subscription email.
- 12 Click double-click the attached .pdf Report document.

NOTE: If you have trouble viewing your .pdf document, go to Adobe.com and download or update the Adobe Reader.



See "Edit a Report Email Subscription" on page 623.



See "Delete a Report Email Subscription" on page 624.



See "About Report Subscriptions" on page 621.

For more Report information:



See "Financial" on page 173.



See "Performance" on page 305.

Back to top

Edit a Report Email Subscription

You can always make changes to the email report schedule.

- 1 From the **System Setup** menu, select **Report Subscriptions**.
- 2 Click to select the schedule.
The schedule is highlighted.
- 3 Click the **Edit** button.
- 4 Make necessary changes.
- 5 Click the **Save** button.
The new changes have been saved and the emails will be sent based on the schedule saved.



See "Schedule Report to be sent via Email" on page 621.



See "Delete a Report Email Subscription" on page 624.



See "About Report Subscriptions" on page 621.

For more Report information:



See "Financial" on page 173.



See "Performance" on page 305.

Delete a Report Email Subscription

You can always delete an email report schedule.

- 1 From the **System Setup** menu, select **Report Subscriptions**.
- 2 Click to select the schedule.
The schedule is highlighted.
- 3 Click the **Edit** button.
- 4 Make necessary changes.
- 5 Click the **Save** button.
The new changes have been saved and the emails will be sent based on the schedule saved.



See "Schedule Report to be sent via Email" on page 621.

 See “Edit a Report Email Subscription” on page 623.

 See “Delete a Report Email Subscription” on page 624.

 See “About Report Subscriptions” on page 621.

For more Report information:

 See “Financial” on page 173.

 See “Performance” on page 305.


About the Organizational Layout

NOTE: Organization Layout is only available from Corporate Login.

Your **Organizational Layout** is a personal diagram of your car wash business. It can be as simple or as complex as you need it to be. You can easily modify your **Organizational Layout** as your business grows and as you add new equipment or even new sites. *WashConnect*® allows you to consolidate your data to view the entire organization, or to segment your data and drill down to the individual site, device or component.

For step-by-step instructions on levels:

 See “About Create Levels” on page 631.

 See “Edit a Level” on page 633.

 See “Delete a Level” on page 633.

For step-by-step instructions on sites:

 See “Edit Site” on page 636.

 See “Assign Sites” on page 638.

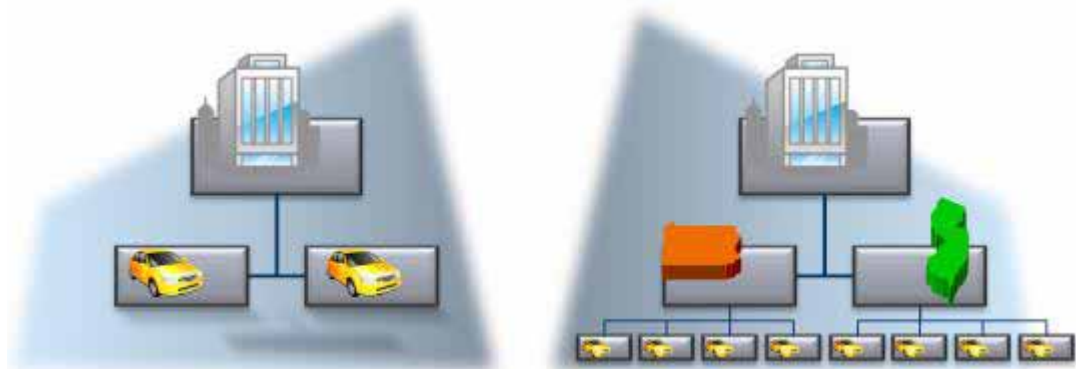


Figure 304. Organizational Layout Concept Diagram

You can apply the **Organizational Layout** to your business in various ways.

- **Create a layout based on equipment type.** For example, let's say you have six in-bay sites with equipment from one manufacturer and another three sites with equipment from a different manufacturer. You can create a layout to aggregate data based on each type of equipment manufacturer, and then analyze the failure rates to identify your most reliable equipment.
- **Create a layout based on demographics.** Perhaps you have a few wash sites located in high-income neighborhoods and a few in low-income neighborhoods. Your layout can group the sites together based on income levels so you can evaluate success rates for pricing structures or promotional activities based on demographics.
- **Create a layout based on wash type or business model.** Perhaps you have various car wash business models: in-bay automatic, self serve and tunnel. You can create an organizational layout to group each business model into a separate branch, and analyze data for each type.
- **Create a layout based on geographic location.** If you have multiple car wash sites in various states, counties, cities, or townships, you can group your sites based on geographic location. Depending on the number of sites you have, you can create a tiered structure that utilizes multiple levels to aggregate data based on designated locations or management territories.

The **Organizational Layout** is more than just a diagram. It also gives you exact control over two important business activities: **Intelligent Reporting** and **Roles-Based Security**.

- **Intelligent Reporting.** You typically think of an Organizational Layout based on geography. For example, say you have four sites in Pennsylvania and four sites in New Jersey. Instead of including all eight sites directly beneath the corporate headquarters, you can add a Pennsylvania branch and a New Jersey branch to the layout. Then to see reports for all four Pennsylvania sites, you simply log on to the Pennsylvania branch to view everything specific to that group.

- **Roles-Based Security.** Perhaps you want to prohibit your New Jersey managers from logging on to the Pennsylvania branch. Your Organizational Layout makes this possible by limiting login choices. With Roles-Based Security, you can even control what each user is allowed to do within the WashConnect® system. Site managers may be able to add and remove employees, while controllers may only be allowed to view reports.



See “Organizational Layout Advanced Concepts” on page 627.



See “Organizational Layout Setup:” on page 630.

Organizational Layout Advanced Concepts

This section includes advanced concepts for the Organizational Layout menu group.



See “About the Organizational Layout” on page 625.



See “Organizational Layout Setup:” on page 630.

Organizational Layout Details

WashConnect® provides multisite reporting and data replication services based on your organizational layout. The organizational layout is made up of levels, parents and sites.

- **Levels** represent the depth of your organization. The highest level is named **Corporate**. This is a default setting. WashConnect® can provide data reporting and analysis for up to 10 levels.
 - For example, if you want to see data for all of the car wash sites in a particular geographical region such as New Jersey, you can create the **State** level: **NJ, PA**.
 - You can create a **City** level: Allentown, Stroudsburg, Clinton, Oldwick.
- A **Parent** is a level that contains one or more levels beneath it.
- **Sites** are the physical car wash locations. Sites link to actual database transactions and customer data, while levels are created for data reporting.



See “Organizational Layout Diagram with Four Assigned Sites” on page 628.

Organizational Layout Diagram with Four Assigned Sites

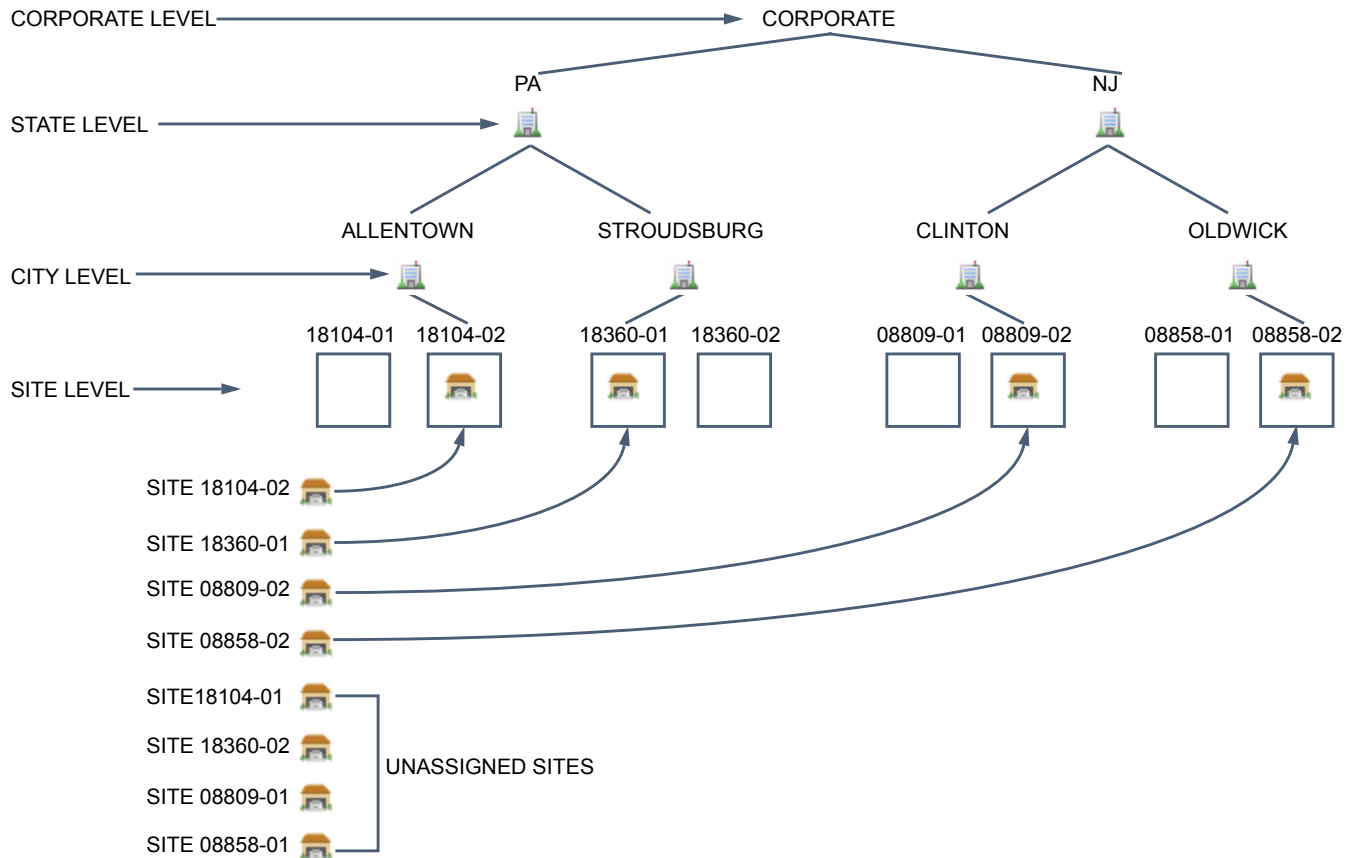


Figure 305. Organizational Layout with Four Assigned Sites

In the previous illustration, the organizational layout includes four levels: **Corporate**, **State**, **City**, and **Site**.

- The **Corporate** group is the parent to **PA** and **NJ**.
- Four cities have been added at the city level: **Allentown** and **Stroudsburg** (with **PA** as parent) and **Clinton** and **Oldwick** (with **NJ** as parent).
- Eight sites exist at the site level, which are organized by zip code: **18104-01** and **18104-02** (with **Allentown** as parent); **18360-01** and **18360-02** (with **Stroudsburg** as parent); **08809-01** and **08809-02** (with **Clinton** as parent); **08858-01** and **08858-02** (with **Oldwick** as parent).

Organizational Layout Diagrams with eight assigned sites

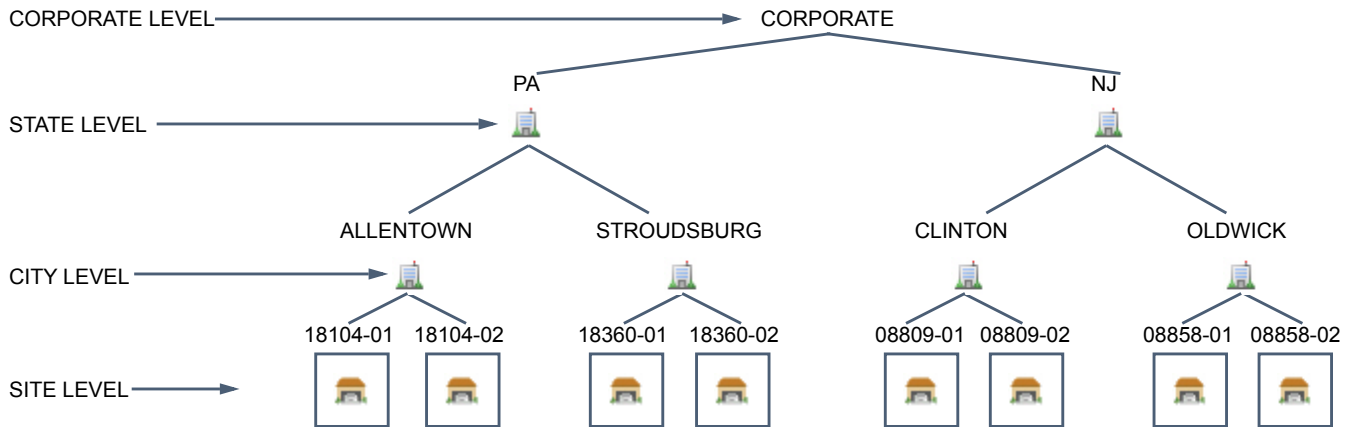


Figure 306. Organizational Layout with Eight Assigned Sites.

Organizational Layout Diagram, Four Sites, Single Parent

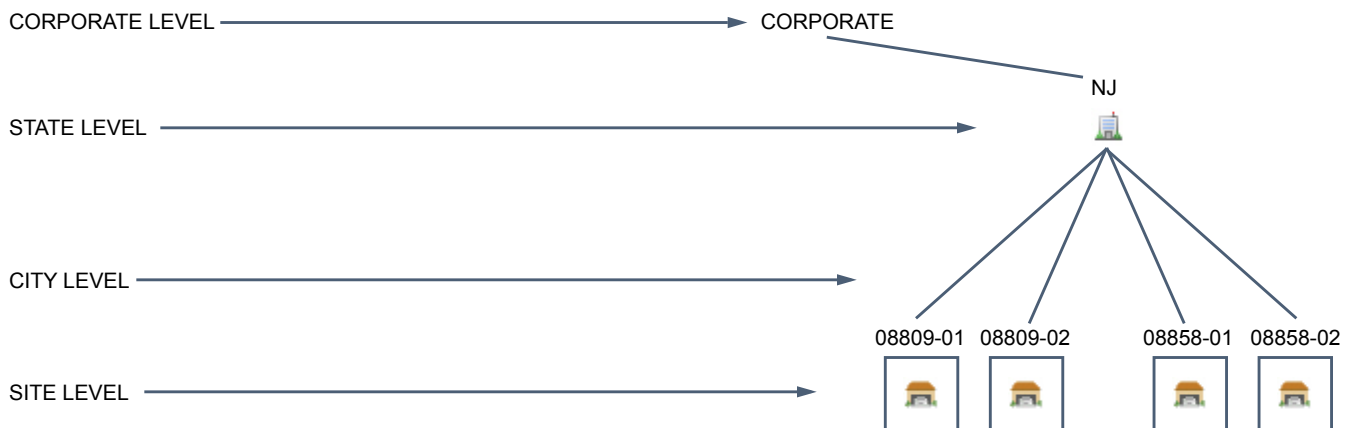
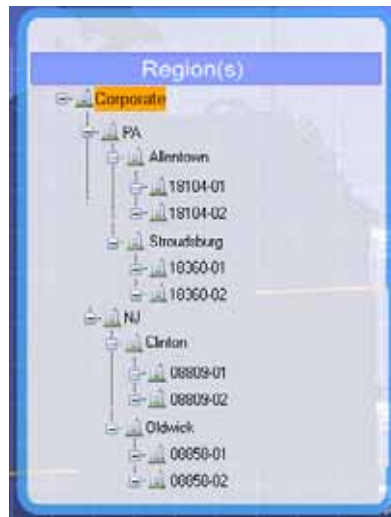


Figure 307. Four Sites with NJ as a Parent

Sites can be assigned to a parent at any level. For example, if you did not want to create the **City** level beneath **NJ**, then you could eliminate **Clinton** and **Oldwick**. You could make **NJ** the parent for all four sites in New Jersey. This is shown in the previous illustration. Note how the groups (**08809-01**, **08809-02**, etc.) are still located at the **Site** level in the hierarchy, but **NJ** is now the parent.

Organizational Layout and Levels

Levels are important for reports that render a **Site Selection Tree** column, such as the **Financial Overview** report and the **Vehicle Performance** report. Levels are also important for the login screen, where they are presented as login locations.



LOGIN SCREEN

Figure 308. Login Screen and Site Selection Tree Examples

In the previous illustration, you can see an example login screen and site selection tree for the organizational layout, which includes four sites in NJ and four sites in PA.

Levels and Sites are represented by different icons in the **Organizational Layout**.



LEVELS ARE CREATED FOR REPORTING.
YOU CAN CREATE LEVELS IN THE ORGANIZATIONAL LAYOUT.



SITES ARE CREATED DURING INSTALLATION.
SITES SIGNIFY PHYSICAL CAR WASH LOCATIONS.

Figure 309. Level and Site Icons

See “About the Organizational Layout” on page 625.



See “Organizational Layout Setup:” on page 630.

Organizational Layout Setup:

In setting up your company’s corporate structure, you will need the step-by-step instructions for the **Organizational Layout** menu group: Create Levels, Manage Sites, and Assign Sites.



“About Create Levels” on page 631.



“About Manage Sites” on page 634.



"Assign Sites" on page 638.



See "About the Organizational Layout" on page 625.



See "Organizational Layout Advanced Concepts" on page 627.

About Create Levels

Create Levels

HELP - What can I do here?

Managers:

- Corporate will always be at the top of your organizational layout, and then create up to 10 levels deep. Lowest levels created will be your car wash sites. Data is replicated up - from the sites to the corporate location.
- Grouping levels together to create a new level for ease of setting up Security Roles. For example, create a state level and set up security roles for your managers in New Jersey so they do not have access to the data from your Pennsylvania car washes.
- Groups enable you to enforce logon security for employees.
- Levels create flexibility for reports and control for multi-site management.
- Levels enable you to aggregate data from multi-sites and according to your organizational layout. View this data in the manner you wish to view it by creating levels based on equipment type, demographics, business type or geographic location.
- Flexibility to organize your sites in whatever manner makes sense to you. For example, if you have regional managers, you can create regions, and restrict the logon privileges at those regions to accept only regional managers and their superiors.



See "Add a Level" on page 632.



See "Edit a Level" on page 633.



See “About the Organizational Layout” on page 625.



See “Organizational Layout Advanced Concepts” on page 627.

Add a Level

You can add a level to the organizational layout. A new level is always added to the lowest position in the organizational layout. You can create up to 10 levels.

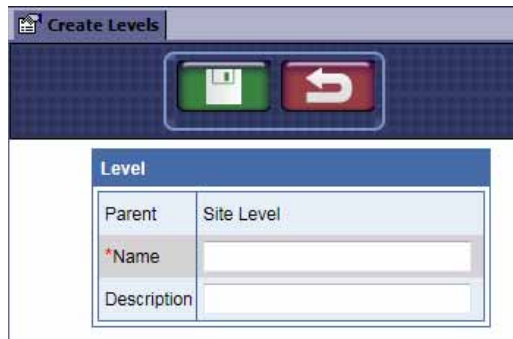
To add a level, follow these steps:

- 1 From the **System Setup** menu, select **Organizational Layout**, and then click **Create Levels**.
The **Create Levels** tab appears.



Figure 310. Create Levels Tab

- 2 Click the **Add**  button.
The **Level** dialog box appears.



- 3 In the **Name** box, type a name.
- 4 Optional: In the **Description** box, type a description.
- 5 Click **Save**.
The level is added to the organizational layout at the lowest position.



See “Edit a Level” on page 633.



See “Delete a Level” on page 633.

Edit a Level

To edit a level, follow these steps:

- 1 Select **System Setup** menu, and then select **Organizational Layout**, and then **Create Levels**.
The **Create Levels** tab appears.

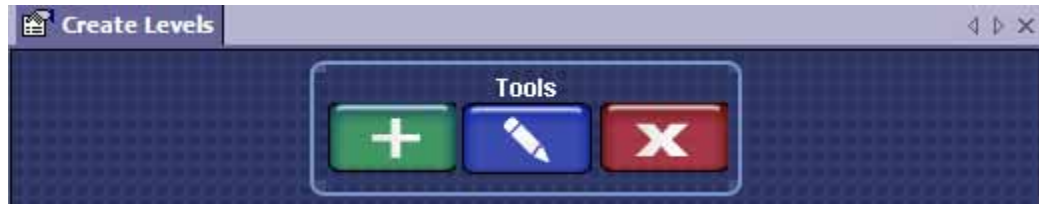



Figure 311. Create Levels Tab

- 2 Select a level, and then click **Edit**  button. The **Level** dialog box appears.
- 3 In the **Name** box, type a name.
- 4 Optional: In the **Description** box, type a description.
- 5 Click the **Save** button. The level is edited.



See "Add a Level" on page 632.



See "Delete a Level" on page 633.

Delete a Level

To delete a level, follow these steps:

- 1 Select **System Setup > Organizational Layout**, and then click **Create Levels**.
The **Create Levels** tab appears.

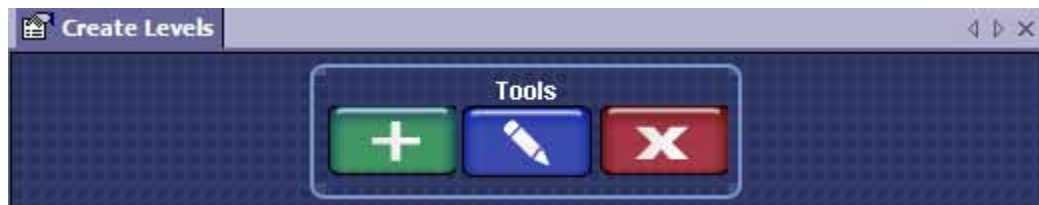



Figure 312. Create Levels Tab

- 2 Select a level, and then click **Delete**  button.
A warning appears.

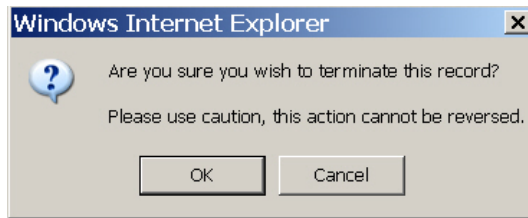


Figure 313. Delete Level Warning

- 3 Click **OK**.
The level is deleted.

NOTE: You cannot delete a level to which sites have been assigned.

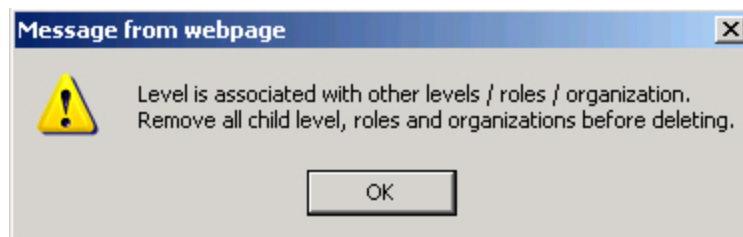




Figure 314. Cannot Delete Level Warning Message

 See "Add a Level" on page 632.

 See "Edit a Level" on page 633.

About Manage Sites

Manage Sites

HELP - What can I do here?

Employees:

- **Sites represent physical locations in the organization, such as a car wash site in Pennsylvania where transactions occur and a database is located.**
- **Edit information about the car wash site.**

Formerly known as Create Site, Manage Sites is available from the System Setup menu, and then select Organizational Layout.

 See "Add Site" on page 636.

 See "Edit Site" on page 636.

 See "Manage Sites Field Descriptions" on page 635.

 See "About Create Levels" on page 631.

Manage Sites Field Descriptions

The following table describes each column in the **Manage Sites** tab.



Site	City	State
Sparkle Corp	Stroudsburg	PA
Sparkle Car Wash	Stroudsburg	PA
Allentown Car Wash	Allentown	PA
Bethlehem Car Wash	Bethlehem	PA
Easton Car Wash	Easton	PA
Phillipsburg Car Wash	Phillipsburg	NJ

Table 6: Manage Sites Field Descriptions

Column	Description
Site	Name of the site.
City	City where the site is located.
State	State where the site is located.

 See "Add Site" on page 636.

 See "Edit Site" on page 636.

 See "About Manage Sites" on page 634.

 See "About Create Levels" on page 631.

Add Site

The list of sites was created during the installation process. You can edit contact information for your sites from WashConnect Corporate Login.

NOTE: An ICS technician can create a new site in the WashConnect® database for you. Numerous factors are involved with the creation of a physical site, such as data replication, autobilling, customer and vehicle data, etc.



See “Edit Site” on page 636.



See “About Manage Sites” on page 634.



See “About Create Levels” on page 631.

Edit Site


To edit the contact information for a site, follow these steps:

- 1 Login to WashConnect Corporate.
- 2 From the **System Setup** menu, select **Organizational Layout**, and then click **Manage Sites**.
The **Manage Sites** tab appears.



Site	City	State
Sparkle Corp	Stroudsburg	PA
Sparkle Car Wash	Stroudsburg	PA
Allentown Car Wash	Allentown	PA
Bethlehem Car Wash	Bethlehem	PA
Easton Car Wash	Easton	PA
Phillipsburg Car Wash	Phillipsburg	NJ

Figure 315. Site Selected to Edit

- 3 Select a Site, and then click the **Edit**  button.
The **Site Contact** dialog box appears.

Site			
*Name	Auto Clean		
Custom Name:	<input type="text"/>	Home Phone:	<input type="text"/>
*Address1:	<input type="text"/>	Alternate Phone:	<input type="text"/>
Address2:	<input type="text"/>	*Business Phone:	<input type="text"/>
Address3:	<input type="text"/>	Mobile Phone:	<input type="text"/>
*City:	<input type="text"/>	Fax Number:	<input type="text"/>
*State:	NJ <input type="text"/>	*Primary Email:	<input type="text"/>
*Zip:	08857	Secondary Email:	<input type="text"/>
Time Clock Configuration			
OT Multiplier	1.0000	Eight Hour OT	<input type="checkbox"/>
Day 7 Multiplier (> 8 hrs)	0.0000	Day 7 OT	<input type="checkbox"/>
Round Minutes	NoRounding <input type="text"/>		

Figure 316. Site Contact Dialog Box

- 4 In the **Name** box, type a name for the site.
- 5 In **Address1**, type an address for the car wash site.
- 6 In **Business Phone**, type the car wash phone number.
- 7 In **City**, **State**, and **Zip**, type the city, state and zip.
- 8 In **Primary Email**, type a primary contact email address.
- 9 Optional: Type information in the other Site boxes.

From the **Time Clock Configuration**:

- 10 In **OT Multiplier**, type a multiplier to be used with the regular hourly rate.
- 11 In **Day 7 Multiplier** (>8 hrs), type a multiplier to be used after employee works 7 days in a row after 8 hours.
- 12 In **Eight Hour OT**, click to select if using OT Multiplier after 8 hours are worked in one day.
- 13 In **Day 7 OT**, click to select if using another Multiplier rate for 7 days straight and over 8 hours are worked.
- 14 In Rounding Minutes, click to select from the drop-down list:
 - **NoRounding** (Exact minutes are used.)
 - **Rounding05** (Rounds to the nearest 5)

- **Rounding10** (Rounds to the nearest 10)
- **Rounding15** (Rounds to the nearest 15)

15 Click the **Save**  button.
The site contact information is updated.



See "Add Site" on page 636.



See "About Manage Sites" on page 634.



See "About Create Levels" on page 631.

Assign Sites

Assign Sites

HELP - What can I do here?

Managers:

- Assign sites to groups in the organization.



See "About Create Levels" on page 631.



See "About Manage Sites" on page 634.



See "Assign Sites" on page 638.



Figure 317. Assign Sites

In WashConnect®, you can create levels and assign sites to levels. For example, you can assign the site **Sparkle Site** to the level **Sparkle Car Wash**.

SPARKLE CAR WASH IS A LEVEL THAT EXISTS AT THE SITE LEVEL IN THE ORGANIZATIONAL LAYOUT.

Organization Chart Name			
Site	Sparkle Site	*Name	Sparkle Car Wash 55687
Parent	Stroudsburg	Level	Site
Contact Information			

THE SITE, **SPARKLE SITE**, IS ASSIGNED TO THE LEVEL, **SPARKLE CAR WASH**.

STROUDSBURG IS THE PARENT TO THE **SPARKLE CAR WASH** LEVEL.

THE NAME IS **SPARKLE CAR WASH** AND YOU MAY INCLUDE THE SITE NUMBER.

Figure 318. Assigning Sparkle Car Wash to Sparkle Site

 See "About Create Levels" on page 631.

 See "About Manage Sites" on page 634.


 See "Assign Sites" on page 638.

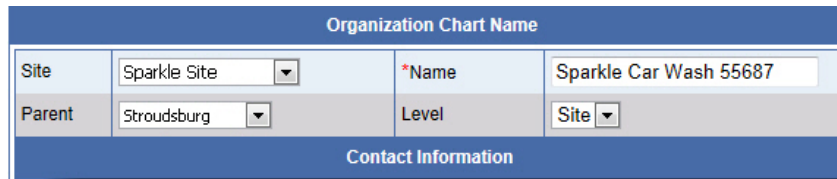


Add

Add a Level to the Organizational Layout

To add a level to the organizational layout, follow these steps:

- 1 From the **System Setup** menu, select **Organizational Layout**, and then click **Assign Sites**.
The **Assign Sites** tab appears.
- 2 Click the **Add**  button.
The **Organization Chart Name** dialog box appears.



Organization Chart Name			
Site	Sparkle Site	*Name	Sparkle Car Wash 55687
Parent	Stroudsburg	Level	Site
Contact Information			

Figure 319. Organization Layout / Assign Site

- 3 In the **Name** box, type a name or description for the group.
- 4 In the **Parent** box, select a parent for the group. The selection you make in the **Parent** box will determine which items appear in the **Level** box.
- 5 In the **Level** box, select the level for the group.
- 6 In the **Site** box, do one of the following:
 - To assign a site to the level, select a site name in the list. These names appear only if the physical site has already been created by an ICS Support Technician. The list includes sites that have not already been assigned to other locations.
 - To create a level with no site assignment, select **--Please Select--** to clear the site assignment. Do not select an item in the list. In this case you will create a level for reporting purposes, which will be seen in reports that render a **Site Selection Tree**, such as the **Financial Overview** report and the **Vehicle Performance** report.
- 7 Click the **Save** button.
The site is created and added to the organization layout.



See “Edit a Level in the Organizational Layout” on page 641.



See “Delete a Level in the Organizational Layout” on page 642.



See “About Create Levels” on page 631.



See “About Manage Sites” on page 634.



See "Assign Sites" on page 638.



Edit

Edit a Level in the Organizational Layout

To edit the parent, level or assignment for a level, follow these steps:

- 1 Select **System Setup** menu, select the **Organizational Layout**, and then click **Assign Sites**.

The **Assign Sites** tab appears.

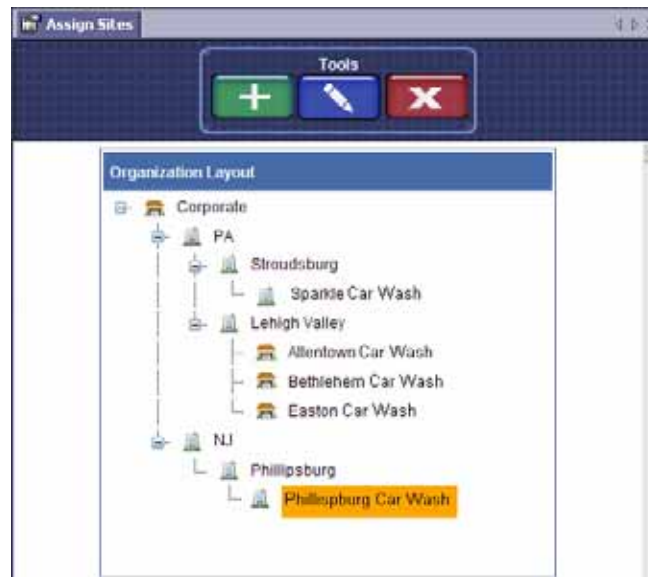


Figure 320. Site Selected to Edit

- 2 Select a site, and then click **Edit**  button. The **Organization Chart Name** dialog box appears.






Organization Chart Name			
Site	Ultimate Car Wash	Name	Ultimate
Parent	Lehigh Valley	Level	Site

Figure 321. Organization Layout / Assign Site

- 3 In the **Name** box, type a name and/or description for the group.
- 4 To edit the group's parent, select a new setting in the **Parent** box.
- 5 To edit the group's level, select a new setting in the **Level** box.
- 6 To edit the group's site assignment, select a new setting in the **Site** box or choose **--Please Select--** to clear the site assignment.
- 7 Click the **Save** button.
The parent, level and assignment settings are updated.



See "Add a Level to the Organizational Layout" on page 639.

-  See “Edit a Level in the Organizational Layout” on page 641.
-  See “Delete a Level in the Organizational Layout” on page 642.
-  See “About Create Levels” on page 631.
-  See “About Manage Sites” on page 634.
-  See “Assign Sites” on page 638.

