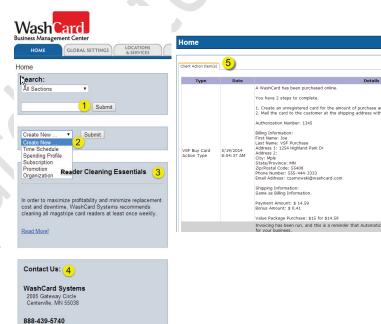
# Index

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# Business Management Center - BMC

#### 1. HOME

- a. Search Feature Back to Index
  - i. Search on partial card numbers.
  - ii. Search on names.
  - iii. Finds Disabled Accounts and Cards.
- b. Create New Back to Index
  - i. This dropdown list will link you to a new setup page for the function chosen.
- c. Tip of the Week Back to Index
  - Suggestions on how to get the most from your WashCard System.
- d. Contact Us Back to Index
  - i. Our Shipping Address and Contact Information.
- e. 5 Client Action Item(s) Back to Index
  - i. Important Information and Announcements.
  - ii. Notification of Online (web) orders and other actions that you need to complete.
  - iii. Items can be closed once read or completed.



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sales@washcard.com

2.

# a. My Account Back to Index

- Name, Address, Time Zone, Web Site: Your information needs to be accurate. We use this information for contacting you and for shipping.
- ii. 2 Emails, Billing, Notifications, Online Payments:
  - 1. Billing
  - 2. Notifications
  - 3. Online Payments: If a payment is made using the Store Front (web site) you will receive an email at this address letting you know of the transaction and the amount.
- iii. **3 Phone Number:** Make it easy for us to contact you...give us your cell number too.
- iv. 4 Site Code: This 5 digit number is the designation for your business. All WashCards for your locations will start with this code.
- v. 6 Credit Card Authorizer BMC and VSF: This information is from the Gateway or Merchant Processor that you choose for handling your credit card transactions.
- vi. **6 Invoiced Account Automatic Payment:** This is the credit card setup information for your automatic monthly invoice payments.
- VST Credit Card Authorizer: If you use WashPass this is necessary for setting up the recurring payment when using the Virtual Sales Terminal (VST).

My Account Contact(s) Invoice(s) Time Schedule(s) Spending Profile(s) Promo WashCard Systems Client Name: Address: 2289 Cedar Street Suite 104A City: State/Province: Zip/Postal Lino Lakes 55038 Code: Country: Central Standard Tim Time Zone www.washcard.com Web Site: **Billed Email** Support@washcard.com Address: Notifications support@washcard.com **Email Address:** Online Payments Copy Email Address: support@washcard.com Phone Number: 888-439-5740
Mobile Number: 970-454-4052 Site Code: 51302 Required Fields: Minimum Credit Card Authorizer - BMC and VSF Type: Timeout USA ePay (Seconds): IIRI : https:/ Key: Buy Email: support@washcard.com WashCard Systems Virtual Store Front support@washcard.com Title: Request Email: Invoiced Account Automatic Payment: Kev: 1234 VST Credit Card Authorizer Type: Timeout USA ePay 60 (Seconds): URL: https:// Key: Pin: 1234

support@washcard.com support@washcard.com

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Email To: Email From:

Edit

# b. **Contacts** Back to Index

i. Contacts and Users of the BMC are setup here – Please enter the names and contact information for anyone that WashCard may have need to contact. They do not have to have BMC access/permissions.

#### ii. Add New Contact

- Name: Use the name fields to create names that will identify your BMC users or locations, if the people may change.
- **Position:** This dropdown list is here only as a reference and has no effect on permissions that are set in the login area.
- Active: This is where an Contact is deactivated from using the BMC Account.
- Phone: Not needed but nice to have. If you have multiple locations, it is a good idea to have a phone number listed for each location and/or primary attendant.
- **Email:** These serve as a quick link to your email and is your User Name when. Logging into the BMC. This needs to be a <u>valid</u> email address.
- 6. Add Contact: Click this button to add the contact to the list. Once you do, you will need to click the <<Return to Contacts Listing to see the contact added to the list. The Login will say Create Login this is the link to access the Create Login page where permissions

  My Account Contact(s) Invoice(s) Time Schedule(s) Specific Sp

#### iii. Contact List

are set.

- Name: Clicking on a name in the list takes you back to the Contact Setup screen where you can edit the settings.
- Status: If you need to change the status of a Contact, click on the **Name** to edit the status.
- **3 Position:** This is the position within your organization. It is best to be consistent with the position names and the permissions given for the BMC. This can be changed by clicking on the **Name** to edit the position.





**Add Contact** 

<< Return to Contacts Listing

- Phone: A valid phone number assists us in contacting the right person for supporting your operation. This number can be changed by clicking on the **Name** and editing the information.
- **Email:** This is a link that will open an email window. WashCard uses this when communicating with you so it needs to be a valid address. This can be edited by clicking on the **Name** and changing the email information.
- Login (Click to Manage BMC Access): By clicking this link you will open the Edit Login page where you will set/change the permissions that each Contact has. You may not want to allow attendants to view the Global Settings, Locations and Services or Reports but they may need to use the Cards and Accounts.

# iv. Contact(s) - Create Login/Edit Login

Email Address & Login Username:\* This is the Username that you enter when logging into the Business Management Center (BMC). It must be a valid email address.

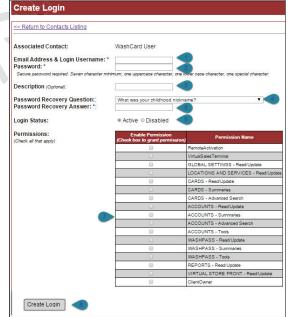
Password:\* Must be at least 7 characters long and contain at least 1 upper case letter, 1 lower case letter and 1 Special character.

**Description (Optional):** Use this to establish groups of users that have the same setup. It can be the same as the Position in the Contact List.

Password Recovery Question: Choose a question from the list that will be easy to remember.

Password Recovery Answer: Make it easy, write it down, chisel it in the desktop..don't forget it. A Password Recovery Question will need to be chosen when creating the BMC login, this is used to recover a lost or forgotten password.

Login Status: To disable a Contact, click the radio button next to Disable and then click **Update** or **Create Login**.



#### Permissions:

- a. Virtual Sales Terminal
  - i. Virtual Sales Terminal is only used for setting up WashPass customers.
  - ii. This will allow users to access the WashPass Setup pages.
    - i. Access the Virtual Sales Terminal by going to:

WashPass tab → Add New Account

#### b. BMC Access

- i. GLOBAL SETTINGS Read/Update
  - i. Gives the user in question access to the Global Settings tab, both Read and Update privileges
- ii. LOCATIONS AND SERVICESS Read/Update
  - i. Gives the user in question access to the Location and Services tab, both Read and Update privileges

Location:

Amount:

Type:

Description:

Prepaid Days:

Start Date:

Customer Type

WashPass Tag/Card:

Guest Pass Card: Full tag and card n

Subscription:

**Washpass Management** 

Recurring Washpass | Prepaid Washpass | Washpass Plans | Washpass Summary | Tools | Add New Account

1 - 25 + CDR Test Location ▼

Prepaid Plan w/ Guest Pass

Consumer ▼

Prepaid Plan w/ Guest Pass ▼

\$5.00

Prepaid

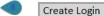
2/24/2015

90

Default is midnight of the first morning following sale. Specified date must fall after today's date.