Delete a Level in the Organizational Layout

To delete a level, follow these steps:

- 1 From the **System Setup** menu, select **Organizational Layout**, and then click **Assign Sites**.
The **Assign Sites** tab appears.

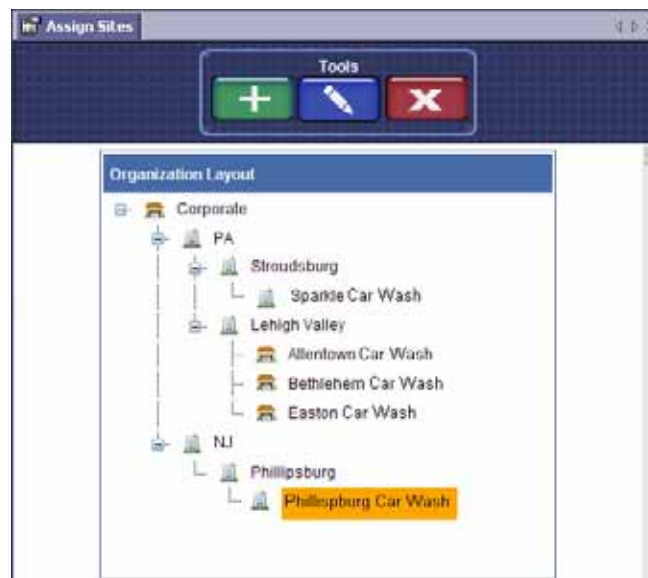


Figure 322. Level Selected to Delete


- 2 Select a Level or Site, and then click **Delete**  button.
A warning appears.









Figure 323. Delete Site Warning

- 3 Click **OK**.
The group is deleted.

NOTE: You cannot delete a group to which sites, roles or users have been assigned.



Figure 324. Cannot Delete Group Warning Message

-  See "Add a Level to the Organizational Layout" on page 639.
-  See "Edit a Level in the Organizational Layout" on page 641.
-  See "Delete a Level in the Organizational Layout" on page 642.
-  See "About Create Levels" on page 631.
-  See "About Manage Sites" on page 634.
-  See "Assign Sites" on page 638.

About Define Tokens

Define Tokens

HELP - What can I do here?

Managers:

- Configure tokens for devices.



The screenshot shows a window titled "Define Tokens" with a "Tools" bar containing three buttons: a green plus sign (+), a blue pencil (edit), and a red X (delete). Below the tools is a table with the following data:

Name	Type	Value
14 Dollar Token	Coin Token	14.00
5 Dollar Orange Note	Bill Token	5.00
5 Dollar Blue Note	Bill Token	5.00
5 Dollar Yellow Note	Bill Token	5.00
Vacuum Token	Coin Token	0.00

Figure 325. Define Tokens



See "Add a Token" on page 644.



See "Edit Token" on page 645.



See "Delete Token" on page 646.

Add a Token

To add a token, follow these steps:

- 1 From the **System Setup** menu, select **Devices**, and then click **Define Tokens**. The **Tokens** tab appears.
- 2 Click **Add**. The **Token** dialog box appears.

Name	Type	Value
US One Dollar Token Coin	Coin Token	1.00
Some Token	Coin Token	1.25
New Token	Bill Token	1.50
<input type="text"/>	CoinToken	<input type="text"/>

Figure 326. Token Dialog Box

- 3 In the **Name** box, type the token name.
- 4 In the **Type** box, select a token type:
 - Variable
 - Coin Token
 - Bill Token
- 5 In the **Value** box, type a token value.
- 6 Click the **Save** button.
The token is added.




See "Edit Token" on page 645.



See "Delete Token" on page 646.

Edit Token

To edit a token, follow these steps:

- 1 Select **System Setup > Devices**, and then click **Define Tokens**.
The **Tokens** tab appears.
- 2 Click the **Edit**  button. The **Token** dialog box appears.

Name	Type	Value
US One Dollar Token Coin	Coin Token	1.00
Some Token	Coin Token	1.25
New Token	Bill Token	1.50
<input type="text"/>	CoinToken	<input type="text"/>

Figure 327. Token Dialog Box

- 3 In the **Name** box, type the token name.
- 4 In the **Type** box, select a token type.
- 5 In the **Value** box, type a token value.
- 6 Click the **Save** button.
The token is edited.




See “Add a Token” on page 644.



See “Delete Token” on page 646.

Delete Token

To delete a token, follow these steps:

- 1 From the **System Setup** menu, select **Devices**, and then select **Define Tokens**. The **Tokens** tab appears.
- 2 Click to select a token in the list, and then click the **Delete**  button. A warning appears.
- 3 Click **OK**. The token is deleted.



See “Add a Token” on page 644.



See “Edit Token” on page 645.

About Device Groups

Device Groups

HELP - What can I do here?

Manager:

- **Save time and simplify the process of running promotions for multiple devices.**
 - For example, create a virtual device group to apply a promotion to all of your *Auto Sentry flex* and *Touch 'n Clean* devices with one simple command.
- **Create a virtual device group with the default settings for that device family.**
 - For example, you have a bay of five Touch 'n Clean devices. If you create a virtual Touch 'n Clean device, you can apply its settings to every Touch 'n Clean in all five bays.
- **Configure one virtual device for numerous devices for both the Touch 'n Clean family and the Auto Sentry Flex family of devices.**
 - For example, a customer with 30 sites can simply set up a Virtual Device Group to deliver promotions to customers. Imagine creating a special holiday promotion one time, and then applying that promotion to 60 Auto Sentry flex devices with one command.
- **Review specific date range to view the results of a sales or marketing campaign, and determine effectiveness of the program.**

You can create and assign device groups.



See *"Add A Device Group"* on page 648.



See *"Refresh Device Group Configuration"* on page 651.



See *"Assign Devices to a Device Group"* on page 648.



See *"Delete Device Group"* on page 650.



See *"Assign Settings for a Device Group"* on page 652.



Figure 328. Device Groups example

Add A Device Group

To add a Device Group, follow these steps:


- 1 From the **System Setup** menu, and select **Devices**, and then select **Device Groups**.
The **Device Groups** tab appears.
- 2 Click the **Add**  button.
The **Device Group** dialog box appears.



Figure 329. Device Group

- 3 In the **Name** box, type a name for the Device Group.
- 4 In the **Type** box, select a type for the Device Group.
- 5 Click **Save**.
The Device Group is saved.



See "Refresh Device Group Configuration" on page 651.



See "Assign Devices to a Device Group" on page 648.




See "Delete Device Group" on page 650.



See "Refresh Device Group Configuration" on page 651.

Assign Devices to a Device Group

To assign devices to a Device Group, follow these steps:

- 1 From the **System Setup** menu, and select **Devices**, and then select **Device Groups**.
The **Device Groups** tab appears.
- 2 Select an item in the **Device Group** list, and then click the **Assign Devices**  button. The **Device Group** dialog box appears.

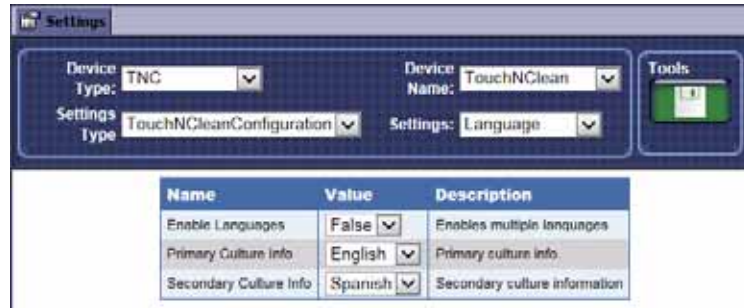



Figure 330. Assign Devices to Device Group

- 3 Select one or more devices in the list, and then click **Save**.
The devices are assigned to the Device Group.


 See "Add A Device Group" on page 648.

 See "Edit a Level" on page 633.

 See "Delete Device Group" on page 650.

 See "Refresh Device Group Configuration" on page 651.

 See "Refresh Device Group Configuration" on page 651.

 See "Assign Settings for a Device Group" on page 652.

Edit Device Group

To edit a Device Group, follow these steps:

- 1 From the **System Setup** menu, and select **Devices**, and then select **Device Groups**.

The **Device Groups** tab appears.

- 2 Select an item in the **Device Group** list, and then click the

Edit  button.

The **Device Group** dialog box appears.



Device Group			
*Name	Flex - (Near and Far)		
Type	Autosentry		
Site ID	Site	Name	
<input type="checkbox"/>	1234001003	Auto Pros Express	Flex 998 Petro
<input checked="" type="checkbox"/>	1234001003	Auto Pros Express	Flex Far Lane
<input checked="" type="checkbox"/>	1234001003	Auto Pros Express	Flex Near Lane


Figure 331. Edit Device Group

- 3 In the **Name** box, type a name for the Virtual Device Group.
- 4 In the **Type** box, select a type for the Virtual Device Group.
- 5 Click **Save**.
The Virtual Device Group is saved.

 See "Delete Device Group" on page 650.

 See "Refresh Device Group Configuration" on page 651.

 See "Refresh Device Group Configuration" on page 651.


 See "Assign Settings for a Device Group" on page 652.

Delete Device Group

To delete a Device Group, follow these steps:

- 1 From the **System Setup** menu, and select **Devices**, and then select **Device Groups**.

The **Device Groups** tab appears.

- 2 Select an item in the **Device Group** list, and then click the **Delete**  button.
A warning **Are you sure you wish to delete this device group? Please use caution, this action cannot be reversed** appears.
- 3 Click **Yes**.
The Device Group is deleted.



See "Add A Device Group" on page 648.



See "Assign Devices to a Device Group" on page 648.



See "Delete Device Group" on page 650.



See "Refresh Device Group Configuration" on page 651.



See "Assign Settings for a Device Group" on page 652.

Refresh Device Group Configuration

You can refresh all devices for a Device Group. For example, perhaps you have a collection of six Touch 'N Clean devices assigned to a Device Group. On one of those devices, you made a change to accept gift cards for a week. After one week, you want that device to revert back to its Device Group settings. You can select that device in the list, and then click **Refresh Device Group Configuration**. The device is reset back to its default Device Group configuration.

To refresh the configuration settings for devices assigned to a Device Group, follow these steps:

- 1 From the **System Setup** menu, and select **Devices**, and then select **Device Groups**.
The **Device Groups** tab appears.
- 2 Select an item in the **Device Group** list, and then select one or more items in the **Assigned Devices** list.

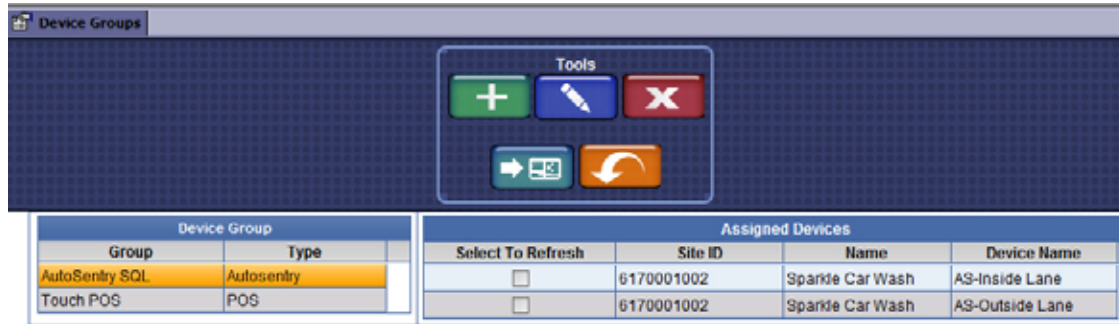



Figure 332. Refresh Device Configuration

- 3 Click the **Refresh Device Configuration**  button.
A warning **Please select assigned devices to refresh its configuration.** appears.
- 4 Click **OK**.
The configuration settings for the selected devices are refreshed back to the default Device Group settings.

In another example, you might assign six devices to a Device Group after you have already configured the Device Group. In this case, each device could have slightly different settings. You can select the devices in the list, and then click **Refresh Device Group Configuration**. All devices will inherit the setting from the Device Group.



See "Add A Device Group" on page 648.



See "Assign Devices to a Device Group" on page 648.



See "Delete Device Group" on page 650.



See "Refresh Device Group Configuration" on page 651.



See "Assign Settings for a Device Group" on page 652.

Assign Settings for a Device Group

You can configure settings for a Device Group.

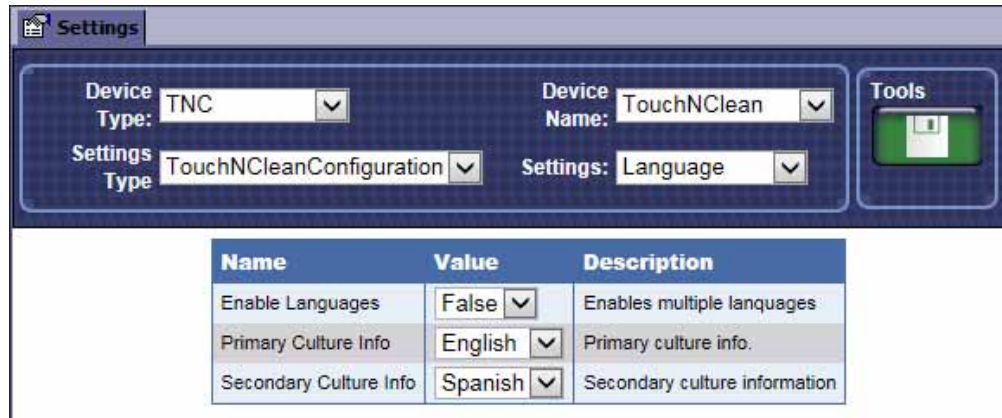


Figure 333. Device Group Settings example

- 1 From the **System Setup** menu, select **Devices**, and then select **Settings**. The **Settings** tab appears.
- 2 In the **Device Type** box, select a device type.
- 3 In the **Device Name** box, select a device name that corresponds to a Device Group.
- 4 Select items in the **Settings** box, and then change parameters. As you make changes, each device assigned to the Device Group is also updated.
- 5 After making necessary changes, click the **Save** button.



See "About Settings" on page 654.



See "Add A Device Group" on page 648.



See "Assign Devices to a Device Group" on page 648.



See "Add A Device Group" on page 648.



See "Delete Device Group" on page 650.



See "Refresh Device Group Configuration" on page 651.

About Settings

Settings for Devices

HELP - What can I do here?

Operators and Managers:

- Central location for all device settings.
- Device Type and Setting combinations can vary.
- Device settings are available for the following and more:
 - Language
 - Coin Acceptor
 - Main Options
 - Clubs
 - Receipt Header and Footer
 - Gift Card Selling
 - Credit Card



See “Search for Device Settings” on page 654.



See “Settings Description Tables” on page 654.

Search for Device Settings

Configuration is filtered by device that exists at the site.

- 1 From the **System Setup** menu, select **Devices**.
- 2 Select **Settings**.

There are many **Device Type** and **Settings** combinations. Description tables provide more information about the settings for a particular combination.

For example, to learn more about the **Accept Multiple Tokens** setting, you can look at the **Auto Sentry Coin Acceptor** description table.

Settings Description Tables

Select one of the following to view the description table:

Auto Sentry

- "Auto Sentry > Backup"
- "Auto Sentry > Books"
- "Auto Sentry > Clubs"
- "Auto Sentry > Coin Acceptor"
- "Auto Sentry > TouchConfiguration > Control"
- "Auto Sentry > TouchConfiguration > CreditCard"
- "Auto Sentry > TouchConfiguration > CreditCard"
- "Auto Sentry Gift Card"
- "Auto Sentry > InBay Wash"
- "Auto Sentry > TouchConfiguration > Language"
- "Auto Sentry > Main Options"
- "Auto Sentry > Receipt"
- "Auto Sentry > Receipt Footer"
- "Auto Sentry > Receipt Header"
- "Auto Sentry > Service FontColor"
- "Auto Sentry > Shift"
- "Auto Sentry > StackNControl Communication"
- "Auto Sentry > Tickets"
- "Auto Sentry > TouchDebug"
- "Auto Sentry > TouchService"
- "Auto Sentry > Vandalism Deterrent"
- "Auto Sentry > VideoQueue Communication"
- "Auto Sentry > WBC Connection"

GLOBAL

- "Global > GlobalConfiguration > CentralLogServer"
- "Global > GlobalConfiguration > Global"
- "Global > GlobalConfiguration > Reporting"
- "Global > GlobalConfiguration > Weather"

LUBE

- "Lube > LubeServiceConfiguration"

POS

- "POS > TouchPOSConfiguration > Clubs"
- "POS > TouchPOSConfiguration > Credit Card Settings"
- "POS > TouchPOSConfiguration > General"
- "POS > TouchPOSConfiguration > LayoutDirection"
- "POS > TouchPOSConfiguration > ProfitCenterDescriptionColor"
- "POS > TouchPOSConfiguration > Prompt Settings"
- "POS > TouchPOSConfiguration > Quick Money Configuration"
- "POS > TouchPOSConfiguration > ReceiptFooter"
- "POS > TouchPOSConfiguration > ReceiptHeader"
- "POS > TouchPOSConfiguration > ReceiptToPrint"
- "POS > TouchPOSConfiguration > Refunds Using Credit Card"
- "POS > TouchPOSConfiguration > Report Server"
- "POS > TouchPOSConfiguration > SoundSettings"
- "POS > TouchPOSConfiguration > Stack Management"
- "POS > TouchPOSConfiguration > Stacking"
- "POS > TouchPOSConfiguration > Tickets"
- "POS > TouchPOSConfiguration > Wash Book POS > WashConnectConfiguration > Menu"

Entrance Sign

- "POS > TouchESConfiguration > Configuration"
- "POS > TouchESConfiguration > Display"
- "POS > TouchESConfiguration > Roller"
- "POS > ETLConfiguration > Logging"

TNC

- "TNC > Component Port > UpCounter"

Settings includes **Device Type** selections. Each **Device Type** includes various **Device Name** selections. Each **Device Name** includes various **Settings Type** selections. And each Settings Type includes various Settings. For example, you can select the **Device Type** of **Autosentry** (i.e., Auto Sentry Flex); the **Device Name** of **Auto Sentry 1**, the **Settings Type** of **Touch Configuration**, and then select specific **Settings** for that device (e.g., **Language**, **Coin Acceptor**, etc.).

Auto Sentry > Backup**Table 7: Auto Sentry Backup**

Field	Description
Backup Destination	Type a destination directory for the backup file. This is typically a shared network directory. Example: \\10.0.0.16\d-drive\
Backup Enabled	True or False. Select True to enable backups. Select False to disable.
Backup Password	Type a backup password. This is the log-in password used to connect to the shared network drive where the backup file is saved.
Backup Username	Type a user name. This is the user name needed to connect to the shared network drive where the backup file is saved.

Auto Sentry > Books**Table 8: Auto Sentry Books**

Field	Description
Books Sell	Default setting is False. Set to False if Wash Books cannot be sold. If True, then customer can purchase Wash Books at the Auto Sentry.
Books Use Gift Card Dispenser	Default setting is No. Set to No if Wash Book Customer Cards cannot be dispensed from Auto Sentry. (Set to No, if dispensing Gift Cards.) If Yes, customer can purchase Wash Books at Auto Sentry and the Customer Card will be dispensed.

Auto Sentry > Clubs

- Purchase a Club Membership at the Auto Sentry flex.
- Redeem a club wash at the Auto Sentry flex.
- Renew club membership at the Auto Sentry flex.
- When renewing club at Auto Sentry flex, can change assigned club.

Auto Sentry > Clubs**Table 9: Auto Sentry Clubs**

Field	Description
Allow Frequency Promotion For Club	True or False. True allows frequency promotion for Club.
AllowRenewSuspended	True or False.
Clubs Display Name	True or False.
Clubs Express	True or False. True turns on the Clubs Express and the customer will not have any further menus, and then just be instructed to enter wash. Set to False if you want to upsell your wash packages and/or offer your customer extra services.
Clubs Renew Existing Program	True or False. Set to True if the customer's credit card is in declined status and attempts to renew at the Auto Sentry, set to True to restrict member to the stay in the club he is a member of? Set to False if you want this member to be able to select another club at time of renewal.
Clubs Self Renew	True or False. If the member is declines, should he be allowed to update his credit card information and renew at the Auto Sentry?
Clubs Sell	True or False. Should Clubs be sold at the Auto Sentry?
Clubs Sell Style	Default is None. None displays a Buy Wash or Buy Club dialog box. Passive selling engages the Clubs Passive Sell Style option. A button for Buy Club Membership will appear along with the other buttons on the Buy Wash main screen. If not interested, the customer does not need to make any selection regarding a Club Membership purchase; hence, Passive. If interested in purchasing a Club Membership, the customer is required to select the Buy Club Membership button from the main menu to learn more or purchase. Active selling engages the Buy Club Membership option to appear before the Main Screen, and the customer must actively select either the Buy Club Membership or the No Thank You button before continuing to the Buy Wash main screen.
First Day Charge From	Expired date or Renewal date . If using a first day of the month auto billing option for club and customer renews at the AutoSentry, which date will he be billed?
Output Hold Time InMS	
Purchased Alarm Output	Output number to be energized when a club is purchased. This is generally used to activate a light or bell.
Sign Up Day Advance Exp. Date	ExpiredDate or RenewalDate . If using an anniversary autobilling option for club, and customer renews at the Auto Sentry, the expiration date advanced by thirty days from the RenewalDate which is his ExpiredDate or expired date which is the current date.

Sell Both Gift Cards and Clubs at Auto Sentry

Configure terminal to sell both gift cards and clubs using the following combinations:

- Active Gift Cards, Passive Clubs
- Active Clubs, Passive Gift Cards
- Passive Gift Cards, Passive Clubs

NOTE: System cannot be configured for both active gift and active clubs. Also, only one type of purchase can happen in a transaction, regardless of the active/passive setting. In other words, if a customer purchases a gift card, they cannot purchase a club in the same transaction and vice-versa.



Figure 334. Passive Sell Style for Clubs and Gift Cards



Figure 335. Active Sell Style for Club Membership

The system supports ONE of the following club membership renewal options:

- Renew existing clubs only – allows customers to renew the membership for the club they were previously enrolled. Customer cannot change into a different club during renewal with this option.
- or–
- Renew membership from club list – allows customer to select the club from a list of clubs offered. The club they are currently a member of may or may not exist in this list. It will exist only if you sell the club at the terminal.

Renew Membership for existing clubs only Settings

To renew a membership for an existing club, follow these steps:

- 1 From **System Setup** > **Devices**, click the **Settings** button.
- 2 Select a Device Type and Device Name.
- 3 From Settings, select **Clubs**.
- 4 From the Clubs_SelfRenew, select **True**.
- 5 From the Clubs_RenewExistingProgram, select **True**.



See "About Club Membership" on page 110.

Renew Membership with the Option to Select a Different Club Settings

Renewal of membership with the option to select a different club, follow these setup instructions:

- 1 From **System Setup** menu, select **Devices**, and then click the **Settings** button.
- 2 In **Device Type**, select a device.
- 3 In **Device Name**, select a device name.
- 4 In **Settings Type**, select a type from the drop-down list.
- 5 In **Settings**, select Clubs.
- 6 From the Clubs_SelfRenew, select **True**.
- 7 From the Clubs_RenewExistingProgram, select **False**.



Name	Value	Description
Clubs_DisplayName	True	Clubs_DisplayNameDesc
Clubs_Express	True	Clubs_ExpressDesc
Clubs_RenewExistingProgram	False	Clubs_RenewExistingProgramDesc
Clubs_SelfRenew	True	Clubs_SelfRenewDesc
Clubs_Sell	False	Clubs_SellDesc
Clubs_SellStyle	None	Clubs_SellStyleDesc
FirstDayChargeFrom	ExpiredDate	FirstDayChargeFromDesc
OutputHoldTimeInMS	500	OutputHoldTimeInMSDesc
PurchasedAlarmOutput	0	PurchasedAlarmOutputDesc
SignUpDayAdvanceExpDate	ExpiredDate	SignUpDayAdvanceExpDateDesc

Figure 336. Settings Renew Membership with Option to Select a Different Club

- If a customer has multiple memberships in a declined state, the system will charge for the current membership and update their status and expiration state. The system will then set the status for the other declined memberships to **Bill**. This will result in autobilling attempting to bill their credit card for the other memberships the next time autobilling runs (generally early the next morning).
- FirstDayChargeFrom can be set to honor the expiration date or the current (renewal) date, if billing is on anniversary date (not 1st of the month). If set to honor the expiration date, then the system updates the new expiration date based on the old expiration date plus club duration. Example, if a membership

expired on the 5th of the month and a customer renews on the 10th, the new expiration date for a monthly club is the 5th of the following month. If set to honor renewal date, the new expiration date for the same example would be the 10th of the next month. Either way, the customer is billed the entire club price (no prorating).

Auto Sentry > Coin Acceptor**Table 10: Auto Sentry Coin Acceptor**

Field	Description
Coin Acceptor Accept Multiple Tokens	True or False. Select True to accept multiple tokens. Select False if the Auto Sentry does not accept multiple tokens.

Auto Sentry > TouchConfiguration > Control**Table 11: Auto Sentry TouchConfiguration Control**

Field	Description
Control 5DigitWashCodeTimeout	Time in Seconds. If the site is allowing both 5-digit and 6-digit codes and only enters 5 digits, type a number of seconds to wait for the 6 th digit.
Admin RFID Card	The manager RFID card number used as an override for customers with RFID tags that do not read.
Conveyor Hold	Time in milliseconds to hold the conveyor/gate output (i.e., 500 represents ½ of a second).
Font Color	Font color to use for displaying non-service text on the interface. Only use if not using custom graphics.
Gate	Indicator that represents how terminals are stacked. NONE means terminals are not stacked (i.e. there is only one terminal or one terminal per tunnel and, therefore, cars can be added to the stack at will). STACKING SIDE BY SIDE which requires the terminal to fire a gate output. The gate input represents the terminals actual gate state (NOT the other terminals gate state). STACKING FRONT TO BACK (there are no physical gates in this scenario). STACKING INBAY For the terminal closest to the wash entry, the gate input MUST NOT be used (always NONE- this terminal can always add the car to the stack). For the other terminal, the gate input represents whether or not a car is at the terminal in front of this terminal (i.e. the proximity sensor from the first terminal is wired to the gate input of the second terminal).
Gross Time Out	Gross period of inactivity to wait (in seconds) before returning to base state.
Multiple Languages	Set to true (1) for multiple languages (primary/secondary), otherwise false (0). Primary/secondary avi files, bitmaps, and text (in tunnel master) must be defined if this is set to true (1).
No Extra Buy Time Out	The set time that the system will move forward to the next screen if the customer does not make a selection on the buy extra services screen (set to 0 to disable)

Table 11: Auto Sentry Touch Configuration Control

Field	Description
Control_Print_Vacuum_BarCode	True or False. Default is True. If True, a forced barcode will print on a Vacuum Ticket.
Control_Print_Vacuum_Ticket	True or False.
Restart Delay	Timeout to wait when at the final screen before returning to the base state. This gets set if a user starts the transaction by touching the screen instead of being sensed by sensor. Also gets set if stacking and wash is busy (via gate control).
Secondary Tunnel	Set this to true (1) if the site contains two tunnels, you are stacking and this terminal stacks to the "secondary" (as opposed to the "primary") tunnel. Otherwise, set to false (0 default).
Stacking	Add car to stack (1 = true, 0 = false)?
Switch Enabled	Set to false (0) if the service unit switch is to be ignored, otherwise true (1). Only for rebooting purposes.
Use Wash Detail	True or False. Print wash detail "WD" ticket.
Use Wash Open	True or False. Use input signal for Wash Open on SIO or PIO board, usually wired to a switch, to determine if wash is open. When it is set to False, the CLOSE request will be treated as Terminate and Touch will close completely, leaving the AutoSentry on the desktop.
Use Wash Open Label	Display text field on bitmap when wash is closed/out of service. If the owner does not have a custom bitmap for this feature, set it to true (1), otherwise false (0).
Control Wash Equipment Monitor Port	
Control_WashOpenSwitchType	

Auto Sentry > TouchConfiguration > CreditCard**Table 12: Auto Sentry TouchConfiguration Credit Card**

Field	Description
American Express	Set to True if site accepts <i>American Express</i> ® cards, otherwise False . Only effects the buy wash bitmap that is displayed.
Cage Host	Location of the Cage credit card transaction handling service. For example, localhost .
Cage Port	Port of the Cage credit card transaction handling service. For example, 11240 .
CAPS Host	Machine name or IP Address of machine which is running CAPS.
CAPS Port	Port number CAPS is listening on (generally 32511).
Card Path	Path used to produce the file for clearing. If using PCCharge, set this to where the program was installed (usually C:\Program Files\Active-Charge).
Discover	Set to True if site accepts <i>Discover</i> ® cards, otherwise False . Only effects the buy wash bitmap that is displayed.
Merchant ID	Merchant number. Defined by PCCharge, ICVerify or TransActive.
Processor	Name of the credit card processor (i.e. "VISA").
Store ID	Store ID assigned by Lynk eCommerce.
Tax Credit Card	Set to True if credit card sales are taxable, but cash sales are not. Otherwise set to False . Currently, this is only necessary for New York locations.
Terminal ID	Terminal ID assigned by Lynk eCommerce.
TimeOut	Timeout (in seconds) to wait for credit card to clear.
Transactive	Use TransActive credit card processor? (True = yes, False = no)
Visa Master	Set to True if site accepts Visa/MC cards, otherwise False . Only effects the buy wash bitmap that is displayed.

Table 13: Auto Sentry Credit Card**Auto Sentry Gift Card**

Set up your Auto Sentry to sell, dispense Gift Cards and customer must activate the Gift Card at the Auto Sentry. Gift Card dispensers are optional and additional fees apply.

- 1 From the System Setup menu, select **Devices**, and then select **Settings**.
- 2 In **Device Type**, select **Auto Sentry**.
- 3 In Device Name, select device name.
- 4 In **Settings Type**, select **TouchConfiguration**.
- 5 In **Settings**, select **GiftCard**.

The Gift Card Settings dialog box appears.

- 6 In Sell Style setting, select Active, Passive, or None.



See “Selling Style for Gift Cards at the Auto Sentry” on page 668.

- 7 Type the necessary values. See the Gift Card Settings table for field descriptions.
- 8 Click the **Save** button.



See “Sell Both Gift Cards and Clubs at Auto Sentry” on page 659.



See “Selling Style for Gift Cards at the Auto Sentry” on page 668.

Auto Sentry > Gift Card Settings

Table 14: Auto Sentry Gift Card Settings

Field	Description
AddValue Bonus Dollars	Increase or add an extra dollar amount to the gift card as a bonus for recharging gift cards. Set to 0 if promotion is not in use; otherwise, set to the approved extra added dollar amount. For example, if this value is set to 5, then if a customer recharges a gift card with \$20.00, the value added to the gift card would be \$25.00 (20 + 5). The customer would only be charged \$20.00.
AddValue FreeWash PLU	Set to 0 if promotion is not in use; otherwise, set to the proper AddValue FreeWash PLU. Instead of adding a dollar amount or a percentage to the gift card, the customer will receive a free wash. The free wash code will print out on the wash receipt.
Add Value Promo	% Increase to use for recharging gift cards. Set to 0 if promotion is not in use; otherwise, set to the proper percentage. For example, if this value is set to 10 (for 10%), then if a customer recharges a gift card with \$20.00, the value added to the gift card would be \$22.00 (20 + 2). The customer would be charged only the \$20.00.
Clerk	Gift Clerk. Usually not necessary. If using World Gift Card and Use Require Clerk ID is checked, then provide the Gift Clerk ID here.
MerchantID	Merchant ID for World Gift Card. May be blank if using WashCard gift cards.
Path	Path to produce file for clearing. If using World Gift, set this path to the same path as the CardPath above. If using WashCard, set this path to the same directory the WashCard Interface program is looking at.
Processor	Processor: "WRLD" for World Gift Card. "WCRD" for WashCard.
Time Out	Time out (in seconds) to wait for gift card to clear.
Max Increase	Maximum dollars customer is allowed to add to the gift card.
Min Increase	Minimum dollars customer is allowed to add to the gift card.
Promo font color.	Promo font color: Black, Maroon, Green, Navy, Purple, Teal, Gray, Silver, Red, Yellow, Blue, Fuchsia.
Sell Style	<p>Default is None. None turns off the selling of gift cards and no gift card button appears.</p> <p>Passive selling engages the buy gift card option. A button for Gift Cards will appear along with the other buttons on the Buy Wash main screen. If not interested, the customer does not need to make any selection regarding gift cards; hence, Passive. If interested in gift cards, the customer is required to select the Buy Gift Card button from the main menu to learn more or purchase.</p> <p>Active selling engages the gift card option to appear on a purchase gift card screen that appears before the Main Screen where the customer must actively select either the Buy Gift Card or the No Thank You button before continuing to the Buy Wash main screen.</p>

NOTE:

- Gift card dispenser works regardless of using passive or active selling mode.
- One Gift Card per transaction is currently supported.
- If the system senses the dispenser is empty or detects an error with the dispenser, then the system automatically turns off selling Gift Cards.

Selling Style for Gift Cards at the Auto Sentry

- **Passive** selling sets the buy gift card option to have an extra button for Gift Cards along with the other buttons on the Buy Wash main screen. If not interested, the customer does not need to make any selection regarding Gift Cards. If interested in Gift Cards, the customer is required to select the **Buy Gift Card** Button from the main menu to learn more or purchase.
- **Active** selling sets the Gift Card option to appear up front and the customer must actively select either the **Buy Gift Card** or **No Thank You** button before continuing to the Buy Wash main screen.
- **None** turns off the selling of Gift Cards and no Gift Card buttons appear. This is the default setting.

Example: Main Menu on Auto Sentry, Gift Card Passive Sell Style:



Figure 337. Auto Sentry Main Menu, Gift Card Passive Sell Style

Example: Main Menu on Auto Sentry, Gift Card Active Sell Style:

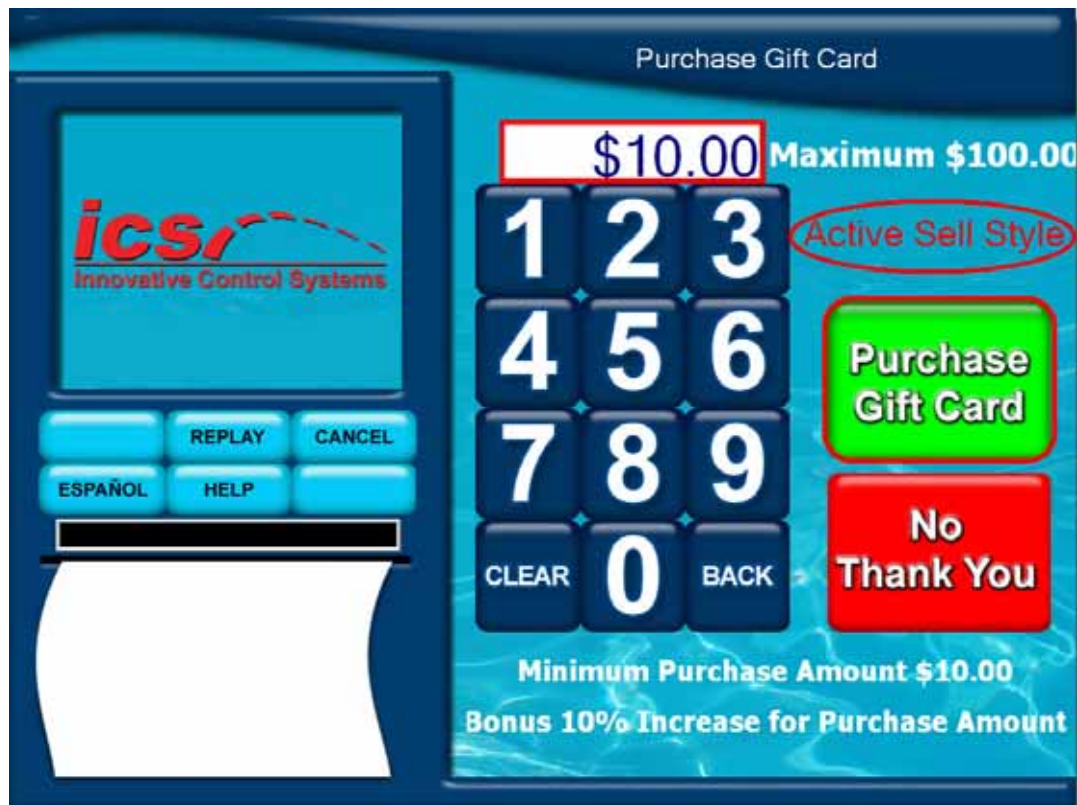


Figure 338. Auto Sentry Main Menu, Gift Card Active Sell Style

Configure terminal to sell both Gift Cards and clubs using the following combinations:

- Active Gift Cards, Passive Clubs
- Active Clubs, Passive Gift Cards
- Passive Gift Cards, Passive Clubs

NOTE: System cannot be configured for both active gift and active clubs. Also, only one type of purchase can happen in a transaction, regardless of the active/passive setting. In other words, if a customer purchases a Gift Card, they cannot purchase a club in the same transaction and vice-versa.

Auto Sentry > InBay Wash

To learn more information on the equipment manufacturer settings, including error handling and a more detailed discussion about output firing, select the **Supported Wash Equipment Information**.

Follow these steps to view the **Supported Wash Equipment Information**.

- 1 Visit our ICS website www.icscarwashsystems.com

- From the **Support** menu, select **Documentation**. From the menu on the left-side, select **Auto Sentry Flex**, and then from the list, click to select the Document Name: **Supported Wash Equipment Information**.

Auto Sentry > InBay Wash

Table 15: Auto Sentry InBay Wash

Field	Description
Drive Ahead Hold Time	Value is in seconds. Time in seconds to hold "Please Drive Ahead."
Wash Equipment	Inbay wash equipment protocol to use. PDQ 360 has the same Protocol as PDQ 4000.
Wash Eqpt ErrTmr	Amount of time in seconds before sending an error alert if configured to do so.
Extra Service Hold Time	Amount of time in seconds to hold extra service output.
InBay Wash Fire Extra Service Only	True or False.
Max InBay Wash Time	This timer should be set to a value based on the maximum time required to wash a car, plus a minute or two. The wash equipment manufacturer can provide this time. This timer is enabled as soon as the Wash Valet gets a Wash Busy signal. If Wash Busy does not drop and the timer expires, then a message is posted to the log. An email is sent if the system is configured to do so
Wash Busy Wait Tmr	This timer is set to a value based on the owner and technician judgment as to how long it will take for a customer to drive into the in-bay. And alert will be sent if the system is configured to do so

Auto Sentry > TouchConfiguration > Language

Table 16: Auto Sentry TouchConfiguration Language

Field	Description
Primary Culture Info	Select a primary language for the Auto Sentry: English, French, German, Spanish
Secondary Culture Info	Select a secondary language for the Auto Sentry: English, French, German, Spanish

Auto Sentry Main Options Buttons

Depending on how you configure your *WashConnect*®, the main options menu can be set up to display up to five out of the eight Purchase buttons. Up to five of these

buttons can appear on the main options *WashConnect*® touch screen but they will always appear in the following order:



Figure 339. Hierarchy of buttons on Main Options screen

NOTE: Purchase buttons, shown in Figure 339, “Hierarchy of buttons on Main Options screen,” are also available in Spanish.

In the Figure 339, “Hierarchy of buttons on Main Options screen,”:

- 1 Buy Wash with cash or card** button. Used to purchase wash if credit cards are accepted.
–or–
Buy Wash button. Used to purchase wash if credit cards are not accepted.
- 2 Join Wash Club** button. Used to sign up customers in a wash.
- 3 Buy Gift Card** button. Used to purchase a gift card. (A Gift Card dispenser is required for this feature and can be purchased for an additional fee if you would like to dispense Gift Cards at the Auto Sentry.)
- 4 Buy Wash Card** button. Used to purchase a Wash Card. (A Card dispenser is not required for this feature but can be purchased for an additional fee if you would

like to use the Card dispenser to dispense Wash Book Customer Card at the Auto Sentry. Otherwise, the barcode and Wash Card number prints at the bottom of the customer's receipt.)



See "About Wash Books" on page 424.

- 5 Wash Code** button. A wash code is unique and cannot be reused. The wash code button is used to enter a five-digit paid ticket code from the fuel pump or a Global six-digit wash codes generated from Corporate. (Five-digit wash codes are generated randomly from the fuel pump interface and include an expiration date.)
- 6 Coupon Code** button. Used to enter a three- four- or five-digit coupon code. (A PLU needs to be created for the coupon and the PLU number is the Coupon number. A Profile needs to be created for Coupons and activated with a valid schedule. Coupon numbers can be reused.)



To assign a Coupon Code, See "Auto Sentry > Shift" on page 679.

- 7 Fund Raiser Code** button. Used to purchase a wash through a coupon code that is set up in the system so sales can be tracked and easily be able to determine the donation amount to forward to the charity or organization. Set up a valid Coupon profile.
- 8 Pay Attendant** button. This button is used to give payment directly to car wash attendant instead of payment terminal. (Pay Attendant Button is not usually enabled for in-bay automatic sites.) This button was designed if customer has questions and needs to ask attendant before purchasing a wash. A receipt will print and customer takes it to the tunnel attendant where the attendant completes the wash purchase. After paying attendant, the vehicle will be added to the stack.) This button has mostly been replaced with an intercom system where the Attendant can answer or help customer with the use of the intercom speaker directly at the Auto Sentry.

Auto Sentry > Main Options**Table 17: Auto Sentry Main Options**

Field	Description
My Listen Port	This value is the My Listen Port.
MainOptions_A LaCarteExtras	True or False. Set to True, if you want to allow variable pricing if A La Carte is enabled.
Allow Card	True or False. Set to True to accept credit cards, and False to not allow credit cards.
Allow Cash	True or False. Set to True to accept cash, and False to not accept cash.
Allow Code	True or False. Set to True to allow 5-digit or 6-digit Wash Codes from the Wash Code button at the auto Sentry. Set to False to not allow 5-digit or 6-digit Wash Codes.
Allow Fund raiser	True or False. Set to True to Accept 4-digit Fund raiser codes by selecting the Fund raiser Code button at the Auto Sentry. Set to False if not allowing 4-digit Fund raiser.
Allow Pay	True or False. Default is False. Warning: This is only useful for a very specific business model. Set to True to allow a Pay Attendant button, where the customer can pay the attendant instead of entering payment at the Auto Sentry. This puts a pay attendant ticket on stack that must be edited before the car can be washed.
MainOptions_GotoBuyIfCashOr Card	True or False. When set to True, and customer swipes credit card, selling gift cards or playing the RFID validations screens (and sense loop was not used). WashConnect® assumes the customer wants to buy a wash, and the system advances to the list of washes on the buy wash screen without pressing the Buy Wash button. When set to False, no assumptions, customer can swipe credit card, but will have to press Buy Wash button to advance to the Buy Wash screen to select a wash from the list.
No Video Only Audio	True or False. Set to True if no video should display in the small window of the Auto Sentry. Set to False if a video should display in the small window of the Auto Sentry.
Pay Output	Output number. If the site is using the Pay Attendant button, what output is energized to let the attendant know.
Save Logs of Days	Number of days. The amount of days to purge Troubleshooting logs to prevent disk space issues.
MainOptions_ShowRedeemBookButton	Default is False. Set to True if you want Show Redeem Book button to appear on Main Options screen.
Save Video To Left	True or False. Set to True to display videos on the left of the screen. Set False to display videos to the right of the screen. Useful for countries that drive on the left.
Wash Type	Automatic, Conveyor, or Presell. This is the wash type for your wash site.

Set up purchase buttons for the Main Options menu

You can configure up to five purchase buttons to appear on the Auto Sentry Main Options menu.

- 1 From the **System Setup** menu, select **Devices**, and then select the **Settings** button.
 - 2 In Device Type, select the **Auto Sentry**®.
 - 3 In Settings Type, select **TouchConfiguration**.
 - 4 In Settings, select **MainOptions**.
 - 5 In **My Listen Port**, select a port value.
 - 6 Select True or False for the following options:
 - Allow Card** The Buy Wash button will appear.
 - Allow Cash** The Buy Wash button will appear.
 - Allow Code** The Enter Wash Code button will appear to enter a five- or six- digit ticket wash codes.
 - Allow Coupon Code** To set up the Coupon Code button, *See "Auto Sentry > Shift" on page 679.*
 - Allow Fund raiser** The Fund raiser button will appear to enter a fund raiser. Fund raisers can also be entered from the Wash Code button.
 - Allow Pay** The Pay Attendant button will appear to forward customer to directly pay car wash attendant instead of pay at the Auto Sentry. (This button is not used for in-bay automatic sites.)
 - MainOptions_ShowRedeemBookButton** The Redeem Book button will appear to enter wash book number.
- NOTE:** Buy Gift Card and Buy Club Membership buttons will appear when repeating steps 1 and 3, and then from the Settings, select GiftCard or Club, and then select passive sell style.
- 7 Other fields are not pertinent to the buttons on the Main Options screen.

8 In **Tools**, click the **Save** button.

Name	Value	Description
My Listen Port	32503	My listen port.
Allow Card	True	Allow card.
Allow Cash	True	Allow cash.
Allow Code	False	Allow code.
Allow Fundraiser	False	Allow fundraiser.
Allow Pay	False	Allow pay.
MainOptions_GotoBuyIfCashORCard	False	MainOptions_GotoBuyIfCashORCardDesc
No Video Only Audio	False	No video only audio.
Pay Output	0	Pay output.
Save Logs of Days	30	Save logs of days.
Show Video To Left	False	Show video to left.
Wash Type	PreSell	Wash type.

Figure 340. Settings for Main Options

Figure 341. Auto Sentry Main Menu Options

Auto Sentry > TouchConfiguration Pay Cash**Table 18: Auto Sentry TouchConfiguration Pay Cash**

Field	Description
Cash	
Change	
Credit	
Credit Owed	
Credit Receipt 1	
Credit Receipt 2	
Insert Cash	
Thank You	
Token	

Auto Sentry > Receipt**Table 19: Auto Sentry Receipt**

Field	Description
FooterLogoNumber	
Header Logo Number	
Bar Code Receipt	Print barcode on receipt (True = yes, False = no). You generally only need the barcode if you are manually stacking from the input terminal and want to scan the ticket.
Bar Code Ticket	Print barcode on presell ticket ("Y" = true, "N" = false). You generally only need the barcode on the presell ticket if you are manually stacking from the input terminal and want to scan the ticket.
Change Error Msg1	Error message to print on receipt when touch is incapable of dispensing the correct change (coin out, bill dispenser failure, etc.)
Change Error Msg2	Error message to print on receipts when touch is incapable of dispensing the correct change (coin out, bill dispenser failure, etc.). This is appended to ChangeErrorMsg1.
Club Receipt Count	Number of receipts to automatically dispense for a club purchase transaction. When set to 0, no receipt will be automatically printed. A Print Receipt button will appear, which the customer must press to print the receipt.
Credit Receipt Count	Number of receipts to automatically dispense for credit/gift transactions. When set to 0, no receipt will be automatically printed. A Print Receipt button will appear, which the customer must press to print the receipt.
Receipt Print Customer Code on Book Redemption	Default is True. If set to True, Customer code will print on Was Book Redemption receipts.
Receipt Promo Receipt Barcode	True or False. Set to True if frequency promotions should generate a wash code and print a barcode for the wash code. Set to False if frequency promotions should just generate wash code and print a wash code without a barcode.
Receipt Promo Receipt On Demand	True or False. Set to True for the frequency promotion to print only when the button is pressed. Set to False to always print.
Receipt Promo Receipt Timeout	Number of seconds. Select a number of seconds that the frequency promotion dialog box should stay open before printing it anyway. Set to 0 to always print.
Receipt Count	Number of receipts to automatically dispense for cash transactions. When set to 0, no receipt will be automatically printed. A Print Receipt button will appear, which the customer must press to print the receipt.

Table 19: Auto Sentry Receipt

Field	Description
Token Error Msg1	Error message to print on receipts when touch is incapable of dispensing the correct tokens.
Token Error Msg2	Error message to print on receipts when touch is incapable of dispensing the correct tokens. This is appended to TokenErrorMsg1.
Receipt WashBook Redemption Text	Default text: Scan to Redeem Book. This allows a line of text to print below the barcode on the customer's receipt every time customer redeems a wash book.

Auto Sentry > Receipt Footer**Table 20: Auto Sentry Receipt Footer**

Field	Description
Receipt Footer0 to 5	Text that appears on the receipt footer. Six lines are available. Each line is limited to 50 characters.

Auto Sentry > Receipt Header**Table 21: Auto Sentry Receipt Header**

Field	Description
Receipt Header 0 to 5	Text that appears on the receipt header. Six lines are available. Each line is limited to 50 characters.

Auto Sentry > Service FontColor**Table 22: Auto Sentry Service FontColor**

Field	Description
Font Color Description1	Used for color selection of font for Description 1 that appears on Standard buttons.
Font Color Description2	Used for color selection of font for Description 2 that appears on Standard buttons.
Font Color Name	Used for color selection of font for Name that appears on Standard buttons.
Font Color Price	Used for color selection of font for Price that appears on Standard buttons.

Auto Sentry > Shift**Table 23: Auto Sentry Shift**

Field	Description
Auto Bump	Automatically bumps the shift at midnight (closes the previous shift at 11:59 pm the previous day and opens a new shift at 12:00 am the current day).
Close on Exit	Parameter no longer supported. Was used to close the register shift whenever the touch application is shutdown (True = yes, False = no).
Coupon Length	Number of digits in PLU for coupons (may be set to 3, 4 or 5).
Max Transaction Amount	Set the register to desired dollar value for maximum cash amount to be accepted by Auto Sentry per transaction.

Auto Sentry > StackNControl Communication**Table 24: Auto Sentry StackNControl Communication**

Field	Description
Gate Control Port	Port number used for Gate Control.
RFID_Token	True or False.

Table 24: Auto Sentry StackNControl Communication

Field	Description
StackControl Port	Port number for StackNControl.
StackNControl IP	This is the IP address of the device running StackController.
StackToTunnel	

Auto Sentry > Tickets**Table 25: Auto Sentry Tickets**

Field	Description
Allow Loaded Tickets	True or False. Configuration to allow tickets of status Loaded to scan at the Auto Sentry.
Detail_Ticket_Expiration_Period	Number in Minutes. Amount of time in minutes that a detail ticket generated at the Auto Sentry will expire if not used. Most washes purchased at an Auto Sentry are processed immediately.
Ticket_Expiration_Period	Number in Minutes. Amount of time in minutes that a ticket generated at the Auto Sentry will expire if not used. Most washes purchased at an Auto Sentry are processed immediately.
Vacuum Ticket Expiration Period	

Auto Sentry > TouchDebug**Table 26: Auto Sentry TouchDebug**

Field	Description
Enhanced Log	True or False. Set to True to enable enhanced logging for troubleshooting purposes. Set to False to turn of enhanced logging.
Monitor	True or False. Set to True to enable enhanced logging for troubleshooting purposes. Set to False to turn of enhanced logging.

Auto Sentry > TouchService**Table 27: Auto Sentry TouchService**

Field	Description
Car Wash Code	
Coupon Wash Code	
Enter Coupon	
Enter Wash Code	
Invalid Service Selected	
No Base Wash Service	

Table 27: Auto Sentry TouchService

Field	Description
No Outputs For Service	
Purchase Wash	
Select Extra Service	
Select Wash	

Auto Sentry > Vandalism Deterrent**Table 28: Auto Sentry Vandalism Deterrent**

Field	Description
Deterrent Alarm Output	Numeric. The output that will be fired when the alarm is tripped.
Deterrent Alarm Time Out	Numeric. Minutes. If set to zero, the alarm never resets based on this timeout. Any number entry greater than zero represents the time to wait (in minutes) until the alarm is automatically reset.
Deterrent Disarm Alarm Time Out	Numeric. Seconds. How long the alarm stays off after you press the Disable Alarm button in the Service Unit diagnostics screen.
Deterrent Enable	True or False . Enable or disable the vandalism alarm.
Deterrent On Change Low High	Type HIGH if the alarm triggers on a logic change from low to high. Else, type LOW .

Auto Sentry > VideoQueue Communication**Table 29:**

Field	Description
Use Video Queue	True or False. This is the setting used to determine if we are using the Third Party Video Queue application to stack the cars Used only with special video stacking hardware.
Video Queue Gate Number	Used only with special video stacking hardware.
Video Queue IP Address	This is the IP Address of the video queue application. Used only with special video stacking hardware.
Video Queue Port	This is the Port used by the video queue application. Used only with special video stacking hardware.

Auto Sentry > WBC Connection**Table 30: Auto Sentry WBC Connection**

Field	Description
controller Device Key (Tunnel 1)	This is the Device ID of the controller that StackController will communicate with when programming washes to Tunnel #1.

Global > GlobalConfiguration > CentralLogServer

You can have most applications log to a central location so the logs can be viewed in real time.

Table 31: Global Configuration CentralLogServer

Field	Description
Central Log Server IP	
Central Log Server Port	Default value is 32710.

Global > GlobalConfiguration > Clubs**Table 32:**

Field	Description
AllowRenewAtDifferentSite	Default is True. True allows ability to disable renewing a club membership if the customer is not from the local site. This is for sites that want each local site to bill their own memberships.
Ignore Billing For Customers Not Using Wash In Days	Default is 0. Type the amount of days the customer has not used the wash, and at this point, the customer will not be charged. This is a goodwill feature so that customers are not charged for services they are not using.
PrintRemainingWashInfo	Default is False. True allows the number of remaining washes to print on customers receipt.
Prorate Clubs	True or False. True allows Prorating. If allowing prorating, all monthly wash club customers are billed on the 1st of every month. If customer initially purchases wash club on a different day of the month, the prorated price will automatically be calculated.
Update Card On File Before It Expires In Days	(Default is 14 days) This field determines the number of days before customer will be prompted to update the credit card on file.

About Prorating

Prorating is honored only if billing on the 1st of the month and prorating is selected. When a customer renews and billing is 1st of the month, their expiration date is moved to the 1st of the next month. If prorating is selected, they are billed the remaining portion. If prorating is not selected, they are billed the entire club amount.

- 1** From **System Setup** menu, select Devices and then select Settings.
- 2** In **Device Type**, select Global.
- 3** In **Device Name**, select Device Name.
- 4** In **Settings Type**, select Global Configuration.
- 5** In **Settings**, select Clubs.
- 6** In **Prorate Clubs**, select True from the drop-down Value
Prorating is now set up for all club customers at all your wash sites. The prorated value is now available to automatically appear on the customer's club wash buttons on the Auto Sentry screen.

The screenshot shows the 'Settings' window in WashConnect. It features a header bar with the title 'Settings'. Below the header, there are four dropdown menus: 'Device Type' set to 'Global', 'Device Name' set to 'Corp Main DB', 'Settings Type' set to 'GlobalConfiguration', and 'Settings' set to 'Clubs'. To the right of these menus is a 'Tools' button with a floppy disk icon. Below the settings area is a table with the following content:

Name	Value	Description
ProrateClubs	False	ProrateClubsDesc

Figure 342. Global Settings for Prorate Clubs

Prorating Example

In this prorate club example, a \$30 wash club is sold within a 30 day month.

- If customer initially purchases the \$30 wash club on the 2nd of the month, the customer would be prorated and charged \$29.
- If customer initially purchases the \$30 wash club on the 5th of the month, the customer would be prorated and charged \$26.
- If customer initially purchases the \$30 wash club at a later date in the month, the customer would be prorated and charged the decremented purchase price until you reach a date where the floor price will be charged for the rest of the month.

The **floor price** is the minimum amount the club customer will be charged in the first prorated month. The floor price is set up from Club Services.



See "Add a Club Service" on page 376.

Global > GlobalConfiguration > Email Server Setup**Table 33: Global EmailServer Setup**

Field	Description
Email From ID	The From Email address ID. ex. support@washnet.com
Email Server Port	Email server port number.
Email Server URI	Email server address.
Email Server User ID	Email server login user ID. ex. userid or userid@provider.tld. Contact your email provider.
Email Server Pwd	Email server login password.
Email Use SSL	Default is True. The True setting uses SSL to connect to SMTP service and enables Email Receipt.

Global > GlobalConfiguration > Global**Table 34: Global Global**

SETTING	DESCRIPTION
Auto Billing Proc	Credit Card Processor used for autobilling.
Alert Ticker Critical Color	AlertTicker color code for critical error message.
Customer Tracking	True or False. Default is True. Enable or disable Customer Tracking for local site.
First Day Of Week	Default is Monday. This is the first day of the week.
Fuel Expiration Period	Numeric. Type the amount of days that fuel ticket washes are valid before expiration.
Fuel Update	True or False.
Global Cage Location	Location of Cage where its running including IP and port. For Example, localhost:3212.
Global Error Code Web Site	URL address for Global Error Code Website. Ex. http://www.washnet.com/errorcodes/index.php
AlertTicker Information Color	Alert Ticker color code for informational message.
Item Rounding	Turns price rounding on or off. Select No Round to turn price round off. Select By Five (rounds to the nearest 5), By Ten (rounds to the nearest 10), or By Twenty Five (rounds to the nearest 25).

Table 34: Global Global

PCI Scan IP	PCI Scan IP address.
Show Other Devices On Journal List	True or False. True shows other devices on journal list.
Stack Hand Services	True or False. True allows stacking of Hand Services PLUs.
TimeClockUseFingerprintOnly	True or False. True only allows fingerprint to clock in and clock out. Must have optional fingerprint reader for this setting.
AlertTicker Warning Color	AlertTicker color code for warning message.
WashConnectDefault Login	True or False. (Default is True.) When True, the Default user will be automatically entered in the User ID field with its password entered in the Password field. When set to False, the User ID and Password fields are not populated.
WashOpen24Hours	True or False. (Default is False.) Set to True when wash is a 24 hour wash.

Global > GlobalConfiguration > Hand Services > HandService_AutoStartCarToBay

Table 35: Global Hand Services HandService_AutoStart CarToBay

Global > GlobalConfiguration > InvoiceFleet**Table 36: Global Invoice Fleet**

Field	Description
Email Body	Type email body message.
Email Subject	Type Email subject keywords.

Global > GlobalConfiguration > Reporting**Table 37: Reporting**

Field	Description
Labor Burden	This is the hourly rate plus worker's compensation and payroll taxes overhead. Also known as the Targeted Labor Cost. See "About Performance Indicator" on page 731.
Sales Per Car	Expected Sales per Car.

Global > GlobalConfiguration > Surcharge Config**Table 38: Global Surcharge Config**

Field	Description
Surcharge Amount	This amount is the amount which will be charged as a surcharge whenever credit card is swiped if surcharge is enabled. Also this amount cannot exceed surcharge threshold amount which is by default 10.
Surcharge Amount Type	Amount or Percentage. This field determines whether surcharge stored is in amount or percentage.
Surcharge Enabled	True or False. If set to True all the applications will be charging surcharge on the credit cards.

Global > GlobalConfiguration > Weather**Table 39: Weather**

Field	Description
Temperature Format	Fahrenheit or Celsius. Default format used to display temperatures.
VSPR_WeatherIconURL	VSPR_WeatherIconURLDesc
Weather API Key	This is the Weather API key. Go to http://www.wunderground.com/weather/api and sign up for Free services to receive Weather API Key. This is used to download weather data.
Weather Location	Type a zip code location where weather data will be collected.



See “Create a Weather API Key” on page 689.



See “Setup Weather Settings for the Vehicle Performance Report” on page 691.

Create a Weather API Key

To load weather information, a Weather API key is required. This key will be saved in the Global Configuration Weather settings. Restrictions exist on how frequently calls can be made to the Weather Underground API. As a result, each site will need its own API key. The following steps outline how to register for an API key.

- 1 Go to <http://www.wunderground.com/weather/api>
- 2 Click on the **Sign Up for FREE** button.
- 3 Type an email address, password, and username, and agree to the terms and conditions.
- 4 Click the **Sign Up** button
- 5 The email address used to sign up will receive a confirmation email with a link. Click the link in the email.
- 6 Enter the email address and password used to create the account, and then click the **Login** button.
- 7 Click the **Explore My Options** button
- 8 Select the **Stratus Plan** and the **History Add-on** as a **Developer** account then click the **Purchase Key** button.

- 9 Fill out the form that is displayed regarding the weather data usage then click the **Purchase Key** button.

*All fields are required

Contact Name

Project Contact Email

Project Name

Project Website

Where will the API be used?

Website Mobile Both Other

Will the API be used for commercial use?

Yes No

Will the API be used for manufacturing mobile chip processing?

Yes No

Please give a brief description of how you will be using our API
255 character max length (206 remaining characters...)

To keep track of weather in hourly sales reports.

I understand that usage of the Weather Underground API requires proper attribution

I agree to the [Terms of Service](#)

[Purchase Key >>](#)

Figure 343. Weather Underground API Key form

GET YOUR API KEY

Analytics Key Settings Featured Applications Documentation Forums

Select a Key to Customize 633c4a06c4a0b35f - Demo Sparkle

Success! You have successfully subscribed to billing plan: Stratus Developer with history

Edit API Key

Key ID
633c4a06c4a0b35f

Project Name
Demo

Company Website

Contact Phone

Contact Email

Update >>

Create a New Key

Regenerate API Key

Has your key been compromised? You can generate a new key.

Consequences

- You will need to change your apps to use the new key.
- Your statistics will be reset.
- This action cannot be undone.

I understand the consequences.

Regenerate Key >>

Billing Information

View your billing information:

- Modify
- Upgrade
- Downgrade
- Cancel

View Billing >>

Customize a plan that suits your needs: TOTAL: \$0 USD per month Purchase Key >>

Figure 344. Weather Underground API Key example

- 10 From Get Your API Key, copy the value displayed in the **Key ID** field.
- 11 This is all you need from the Weather Underground. Next you will need to enter this number in *WashConnect*®.




See “Setup Weather Settings for the Vehicle Performance Report” on page 691.

Setup Weather Settings for the Vehicle Performance Report

This setup is to allow the Weather Underground to provide data for the Temperature column found in the Vehicle Performance Report. Follow these steps:

- 1 Login to *WashConnect*® at site.
- 2 From the **System Setup**, select **Devices**, and then **Settings**.
- 3 Select **Global, Device, GlobalConfiguration**, and then **Weather**.



Name	Value	Description
Temperature Format	Fahrenheit	Default format used to display temperatures.
Weather API Key	633c4a06c4a0b35f	This is the Weather Underground API key from http://www.wunderground.com/weather/api used to download weather data.
Weather Location	18083.1.99999	This is the location where weather data will be pulled for.

4 In **Temperature Format**, select either **Fahrenheit** or **Celsius**.

5 In **Weather API Key**, paste the **Weather API Key** value.



See “Create a Weather API Key” on page 689.

6 In **Weather Location**, type the zip code for the site.

7 Click the **Save** button.

The Vehicle Statistical Performance Report is now set up to display hourly temperatures from the Weather Underground.



See “View the Vehicle Statistical Performance Report (VSPR)” on page 315.

Lube > LubeServiceConfiguration**Table 40: Lube Lube Service Configuration**

Field	Description
CheckControllerService Assignment	True or False. (Default value is True)
Lube Service Password	Type a password used to authenticate web service for lube ticket generation. Must be 8 character long, must have 1 upper case, 1 lower case letter, 1 number and 1 special character
Ticket Expiration Period	Type in the amount of days until the Tickets expire.
WashCodeType	LocalWashCode or GlobalWashCode. (Default value is LocalWashCode)

POS > TouchPOSConfiguration > Cage Configuration**Table 41: POS TouchPOSConfiguration Cage Configuration**

Field	Description
Cage Location	Location of Cage on PC i.e. D:\ICS\Cage
Cage PADSS IP	IP Address of Cage where its running.
Cage PADSS Port	TCP/IP port of Cage where its running.
Cage PADSS Timeout	Timeout for POS/Presell to wait for response from Cage PADSS.
Touch POS Listener Port	This is the port which POS uses to listen any messages from cage.

POS> TouchPOSConfiguration > Clubs**Table 42: POS TouchPOSConfiguration Clubs**

Field	Description
AutoRedeemAfterBuyingClub	True or False. Auto redeem after buying club description. If True, Customer can buy club and redeem his wash both in the same transaction.
AutoRedeemAfterRenewingClub	True or False. Auto redeem after renewing club description. If True, customer can renew club and redeem the club wash both in the same transaction.
Clubs Express	True or False.
Sign Up Day Advance Exp. Date	Expired Date or Renewal Date. This field determines whether to advance the expiration date of program membership from the date it was renewed or from the expired date.

POS > TouchPOSConfiguration > Credit Card Settings**Table 43: POS TouchPOSConfiguration Credit Card Settings**

Field	Description
AlwaysAcceptCardSwipe	True or False. If True, always accept card swipe. Allows to swipe Credit/Gift card before the transaction is finalize.

POS > TouchPOSConfiguration > General**Table 44: POS TouchPOSConfiguration General**

Field	Description
AcceptChecksAs Payment	True or False. Default value is true. If set to false, this disables Checks as a payment type.
AllowNonWashServicesPurchasedUsingFleet	True or False.
AllowRefundsFromAnotherSite	True or False.
Auto_Keyboard_Pop_Up	True or False. If set to true POS/Presell will show keyboard automatically on required input fields.
AutoAddPrepaidBalanceIfNegative	True or False.
BackgroundSizeEffectiveWhenSortBy PLU	Select Regular, Medium or Large. Default value is Regular. Prerequisite: SortPOSServices setting must be PLU. When sorting by PLU, all buttons will be the same size.
Customer_Management_Prompt	True or False. If set to False POS/Presell will disable functionality of searching vehicles using License plates.
Default_Selected_Item_While_Redeeming_Program	Select None, LowestPrice, HighestPrice, or Order.
DefaultFocus	None or LicensePlate. (Default value is None.) If set to LicensePlate, POS/Presell will start searching license plates after first two characters are entered.
Default Scan Field	Ticket, PLU, None or Customer. This field represent the default scan field for the barcode scanner of either 'Ticket', 'PLU', or None. When it is set to 'Ticket', the barcode scanner will attempt to find the scanned barcode in the Ticket table. When it is set to 'PLU' the scanned barcode will attempt to be found in the Inventory Item table. When it is set to 'None' the scanned barcode will attempt to be found in the Ticket table and if unsuccessful, then found in the Inventory Item table.
FontSizeForLargeServices	Numeric. Default value is 11. type font size.
FontSizeForMediumServices	Numeric. Default value is 11. Type font size.
FontSizeForRegularServices	Numeric. Default value is 11. Type font size.

Table 44: POS TouchPOSConfiguration General

Field	Description
ForceBaseFromWashProfitCenterWhileChargingFleets	True or False. (Default is True.) If set to False , POS will not force the purchase of an Express base while charging the sale to a fleet account. If set to True , the POS will require a wash base to be purchased when paid by fleet.
Greeter_Management_Prompt	True or False. If set to False, POS/Presell will disable functionality of changing the Greeter on the fly. This setting can prevent Greet from being changed unless WashConnect® is logged out and a new User (Greeter) logs in.
Hide AutoSearch License Plates	True or False.
Hide_Customer_Search	If set to True, POS/Presell will disable functionality of searching customers.
Hide_No_Sale	True or False.
Hide_No_Tax	True or False.
Honor_POS_Profiles_During_FreeRewash	True or False. (Default value is False.) If set to True, this setting allows the site to determine whether the Free Wash/Rewash options should follow the defined Touch POS Profile or not.
SendAllServicesToPoleDisplay	True or False. (Default value is False.) If set to True, POS will show the next service selected but the total will not be seen until you are finalizing the sale. If False, each service appears on one line while the total appears on the bottom.
ShiftSpanMidnight	Default is False. If set to True, this setting will allow shift to span midnight once. If the shift is left open and a second midnight is reached, it will force a closure of the open shift and a start of a new shift.
Show_Car_Count_On_POS	True or False. (Default value is False) If True, POS will display car count information on the POS.
ShowIndividualItemsForUpgradeOnActualReceipt	True or False. If set to True POS will print all upgraded sales items on actual receipt instead of one lump sum upgraded item.
ShowIndividualItemsForUpgradeOnVirtualReceipt	True or False. If set to True POS will display all upgraded sales items on actual receipt instead of one lump sum upgraded item.
ShowPackagesInProfitCenter	True or False. If set to True POS/Presell will be displaying packages to be sellable in the profit center.
ShowPriceIncludingTaxOnService	True or False.

Table 44: POS TouchPOSConfiguration General

Field	Description
SortPOSServices	PLU or SalesItemCategory. Default setting is PLU. When sorting by Sales Item Category, it supports different Text Size, Background Color and Size Buttons for different types of services (base, extra, by profit center).
Ticket_Management_Prompt	True or False. If set to False POS/Presell will disable functionality of entering or searching tickets
TouchCompatible	True or False. Set to True to see the scroll buttons on TouchPOS applications where a touch screen is being used.



See “About POS and Presell Service Buttons” on page 579.

POS > TouchPOSConfiguration > Hide POS Buttons

Table 45: POS TouchPOSConfiguration Hide POS Buttons

Field	Description
Disable Payout	True or False. Default is False. If true POS will disable the Payout button.
DisableRefund	True or False. Default is False. If true POS will disable the Refund button.
DisableRFID	True or False. Default is False. If true POS will disable the RFID button.
DisableROA	True or False. Default is False. If True POS will disable the ROA button.
DisableStack	True or False. Default is False. If true POS will disable the Stack button.
Disable TicketGen	True or False. Default is False. If true POS will disable the TicketGen button.
DisableVoid	True or False. Default is False. If true POS will disable the Void button.
Hide_No_Sale	True or False. Default is False.
Hide_No_Tax	True or False. Default is False.

POS > TouchPOSConfiguration > LayoutDirection

Table 46: POS TouchConfiguration LayoutDirection

Field	Description
LayoutDirection	RightHand or LeftHand. Select the side of the TouchPOS, you would like to view the virtual receipts and videos to show.

POS > TouchPOSConfiguration > ProfitCenterDescriptionColor**Table 47: ProfitCenterDescriptionColor**

Field	Description
BaseWashServiceBackGroundColor	Select color for the Base Wash Service Background on Touch POS.
BaseWashServiceDisplayColor	Select color for the Base Wash Service Display on Touch POS.
BaseWashServicePLUColor	Select color for the Base Wash Service PLU on Touch POS.
BaseWashServicePriceColor	Select color for the Base Wash Service Price on Touch POS.
ClubBackgroundColor	Select color for the Club Background on Touch POS.
ClubDisplayColor	Select color for the Club Display on Touch POS.
ClubPLUColor	Select color for the Club PLU on Touch POS.
ClubPriceColor	Select color for the Club Price on Touch POS.
DiscountBackgroundColor	Select color for the Discount Background on Touch POS.
DiscountBackgroundColor	Select color for the Discount Background on Touch POS.
DiscountDisplayColor	Select color for the Discount Display on Touch POS.
DiscountPLUColor	Select color for the Discount PLU on Touch POS.
ExtraWashServiceBackGroundColor	Select color for the Extra Wash Service Background on Touch POS.
ExtraWashServiceDisplayColor	Select color for the Extra Wash Service Display on Touch POS.
ExtraWashServicePLUColor	Select color for the Extra Wash Service PLU on Touch POS.
ExtraWashServicePriceColor	Select color for the Extra Wash Service Price on Touch POS.
GiftCardLiabilityBackgroundColor	Select color for the Gift Card Liability Background on Touch POS.
GiftCardLiabilityDisplayColor	Select color for the Gift Card Liability Display on Touch POS.
GiftCardLiabilityPLUColor	Select color for the Gift Card Liability PLU on Touch POS.
GiftCardLiabilityPriceColor	Select color for the Gift Card Liability Price on Touch POS.
InventoryItemBackgroundColor	Select color for the Inventory Item Background on Touch POS.

Table 47: ProfitCenterDescriptionColor

Field	Description
InventoryItemDisplayColor	Select color for the Inventory Item Display on Touch POS.
InventoryItemPLUColor	Select color for the Inventory Item PLU on Touch POS.
InventoryItemPriceColor	Select color for the Inventory Item Price on Touch POS.
MiscellaneousBackGroundColor	Select color for the Miscellaneous Background on Touch POS.
MiscellaneousDisplayColor	Select color for the Miscellaneous Display on Touch POS.
MiscellaneousPLUColor	Select color for the Miscellaneous PLU on Touch POS.
MiscellaneousPriceColor	Select color for the Miscellaneous Price on Touch POS.
PackageBackGroundColor	Select color for the Package Background on Touch POS.
PackageDisplayColor	Select color for the Package Display on Touch POS.
PackagePLUColor	Select color for the Package PLU on Touch POS.
PackagePriceColor	Select color for the Package Price on Touch POS.
RetractBackGroundColor	Select color for the on Touch POS.
RetractDisplayColor	Select color for the Retract Display on Touch POS.
RetractPLUColor	Select color for the Retract PLU on Touch POS.
RetractPriceColor	Select color for the Retract Price on Touch POS.

POS > TouchPOSConfiguration > Prompt Settings**Table 48: Prompt Settings**

Field	Description
AssignExistingCustomerInformationPrompt	If set to true POS will prompt before assigning existing customer while purchasing Clubs.
Club Customer Information Prompt	POS will be prompting Customer form to fill up after purchasing a club.
Confirm Payout Prompt	If set to true POS will prompt every time for confirmation while doing Payout.
Confirm Redeem Prompt	If set to true POS will prompt every time before validating a customer.
ConfirmRewashToStackWithout Gate	None, SkipGateWithNoConfirmation, or SkipGateWithConfirmation. (Default value is None.) This setting determines whether a prompt message will be displayed when adding a Free Wash to the Stack without gate. Depending on the configuration option, the POS will stack a rewash car with or without requesting the gate token. The car will be given the status of PendingToStack.
Freewash Customer Information Prompt	If set to true POS will prompt customer to enter customer name, phone number and reason for free wash.
Prompt Confirmation	True or False.
Refunds Customer Information Prompt	If set to true POS will prompt customer to enter information before refunding a transaction.
Rewash Customer Information Prompt	If set to true POS will prompt customer to enter customer name, phone number and reason for re wash.

POS > TouchPOSConfiguration > Quick Money Configuration**Table 49: Quick Money Configuration**

Field	Description
Quick_Money_1	Numeric. Default value is 1 for quick money button.
Quick_Money_2	Numeric. Default value is 5 for quick money button.
Quick_Money_3	Numeric. Default value is 10 for quick money button.
Quick_Money_4	Numeric. Default value is 20 for quick money button.

POS > TouchPOSConfiguration > ReceiptFooter**Table 50: ReceiptFooter**

Field	Description
Receipt Footer 0 to 5	Text that appears on the receipt footer. Six lines are available. Each line is limited to 50 characters.

POS > TouchPOSConfiguration > ReceiptHeader**Table 51: ReceiptHeader**

Field	Description
Receipt Footer 0 to 5	Text that appears on the receipt footer. Six lines are available. Each line is limited to 50 characters.

POS > TouchPOSConfiguration > ReceiptToPrint**Table 52: ReceiptToPrint**

Field	Description
EmailWash BookReceipt	Default is True. If customer has a previously established email address in <i>WashConnect</i> ®, when the customer purchases the wash Book, a receipt will automatically be sent to the customer.
HideChangeOnReceiptIfZero	True or False. (Default value is true) If true POS will print Tax information while closing the receipt.
HideSubTotalNTaxInfoForInvoicedCustomers	True or False. (Default value is false) If set to True, hide subtotal and tax information for invoiced fleet customers.
Merchant Copy For Detail Ticket	If set to True, POS will print a duplicate detail receipt for merchant.
Number Of Cash Receipt To Print	This determines the number of receipts POS will print while doing a cash transaction.
Number Of Clubs Receipt To Print	This determines the number of receipts POS will print while doing a club transaction.
Number Of Credit Receipt To Print	This determines the number of receipts POS will print while doing a credit/gift transaction.
NumberOfPayoutReceiptToPrint	
NumberOfRefundReceiptToPrint	
NumberOfVoidReceiptToPrint	
PrintTaxDetailsOnReceipt	True or False. (Default value is False.) If true, POS will print tax information while closing the receipt.
Print All Valid Wash Books on Receipts	Default is True. If set to true POS will print all the customer valid wash books on the receipt.
Print Barcode Receipt	If set to true, POS will print barcode of the wash code on the receipt.
Print Customer Code on Book Redemption	True or False. If set to true POS will print barcode of the customer card on the receipt while redeeming a wash book

Table 52: ReceiptToPrint

Field	Description
Print Detail Receipt	If set to true POS will print a detail receipt for detail service bought.
Print No Sale Receipt	If set to true POS will print a no sale receipt.
Print Vacuum Receipt	
Print Wash Book Barcode Receipt	Default is True. If set to True, POS will print barcode of the customer card on the receipt while purchasing Wash book.

POS > TouchPOSConfiguration > Refunds Using Credit Card**Table 53: Refunds Using Credit Card**

Field	Description
Refund On Credit Card	If set to True, POS will be doing a blind credit on credit cards while doing refunds.

POS > TouchPOSConfiguration > Report Server**Table 54: POS TouchPOSConfiguration Report Server**

Field	Description
Report Server Folder	Name of the folder in reporting service from where report runs.
Report Server URL	Reporting service URL.
Report Server Domain	Reporting service domain name
Report Server User Name	Reporting server login user name.
Report Server User Pwd	Reporting server login password.

POS > TouchPOSConfiguration > SoundSettings**Table 55: POS TouchPOSConfiguration SoundSettings**

Field	Description
Enable Beep	True or False.

POS > TouchPOSConfiguration > Stack Management**Table 56: Stack Management**

Field	Description
Fire Gate Remotely	True or False. If set to True, POS will be firing the gate remotely.
Gate Control Device ID	TouchPOS or none. This is the device ID of the StackController where physical gate exists.
GateRelay	Relay 1 - 9. Select a relay or None.
MasterGateControlPort	
MasterStackToDeviceIP	
MasterStackToDevicePort	
StackToDeviceID	TouchPOS or None. This field determines the device of the Stack controller where actual stacking happens.
TouchPOSListenerPortForSNC	This is the port which POS uses to listen any messages from stack controller.

POS > TouchPOSConfiguration > Stacking**Table 57: Stacking**

Field	Description
DisplayNameForTunnel1	Display Name for Tunnel 1.
DisplayNameForTunnel2	Display Name for Tunnel 2.
Gate Busy Yes No Timeout	This is the time (in seconds) POS/Presell will wait for customer input if gate is busy. If no input is provided POS/Presell will continue to wait for gate.
Gate Control	TouchPOS will wait for Gate to be Granted from StackNControl
Gate Control Without Token	If set to True, POS/Presell will wait for gate before posting to stack.
Gate Full Wait Timeout	This is the time (in seconds) POS/Presell will wait for customer input if gate is busy.
RFID Token	TouchPOS will wait for Token to be Granted from StackNControl.
Stack Full Wait Timeout	This is the time (in seconds) POS/Presell will wait for a place in stack if stack is full.
Stack Full Yes No Timeout	This is the time (in seconds) POS/Presell will wait for customer input if stack is full. If no input is provided POS/Presell will continue to wait for a place in stack.

Table 57: Stacking

Field	Description
Stacking	Set to True to enable. If True, TouchPOS will stack Cars after Transaction is done.
Stack To Tunnel	Controller 1, Controller 2, or StackToEither. This designates to which tunnel the POS or Presell will stack. Default is set to 1.
View Multiple Tunnel	True or False.

POS > TouchPOSConfiguration > Tickets**Table 58: Tickets**

Field	Description
Detail Ticket Expiration Period	
Ticket Expiration Period	
Vacuum_Ticket_Expiration_Period	

POS > TouchPOSConfiguration > Wash Book**Table 59: Wash Book**

Field	Description
PrintWashBookBarcodeReceipt	Default True. This allows wash book barcode to print on wash receipt.
PrintAllValidWashBooksOnReceipts	Default True. This allows all valid wash books to print on wash receipt.
EmailWashBookReceipt	Default True. This allows email of wash book receipt upon purchase of wash book if customer's email address has been added previously.
PrintCustomerCodeOnBookRedemption	Default True. This allows the customer card barcode to print on wash receipts of Wash Book redemptions.

POS > WashConnectConfiguration > Menu**Table 60: Menu**

Field	Description
Show Menu Search	True or False. Default is True. If True, allows a search within the WashConnect main menu.

Touch ES

The Touch ES is the interactive Entrance Management Sign. This is an optional and additional piece of equipment sold by Innovative Control Systems. This sign displays at the entrance of your tunnel to display the customer's purchased services. On the touch screen, you can also add additional services for customers, and set retracts easily. You can also adjust the stack on the touch screen as well as remove a car that exits before entering the tunnel. Contact Sales for more information.



See "POS > TouchESConfiguration > Config" on page 707.

POS > TouchESConfiguration > Config**Table 61: Config**

Field	Description
ListenerPort	
StackNControl_IPAddress	
StackNControl_Port	
StackNControl_DeviceID	The roller buttons will no longer appear on the TouchES if the controller device does not support it. To get the roller buttons to appear, enter a Device ID.

POS > TouchESConfiguration > Configuration**Table 62: Configuration**

Field	Description
AutoLaunchWashConnect	
WashConnectLocation	

POS > TouchESConfiguration > Display**Table 63: Display**

Field	Description
DriveAheadVideo	
EntranceDelay	
EntranceVideo	
IdleDelay	
IdleImage	
LogoImage	
ThankYou Delay	
Service Image Path	Default location is assets \ services. Define the path where the service list graphics are stored.
ThankYouVideo	

POS > TouchESConfiguration > Roller**Table 64: Roller**

Field	Description
Roller_ButtonType	

POS > ETLConfiguration > Logging**Table 65: Logging**

Field	Description
Log Purge Threshold	

TNC > Component Port > UpCounter**Table 66: UpCounter**

Field	Description
XCeptor - Coin Acceptor	
Mars - Bill Acceptor	
Card Reader	

About Controller Services**Controller Services****HELP - What can I do here?****Owners and Managers:**

- Assign an output or controller service for a Sales Item PLU that controls the relay for the tunnel equipment.
- Edit a Controller Service.
- The Controller Services list is the same list that is used when adding a new Sales Item from Goods & Services -> Sales Items.



See "Assign an Output or Controller Service" on page 708.

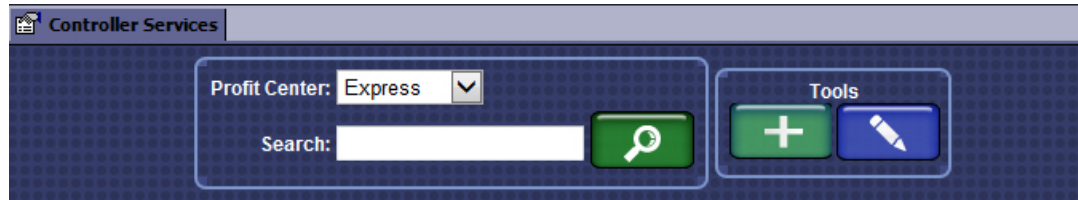
Assign an Output or Controller Service

You can assign an output or controller service for a Sales Item (PLU) that controls the relay(s) for the tunnel equipment.

NOTE: The TunnelMaster Jr. and the TunnelMaster WBC controllers can configure up to 32 controller services. Each Controller Service may fire one or more

relays in the tunnel based on the configuration of the Controller Service setup in TunnelMaster Jr or TunnelMaster WBC controller software.

- 1 From the **System Setup** menu, select **Devices** and then **Controller Services**.
- 2 In **Profit Center**, select a Profit Center.



Controller Services			
PLU #	Name	Price	Type
1	Base Exterior Car Wash	\$0.00	Base
2	Deluxe Exterior Prot	\$0.00	Base
3	Exterior Protection Package	\$0.00	Base
4	Extra Exterior Protection	\$0.00	Extra
5	Extra Full Service	\$0.00	Extra
6	Extra The Ultimate	\$0.00	Extra
7	Exterior Prot UPG	\$0.00	Extra
8	Extra Hand Finished Tire Shine	\$0.00	Extra
9	Pick Up Dryer Retract	\$0.00	Retract
10	Extra Online Tire Shine	\$0.00	Extra

Figure 345. Controller Services


- 3 Click the **Add Account**  button.
- 4 In **PLU**, type a new PLU.
- 5 In **Name**, type a new Name.
- 6 In **Price**, type a price.
- 7 In **Type**, select a type. Base, Extra or Retract.



Figure 346. Controller Service Add or Edit dialog box

NOTE: You cannot delete Controller Services.

- 8 Click the **Save**  button.

- 9 The new controller service will immediately be available in the Assign Controller Services for setup of a Sales Item.

NOTE: This is where you can create the list that appears when assigning controller services to a Sales Item (PLU).



See “About Controller Services” on page 708.

About TouchNClean Outputs

TouchNClean Outputs

HELP - What can I do here?

Owners and Managers:

- A TouchNClean Service is a time package that can be sold at the TouchNClean device.
- Assign an output or controller service for a Sales Item PLU that controls the relay for the tunnel equipment.
- Edit a Controller Service.
- The Controller Services list is the same list that is used when adding a new Sales Item from Goods & Services menu.



“Add a TouchNClean Service with Output”



“Edit a TouchNClean Output”



“Delete a TouchNClean Output”



“Sorting TouchNClean Outputs”



“TouchNClean Dependency”

Add a TouchNClean Service with Output

A **TouchNClean Service** is a time package that can be sold at the TouchNClean device. Outputs control the tunnel equipment for a TNC service.

To add a service with an output, follow these steps:

- 1 From the **System Setup** menu, select **Devices**, and then click **TouchNClean Outputs**. The **TouchNClean Outputs** tab appears.

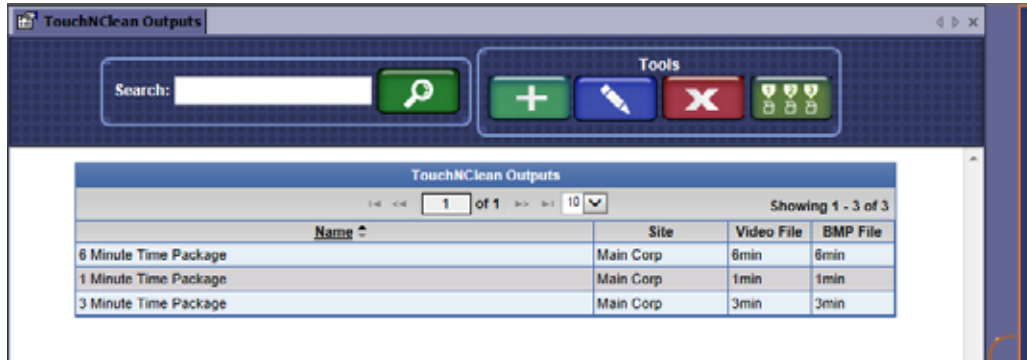


Figure 347. Add TNC Service

- 2 Click the **Add**  button. The **TouchNClean Output** dialog box appears.

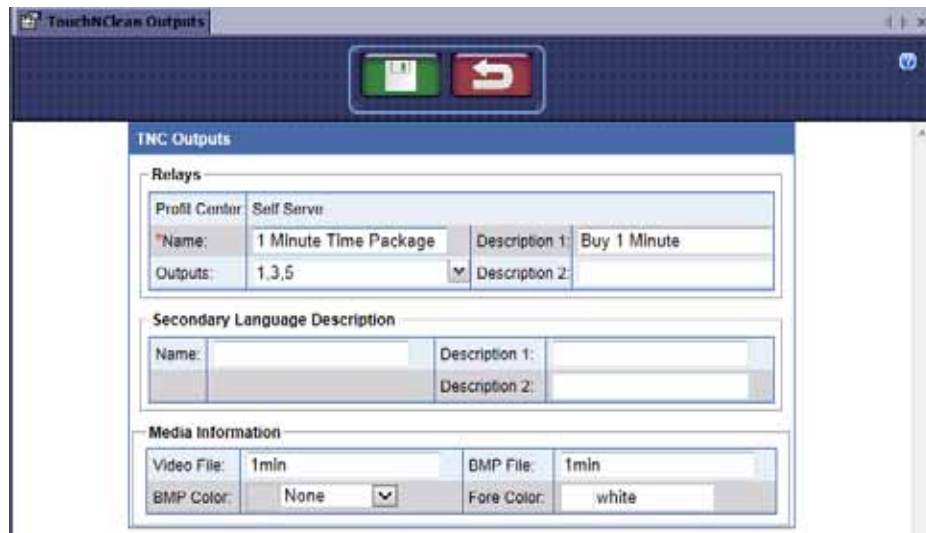


Figure 348. Add TouchNClean Output Dialog Box

- 3 In the **Profit Center** box, Self Serve is automatically selected.
- 4 In the **Name** box, type a name for the service (i.e., 1 Minute Time package).
- 5 In the **Outputs** box, click the drop-down arrow.
- 6 Click to select the **Output(s)** check boxes to assign to a TouchNClean Service.

- 7 Optional: This is where you can enter the text to appear on the button for an TNC device. This is also where you can create secondary language messages.
- 8 Type or select information in the remaining boxes.
- 9 Click **Save**.
The TNC Output is saved.

 *"Edit a TouchNClean Output"*

 *"Delete a TouchNClean Output"*

 *"Sorting TouchNClean Outputs"*

Edit a TouchNClean Output

To edit a TouchNClean Output, follow these steps:

- 1 From the **Configuration** menu, select **Goods & Services**, and then click **TouchNClean Outputs**.
The **TouchNClean Outputs** tab appears.

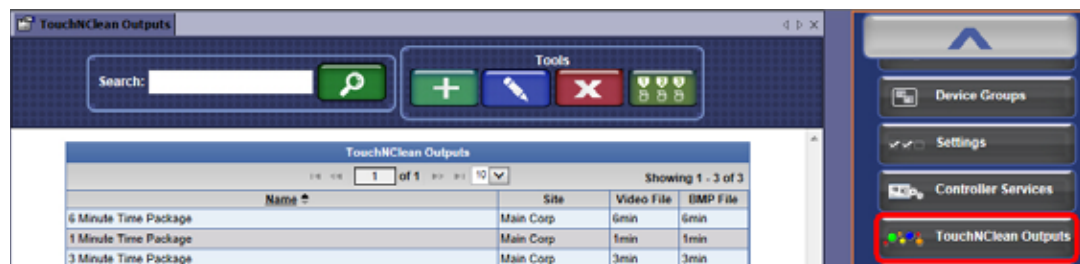



Figure 349. Edit TouchNClean Output

- 2 Select a service, and then click the **Edit**  button.
The **TouchNClean Outputs** dialog box appears.



TNC Outputs			
Relays			
Profit Center:	Self Serve		
Name:	1 Minute Time Package	Description 1:	Buy 1 Minute
Outputs:	1,3,5	Description 2:	
Secondary Language Description			
Name:		Description 1:	
		Description 2:	
Media Information			
Video File:	1min	BMP File:	1min
BMP Color:	None	Fore Color:	white

Figure 350. Edit TNC Outputs Dialog Box

- 3** In the **Name** box, edit the name of the service.
- 4** In the **Outputs** box, edit the Outputs selected.
- 5** Optional: Type or select information to edit the remaining boxes.
- 6** Click the **Save** button.
The edited TNC service is saved.



“Add a TouchNClean Service with Output”



“Delete a TouchNClean Output”



“Sorting TouchNClean Outputs”

Delete a TouchNClean Output

To delete a TNC service, follow these steps:

- 1** From the **Configuration** menu, select **Goods & Services**, and then click **TouchNClean Outputs**.
The **TNC Output** tab appears.


- Select a TNC output, and then click the **Delete**  button. A warning appears, Are you sure you wish to terminate this record? Please use caution, this action cannot be reversed.



Figure 351. TouchNClean Output Termination Warning Message

- Click **Yes**.
The TNC service is deleted.

You can add services to TouchNClean devices.

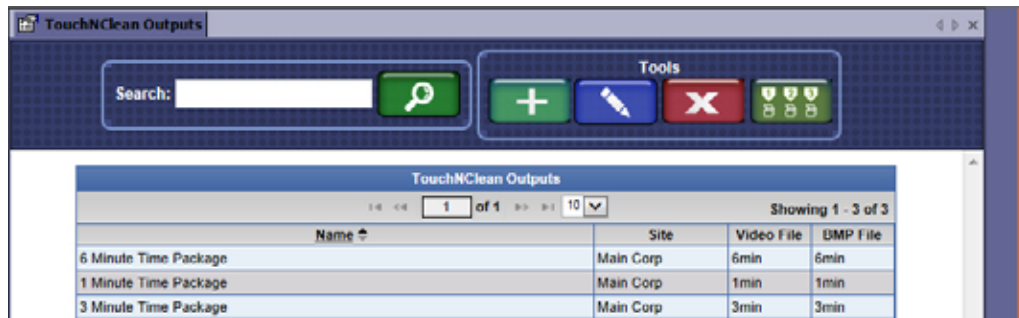


Figure 352. TNC Service

 *"Add a TouchNClean Service with Output"*

 *"Delete a TouchNClean Output"*

 *"Sorting TouchNClean Outputs"*

Sorting TouchNClean Outputs

You can sort the **TNC Service** list.

- From the **System Setup** menu, click to select **Devices**, and then click **TouchNClean Outputs**.
The **TouchNClean** tab appears.
- From the **TouchNClean Outputs** list, select the underlined column header **Name**.

The list is sorted on that column in ascending order.

- 3 Click to select the column header again.
The list is sorted in descending order.

 *"Add a TouchNClean Service with Output"*

 *"Edit a TouchNClean Output"*

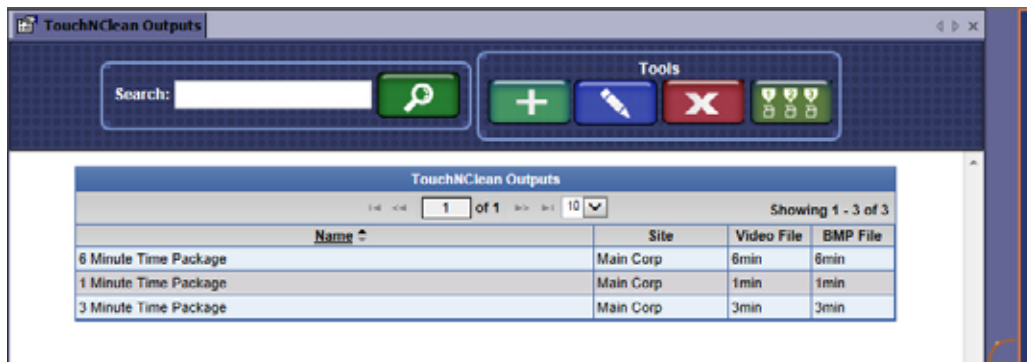
 *"Delete a TouchNClean Output"*

 *"Sorting TouchNClean Outputs"*

TouchNClean Dependency

Dependency allows you to require a specific order of wash services for the TouchN-Clean. For example, dependency to use the foaming brush is based on first using the high pressure rinse.

- 1 From the **System Setup** menu, click to select **Devices**, and then select **TouchNClean Outputs**.
The **TouchNClean Outputs** tab appears.



- 2 Select a time package from the TouchNClean Outputs.
- 3 Click the **Dependency**  button.

The TouchNClean Wash Service Dependency dialog box appears.

TouchNClean Wash Service Dependency	
Service	1 Minute Time Package
PLU	
Profit Center	Self Serve

Depend on
 --None-- AND --None-- AND --None--

Figure 353. TouchNClean Wash Service Dependency

- 4 In Depend On, select High Pressure Rinse or the service you need the customer to complete first.
- 5 Click the **Save** button.
The FoamingBrushWarning.avi will play at the TouchNClean.



"Add a TouchNClean Service with Output"



"Delete a TouchNClean Output"



"Sorting TouchNClean Outputs"



"About TouchNClean Outputs"

About My Devices

My Devices

HELP - What can I do here?

Owners and Managers:

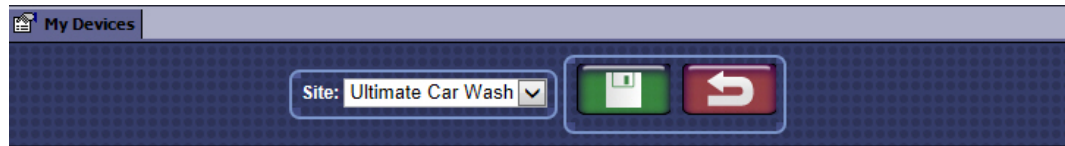
- Rename your devices.
- Customize naming so it makes sense to your wash.
- For example, TNC Bay 1 can be renamed TNC Bay 1 Closest to Tunnel.
- Select if device Uses Safe or not.

See “Rename a Device” on page 717.

Rename a Device

You rename the device to a name that suits your car wash best. To rename a device, follow these steps:

- 1 From the **System Setup** menu, select **Devices**, and then click **My Devices**. The **Rename Devices** tab appears.
- 2 From Site, select a site from the drop down list.
- 3 In the Site Device List, locate the device and then click in the Device Name Column. The cursor appears.
- 4 In **Device Name**, type a new name for the device.
- 5 In **Use Safe**, click to select **Use Safe** check box if the device is using the safe.
- 6 Click the **Save** button. The device name is saved and appears in the Site Device List.



Site Device List					
ID ↕	IP Address	Device	Profit Center	Device Name	Use Safe
0	localhost	Global		Site Main DB	
1011	localhost	Autosentry	Cashier	InBay 1	<input type="checkbox"/>
1012		Autosentry		AS-Outside Lane	<input type="checkbox"/>
2021	localhost	TNC	TNC TNC TNC Gift Cards	TNC Bay 1	<input type="checkbox"/>
2022	localhost	TNC	TNC TNC TNC Gift Cards	TNC Bay 2	<input type="checkbox"/>
2023	localhost	TNC	TNC TNC TNC Gift Cards	TNC Bay 3	<input type="checkbox"/>
2024	localhost	TNC	TNC TNC TNC Gift Cards	TNC Bay 4	<input type="checkbox"/>
2025	localhost	TNC	TNC TNC TNC Gift Cards	TNC Bay 5	<input type="checkbox"/>
4001		Controller		WBC	
6001		POS		Lobby POS	<input type="checkbox"/>
6002		POS		HS POS	<input type="checkbox"/>
13112	localhost	Autosentry	Club Tunnel AutoSentry AutoSentry AutoSentry AutoSentry	Station1 - POS	<input type="checkbox"/>

Figure 354. Site Device List

Assign Denominations

Assign Denominations

HELP - What can I do here?

Managers:

- Assign a currency value for a channel of the coin hopper.
- Assign a token value for a channel.



See "Add Currency Value for the Coin Acceptor" on page 719.

Add Currency Value for the Coin Acceptor

To assign a currency value for a channel of the coin acceptor, follow these steps:

- From the **System Setup** menu, select **Devices**, and then select **Assign Denominations**.

The **Assign Denominations** tab appears.



Figure 355. Assign Denominations Tab

- In the **Device** box, select a device.
- In the **Component** box, select a coin acceptor component.

- Click the **Add** button.
The **Assign Denominations** dialog box appears.

Denomination	Channel
25¢ (Quarter)	1
\$1.00 (Coin)	2
25¢ (Quarter) <input type="text"/>	<input type="text"/>

Figure 356. Assign Denominations Dialog Box

- 5 The last line in the dialog box is editable. In **Denomination** box, from the drop-down list, select a denomination:
 - 25¢ (Quarter)
 - 10¢ (Dime)
 - 5¢ (Nickel)
 - \$1.00 (Coin)
 - 1¢ (Penny)
 - US Once Dollar Token Coin
 - Some Token

NOTE: Items that appear in the **Denominations** list are defined with separate commands. Token denominations are defined with the **Define Token** command.

- 6 In the **Channel** box, type a channel number.

NOTE: Coin acceptor channels must be programmed separately at the coin acceptor. Refer to the coin acceptor documentation or contact ICS Support for more information.

- 7 Click **Save** when you are finished.
The denomination is assigned to a channel on the coin acceptor.



See “Assign Denominations” on page 719.

About Manage Profit Centers

Profit Centers

HELP - What can I do here?

High Level Manager:

- A profit center is a part of the car wash that can be treated as a distinct area where revenues and expenses are determined separately and profitability is measured.
- This feature can affect all sites within the organizational layout.
- Compare the profit centers in reports to help determine which areas of the car wash are operating efficiently, and which ones are lagging in terms of sales objectives and labor performance.
- Profit Centers typically roll up to Facility Totals.



"Add Profit Center and Description"



"Edit a Profit Center and Description"



"Delete a Profit Center and Description"



"Disable a Profit Center and Description"



"Assign Devices to a Profit Center"

Add Profit Center and Description

To add a profit center description, follow these steps:

- 1 From the **System Setup** menu, select **Profit Centers**, and then select **Manage Profit Centers**.

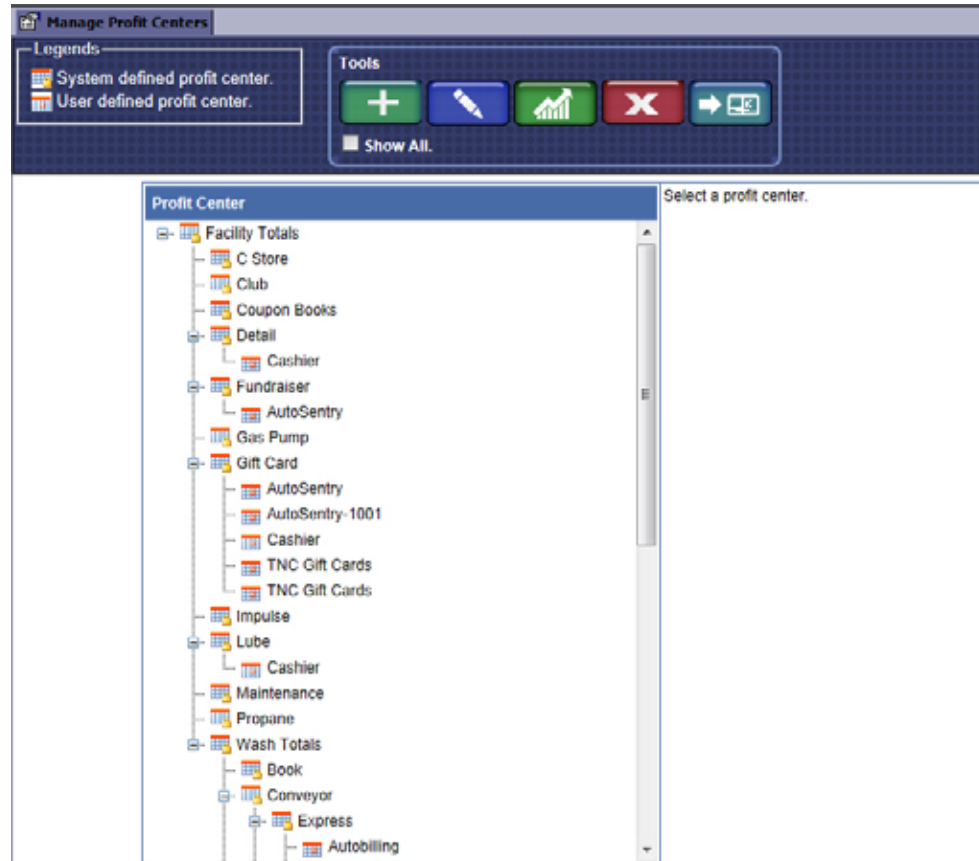



Figure 357. Profit Center Descriptions

- 2 In **Profit Center**, click to select a Profit Center parent for the new Profit Center.
- 3 Click the **Add**  button.
The **Profit Center Description** dialog box appears.

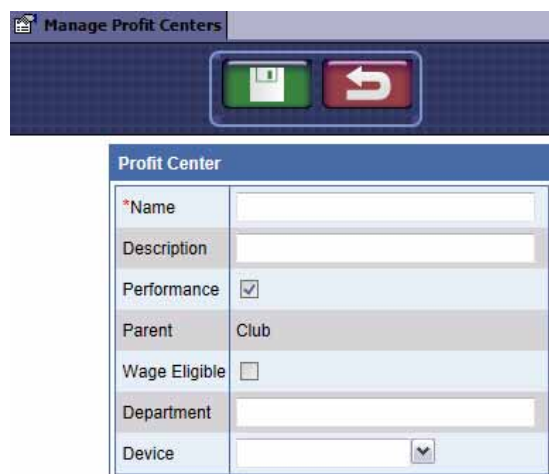


Figure 358. Profit Center Description Dialog Box

- 4 In the **Name** box, type a name for the profit center.
- 5 In the **Description** box, type a description for the profit center.
- 6 In **Performance**, click to select the Performance check-box if you want to collect performance statistics for the profit center.
- 7 In **Parent**, the Parent Profit Center will be displayed.
- 8 In **Wage Eligible**, click to select the Wage Eligible check box.
- 9 In **Department**, type a department name.
- 10 In **Device**, click to select the drop-down list, and then select one or more devices that report transactions and performance statistics to the profit center.
- 11 Click the **Save** button when you are finished.
The profit center is saved.



“Edit a Profit Center and Description”



“Delete a Profit Center and Description”



“Disable a Profit Center and Description”



“Assign Devices to a Profit Center”



“Add Profit Center and Description”

Edit a Profit Center and Description

To edit a user defined profit center description, follow these steps:

- 1 From the **System Setup** menu, select **Profit Centers**, and then click **Manage Profit Centers**.
The **Profit Center** dialog box appears.

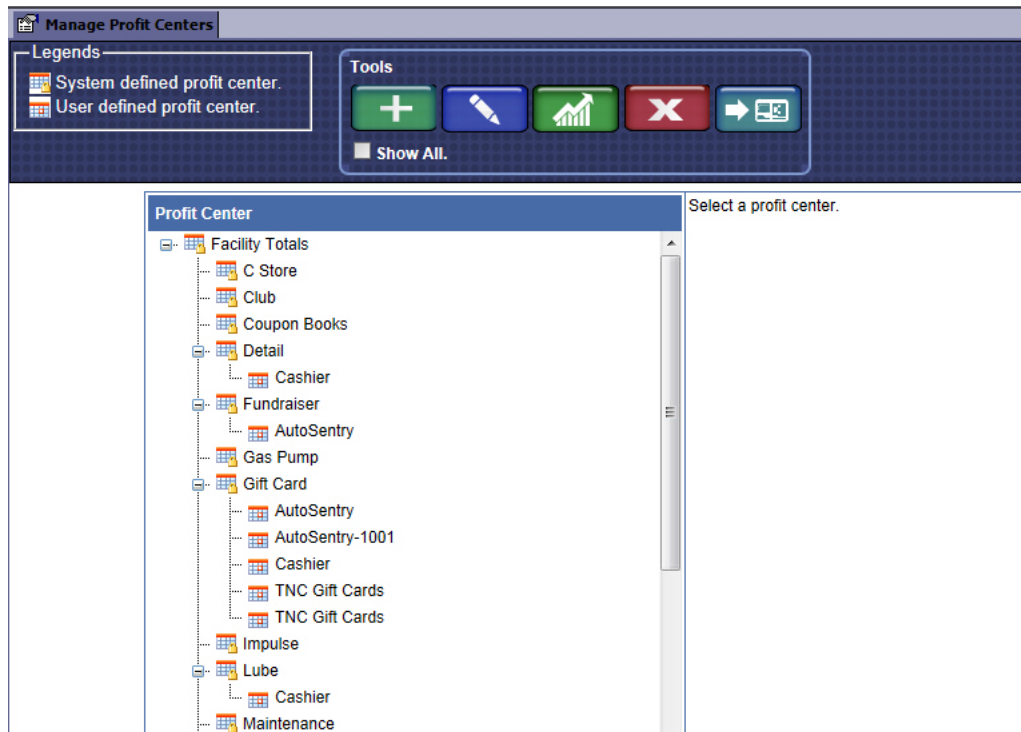


Figure 359. Profit Center Description


- 2 Click to select an user defined profit center in the list, and then click the **Edit**  button.
The **Profit Center** dialog box appears.



Figure 360. Edit a Profit Center Description

- 3 In the **Name** box, edit the name of the profit center.
- 4 Click **Save** when you are finished.
The profit center is edited.



"Add Profit Center and Description"

 *"Assign Devices to a Profit Center"*

 *"Delete a Profit Center and Description"*

 *"Disable a Profit Center and Description"*

Delete a Profit Center and Description

WARNING: When a Profit Center is terminated, WashConnect® will automatically remove the default association to avoid having two default profit centers. If a profit center is terminated, the users in which are defaulted to that profit center will have this association removed.

To delete a profit center description, follow these steps:

- 1 From the **System Setup** menu, select **Profit Centers**, and then click **Description**. The **Description** tab appears.

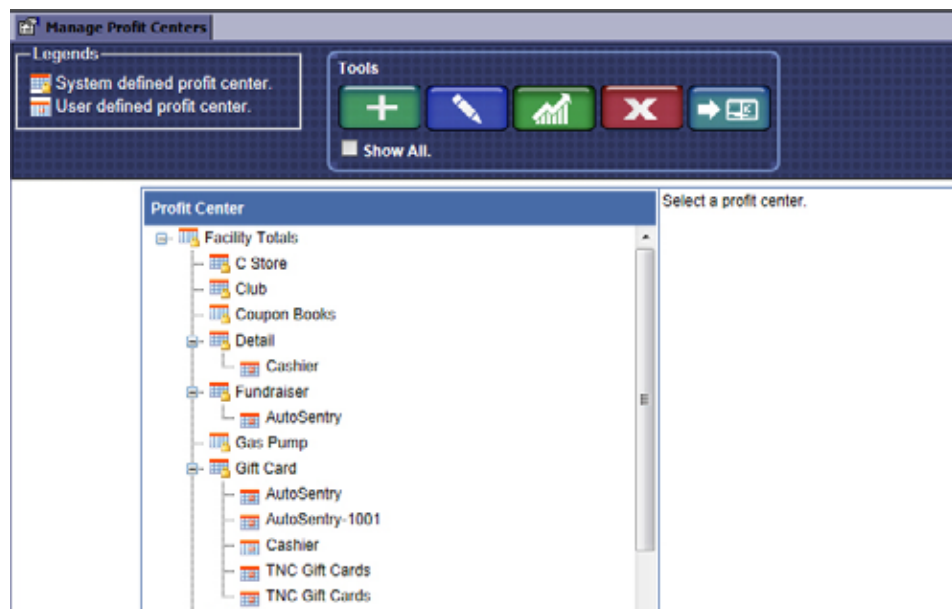



Figure 361. Profit Center Description

- 2 Select an item in the list, and then click the **Delete**  button. A warning appears.
- 3 Click **OK**. The profit center description is deleted.

 *"Add Profit Center and Description"*

 *"Edit a Profit Center and Description"*

 *"Assign Devices to a Profit Center"*

 *"Disable a Profit Center and Description"*

Disable a Profit Center and Description

To disable a profit center description, follow these steps:

- 1 From the **System Setup** menu, select **Profit Centers**, and then click **Manage Profit Center**.

The **Manage Profit Center** tab appears.

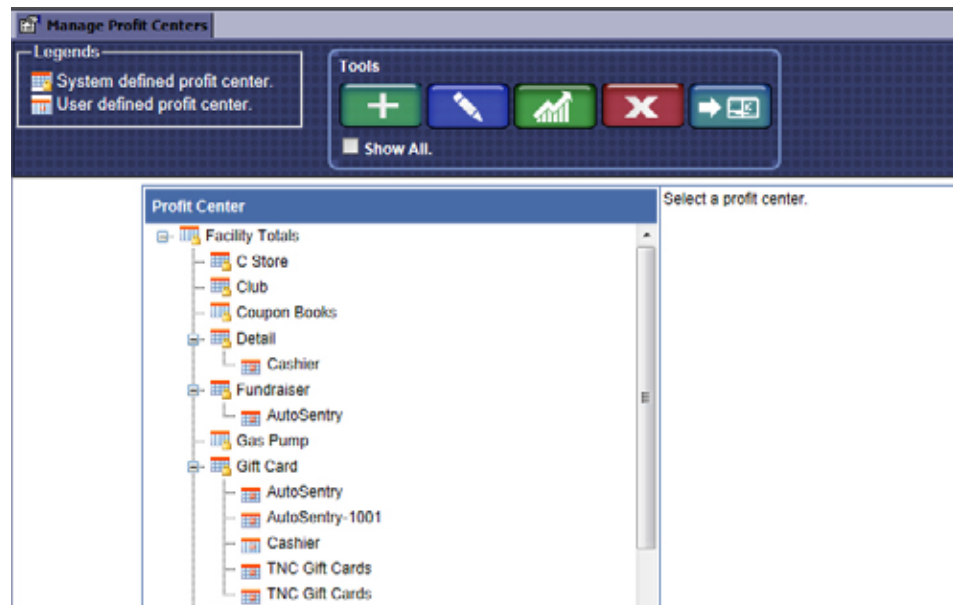



Figure 362. Manage Profit Center Description

- 2 Click to select the Profit Center.
- 3 Click the **Disable**  button.
The **Are you sure you want to disable selected profit center?** message appears.
- 4 Click **Yes** to disable the Profit Center.
The profit center is disabled but not deleted.
The profit center description disappears from the list.
- 5 Click to select the **Show All** check box to see all the Profit Centers including the disabled profit centers.
- 6 Click to select a Profit Center.

- 7 Click the **Enable** button.
The message **Are you sure you want to enable selected profit center?** appears.
- 8 Click the **Yes** button.
The profit center is enabled and appears in the Profit Center list.

 *"Add Profit Center and Description"*

 *"Edit a Profit Center and Description"*

 *"Assign Devices to a Profit Center"*

 *"Delete a Profit Center and Description"*

Assign Devices to a Profit Center

To assign devices to a system defined profit center, follow these steps:


- 1 From the **System Setup** menu, select **Profit Centers**, and then click **Manage Profit Center**.
The **Manage Profit Center** tab appears.
- 2 Select a profit center in the list, and then click the **Assign Devices**  button.
The **Profit Center** dialog box appears.



Figure 363. Profit Center Dialog Assign Device Dialog Box

- 3 In the **Device Name** list, select one or more devices.
- 4 Click **Save**.
The device is assigned to the profit center.

 *"Add Profit Center and Description"*



"Assign Devices to a Profit Center"



"Edit a Profit Center and Description"



"Delete a Profit Center and Description"



"Disable a Profit Center and Description"

Profit Center Order

Profit Center Order

HELP - What can I do here?

Managers:

- **Order your Profit Centers as they should appear in a Profit Center listing.**



See "Reorder your list of Profit Centers" on page 729.



See "Assign Devices to a Profit Center" on page 727.

Reorder your list of Profit Centers

- 1 From the **System Setup** menu, select **Profit Centers** and then select **Profit Center Order**.



Figure 364. Profit Center Order tab example

- 2 Click to select the **Profit Center**.
- 3 Click the Reorder buttons **Move Up**  button or **Move Down**  button to organize the Profit Center list.
- 4 Click the **Save** button.
The Profit Center list is reordered.



See "Assign Devices to a Profit Center" on page 727.



See "Profit Center Order" on page 728.



See "About Manage Profit Centers" on page 721.

Performance Indicator

Performance Indicator

HELP - What can I do here?

Managers:

- Set your key performance indicators for each profit center.
- View the Performance Gauge Report which is based off your Performance Indicator settings.



See "Add a Performance Indicator" on page 730.



See "About Performance Indicator" on page 731.



See "About Manage Profit Centers" on page 721.



See "Profit Center Order" on page 728.

Add a Performance Indicator

You can define the number of employees for different levels of activity in each profit center by following these steps:

- 1 From the **System Setup** menu, select **Profit Centers** and then select **Performance Indicator**.
- 2 Select the **Site** location from the drop-down list.

- 3 Click the **Add**  button.



Figure 365. Performance Indicator Add Example

- 4 Select a **Profit Center** from the drop-down list.
- 5 In **Sales Per Car**, type targeted dollar amount.
- 6 In **Targeted Labor Cost**, type targeted dollar amount.
- 7 Click the **Save** button.
View these Key Performance Indicators from the Performance Gauge and Vehicle Statistical Performance Report.



See “About the Performance Gauge Report” on page 327.



See “About Performance Indicator” on page 731.

About Performance Indicator

First, define the required number of employees for different levels of activity in each profit center.

These are established from the **Performance Indicator** screen. You can set them for each profit center. For example:

- You can set your targeted **Sales per Car** at \$14.25 for the wash profit center.
- You can set the average labor burden or **Targeted Labor Cost** at \$10.50 per employee, which is more than just the hourly rate. It includes worker's compensation and payroll taxes.
- View the Performance Gauge report and the variances will be based on the Sales per Car and the Labor Burden that is set up from the Performance Indicator.



See “About the Performance Gauge Report” on page 327.

NOTE: Disabled profit centers will not appear in Performance Gauge reports.

Finally, you can set your targeted labor staffing requirements. You might set a minimum of 7 employees for up to 15 cars; 10 employees for 25 cars; 15 employees for 45 cars and so on.



See “About Performance Indicator” on page 731.



See “Add a Performance Indicator” on page 730.

About Req Man Hours

Req Man Hours

HELP - What can I do here?


Managers:

- This is the number of man hours necessary to handle the cars per hour for the time frame.
- Req. Man Hours is displayed in two reports:
 - Vehicle Statistical Performance Report
 - Performance Gauge Report

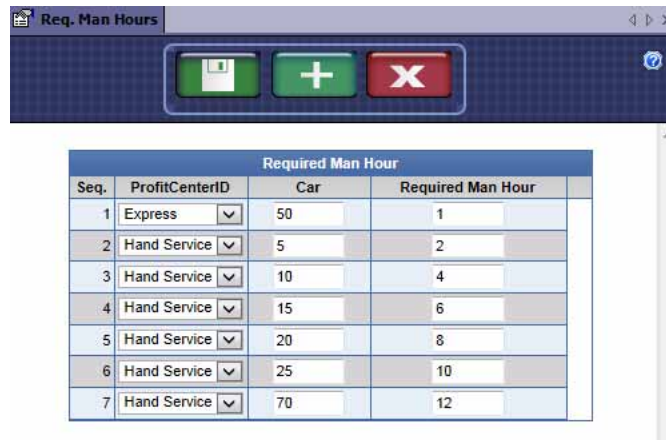


See “Set Req. Man Hours” on page 732.

Set Req. Man Hours

- 1 From the **System Setup** menu, select **Profit Centers** and then **Req. Man Hours**.
- 2 Click the **Add**  button.
A new sequential line appears.
- 3 In **ProfitCenterID**, select a Profit Center.
- 4 In **Car**, set the amount of Cars washed per hour.
- 5 In **Required Man Hour**, type the amount of employees needed to wash the selected amount of cars.

6 Click the **Save** button.



Required Man Hour			
Seq.	ProfitCenterID	Car	Required Man Hour
1	Express	50	1
2	Hand Service	5	2
3	Hand Service	10	4
4	Hand Service	15	6
5	Hand Service	20	8
6	Hand Service	25	10
7	Hand Service	70	12

Figure 366. Req. Man Hours

The Required Man Hours table defines the specific profit center, the number of cars per hour and the required Employees to accommodate the numbers of cars. You may have multiple entries in a profit center that is highly labor intensive, such as Hand Finished Services.

The labor standards must be configured for each Profit Center as each facility is laid out differently. This information is critical in evaluating the facility's labor performance and maintaining the level of service and quality of wash you desire to offer your customers. The ICS system is unique in its methods of assisting the operator in achieving the desired quality and speed of service standards. Be sure to take time to analyze the facility to maximize labor efficiencies in each profit center to be tracked. Once management standards are set accurately, reporting will be useful to site management in assessing manpower needs for each profit center.

Example: If your goal is to achieve 6 Cars per Man Hour and your minimum staffing is 2, then your first entry might be 12 Cars and 2 Required Man Hours.



See "Required Man Hours Descriptions" on page 733.



See "About Req Man Hours" on page 732.

Required Man Hours Descriptions

You can view the field descriptions for Req. Man Hours in the following chart.

Table 67: Req. Man Hours Descriptions**Table 68: Req. Man Hours Descriptions**

Field	Description
Seq.	Line number.
ProfitCenterID	Express; Full Service; Hand Service; Inbay Auto
Car	Cars to process per hour.
Required Man Hour	Number of employees to process the amount of Cars per hour.



See “Required Man Hours Descriptions” on page 733.



See “About Req Man Hours” on page 732.

CHAPTER 13: STACKNCONTROL

The StackNControl menu consists of Stack Management and Gate Management.



See "About Stack Management" on page 735.



See "About Gate Management" on page 742.



See "Hand Service Management" on page 746.

About Stack Management

Stack Management

HELP - What can I do here?

Cashiers and Presell Operators:

- Manage tunnel with Stack, Tunnel and Pending queues.
- Set retracts.
- Edit tickets and add an extra services.
- Fire Roller.
- Start/Stop Wetdown.

Stack Management can control up to two tunnels, each tunnel in their own Stack Management tab. From one Gate Management tab, you can view and edit both tunnels which are clearly identified.

Stack Management is your central control center for the cars approaching the tunnel in the stack and those going through the tunnel. Quickly add retracts to vehicles in the stack and in the tunnel as long as they have not passed the point of the service to be retracted. Customers may purchase another service while in the Stack or Pending. This feature is available to Cashiers and Presell Operators who are clocked in and are in an open Touch POS session. Stack Management can also be accessed and used at a Touch ES (Entrancement Management Sign). There is a Pending area for the cars pulled out of the stack before entering the tunnel that is available from the Stack Management menu only.

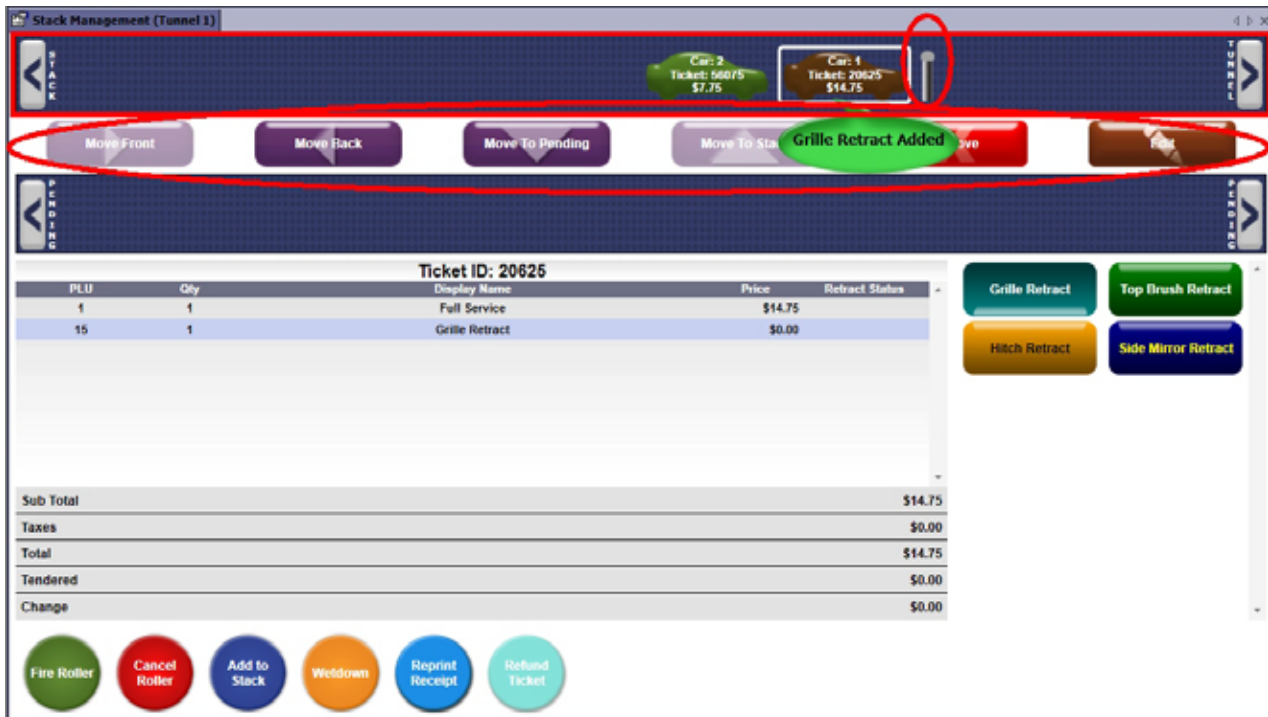


Table 69: Stack Management

Click to select one of the following items:

- “Edit the Order of the Stack”
- “Edit a Ticket for a car in Stack or Pending Queue”
- “Fire Roller”
- “Reset the Gate Queue”
- “Retract Controller Services”
- “Remove Vehicle from Gate Queue”
- “Reset the Gate Queue”

Edit the Order of the Stack

NOTE: In Australia, the Stack is on the right and the tunnel on the left.


- 1 On a Touch POS, open **WashConnect**.
- 2 In the StackNControl menu, select **Stack Management**.
- 3 Click to select the car icon in the Stack queue.
- 4 Click one of the following buttons:
 - Move Forward
 - Move Back
 - Move to Pending
 - Move to Stack
 - Remove
- 5 Repeat as necessary.

For more information, select one of the following:

- “Edit a Ticket for a car in Stack or Pending Queue”
- “Fire Roller”
- “Reset the Gate Queue”
- “Retract Controller Services”
- “Click to select one of the following items:”
- “Remove Vehicle from Gate Queue”
- “Reset the Gate Queue”

Edit a Ticket for a car in Stack or Pending Queue

You can add a last minute service to the customer’s ticket.

- 1 Click to select the car or truck icon to edit.
- 2 Click the **Edit**  button.
When in edit mode, the car turns maroon and then the Sales screen appears.

NOTE: If the Touch POS sales screen does not appear, you will need to **Open Shift**.

- 3 Add the service item and finalize the sale.



See “Enter a New Sales Transaction at Touch POS” on page 581.

The Ticket ID number and details appear.

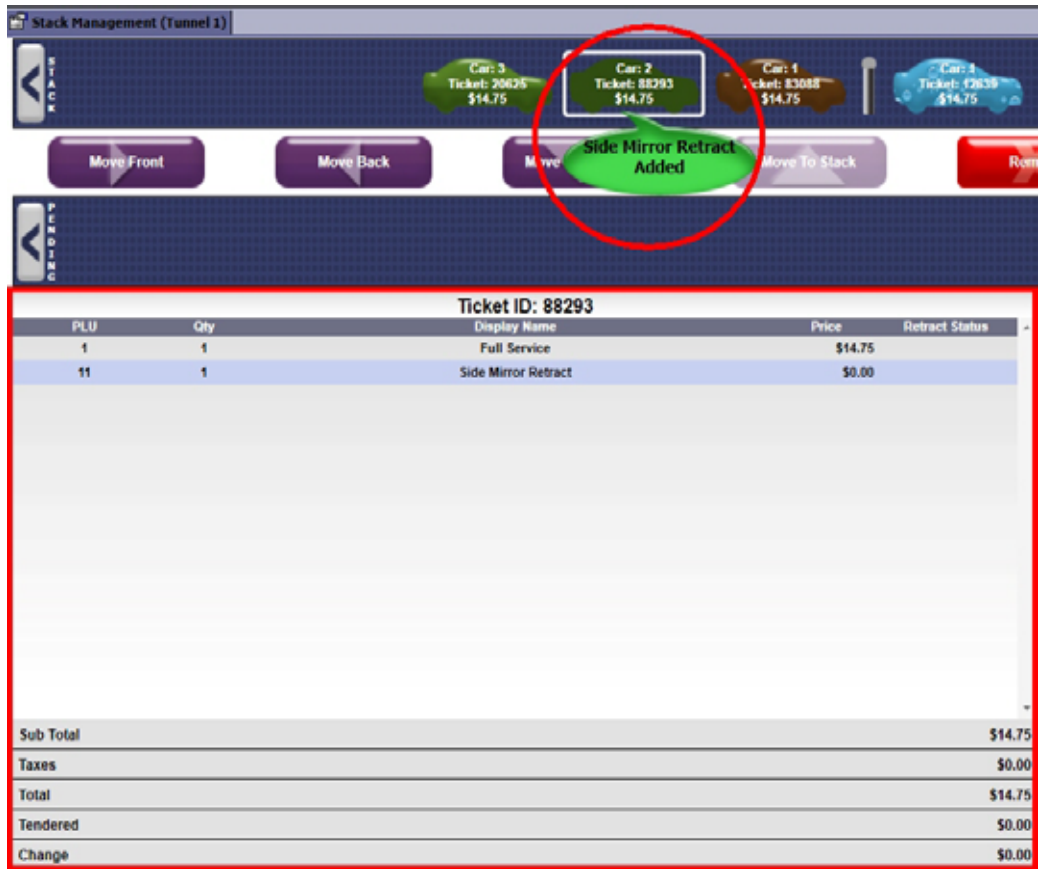


Figure 367. Ticket ID and Details for the Selected car in the Stack

Click to select one of the following items:

- “Edit the Order of the Stack”
- “Fire Roller”
- “Reset the Gate Queue”
- “Retract Controller Services”
- “Click to select one of the following items:”
- “Remove Vehicle from Gate Queue”
- “Reset the Gate Queue”

Fire Roller

You can fire the roller if the car is stuck in the stack.

- 1 Click to select the car approaching the Tunnel Entrance.



- 2 Click the **Fire Roller** button.

The Roller will fire and the vehicle will enter the tunnel. On the Stack Management screen, you can view the currently loaded vehicle shown in brown. The vehicle entering the tunnel turns orange while sensing. The car turns blue once it is in the tunnel and being washed. The vehicle turns maroon in edit mode.

Click to select one of the following items:

- “Edit the Order of the Stack”
- “Edit a Ticket for a car in Stack or Pending Queue”
- “Reset the Gate Queue”
- “Retract Controller Services”
- “Click to select one of the following items:”
- “Remove Vehicle from Gate Queue”
- “Reset the Gate Queue”



See “Controller Service Buttons” on page 739.

Controller Service Buttons

The controller service buttons can be configured in WashConnect® and match the Tunnel Master WBC PLUs.



Please see the Tunnel Master WBC, as the buttons can vary based on WBC configuration.



Figure 368. Controller Services example

Retract Controller Services

You can retract services in the Stack queue as well as in the tunnel queue, up until the service begins.

- 1 From the StackNControl menu, select **Stack Management**.
- 2 Click to select a vehicle icon.
- 3 Click to select a single or multiple retract controller service button(s).
 - The green popup bubble appears if the Retract has been added.
 - The yellow popup bubble appears if a Partial Retract has been added (some of the Retracts have been added and the other ones were missed).
 - The red popup bubble appears if a Retract was missed.

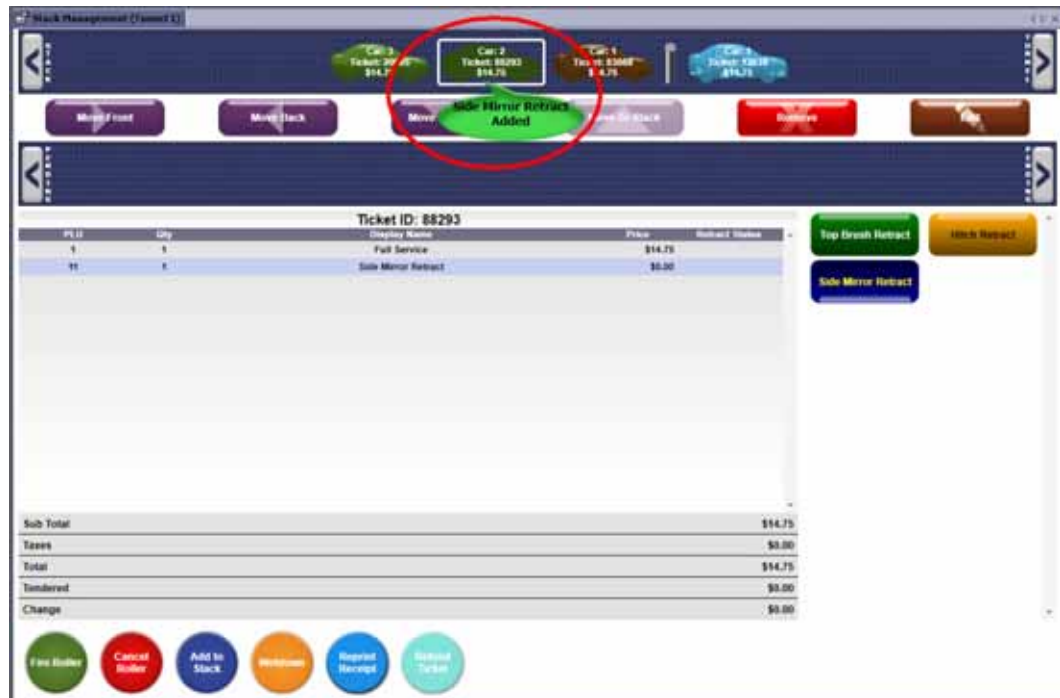


Table 70: Stack Management Example of a Popup Bubble


Click to select one of the following items:

- “Edit the Order of the Stack”
- “Edit a Ticket for a car in Stack or Pending Queue”
- “Fire Roller”
- “Reset the Gate Queue”
- “Click to select one of the following items:”
- “Remove Vehicle from Gate Queue”
- “Reset the Gate Queue”

Move from Stack to Pending

If there is a reason a vehicle needs to be removed from the tunnel queue, such as items in the back of a pickup bed, the vehicle can be temporarily moved into the Pending queue. This will allow other vehicles to go through the wash and when the Pending vehicle is ready to go through the wash, the vehicle can be moved back to the Stack queue.

Follow these steps to Remove Vehicle from Stack Queue and move to Pending:

- 1 On the right-side, locate the **StackNControl**  menu.
- 2 Select the **Stack Management** button.
- 3 Select the necessary vehicle icon in the Stack queue.
- 4 Select the **Move to Pending** button.

The vehicle will be moved from Stack to Pending.



See "Move Vehicle in Pending back to the Stack" on page 741.



See "Stack Color Key" on page 741.



See "About Stack Management" on page 735.

Move Vehicle in Pending back to the Stack

When the vehicle is ready to go through the tunnel, follow these steps:

- 1 Click the pending vehicle icon in the Pending section.
- 2 Then click the Move to Stack button.
The vehicle will be moved from Pending to Stack.



See "Move from Stack to Pending" on page 740.



See "Stack Color Key" on page 741.



See "About Stack Management" on page 735.

Stack Color Key

Stack Color Code Chart

Green – Sales is complete and on Stack

Brown – Current loaded vehicle and next to enter tunnel.

Orange – Entering wash and sensing in progress.

Blue – Vehicle entered tunnel and is now being washed.

Maroon – Vehicle is in Edit mode.

Purple – Vehicle is a Pay Attended selection that will require editing.



See "Move from Stack to Pending" on page 740.



See "Stack Color Key" on page 741.



See "About Stack Management" on page 735.

About Gate Management

Gate Management

HELP - What can I do here?

Wash Operators:

- Rarely use this feature.
- Reset Gate queue.
- Remove vehicle from Gate queue.
- Manage pending queue in Stack Management.

Click to select one of the following items:

“Edit the Order of the Stack”

“Edit a Ticket for a car in Stack or Pending Queue”

“Fire Roller”

“Reset the Gate Queue”

“Retract Controller Services”

“Remove Vehicle from Gate Queue”

“Reset the Gate Queue”

Remove Vehicle from Gate Queue

Gate management is available in the event a car gets out of line before going through the tunnel for whatever reason. Removing a vehicle from the Gate queue may be necessary.

For instance, if the customer purchased a wash but drove out of the line before entering the tunnel, then you would remove the vehicle from the Gate queue.

The Gate queue is strictly for the cars waiting for the gate to be opened or whose gate already opened and have not yet crossed over the stack controller loop. The cars merge into one single lane before the tunnel entrance and cross over the Stack Control loop, and it's at this point where the cars are automatically removed from the gate queue.

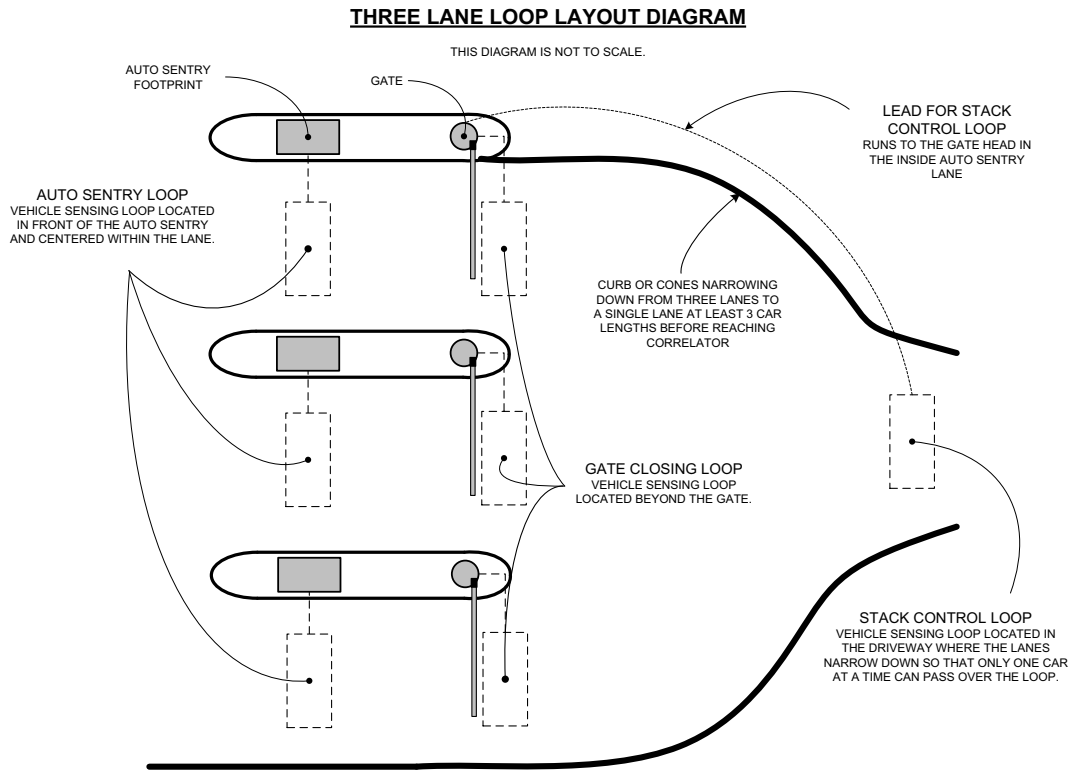


Figure 369. Gate queue area example of 3 lanes



Figure 370. Gate Management from the POS



Figure 371. Gate Management tab with Double Tunnels on Touch ES

- 3 From the StackNControl menu, click **Gate Management**.
- 4 Click to select the vehicle from the Gate that is no longer in the queue.
- 5 Click the **Remove** button.

Click to select one of the following items:

- “Edit the Order of the Stack”
- “Edit a Ticket for a car in Stack or Pending Queue”
- “Fire Roller”
- “Reset the Gate Queue”
- “Retract Controller Services”
- “Click to select one of the following items:”
- “Reset the Gate Queue”

Reset the Gate Queue

Resetting Gate Queue may be necessary if system was shut down suddenly, and then restarted, but cars are not entering the tunnel.

- 1 From the StackNControl menu, click **Gate Management**.
- 2 Click the **Reset** button.
The gate queue is reset and may or may not be in the same order as before.

Click to select one of the following items:

- “Edit the Order of the Stack”
- “Edit a Ticket for a car in Stack or Pending Queue”
- “Fire Roller”
- “Reset the Gate Queue”
- “Retract Controller Services”
- “Click to select one of the following items:”
- “Remove Vehicle from Gate Queue”

Raise Gate Manually

These are the recommended instructions for manually raising the gate. Follow the instructions if a customer purchased a wash or if no wash was purchased.

IMPORTANT: Raising a gate manually does not stack a vehicle.

No Wash Purchased

If customer does not buy a wash, and there is an area where they can pull out of line before entering the tunnel, you can manually raise the gate with the switch at the tunnel entrance: There are three positions for the Gate Switch, Up, System (Center), and Down.

- 1 Lift the Gate Switch to the Up position. After the gate raises, move the switch to the center or system position.
-OR-
- 2 *Go to Wash Status menu, and click the toggle button to raise the Gate. The gate will automatically close after the vehicle passes through.
IMPORTANT: If the gate switch is moved to the down position and left in the down position, the gate will remain closed, and will not open for the next customer.
- 3 Open Stack Management and confirm the Stack is correct.
- 4 Reorder, if necessary.

NOTE: If a customer is getting a Rewash, there are a few ways to set up a Rewash that are recommended. See the WashConnect User Manual to determine the best Rewash option for your wash such as using a wash code, fleet card, gift card, etc.

Wash Purchased but Gate Doesn't Open

If customer purchased a wash, and the Auto Sentry has a Wash Busy screen, and the gate is not opening to let customer proceed, follow these instructions:

- 1 In WashConnect, go to Gate Management under the StackNControl menu on right-side, and click the Reset button.
- 2 If the gate does not raise, you may need to press the Reset button a few times.

- 3 Upon selecting the Reset button, the customer's gate will open and the wash will go on Stack.
- 4 Open Stack Management, and confirm the Stack is correct.
- 5 Reorder the Stack, if necessary.

Call ICS technical support, if you find you are doing this for many customers, this could be an indication of a technical issue.

*Raise Gate feature from Wash Status menu is available in version 1.3.2 and higher.

Hand Service Management

The WashConnect system can automatically manage vehicles in your Hand Finished Services bays more intelligently and efficiently with Hand Service Management features.

- Monitor and inform customers about the expected wait time to receive the purchased Hand Finished/Detail services by managing the number of cars in hand finished service bays. This feature is set up to increase sales when wait time is low and decrease hand services sales when the wait time is high.
- **Wait Timer** - Hand Finished Services wait time message appears on the Touch POS and the Auto Sentry Base Wash screen. Wait timer, representing the time it will take from time of purchase to begin the service on the vehicle. Labor data can be ignored or included when calculating the estimated service wait time for hand finished services. (setting)
- **Pricing** - for hand finished services can change to help manage demand. Hand finished services pricing can be discounted based on estimated wait time or vehicles waiting for Hand Finished Services. No wait time provides the largest discount, and as the wait time builds, the pricing goes up until there are no discounted services offered. This feature is to manage the supply and demand for the hand service area.
- Use of Multiple Wireless Scanners - using prefix codes for your scanners, you can assign vehicles to different bays. Each individual scanner is tied to a different bay number. By scanning the ticket, you are able to remove the vehicle from Hand Finished Service bay and then mark the car as finished.



See "View Vehicles in Hand Services" on page 747.



See "Complete Service for Vehicle in Hand Services" on page 748.

View Vehicles in Hand Services

NOTE: Honeywell Barcode Scanner is an additional advice that is available as a global component.

You can use wireless scanners in the Hand Finished Services bays as well as the queue.

- 1 From the **StackNControl** menu, select **Hand Service Mgmt.**
The Hand Service Mgmt tab appears. The following figure displays an example of one vehicle in the queue and one vehicle in Bay 1.



Figure 372. Hand Service Mgmt tab


NOTE: Timers can be set to count up or down for hand service queues and bays.

- 2 Double-click the vehicle.
The pop-up window appears displaying the wash ticket and the current time it has been in the queue or in bay.



Figure 373. Hand Service Mgmt displaying Wash Ticket

NOTE: Configure maximum number of cars in your hand service bay(s).

 See "Hand Service Management" on page 746.

 See "Complete Service for Vehicle in Hand Services" on page 748.

Complete Service for Vehicle in Hand Services

When the service is complete you can complete the wash service ticket.

- 1 From the Hand Service Mgmt tab, double-click the vehicle to view the Wash Ticket.
- 2 The pop-up window displays the Vehicle, the wash ticket and the time the vehicle has been in the bay.

- 3 Select the service from the Wash Ticket, and then click the **Service Complete**



- 4 Select the **Hide Window**



If all hand services are complete, the vehicle is removed from the Bay, and the wash ticket is complete.



See "View Vehicles in Hand Services" on page 747.



See "Hand Service Management" on page 746.

Camera for Hand Finished Services Management

Camera may be setup to capture and store a photograph of the vehicle at the Auto Sentry, and attach it to the transaction so the image may be used in the Hand Finished Service Management.

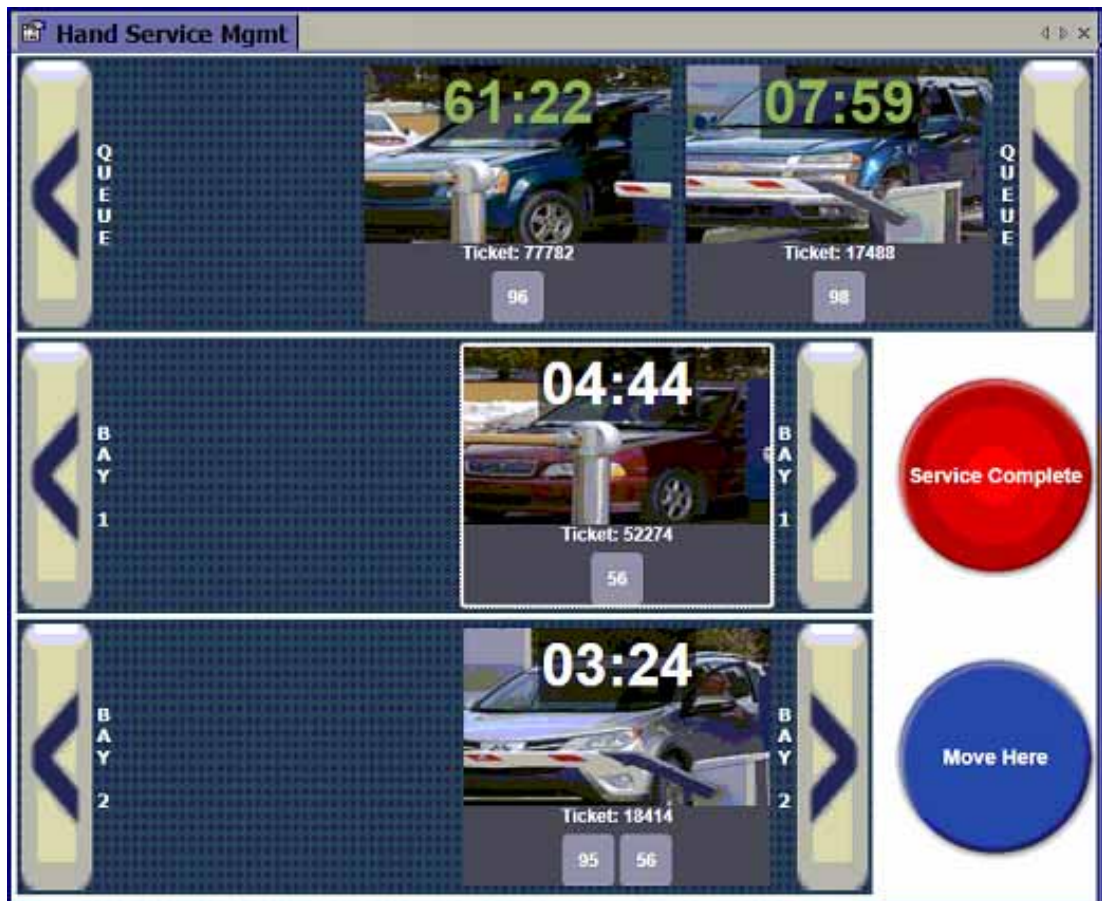





Figure 374. Hand Service Mgmt Tab (camera) Example








Figure 375. Hand Service Mgmt with close up and wash Ticket example

Standard Hand Services Management Graphics

Standard icons and display names are configured from the Sales Items menu. If not using custom graphics, a standard default icon will be used with the PLU:

-  Hand Wax
-  Interior Clean
-  Carpet Shampoo

-  Full Service
-  Seat Cleaning
-  Tire Shine
-  Towel Dry
-  Vacuum

Tip Request an ICS professional graphic designer to create your custom Hand Finished Services graphics.

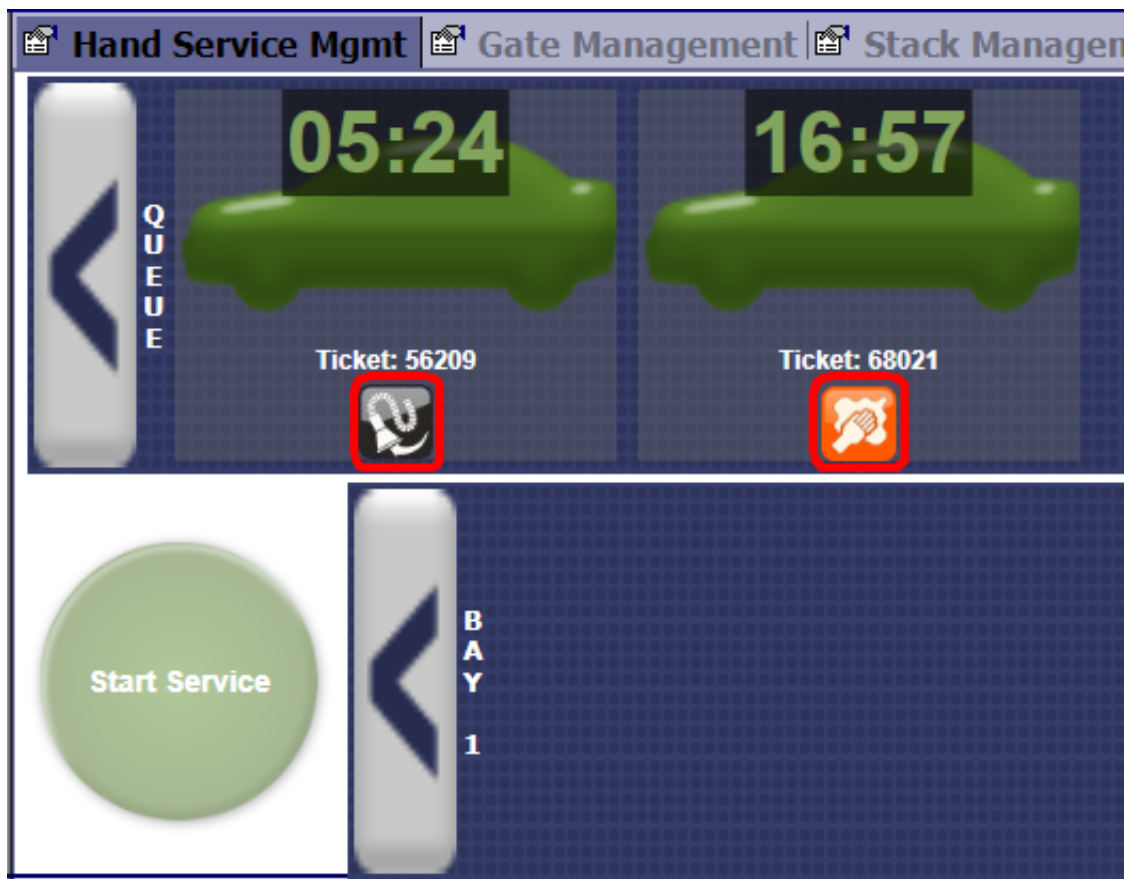


Figure 376. Hand Service Mgmt standard icons





CHAPTER 14: TIME CLOCK

Time Clock has the following menus and commands:

- Time Clock
 - “Log In and Log Out”
 - “Edit Time Clock”
- Time Clock Reports
 - “Employee Time Clock Summary”
 - “Employee Time Clock Detail”
 - “Employees Working Today”
 - “Employees Not Working Today”

Log In and Log Out

Time Clock Log In / Log Out	HELP - What can I do here? Employees: <ul style="list-style-type: none">• Must Log In at beginning of shift.• Log In prior to selecting Greeter or Open Shift on Touch POS.• Log Out at end of shift.
--	--

-  See “Log In and Log Out” on page 753.
-  See “Edit Time Clock” on page 758.
-  See “Change Labor” on page 755.
-  See “Time Clock Report” on page 756.

Log In / Log Out

Employees or users can Log In and Log Out from the Time Clock menu (User must be set up completely in WashConnect® from Manage > Users).

NOTE: The Time Clock menu can be enabled or disabled from appearing in the main menu. Set this up at Corporate only, See “Edit Security Role” on page 532.

-  See “About Manage Users” on page 541.

NOTE: At any time, click **Change User** button to cancel and reset to enter another User Name or Employee ID.



- 1** From the **Time Clock** menu, click the Log In/Log Out.
- 2** In the **Time Clock** menu, click to select **Log In/Log out**.
The Log In/Log Out tab appears.
- 3** In User Name, type your **User Name**.

NOTE: If using a fingerprint reader, depending on how reader is set up, then the user will have to swipe their finger on the finger print reader to log in or log out.


- 4** Click the **Search**  button.



Figure 377. Log In / Log Out Employee ID

- 5 If necessary, the **Select Employee** dialog box appears.
 - Click to select the **User**.
The User is highlighted.
 - Click **OK**.
- 6 If necessary, select a Profit Center from the drop-down box.
Note: The default profit center is setup in Wages from the Users menu.
- 7 Select the Department from the drop-down box.
- 8 Click the **Punch In**  or the **Punch Out**  button.
The punch in time stamp is entered. The screen refreshes and is ready to search for another Employee ID.

 See "Change Labor" on page 755.

 See "Log In and Log Out" on page 753.

 See "Edit Time Clock" on page 758.



 See "Change Labor" on page 755.


 See "Time Clock Report" on page 756.

Change Labor


User can remain logged in but switch to a different area of work without logging out. User can change which labor profit center with the Change Labor button. This is important especially if different jobs have different wages attached. For example, the

User may be punched in as the Tunnel Attendant, but was asked to switch to Hand Services, and can do this with a click of the Change Labor button.

- 1 From the **Time Clock** menu, click to select **Log In/Log out**.
The Log In/Log Out tab appears.
- 2 Click the **Search**  button, and then begin typing a user that is known. A list box appears with the User Names that have the letter or phrase you were typing.
- 3 Click to select the name from the list.
–or–
- 4 In **User Name**, type your **User Name** with auto complete.
- 5 Click to select a User, and then click **OK**.
If User is already logged in, the Change Labor button appears next to the Log In button.
- 6 In **Profit Center**, select a new profit center.
- 7 In **Department**, select a new department.
- 8 Click the **Change Labor**  button to punch in to different Department and/or Profit Center.
The screen returns to Search for another User Name.

 See “Log In and Log Out” on page 753.

 See “Edit Time Clock” on page 758.

 See “Change Labor” on page 755.



 See “Time Clock Report” on page 756.

Time Clock Report

You can also quickly pull the Employee Time Clock Details report for the week for the selected user from the Log In/ Log Out tab.

NOTE: The week breakdown is based on the First Day of Week setting.

- 1 From the **Time Clock** menu, click **Log In/Log Out**.
The Log In/Log Out tab appears.

- 2 After selecting the employee or User Name, click the **Time Clock Report**  button.
- 3 Click to select the calendar, and then select the **Start Date** or type a date in the following format: MM/DD/YYYY.
- 4 Click to select the calendar, and then select the **End Date** or type a date in the following format: MM/DD/YYYY.
- 5 In **Employee** box, select a specific employee or select All.
- 6 In **Site** box, select a specific site or select All.
- 7 Click the **View Report**  button.
The Employee Time Clock Details report appears. You can print or export this report.
- 8 Click the **Printer** button to print the report.
—or—
Select a format, and then click the Export text link for the **Employee Time Clock Detail**.



For more information, see “View the Employee Time Clock Summary” on page 760.



See “Log In and Log Out” on page 753.



See “Edit Time Clock” on page 758.



See “Change Labor” on page 755.



See “Time Clock Report” on page 756.

Edit Time Clock

Time Clock
Edit Time Clock

HELP - What can I do here?

Managers:

- Edit Time Clock.
- Must have a Security Role set up to edit time clock from Configuration menu.

Edit Time Clock

Setup a Security Role to edit Time Clock entries. You can edit or add an entry. The Start Date, End Date, Start Time, End Time, Profit Center and Department can all be edited for individual punch in or punch out entries.


Managers can edit Time Clock stamps from Edit Time Clock command.

- 1 From the Search Records section, you can search with the following parameters: Start Date, End Date, Site and Employee.

The screenshot shows the 'Edit Time Clock' interface. At the top, there is a 'Search Records' section with filters for Start Date (11/9/2012), End Date (11/9/2012), Site (All), and Employee (All). Below the filters are several icons: a green plus sign, a blue magnifying glass, a red X, and a green arrow. Below this is a table of time clock records with columns: Last Name, First Name, Employee ID, Site, Day, Date, Start Time, Stop Date, Stop Time, Profit Center, Department, and Hours.

Last Name	First Name	Employee ID	Site	Day	Date	Start Time	Stop Date	Stop Time	Profit Center	Department	Hours
User	Demo	Demo	Main Corp	Friday	11/9/2012	10:41:41 AM	11/9/2012	10:43:09 AM	Expense		0.03
User	Demo	Demo	Main Corp	Friday	11/9/2012	10:43:39 AM	11/9/2012	10:43:48 AM	Expense		0.00
User	Demo	Demo	Main Corp	Friday	11/9/2012	10:43:46 AM	11/9/2012	10:44:02 AM	Expense		0.02
User	Demo	Demo	Main Corp	Friday	11/9/2012	10:44:02 AM	11/9/2012	11:52:23 AM	Expense	Clean Up	1.15
User	Demo	Demo	Main Corp	Friday	11/9/2012	11:53:03 AM			Expense	Cashier	4.62
Matt	Tin	Demo3	Main Corp	Friday	11/9/2012	2:36:03 PM			Expense		2.80
Smith	Wendy	Demo4	Main Corp	Friday	11/9/2012	3:37:18 PM			Fundraiser		1.98
Smith	Wendy	Cashier1	Main Corp	Friday	11/9/2012	3:18:55 PM	11/9/2012	3:33:58 PM	Fundraiser		0.25
Smith	Wendy	Cashier1	Main Corp	Friday	11/9/2012	3:33:58 PM	11/9/2012	3:37:12 PM	Fundraiser		0.07
Smith	Wendy	Cashier1	Main Corp	Friday	11/9/2012	3:37:12 PM	11/9/2012	3:53:36 PM	Fundraiser		0.27

Figure 378. Edit Time Clock Employee Search Results List

- 2 In the Search Records section, click the **View**  button.
- 3 Click to select a Time Clock entry to edit, and then click the Edit button. The Edit Time Clock tab appears with the selected Time Clock entry.
- 4 Make necessary changes for the following editable fields:
 - Start Date
 - Start Time

- End Date
 - End Time
 - Profit Center
 - Department
- 5 Click the **Save** button –or– **Cancel**  button and exit without saving your changes.



“About the Time Clock Reports”



See “Log In and Log Out” on page 753.



See “Edit Time Clock” on page 758.



See “Change Labor” on page 755.

About the Time Clock Reports

Review employees’ hours documented in the four Time Clock Reports:

- “Employee Time Clock Summary”
- “Employee Time Clock Detail”
- “Employees Working Today”
- “Employees Not Working Today”



SEE “TIME CLOCK” ON PAGE 753.

Employee Time Clock Summary

Employee Time Clock Summary

HELP - What can I do here?

Managers:

- View this report with any of the following parameters selected:
 - Dates
 - Specific Site
 - One Employee or All
- This report provides totals for the following:
 - Profit Center
 - Department
 - Regular Hours
 - Overtime Hours
 - Total Hours



See "View the Employee Time Clock Summary" on page 760.

View the Employee Time Clock Summary

The total hours worked appear on the Employee Time Clock Summary.

NOTE: The week breakdown is based on the First Day of Week setting.

- 1 From the Time Clock menu, select **Time Clock Reports**.
 - 2 From the Time Clock Reports, select **Employee Time Clock Summary**.
 - 3 Click to select the calendar, and then select the Start Date or type a date in the following format: MM/DD/YYYY.
 - 4 In **Employee** box, select a specific employee or select All.
 - 5 In **Site** box, select a specific site or select All.
- The Employee Time Clock Summary report appears. You can print or export this report.

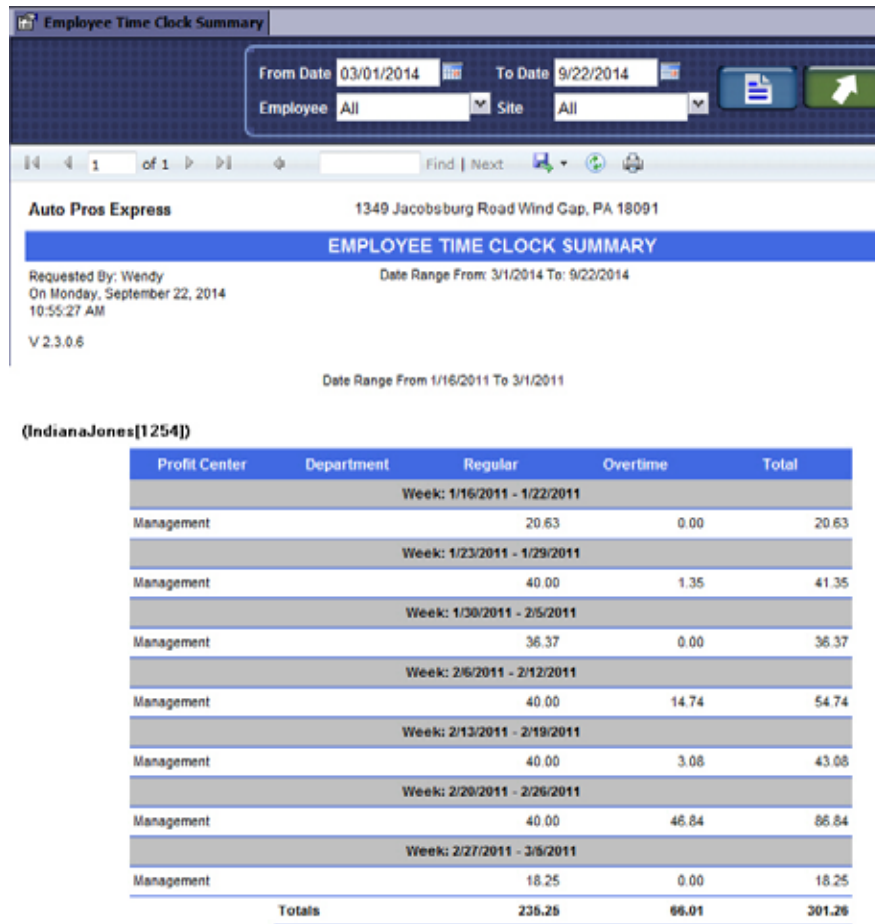


Figure 379. Employee Time Clock Summary Report sample

 See "Printing a Report" on page 66.

 See "Export a Report" on page 67.

- "Employee Time Clock Detail"
- "Employees Working Today"
- "Employees Not Working Today"

Employee Time Clock Detail

Employee Time Clock Detail

HELP - What can I do here?

Managers:

View the following criteria in this report:

- Day of Week
- Site
- Start Date
- Start Time
- Stop Date
- Stop Time
- Profit Center
- Department
- Regular Hours
- Overtime Hours
- Total Hours



See “View the Employee Time Clock Detail Report” on page 762.

View the Employee Time Clock Detail Report

Punch in and punch out details appear on the Employee Time Clock Detail.

- 1 From the Time Clock menu, select **Time Clock Reports**.
- 2 From the Time Clock Reports, select **Employee Time Clock Detail**.
- 3 Click to select the calendar, and then select the Start Date or type a date in the following format: MM/DD/YYYY.
- 4 In **Employee** box, select a specific employee or select All.
- 5 In **Site** box, select a specific site or select All.
The Employee Time Clock Details report appears. You can print or export this report.

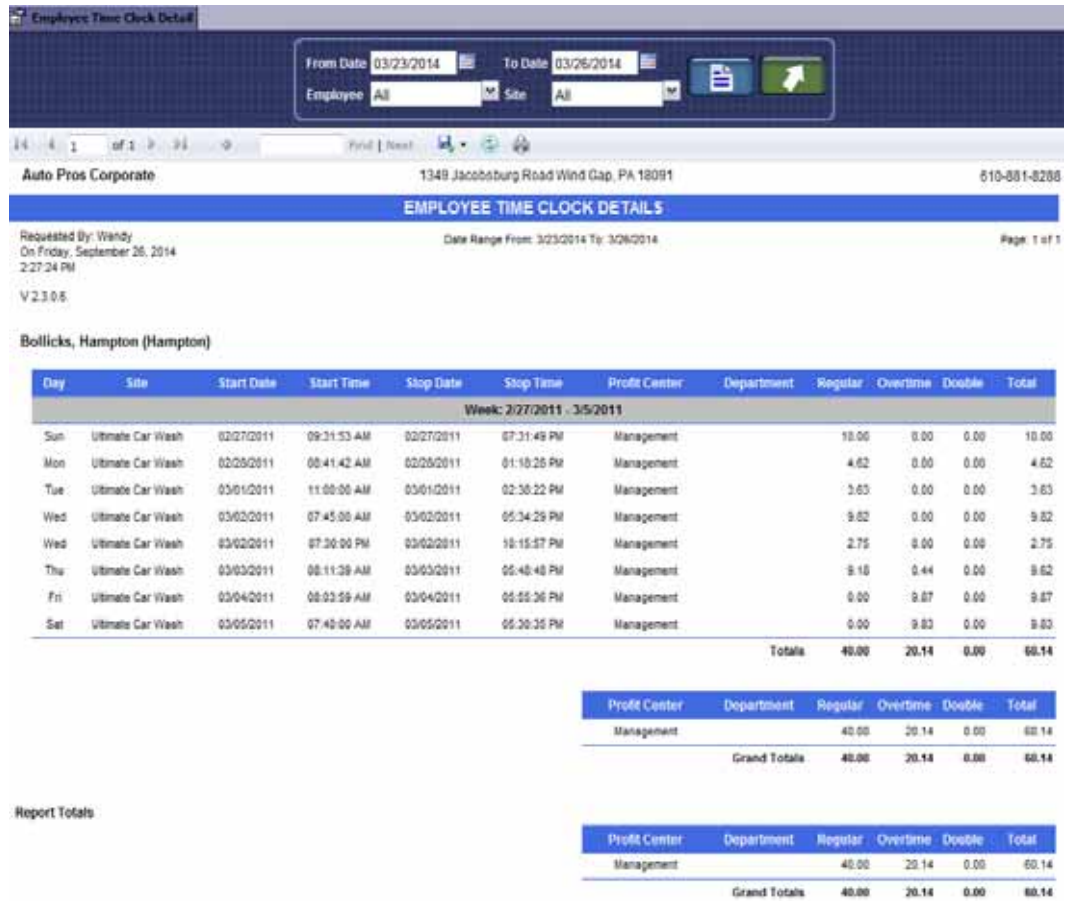


Figure 380. Employee Time Clock Details Report sample



See "Printing a Report" on page 66.



See "Export a Report" on page 67.

- "Employee Time Clock Summary"
- "Employees Working Today"
- "Employees Not Working Today"

Employees Working Today

Employees Working Today

HELP - What can I do here?

Managers:

- View, at a glance, which employees are NOT working today.
- View the following criteria in this report:
 - Employee ID
 - Last Name
 - First Name
 - Home Phone
 - Mobile Phone
 - Week(Hours Worked)



See “Employees Working Today” on page 764.

View the Employee Working Today Report

Employees Working Today report can be pulled by individual sites or all sites. At a glance, determine which employee would be best to call in based on their hours already worked.

NOTE: You cannot change the date for this report.

- 1** From the Time Clock menu, select **Time Clock Reports**.
- 2** From the Time Clock Reports, select **Employees Working Today**.
- 3** In **Site** box, click to select specific site(s) or select **All**.
The Employee Working Today report appears. This report can be printed or exported.

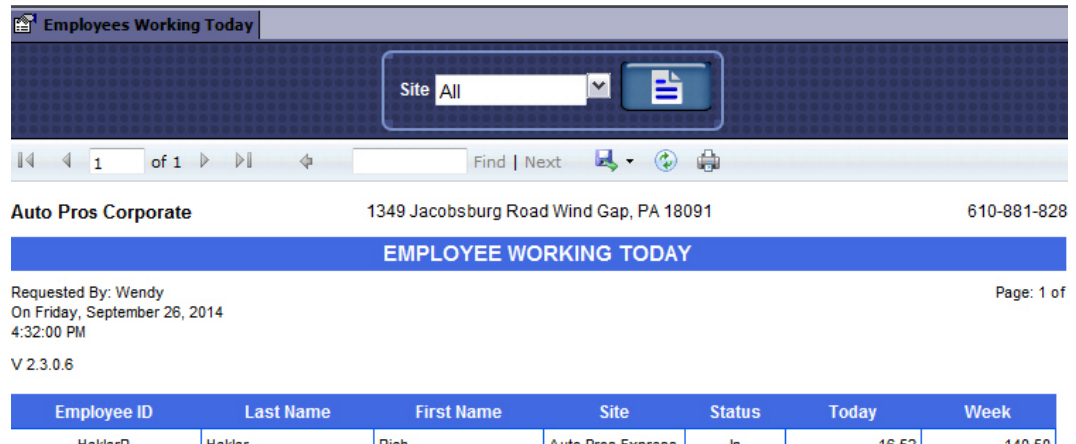


Figure 381. Employees Working Today sample report



See "Printing a Report" on page 66.



See "Export a Report" on page 67.

- "Employee Time Clock Summary"
- "Employee Time Clock Detail"
- "Employees Not Working Today"


Employees Not Working Today

Employees Not Working Today

HELP - What can I do here?

Managers:

- View, at a glance, which employees are NOT working today.
- View the following criteria in this report:
 - Employee ID
 - Last Name
 - First Name
 - Home Phone
 - Mobile Phone
 - Week(Hours Worked)

 See “View the Employees Not Working Today Report” on page 766.

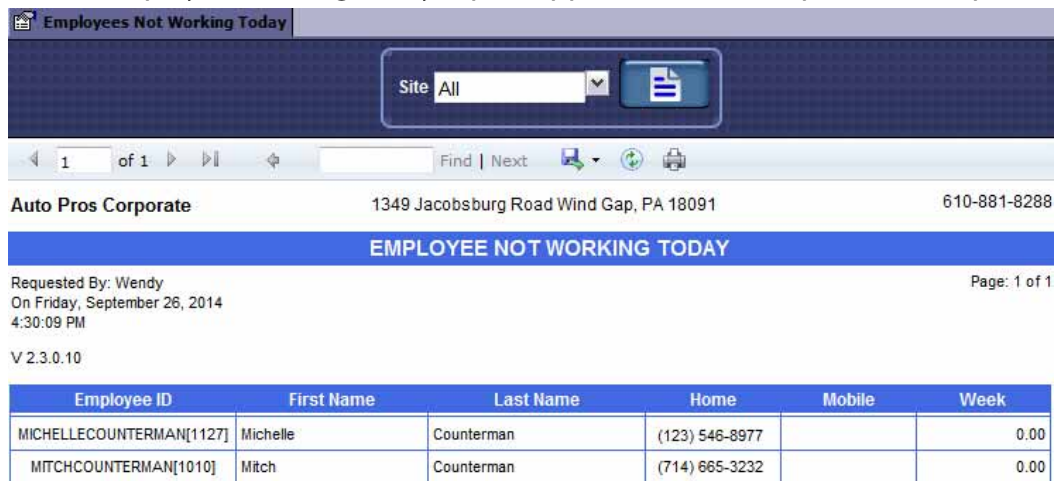
 See “Printing a Report” on page 66.

 See “Export a Report” on page 67.

View the Employees Not Working Today Report

NOTE: This report is in real-time.

- 1 From the Time Clock menu, select **Time Clock Reports**.
- 2 From the Time Clock Reports, select **Employees Not Working Today**.
- 3 In **Site** box, click to select specific site(s) or select All.
The Employee Working Today report appears and can be printed or exported.



Employee ID	First Name	Last Name	Home	Mobile	Week
MICHELLECOUNTERMAN[1127]	Michelle	Counterman	(123) 546-8977		0.00
MITHCOUNTERMAN[1010]	Mitch	Counterman	(714) 665-3232		0.00

Figure 382. Employees Not Working Today Report sample

 See “Printing a Report” on page 66.

 See “Export a Report” on page 67.

- “Employee Time Clock Summary”
- “Employee Time Clock Detail”
- “Employees Working Today”

CHAPTER 15:

WHAT'S NEW ARCHIVE

The What's New Archive is a collection of What's New documents. The benefits, features, and enhancements are listed with a hyperlink to go to the respective help instructions, if available.

["VERSION 1.3.2.213"](#)

["VERSION 1.3.0"](#)

["VERSION 1.2.3"](#)

VERSION 1.3.2.213

September 18, 2015

New Benefits, Features, and Enhancements

***New!* Hand Finished Service Management —**

The WashConnect system can automatically manage your Hand Finished Services more intelligently and efficiently with the following Hand Finished Service Management features:

- Monitor and inform customers about the expected wait time to receive the purchased Hand Finished/Detail services by managing the number of cars in hand finished service bays.
- Hand Finished Services management system calculates an estimated wait time on both the Touch POS and Auto Sentry.
- Wait time message appears on the Touch POS and the Auto Sentry Base Wash screen for hand finished services. Labor data can be ignored or included when calculating the estimated service wait time for hand finished services.
- Pricing for hand finished services can change to help manage demand. Hand finished services pricing can be discounted based on estimated wait time or vehicles waiting for Hand Finished Services. No wait time provides the largest discount, and as the wait time builds, the pricing goes up until there are no discounted services offered.

- Configure maximum number of cars in the hand service bay to customize WashConnect to your wash.
- Wait timer, representing the time it takes to begin the service on the car, displays cars in the hand service queue.
- Timers can be set to count up or down for hand service queues and bays.
- With the use of multiple wireless scanners (with prefix codes), you can assign vehicles to different bays. Each individual scanner is tied to a different bay number. By scanning the ticket, you are able to remove the vehicle from Hand Finished Service bay and then mark the car as finished.
- Custom icons and display names are configured from Sales Items menu. If not using custom graphics, a default icon will be used with the PLU. Request an ICS professional graphic designer to create your custom Hand Finished Services graphics.
- Cameras may be setup to take a photograph of the car at the Auto Sentry, and attach it to the transaction so the image may be used in the Hand Finished Service Management.



See “Hand Service Management” on page 746.

New! Discount All Washes —

Discount ALL of your washes at one time with a single global coupon code (PLU). Simply create wash packages as before and add the packages to one profile with the new Discount Coupon service type.

New! at the Auto Sentry —

- **Cash Club** - It's here by popular demand. The Auto Sentry can now accept cash for club purchases.
- **Help Button** - When your customers need help, they can simply touch the Help button on the Auto Sentry touch screen to flag down an attendant. The touch screen Help button can fire a relay to activate a horn or light.
- **Renew Terminated or Suspended Club Customers** at the Auto Sentry. Terminated club customers need to swipe a new credit card and get a new RFID Tag adhered to their windshield. Suspended customers may simply reactivate their credit card on file, and all their club information needed is reactivated.

Management Reports —

New! Dashboard Reports —

The new Dashboard Reporting for WashConnect® allows you to select the reports you care about and view them ALL on ONE screen at the same time. No more clicking back and forth, or refreshing information to see how your wash is doing. Simply

Logon and view all the Dashboard reports. The Dashboard is the only reporting available directly through the use of a Web Browser.



See "About the Dashboard Report" on page 310.

New! Introducing four corporate reports—

■ **Audit Trail Logs –**

Protect against fraud. Track whenever out of the normal activities happen at your wash. In this report, you can view the activity logs of who performed the activity type including a date and time stamp in chronological order. For example, a log is created for any time clock edit, when a cash drawer is opened with no sale, if a user is terminated, and a few more.



See "About the Audit Trail Log" on page 270.

■ **Book Report –**

Wash Book information can be viewed from the Book Report. This report displays customers wash book information such as where and when wash book was purchased, how many books were purchased, number of washes redeemed, etc.



See "About Book Report" on page 249.

■ **Credit Cards Summary –**

The Credit Cards Summary can only be viewed at Corporate. This summary displays a break down of the credit card totals per credit card company and the amount of transaction and total amount charged. You can view this in your wash's corporate structure. You can view the quantity of transactions and total amount per credit card.



See "About Credit Cards Reconciliation" on page 205.

■ **Shift Not Verified Report –**

The Shifts Unverified Report is accessed by clicking the hyperlink on the Shift Detail Report. This link will only be available if there are unverified shifts detected within the requested date range of the Shift report. This report identifies the shift(s) that are unverified and provides technical support with information to resolve the issue.



See "Unverified Shifts" on page 194.

Report Enhancements —

- When closing the Shift, an End of Day feature can be enabled to automatically log out employees who are already clocked in and print selected End of Day Reports.
- Create and save user preferences for most of the management reports.
- Shift and Vehicle Statistical Performance (VSPR) Reports provide additional recalculation information.
- Select multiple levels, instead of strictly using site level, with a tree structure for the following reports: Shift Detail, VSPR, Payouts, Received On Account, Free Wash, Rewash, Checks, Voids, Fleet Accounts, Refunds, Unverified Journals, Credit Cards, Gift Card, Shifts Unverified, Controller Services, Services Washed, and Statistical Comparison.
- Fleet Activity Report displays with references to Prepaid Accounts, showing the beginning and ending balances for the selected period as well as the transactions for redemption or additions to the balance.
- Added Site column to Vehicle History Report.

Marketing —**■ Wash Busy Videos for InBay –**

Wash Busy videos can now be a source of income. You can sell advertising space on your Auto Sentry to local businesses with an InBay Wash Busy video. The Auto Sentry can play more than one video in a consecutive loop for customers who are waiting while your wash is busy.

Sales Programs —**■ *New!* Customer Tracking and Punch Card Redemption —**

Track customer purchases and offer punch card promotions through the Auto Sentry increasing sales and promoting customer loyalty.

■ Frequency Promos —

- Frequency Promotions can be generated at Corporate. You can view, but not edit, the Frequency Promotions at the site level. Assign corporate sales items (PLUs) to site level sales items (PLUs).
- Frequency Promotions can be deactivated or terminated.

Clubs —

- Determine if club customer is signed up with auto-billing by checking the barcode field as well as the RFID field.
- When searching for an RFID tag number from the Customer Manage tab, type in the beginning of RFID tag number and you will notice an auto complete feature drops down a menu with the possible numbers for the RFID field, making it faster to locate customers and eliminating typing errors.
- You can override rounding for club price during auto-billing or club purchase.

Stack Management —

- Show or hide **Fire Roller** and **Cancel Roller** buttons on the TouchES (Entrance System).
- Enable/disable Hand Service Mgmt tab from the StackNControl menu. This tab tracks the vehicle's progress of hand finished services (In Tunnel Stack, In Tunnel, In Hand Service Stack) providing an indication of the car's location within the process.
- Actual number of cars in the stack and the number of cars in the tunnel display on the Stack Management tab.
- You can arrange **Retracts** in a desired sort order on the Touch POS.
- Enhance your Stack Management experience on the POS with the ability to disable the Stack Management animation if the Stack Management tab is not currently selected.
- Fire roller from Stack management, if using a third party controller, and have a relay output defined.

WashConnect and Touch POS Tools —

- Added menu item search field to find specific WashConnect menu items or tabs easily.
- POS touch screen is easier to use with the increased size of all WashConnect tabs.
- From WashConnect login screen, you can disable the Default User from automatically populating the User ID and password.
- Inactivity Timer Log off feature can be enabled to lock the Touch POS if no activity is going on.
- Hide buttons not in use on your Touch POS, such as Void, Stack, Refund, RFID, ROA, Payout, and TicketGen.
- Ability to print Wash Code and Barcode on duplicate receipts at POS.
- Ticket Generation transactions can be tracked when using the transaction type Ticket Gen.
- When an originating transaction is voided, all of the created Paid Tick Gen tickets from this transaction will be rendered invalid and changed to a Delete status.
- Create custom profiles to assign PLUs to the profit centers.
- Quickly search for vehicles by bar code.



See "Edit Vehicle Information" on page 91.

- You can now merge two gift cards.
- Balance check can be performed by swiping or typing gift card number to check balance from the gift card balance screen. Swiping gift card engages pop up keyboard without having to touch the screen.

Fleets —

***New!* Prepaid Fleet Accounts –**

In addition to setting up fleets as ROA (Received on Account), fleet accounts can now be set up as a prepaid account. Instead of charging washes to be invoiced at a later date as an ROA, the fleet can prepay the account and carry a balance of funds and so that each wash reduces that balance. Funds are available for use by any member of that fleet.

***New!* Prepaid Fleet Bonus - Progressive Fleet —**

NOTE: This feature is only available when you contact ICS to set up the use of Prepaid Fleets.

- Reward customers for committing large amounts to the balance they carry on their prepaid cards by giving larger bonus amounts or percentages to those customers purchasing larger amounts to their account.
- The Progressive Bonus system was designed as an incentive to dedicate a larger amount of funds during the Prepaid Fleet recharge phase. For example, an increase to the fleet of \$50 may reward a bonus of 3% = \$1.50 total increase; an increase to the fleet of \$100 may reward a bonus of 7% = \$7.00 total increase; or an increase to the fleet of \$200 may reward a bonus of 15% = \$30 total increase.
- The site may set up different progressive scales and assign specific fleets to each, rewarding larger fleet usage with larger bonuses. The bonus may be a flat dollar amount reward or a percentage of the purchase.
- Configure number of fleet receipts to be printed at the Touch POS.
- Ability to print a signature line for Fleet transactions at Touch POS.
- Fleet rules apply to the individual vehicles of a fleet while keeping the option to manage the fleet account with rules.
- Merge corporate fleet account and individual fleet customers through Customer/Manage and Fleet/Accounts tabs.
- When a customer's card is used to access a corporate fleet member's account, rules applied to the individual vehicle will be honored over any rules set up for the fleet which it is assigned to. This will allow fleet managers to vary the privileges of its individual members.

Accept Credit Payments Outside the POS —

- Set up fuel credit cards to be cleared outside the POS using third party terminals.

Time Clock —

- When clocking in or out, user receives a confirmation message acknowledging a successful punch in or out.
- Customize your time clock standards with new time clock configuration fields:
 - Weekly OT Threshold: The number of hours needed before getting overtime on a weekly basis (Default: 40).
 - Daily OT Threshold: The number of hours needed before getting overtime on a daily basis (Default:8).
 - Daily Double Time Threshold: The number of hours need before getting double time on a daily basis. (Default:12)

Other —

- Ability to export time clock information to multiple payroll processors: ADP or Paychex.
- Ability to change the order of the sites as they appear at the WashConnect Login screen.
- All weather requirements are setup for every site at one central corporate location for all sites in your car wash organization with ICS Support.
- System PLU -185 and -186 are the only system PLUs that can be changed. You can edit the Item Description. They are the PrepaidFleetPayment and PrepaidFleetBonus items and the description will display on the POS under the ROA button.
- New Wash Status page with ability to open and close Auto Sentry terminals and view status of TNC terminals. Control wash open signal through WashConnect or toggle switches.
- Create Global Discount Coupons and redeem at both the Auto Sentry and Touch POS.
- Send Hand Finished Service alert to indicate a purchase has been made.
- Wash Book counts tied to an RFID tag can be redeemed. Tag cannot be tied to a club or a fleet.
- Limited Club Members exceeding their wash limit are eligible for discounted pricing set up from a profile using the Customer Group feature.
- To provide better traceability instead of deleting data, you no longer can hard Delete Profiles but will Terminate Profiles instead.
- Other Profile enhancements have been made to speed up profile schedule saving.
- Vehicle make and model entries are set up to auto-complete, formerly were drop-down lists.

- The POS displays to the 1/1000s of a \$1.00 for Gas Pump profit center. (i.e. \$3.786)
- Virtual receipt and printed receipt will show the number of gallons purchased and the price per gallon.
- Users, from other sites, can log into the Auto Sentry's Service Unit Screen.

VERSION 1.3.1

January 20, 2015

New Benefits, Features, and Enhancements

Fleet Promotion

Discount Price List Promotion is a new Promotion category. This promotion can be created at Corporate and then can be assigned to selected fleet accounts through the Fleet/Accounts tab at local sites. Within the Discount Price List promotion, specific PLU numbers can be selected and three types of discounts can be assigned to the PLU. These include changing the actual price, granting a percentage discount, and getting a specified amount discounted off the price.



See "" on page 774.

Reports

- New! Statistical Comparison Report compares the sales performance of one period versus another period. (Available at Corporate only.)



See "About Statistical Comparison Report" on page 344.

- Vehicle Statistical Performance Report (VSPR) enhancements:
 - VSPR reporting interval options available: Hour, Day, Week, Month or Annual.
 - When displaying the VSPR by week, the weeks match the First day of week setting from the Global Configuration.



See "View the Vehicle Statistical Performance Report (VSPR)" on page 315.

- View Register Report is available to reprint duplicate receipts from a POS for days other than today. Once the View Previous Days permission is granted for the user from Users > Security Roles menu, they have the ability to select previous days within the View Register report.



See "Set previous days privilege on View Register Report" on page 245.

- Credit Card and Shift Detail Reports - From the Credit Card and Shift Detail Reports, the Payment Type column by default combines Visa and Master Card. Contact support to separate Visa and Master Card totals into two separate columns if necessary.



See "About Payment Account" on page 509.

- Formerly, Transactional Detail Report, has been renamed Transaction Detail Report.
- Controller Services Report - The Controller Services Report displays controller transactions accurately showing which controller services have been used against the services sold.

Site IDs

Within Customer > Manage menu, you can find a field called Site in both Customer and Vehicle. The Site column shown there represents where the customer and vehicle were signed up. This becomes significant if you run Autobilling at each individual site because then you can setup to only bill those memberships that belong to the Site. Memberships can also be billed from where the individual vehicles were signed up versus where the customer was signed up. When doing these things, changing the Site would assign the membership to that Site, meaning it would receive the Autobilling revenue. This functionality is permission-based.



See "Add a Customer" on page 81.

Wash Code Enhancement

This enhancement is to keep customers moving quickly through the Auto Sentry, if a customer enters a wash code that was already used within the last 30 days, a popup message informs customers the wash code was already redeemed with a message stating, Already Washed on date and time.



See "About Ticket Generation" on page 601.

POS

- Setting to show/hide car count information on the POS screen.
- When renewing a club, customer can change club at POS.
- Added ability to perform club renewals at the Presell terminal.

- Direct Plate Search: POS/Presell will start searching license plates after 2 characters are entered.
- Pole Display viewing options:
 1. On the first line of the pole display, you can view the current service being rung up. On the second line, the running total appears. (Default setting)
 2. **New!** Both lines on the pole display show the last two item(s) or service(s) being rung up, until the Finalize button is selected, and then the total appears on the second line of pole display. This option was requested to mimic the pole display setting in the Tunnel Master management system.
- Automatically open Presell page in WashConnect for Presell terminal.
- Touch POS implements paging on sales items for faster response time.

Other Features

- At the Auto Sentry, customer can go directly to Buy Wash when selling Gift Cards or playing the RFID validation screens by selecting the Go Directly to Buy Wash setting.
- Now the Card number field can be edited from Customers > Manage menu so fleet customers and general customers can be edited through the same screen as club customers. The number entered here is the number that needs to be encoded on a Customer Card for accessing Fleet memberships at the Auto Sentry/POS or for identifying a General customer at the POS. This number will not be able to access a club membership at an Auto Sentry.
- Barcodes can now be assigned to club vehicles offering another means of tracking club vehicles besides the use of RFID tags.
- Privilege added to show/hide the Report Default Date menu.



See "Default Date Range" on page 74.

Enhanced Password Security

To prevent administrative vulnerability, WashConnect User Passwords must meet the following minimum requirements:

- Be at least six characters in length.
- Contain at least 1 uppercase letter.
- Contain at least 1 lowercase letter.
- Contain at least 1 number.



See "About Manage Users" on page 541.

Canada Only

New! CAGE Support for LoyalMark Gift.

VERSION 1.3.0

September 18, 2014

New Features and Enhancements

Customer Groups

Customer Group(s) can be created to include individually specified customers. Customer groups can then be used in the profile system to offer special prices based on their Customer Group(s) association. For example: You can offer your best customers a discount for their loyalty by including them in a Customer Group that is associated with a wash profile set up with special pricing.



See “About the Group menu” on page 102.

Fleet

- Fleet invoicing has been streamlined to make it more intuitive and user friendly. In addition to streamlining the overall function, fleet invoices can be generated and attached as a PDF to an email and sent to primary fleet email address.
- Ability to assign fleet discounts at time of sale (not time of invoice) to individual fleets.
- Ability to void an ROA payment and remove it from the fleet invoice.
- Ability to add a line of text and up to three footers to all fleet invoices; this message must be the same across ALL fleet accounts.



See “About Fleet Manage” on page 171.

Club and Fleet Profiles

Club and Fleet profiles now allow up to 40 base services and 40 extra service(s) for both POS and Presell devices.



See “About Profiles” on page 434.

Memberships and Autobilling

Each individual site in a corporate structure has the option to independently bill their own club memberships instead of billing all club memberships from one site.



See "About Club Membership" on page 110.



See "Add a Club Customer" on page 85.

Enhanced Report

Added a Bill check box to Declined Payment Report to allow for individual selection(s) or ALL club memberships to be marked as Bill.



See "Mark Bill in Declined Payment Club Report" on page 133.

Vacuum

- Added ability to create and update various types of sales items within the Vacuum profit center. This feature allows you to create wash packages with the vacuum portion allocated to the vacuum profit center.
- Generate and Redeem Vacuum Tickets.



See "About Sales Items" on page 392.



See "About Manage Profit Centers" on page 721.

Touch POS

- First Name and now Last Name Greeter Identification for both POS and Presell devices.
- Ability to configure the Quick Money buttons: default values are \$1, \$5, \$10, and \$20.
- Checks can be disabled and excluded as a payment type.
- Option to hide No Tax or No Sale buttons.
- Ability to force greeters to be clocked-in before posting sales on POS.
- Two ways to change the size of POS services buttons:
 - All buttons can be either Regular, Medium or Large size.
 - Regular, Medium or Large buttons can be applied to each type of service category: base, club, extra, etc.
- Added ability to print general reports on POS with a receipt printer.
- Added hourly car count per shift to the bottom of the POS screen.

- Ability to hide all denominations or just zero denominations on receipt when closing a POS shift.



See "About Touch POS Sales Entry" on page 578.

Enhanced Reporting

- Vehicle Statistical Performance Report (VSPR) added minimum and maximum temperature column for specified date ranges.
- Promotions added ability for WashConnect® to track Bonus Points or Card Punch totals.



See "Add Bonus Point Promotion" on page 456.



See "Add a Punch Card Promotion" on page 470.

- Define which site a customer belongs to by assigning a Site ID to a specific vehicle within the Customer menu Manage form.
- Vehicle History is now available for non-club vehicles as well as club vehicles.



See "About the Vehicle Statistical Performance Report (VSPR)" on page 315.

Canada Only

Non-autobilling sites can advance club membership expiration dates from Advance Expiration screen.



See "About Advance Expiration" on page 146.

VERSION 1.2.3

April 28, 2014

New Features and Enhancements:

Wash Book

This feature allows any customer to purchase a group of washes at a discounted price, typically paying for X number of washes while getting Y number of free washes. Both X and Y are fully configurable. Customers can purchase and redeem Wash Books at an Auto Sentry or TouchPOS.



See "About Wash Books" on page 424.

Biometric FingerPrint Reader

Simply log in to WashConnect® with a quick scan of your fingerprint. The FingerPrint reader is a valid authentication Login method for WashConnect® and Time clock.



See "Add User's Fingerprints" on page 552.

A la Carte Feature

Customers can now select up to six Extra Service selections in one transaction.

NOTE: When Auto Sentry A La Carte setting is enabled, the No Upgrade button appears until an upgrade or extra service is selected, then the button changes to Done with Extra Services while up to all six upgrades or extra services can be selected.

Variable Pricing

PLU items in the Extra Services Menu can now have Selection Dependent Pricing assigned to them. The price displayed will be dependent on other Extra Services that have already been selected. This will allow you to lower prices on selected Extra Services under specific conditions that you pre-configure. (i.e., Customer has selected Tire Shine for \$3.00 which will lower the price of the Wheel Brite from \$3 to \$2.)



See "About Variable Pricing" on page 405.

Sales Tax Rounding

With the Variable Pricing of the Extra Services, taxes could make the total amount uneven (i.e., \$3.01). The Sales Tax rounding feature will allow the system to automatically adjust your services advertised price so the final amount will be even (\$3.00).



For Item Rounding, See "Global > GlobalConfiguration > Global" on page 686.

Centralized logging

From one server, centralized logging allows real-time viewing of the logs. It saves time as we can view the log up until the point of equipment failure even when equipment is still down.

Multiple Tunnel Management

Save on the cost of purchasing and maintaining two servers to operate two tunnels. Now you can view and manage two separate tunnels from one server.

One Centralized Logging Server gives the ability to operate both Gates. Gate Management tab allows easy removal of cars from the Gate to Pending with clear identification of the two separate tunnels. You can easily add or remove cars before they reach the 5th loop. Once the car passes the 5th loop, they will no longer appear in Gate Management but can be edited in the Stack Management tab.

One Stack Management tab appears for each individual tunnel for ease of firing roller, canceling fire, adding services and retracts, pull car out of stack to pending, reload car to stack, move car position, reprint receipt and refund tickets. At a glance, you can view the ticket for each car in the stack.



See "About Stack Management" on page 735.

Touch Entrance Sign

This 42" touch screen Entrance Management Sign (Touch ES) allows your tunnel entrance employee more control to fire and stop rollers without moving focus from loading car. The Touch ES will also display tunnel entrance instructions, and tunnel services purchased in a graphical confirmation.



See "About Touch POS Sales Entry" on page 578.

Weather Index on Vehicle Performance Report

Temperature and Weather Icons display on the Vehicle Performance Report.



See "Setup Weather Settings for the Vehicle Performance Report" on page 691.

Export Data

Export System Data is a new tab which allows you to export specific data out of the database using one of three output file types: .csv, .txt, and .xml. There are three main types of data that can be exported which include Configuration data, Customer data, and Shift/Transactional data. Upon exporting, a zip file is created and named ICSDDataExport.zip.



See "About Export System Data" on page 501.

Autobilling

Sell non-renewing Club Memberships paid for by Cash or Credit at the POS terminal.

Disable Autobill for club customers who have not used the wash in X months so they are not charged.

POS and Auto Sentry can proactively ask Club Customers to update credit card on file for Club Autobilling if card is expiring within X (configurable) days.



See “Add a Club Service” on page 376.

Journals

The Cash Management feature has been streamlined making it faster and easier to manage the flow of cash in and out of your system. You can now View Journal History, Verify Entries, and perform Safe Journal entries on the same screen without having to navigate to another menu.



See “Search for a Journal Entry” on page 273.

CHAPTER 16:

MARKETING - QUICK STARTS

Quick Starts provide brief, concise information about commands or features to setup popular marketing tasks for the Auto Sentry without all the details. See the individual help instructions for the individual task.

FAQ

- "Coupon Codes - Quick Start" (Coupon Codes)
- "Create a Barcode - QuickStart"
- "Wash Club Offerings - Quick Start"
- "Frequency Promotions - Quick Start"
- "Gift Cards Promotional Selling - Quick Start"
- "Fund Raiser - Quick Start"

Coupon Codes - Quick Start

Coupon Code is the tool used for mass distribution since the same code can be used multiple times. On your advertisement coupon, use a 3-, 4-, or 5-digit number with an expiration. Customers can enter a valid coupon code directly at the Auto Sentry.

I. Set up Auto Sentry Coupon Code Length

Set the coupon code length.

- 1 **System Setup > Devices > Settings.**
- 2 Select **Auto Sentry**, Device Name, **TouchConfiguration**, and **Shift** settings.
- 3 Set the **Coupon Length** which adjusts the amount of digits the Auto Sentry accepts on the keypad (3-, 4-, or 5-digit number).

NOTE: The coupon length can be changed; however, be certain your previous promotion of a different coupon length has expired before adjusting length of coupon code.

- 4 If the **Coupon Length** setting is changed, the Auto Sentry must be restarted for this change to take effect.



See “Auto Sentry > Shift” on page 679.

II. Add the Coupon PLU

Add Sales Item PLU for a coupon.

- 1 Select **Configuration > Goods and Services > Sales Items**.
- 2 Add a new Sales Item PLU. If you use the same coupon number as the PLU number, it will be easy to locate on the Shift Detail Report.
- 3 In **Barcode**, type the 3-, 4- or 5- digit Barcode number.



See “Create a Barcode - QuickStart” on page 785.

- 4 You can use **Advertised Extra Service Video** files for extra services.



See “About Sales Items” on page 392.

III. Set up the Profile for the Coupon

Create a new profile for the coupon. This coupon profile allows the Auto Sentry to accept the coupon code during a time period. Set up this time period in the profile’s schedule. A valid coupon profile schedule must be set up.

- 1 Select **Configuration > Goods and Services > Profiles**.
- 2 Add and name a new Profile for the Coupon.
- 3 Add Wash Service and select the Wash PLU and the Coupon PLU.
- 4 **Save**.
- 5 Select the previously saved Coupon Profile.
- 6 Add a schedule to the Coupon Profile.
- 7 Click the **Applies to** drop-down arrow, and select **Coupon**.
- 8 Set Coupon Profile schedule parameters.
- 9 **Save**.



See "Add a Profile with a Base Wash and Extra Service" on page 435.



See "Flex / Retail Standard Screen" on page 411.

NOTE: There is no setting to turn on/off the coupon code. If a valid profile schedule exists for the coupon, the Coupon Code button appears on the Auto Sentry Main Options menu.



Figure 383. Auto Sentry Main Options Coupon Code button

Create a Barcode - QuickStart

You can create a barcode to include in coupon advertisement for newspaper, magazine, Facebook, etc. that is acceptable to use with the POS and Auto Sentry Barcode Scanner. Follow these quick steps to create a valid barcode:

- 1 In your internet browser, you can open the Free Barcode Generator from the following location: www.barcoding.com/upc
The Free Barcode Generator form opens.
- 2 In **Barcode Data**, type the 3-, 4-, or 5-digit coupon code.
- 3 In **Barcode Symbology**, select one of the following three types that can be read at the POS and Auto Sentry barcode scanner:

- Code 93
 - Code 128
 - UCC/EAN 128
- 4 In **Output Format**, select one of the following formats requested by your graphics designer who is creating the coupon advertisement.
 - .bmp
 - .gif
 - .jpg
 - .png
 - 5 Click the **Generate Barcode** button.
The barcode thumbnail graphic preview appears.
 - 6 To save a full size version of your barcode, right-click the thumbnail graphic, and select **Save Image**.

NOTE: Write down the barcode file location where you saved the full-size version of your barcode. You will need to forward this file to your graphic designer. You can now print the coupon with this graphic image. As long as the print quality of the ad is high, your customer will find it easy to scan the coupon at the Auto Sentry.



See “Coupon Codes - Quick Start” on page 783.

Wash Club Offerings - Quick Start

NOTE: Club members are less likely to visit a competitor.

Customers who join an unlimited wash club provide a credit card that will automatically be charged a flat fee every month, and in return receive as many washes as they wish for that particular vehicle.

Assuming your sales items are set up for your wash menu services and extra service items, follow all three sections for the Quick Start steps below to setup your Wash Club.

I. Setup up to 6 Wash Clubs (and Rules)

- 1 Login to *WashConnect*® at **Corporate**.
- 2 Select **Configuration > Goods and Services > Club Services**.
- 3 Type the name of your first Wash Club offer and the price for this Club. Keep in mind, wash clubs are based on your existing wash menu.

- 4 In Club Rule, set the parameters: Duration, Limited/Unlimited, Billing, and Grace. Save. Repeat for other wash club(s).

NOTE: Wash Club PLU is automatically assigned a number between 900 and 999.



See "About Club Services" on page 375.

II. Setup Discounts for each Wash Club

Per base wash, a discounted (free) wash is needed for the Wash Club Package. Since the Club Membership redeems a base wash, you will need to set up a discount for the base wash as a Discount PLU (not to be confused with the club services PLU). In the next step, you will select this discounted free wash PLU to offset the charges against the base wash in a package. This is because the customer already paid for his wash club in the club membership, and does not get charged again but allows you to track the washes redeemed.

- 1 Login to *WashConnect*® at local site.
- 2 Select **Configuration** > **Goods and Services** > **Sales Items**.
- 3 In **Profit Center**, select **Club**.
- 4 Add a Sales Item.
Type a PLU number and PLU name. Ex: Basic Wash Discount
- 5 Type a negative amount for the Base Wash of the club.
- 6 Select **Discount** for Type.
- 7 Click the **Save** button.



See "About Sales Items" on page 392.

III. Create a Package for each Wash Club level

Create a separate Package for each wash club level or offering. Packages combine the base wash service PLU for the club and a discount free wash PLU. The customer has already paid for the wash in the membership fee, and will not be charged when redeeming a wash. This package balances out to zero. Base Wash \$7.00 + Base Wash Discount -\$7.00 = \$0

- 1 If necessary, login in to *WashConnect*® at local site.
- 2 Select **Configuration** > **Goods and Services** > **Packages**.
- 3 Click Add Package button.
- 4 Type a name and a new PLU number for the wash club package.
- 5 Click **Add Sales Item**

- 6 From the Profit Center list, select two PLUs:
 - Select the Base Wash Service (ex: **\$7.00**) for the Club.
 - Select the Base Wash Service Discount (ex: **-\$7.00**) for the Club.
This will return \$0 because the customer has already paid for the wash in his club membership fee but we still need to select the base wash to turn on the services in the tunnel.

IV. Create a new Profile for each Wash Club

Create a profile for each wash club that includes the base wash, extras and upsells for that wash club.

- 1 If necessary, login to *WashConnect*® at local site.
- 2 Select **Configuration > Goods and Services > Profiles**.
- 3 Type a name for the wash club **Profile**.
- 4 In service type, select **Club Service**.
- 5 Select a PLU for your one of your Wash Club offerings.
- 6 Add a Schedule, and In **Applies To**, select **Club**.
- 7 In Rule, select the Club **Rules** (or Program) from the drop-down list.
- 8 Click **OK**, and the click **OK** again.
- 9 Repeat steps 1 through 7 for each wash club level.

V. Create a Profile for the entire Wash Club Offerings

This profile is used to include all your valid Wash Club profiles so the profile can be scheduled to appear on the Purchase Club Membership screen.

- 1 If necessary, login to *WashConnect*® at local site.
- 2 Select **Configuration > Goods and Services > Profiles**.
- 3 Type a name for the wash club **Profile**.
- 4 In service type, select **Club Service**.
- 5 Select all of the PLUs for your Wash Club offerings menu.
- 6 Add a Schedule, and In **Applies To**, select **Club Sales**.
Immediately after setting up a valid Club Sales schedule, your wash club menu will appear for customers after they select the **Join Wash Club** button.

Example: Unlimited Wash Club		
PLU	Name	Price
Exterior Wash Menu		
50	Straight	\$ 5.00
51	Flush	\$ 7.00
53	Straight Flush	\$ 9.00
54	Royal Flush	\$ 11.00
Club Services		
Auto 917	Flush Club	\$ 14.00
Auto 918	Royal Flush Club	\$ 24.00
Discount Wash		
151	Flush Discounted	(\$7.00)
154	Royal Flush Discounted	(\$11.00)
Package (Clubs)		
351	Flush Club Package	\$0.00
354	Royal Flush Club Package	\$0.00
Extra Services		
205	Wheel Sparkle	\$ 2.00
206	RainX	\$ 2.00
207	Combo	\$ 3.00

Frequency Promotions - Quick Start

Reward customers who buy services on a regular basis with price reductions on each return visit. If the customer keeps buying a service within a preset time period the cost keeps dropping with each visit. The wash code prints at the bottom of their receipt as well as the promotion for their next wash.

The following are the four major menu items to complete to create a Frequency Promotion for one of your base washes:

- 1 Sales Items** from Configuration > Goods & Services menu: Add a PLU for each Discount and one for the free Base Wash.
- 2 Packages** - Setup a Package PLU for each discounted wash as well as the free wash.
- 3 Promo Receipt Text** - Type a name for each wash receipt and then type the message to appear on bottom of each discounted wash receipt.

- Promo Setup** - Locate the PLUs, setup the expiration of the wash code offer, activate it and select the name of the Receipt text.



See "About Frequency Promotion Packages" on page 423.

Gift Cards Promotional Selling - Quick Start

Gift Cards make great gifts but sometimes customers need encouragement to purchase them.

NOTE: Gift Card Sales are non-taxable always. When the customer returns with the gift card to purchase items, he/she will then be charged applicable tax on the purchased items.

You can set up these options for your Auto Sentry at any time. There are three selling promotions for Gift Card Sales:

- System Setup > Devices > Settings**, select **Auto Sentry, TouchConfiguration** and **GiftCard**.
 - Increase Gift Card value by a set **Dollar Amount**:
 - **AddValue Bonus Dollars**, set to 0 if promotion is not in use –or– set to the dollar amount to be added to the amount of the gift card purchase. For example, a customer purchases \$25 gift card, and Add Value Bonus Dollars is 5, then \$5.00 is added to the \$25 gift card amount, and the amount on the gift card will be \$30.
 - or–
 - Offer a **Free Wash** with the purchase of a gift card:
 - **AddValue FreeWash PLU**, set to 0 if promotion is not in use –or– set to the wash PLU of the free wash that customer's will receive at time of gift card purchase.
 - or–
 - Increase Gift Card value by a **Percentage of the Sale**:
 - **Add Value Promo**, set to 0 if promotion is not in use –or– set to the dollar amount to be added to the amount the customer purchases.
- Click **Save**.
- Restart the Auto Sentry.
Changes will take effect immediately after Auto Sentry restarts.

NOTE: After gift value is entered and purchase gift button is pressed, if customer needs to change the amount, he or she will need to press the cancel button and reenter the correct amount.



See "Auto Sentry Gift Card" on page 665.

Fund Raiser - Quick Start

You can use a coupon code to setup a fund raiser where the monies collected will be donated to the group in a lump sum to benefit a charity or group. Follow these quick start instructions:

PLUs needed for the Fund Raiser

- 1 Use an existing Base Wash Sales Item PLU for the fund raiser from the (Express) Profit Center. (i.e., \$7.00 wash includes tax).
- 2 From the Goods and Services menu, setup a **Sales Item** for a PLU for the amount to donate to the Fund raiser for the wash (i.e., for a \$7 base wash with a 50% donation, type the price of \$3.50. Fund raisers are typically not for profit; therefore, not taxable). Setup this PLU from **Fund raiser Profit Center**. If exporting to accounting software, select a general ledger payable **Account ID**. This is the amount you will be donating to the fund raiser. (The Fund Raiser Report can be viewed at the end of the campaign. If the total amount is the same as your Shift Detail report for the same time period, which it should be if you set up the Fund raiser as stated in this quick start, then you can cut a check for the total amount payable.)

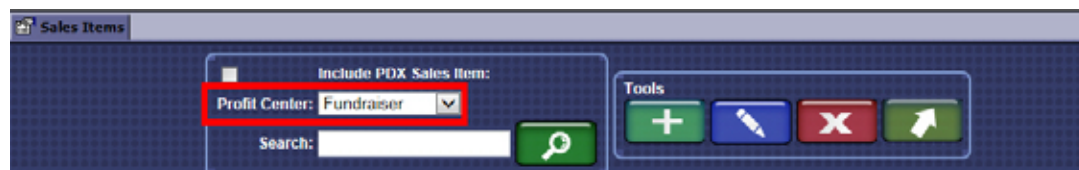


Figure 384. Add Fundraiser Sales Item

- 3 From the Goods and Services menu, setup a **Sales Item** for a **Discount PLU** from the **Wash** Profit Center. If you collect tax on base washes, then this discount amount is also taxable. If exporting to accounting software, select a predetermined General Ledger Account ID.(i.e., If you are coding \$3.50 (non-taxable) of your Base Wash to Fund raiser, and discount \$3.50 (including tax) from your original Base (taxable) wash. Set up the discount PLU price as \$3.30 plus 6% tax.)
- 4 From the Goods and Services menu, setup a **Package** PLU (3 or 4 digits in length) which will be the Fund raiser Code which is the same as the Coupon Code. From the Package Sales Items section, add the 3 Sales Items from steps 1, 2, and 3 for the Package from the (Express) Profit Center. The Package price is calculated automatically based on the Sales Items.
- 5 Setup the Auto Sentry Touch Screen to display the Coupon Code button or the Fund Raiser Code button. The same coupon code is accepted from both buttons.
 - To setup Enter Coupon Code button: In System Setup > Device Settings > **Shift**, type 3 or 4 for the Coupon Code Length.

- To setup Enter Fund Raiser Code button: In System Setup > Device > Settings > Main Options, select True to allow **Fund raiser**.

NOTE: Only five main option buttons can appear on your Touch Screen. If you already have five buttons, you will have to determine which buttons are most important.

6 Setup a **Profile** for the Fund raiser Coupon Code(s):

- Add base Package PLU(s).
- Add any extra services PLU(s).
- Add any PLUs that you can set up for additional donation amounts (when setting up Sales Item PLU, in Type, select **Extra**).
- Schedule the valid time and dates
- In Applies To, select **Coupon**.

After all this has been set up and the schedule is valid, the Auto Sentry touch screen will have an Enter Coupon button and/or Fund raiser Code button on the main options screen.



See “Main Options Screen on Auto Sentry Touch Screen” on page 793.



Figure 385. Main Options Screen on Auto Sentry Touch Screen

Sell a discounted Gift Card at Touch POS - Quick Start

You can set up your Touch POS to sell Gift Cards at a discounted price. Customer can select the desired amount of the gift card, and the Touch POS can automatically discount it for X percentage.

- 1 From the **Configuration > Goods and Services > Sales Items**.
- 2 In **Profit Center**, select **Gift Card**.
- 3 Click **Add**.
- 4 Add PLU number and Name
- 5 In **Type**, select **Discount**.
- 6 Click to select **Discount**, and then in the Price % (percentage) box, type a number for the percentage discount.
- 7 Click to mark the **Department** check box to enable multiple price option.
- 8 In **Account ID**, select an account number.



If setting up selling Gift Card at Auto Sentry, See "Auto Sentry Gift Card" on page 665.

Sales Commission - Quick Start

Set up Sales Commissions for employees. Follow these steps from beginning to end in setting up Sales Commission to reviewing the sales commissions.

- 1 Designate a Commission Schedule from **Configuration > Commissions > Schedules**.
- 2 Create Eligibility Rules from **Configuration > Commissions > Positions**.
- 3 Assign Commission Position from **Manage > User > Wages**.
- 4 User Must **Clock In**.
- 5 User must sign in as **Greeter**.
- 6 Greeter must sell commissioned items.
- 7 Review Sales Commission Report from **Financial > Audit Controls**.



See "About Commissions" on page 513.



See "About Sales Commission" on page 263.

Fundraiser - If tracking Individual Volunteer Sales - Quick Start

This is an option for running a fund raiser that requires the individual tracking of funds. For instance, a marching band offers the members to operate a fund raiser but track how much money each individual sells. The volunteers individually receive the portion of their individual sales, you can set up the fund raiser as follows:

- 1 Setup or use the existing Base Wash Sales Item PLU for the fund raiser. (i.e., \$6.60 always taxable for a \$7 wash)
- 2 From Sales Items, set up a PLU as a discount for the base wash. Use the negative amount (base wash less tax). i.e., -\$3.30 if you are donating half of the \$7.00 wash including 6% tax. If exporting to accounting software, select a general ledger payable Account ID.
- 3 Setup up a Fundraiser Discount PLU in WashConnect®. i.e., \$3.30 if you donate half the \$7.00 including tax. This amount is the proceeds for the Fund raiser. If exporting to accounting software, select a predetermined General Ledger Account ID
- 4 Set up a package from the fund raiser Profit Center for the wash you are selling in the fund raiser. The package includes the base PLU, the base wash discount PLU, and the fund raiser PLU. Make certain the price calculated is your actual retained earnings on wash.
- 5 Set up a Fleet fund raiser account so that you can generate tickets and have some time to create the wash code cards for the fund raiser, and customer can return at a later date to purchase these marketing wash code cards.
- 6 Paid Ticket Generation at POS Site Level, generate 5-digit wash codes. Set up a Fleet Account for this fund raiser, so the codes can be paid for after the marketing pieces are printed. These codes can be entered by customers at Auto Sentry or POS to redeem their pre-paid fund raiser wash.
- 7 Random and unique wash codes can be printed on card stock. Protect these numbers from theft by placing scratch off stickers on top of the numbers.

NOTE: Call Technical Support if you would like ICS Marketing to print 5-digit wash codes (barcodes - barcode reader is required) printed on labels or card stock (additional fees apply).

- 8 Fund raiser Leader can come in to car wash and purchase the wash code cards at the Touch POS. Leader will need to pay \$2.66 per wash code for this example. Leader brings Tax Exempt form to keep on file at car wash. In Touch POS, select ROA, search for the Fleet fund raiser account, and enter amount to pay for wash codes and Finalize sale.

FAQs

Frequently asked questions that you can resolve without having to call technical support.

- Stack Controller does not auto delete cars in hand service queue at midnight for a 24 hour wash.
 - Enable wash open 24 hours in global settings:
In **WashOpen24Hours**, set to True.



Figure 34, "Global Global," on page 686

INDEX

A

- About Fleet Invoice, 162
- About the Voids Report, 239
- Acceptor edits
 - shift detail report, 199
- Account ID
 - club services, 386
 - sales item, 415
- Accounts
 - shift detail report, 197
- Add value promo
 - auto sentry gift card, 667, 790
- Address
 - declined payment report, 135
 - vehicle history report, 124
- Adds (+)
 - shift detail report, 198
- Admin RFID card
 - auto sentry control, 663
- Alerts
 - about, 492
 - configuring, 500
- American express
 - auto sentry credit card, 665
- Amount
 - declined payment report, 135
 - vehicle history report, 125
- Amount tendered
 - fleet activity report, 220
- Auto billing, 683
- Auto bump
 - auto sentry shift, 679
- Auto sentry coin acceptor, 679
- Auto sentry credit card, 679
- Auto sentry DeviceIntDebug, 683
- Auto sentry ETL heartbeat, 683
- Auto sentry gift card, 679
- Auto sentry logging, 670
- Auto sentry main options, 683
- Auto sentry receipt, 683
- Auto sentry receipt footer, 670
- Auto sentry receipt header, 679
- Auto sentry RFID, 683
- Auto sentry service font color, 683
- Auto sentry shift, 683
- Auto sentry touch debug, 679
- Auto sentry vandalism deterrent, 679
- Auto sentry WBC connection, 683
- Average monthly usage
 - sales item, 416

Average wash per vehicle
profitability report, 115
Avg. days between visits
club usage report, 120
vehicle history report, 124
Avg. visits/month/vehicle
club usage report, 120

B

Backup destination
TNC backup, 657
Backup enabled
TNC backup, 657
Backup password
TNC backup, 657
Backup username
TNC backup, 657
Bar code
sales item, 415
Bar code receipt
auto sentry receipt, 677
Bar code ticket
auto sentry receipt, 677
Base wash
adding, 435
Beginning bank
shift detail report, 198
Billing day
club dialog box, 387
BMP color
club services, 387
sales item, 416
BMP file
club services, 387
sales item, 416

C

Cage location
safe credit options, 665
CAPS host
auto sentry credit card, 665
CAPS port
auto sentry credit card, 665
Card path
auto sentry credit card, 665
Card#
credit card report, 204, 212
Cars
text messaging dialog box, 320
Cash advances
shift detail report, 199
Category
sales item, 415
Change error msg1

- auto sentry receipt, 677
- Change error msg2
 - auto sentry receipt, 677
- Charged
 - fleet activity report, 220
- Check #
 - checks report, 216
- Check amount
 - checks report, 216
- Checks
 - shift detail report, 198
- Checks report
 - viewing, 217
- Clerk
 - auto sentry gift card, 667
- Close on exit
 - auto sentry shift, 679
- Club (customer and vehicle)
 - club summary report, 128
- Club reports
 - club summary, 125
 - club usage, 115
 - declined payment, 129
 - revenue distribution, 136
 - vehicle history, 121
- Club revenue
 - club usage report, 120
 - profitability report, 114
- Club rules
 - examples, 388
- Club services
 - about, 375
 - adding, 388
 - editing, 382
 - filtering, 385
 - terminating, 383
- Club summary report
 - about, 125
 - viewing, 129
- Club types, 388
- Club usage report
 - about, 115
 - viewing, 116, 122
- Clubs
 - about, 60
 - adding, 492
 - editing, 492
 - menu, 388
- Component type
 - alert configuration, 501
- Configuration
 - club, 388
 - club services, 375
- Configuration menu, 371, 783

- Configure menu, 109, 147
- Contact
 - declined payment report, 135
 - vehicle history report, 124
- Conveyor hold
 - auto sentry control, 663
- Coupon length
 - auto sentry shift, 679
- Credit card
 - declined payment report, 135
 - shift detail report, 197
- Credit cards report
 - about, 202
 - viewing, 209
- Credit receipt count
 - auto sentry receipt, 677

D

- Date
 - checks report, 216
 - credit card report, 204, 212
 - fleet activity report, 220
- Date declined
 - declined payment report, 135
- Debit card
 - shift detail report, 197
- Declined
 - club summary report, 128
- Declined payment report
 - about, 129
 - editing a customer, 133
 - notes, 131
 - printing, 133
 - search, 134
 - viewing, 135
- Deposits report
 - about, 221
- Description
 - club services, 386, 387
 - sales item, 415
- Deterrent alarm output
 - auto sentryvandalism deterrent, 682
- Deterrent alarm time out
 - auto sentry vandalism deterrent, 682
- Deterrent disarm alarm time out
 - auto sentry vandalism deterrent, 682
- Deterrent enabled
 - auto sentry vandalism deterrent, 682
- Deterrent on change low high
 - auto sentry vandalism deterrent, 682
- Device ID
 - auto sentry RFID, 681
- Discover
 - auto sentry credit card, 665

- Dispenser edits
 - shift detail report, 198
- Display name
 - sales item, 414
- Duration
 - club dialog box, 387

E

- Edited transactions
 - shift detail report, 199
- Ending Bank
 - shift detail report, 199
- Enhanced log
 - auto sentry touch debug, 679
- Even
 - shift detail report, 199
- Extra service
 - adding, 435
- Extra service amount
 - sales item, 416

F

- Financial reports
 - brief descriptions, 176
- First name
 - declined payment report, 135
 - vehicle history report, 124
- Fleet activity report
 - about, 217
 - viewing, 221
- Font color
 - auto sentry control, 663
- Fore color
 - club services, 387
 - sales item, 416
- Free wash report
 - about, 224
 - viewing, 228
- Fuel sales
 - shift detail report, 197

G

- Gate
 - auto sentry control, 663
- Gift free
 - shift detail report, 197
- Gift redeemed
 - shift detail report, 197
- Gift sold
 - shift detail report, 197
- Grace period
 - club dialog box, 388
- Gross time out
 - auto sentry control, 663

I

- Installation
 - options, 40
- Item price
 - fleet activity report, 220

L

- Language
 - about, 414
 - editing, sales items, 375
- Last name
 - declined payment report, 135
 - vehicle history report, 124
- License
 - declined payment report, 135
 - fleet activity report, 220
 - vehicle history report, 124
- License plate
 - club usage report, 120
- Logging in, 71
 - corporate server, 72
 - default users, 59

M

- Man hours
 - text messaging dialog box, 320
- Max increase
 - auto sentry gift card, 667
- Max transaction amount
 - auto sentry shift, 679
- Menu bar
 - illustrated, 44
- Menu tab, 55
- Merchant ID
 - auto sentry credit card, 665
- MerchantID
 - auto sentry gift card, 667
- Message types
 - alert configuration, 501
- Min increase
 - auto sentry gift card, 667
- Most visited vehicle
 - club usage report, 120
- Multiple languages
 - auto sentry control, 663
- Multi-site, 41

N

- Name
 - club services, 386, 387
 - club usage report, 120
 - revenue distribution report, 138, 143, 145
 - sales item, 415

- New
 - club summary report, 128
- No extra buy time out
 - auto sentry control, 663
- No sale count
 - shift detail report, 199
- Non taxable sales
 - shift detail report, 197
- O**
- Open price
 - sales item, 415
- Other details
 - sales item, 416
- Over
 - shift detail report, 199
- P**
- Password
 - changing for a user, 549
- Path
 - auto sentry gift card, 667
- Payouts
 - shift detail report, 198
- Payouts report
 - about, 232
 - viewing, 235
- Performance menu, 305, 735, 753, 767, 783
- Performance reports
 - brief descriptions, 307
- PLU
 - club services, 386
 - sales item, 414
- Posted date
 - vehicle history report, 125
- Price
 - checks report, 216
 - club services, 386
 - credit card report, 204, 212
 - revenue distribution report, 138, 141, 143, 145
 - sales item, 415
- Primary culture info
 - safe language, 658, 673
- Processor
 - auto sentry credit card, 665
 - auto sentry gift card, 667
- Profile
 - about, 417
 - adding, 435
 - editing, 440
- Profit center
 - club services, 386
 - sales item, 414
- Profit centers, 721

Profitability
about, 112

Q

Qty redeemed
revenue distribution report, 138

Qty.
revenue distribution report, 138, 141, 143

R

Reason
declined payment report, 135

Rec'd on account
shift detail report, 197

Receipt count
auto sentry receipt, 677

Receipt footer 0 to 5
auto sentry receipt footer, 678, 701, 702

Receipt header 0 to 5
auto sentry receipt header, 679

Received on account report
about, 235
viewing, 239

Recipient email
alert configuration, 501

Recurring ID
declined payment report, 135
vehicle history report, 124

Refund due
shift detail report, 198

Register reports
credit cards report, 202
deposits report, 221
fleet activity report, 217
free wash report, 224
payouts report, 232
received on account report, 235
rewash report, 228
shift report, 186

Removes (-)
shift detail report, 198

Rename devices, 710

Renewed
club summary report, 128

Replication, 58

Report date range, 77

Reports
about, 61
exporting, 67
printing, 66
searching, 69
zooming, 68

Restart delay
auto sentry control, 664

- Retired transactions
 - shift detail report, 199
- Rev/wash
 - club usage report, 120
- Revenue
 - vehicle history report, 124
- Revenue distribution report
 - about, 136
 - viewing, 138
- Revenue per wash
 - profitability report, 115
 - vehicle history report, 124
- Rewash report
 - about, 228
 - viewing, 232
- RFID
 - declined payment report, 135
 - vehicle history report, 124

S

- Sales @ combined tax rates
 - shift detail report, 197
- Sales item
 - deleting, 409
 - display name, 414
 - editing, 414
 - language, 414
 - outputs, 375
 - searching, 407
- Sales tax
 - fleet activity report, 220
 - sales item, 415
- Sales/car
 - text messaging dialog box, 320
- Schedule
 - about, 441
 - deleting, 446
 - editing, 445
- Scroll buttons, 53
- Searchable
 - sales item, 415
- Secondary tunnel
 - auto sentry control, 664
- Service
 - fleet activity report, 220
 - vehicle history report, 125
- Shift report
 - about, 186
 - viewing, 202
- Site
 - vehicle history report, 125
- Site ID
 - revenue distribution report, 138, 143, 145
- Site name

- revenue distribution report, 138, 143
- Stack Management, 736
- Stacking
 - auto sentry control, 664
- Starting, 70
- Status bar, 57
- Store ID
 - auto sentry credit card, 665
- Sub total
 - fleet activity report, 220
 - revenue distribution report, 138, 143, 145
- Suspended
 - club summary report, 128
- Switch enabled
 - auto sentry control, 664
- System setup menu, 611

T

- Tax
 - checks report, 216
 - credit card report, 205, 212
 - revenue distribution report, 138
- Tax credit card
 - auto sentry credit card, 665
- Taxable
 - club services, 386
- Terminal ID
 - auto sentry credit card, 665
- Terminated
 - club summary report, 128
- Ticket
 - checks report, 216
 - credit card report, 204
- Time
 - checks report, 216
 - credit card report, 204, 212
- Time out
 - auto sentry gift card, 667
- TimeOut
 - auto sentry credit card, 665
- Token error msg1
 - auto sentry receipt, 678
- Token error msg2
 - auto sentry receipt, 678
- Tokens redeemed
 - shift detail report, 198
- Total
 - checks report, 216
 - credit card report, 205
 - fleet activity report, 220
 - revenue distribution report, 138
- Total active
 - club summary report, 128
- Total income

- shift detail report, 197
- Total non-cash
 - shift detail report, 198
- Total rev/wash
 - club usage report, 120
- Total revenue
 - club usage report, 120
 - profitability report, 114
 - vehicle history report, 124
- Total revenue per wash
 - profitability report, 115
 - vehicle history report, 124
- Total sales
 - shift detail report, 197
- Total wash
 - profitability report, 114
 - vehicle history report, 124
- Trans ID
 - fleet activity report, 220
- Transaction
 - checks report, 216
 - credit card report, 204, 212
 - declined payment report, 135
- Transaction ID
 - vehicle history report, 125
- Transactive
 - auto sentry credit card, 665

U

- Under
 - shift detail report, 199
- Upgrade qty
 - club usage report, 120
 - vehicle history report, 124
- Upgrade quantity
 - profitability report, 115
- Upgrade rev/wash
 - club usage report, 120
- Upgrade revenue
 - club usage report, 120
 - profitability report, 114
 - vehicle history report, 124
- Upgrade revenue %
 - club usage report, 120
- Upgrade revenue per wash
 - profitability report, 115
 - vehicle history report, 124
- Upgrade revenue percent
 - profitability report, 115
- Upgrade revenue percentage
 - vehicle history report, 124
- Upgrade vehicle percent
 - profitability report, 115
- Upgrade vehicle percentage

- vehicle history report, 124
- Use wash detail
 - auto sentry control, 664
- Use wash open
 - auto sentry control, 664
- Use wash open label
 - auto sentry, 664
- User
 - alert configuration, 500, 511
- Users
 - default login, 59
- Users menu, 525, 557

V

- Vehicle history report
 - about, 121
 - viewing, 125
- Vehicles
 - profitability report, 114
- Version, 39
- Video file
 - club services, 387
 - sales item, 416
- Visa master
 - auto sentry credit card, 665
- Visits
 - club usage report, 120
- Voided transactions
 - shift detail report, 199

W

- Wash equipment
 - auto sentry control, 664
- Wash or profit center name
 - shift detail report, 196
- Wash per day
 - club dialog box, 388
- Wash per month
 - club dialog box, 388
- Wash per quarter
 - club dialog box, 388
- Wash per six month
 - club dialog box, 388
- Wash per week
 - club dialog box, 388
- Wash per year
 - club dialog box, 388
- WBC device key
 - auto sentry WBC connection, 683
- Workspace
 - illustrated, 44
 - tabs, 56

Change History

Table 71: Document Change History

Document Version	Date(s)	Reviewer Initials	Description
1.0	January 13, 2010		First review release.
	April 23, 2010	JM, RH, BB, JW, NV, MR, BM, RW, JP, MM	Second review release.
	May 5, 2010		First release.
2.0	December 15, 2010	RH, JM, MR	Second release. Clubs-only.
3.0	May 20, 2011	RH, JM, MR	Third release. Combined interface.
4.0	August 8, 2013 May 22, 2014	WS	Fourth release. Touch POS, StackNControl, Journal Verify, Cash Management, Promotions.
5.0	September 25, 2014	WS, ES, JM, BM	Fifth release.
6.0	June 17, 2015	WS, BM	Sixth release.

WashConnect, Auto Sentry, Touch 'N Clean, Lube Master and Tunnel Master are registered trademarks of Innovative Control Systems, Inc.

American Express is a registered trademark of American Express Company.

Discover is a registered trademark of Discover Financial Services Corporation.

Intuit Quickbooks is a registered trademark of Intuit, Inc.

Mastercard is a registered trademark of MasterCard International Incorporated.

Sage Peachtree and *MAS 90* is a registered trademark of The Sage Group plc.

SQL Server is a registered trademark of Microsoft Corporation.

TransFirst is a registered trademark of TransFirst LLC.

Visa is a registered trademark of Visa International Service Association.

Windows and *Explorer* are registered trademarks of Microsoft Corporation.

All other company or product names are referenced for identification and may be trademarks of their respective owners.

No part of this document may be reproduced in any form or by any means, including but not exclusive to electronic, mechanical, photocopying, etc., without the prior written permission of Innovative Control Systems.

This document and the information contained within subject to change without notice.

UM 012108 *WashConnect*® User Manual Version 6.0 June 17, 2015

Innovative Control Systems, Inc.

1349 Jacobsburg Road

Wind Gap, PA 18091

<http://www.icscarwashsystems.com/>

610-881-8000

610-881-8100 - Fax

documentation@icscarwashsystems.com

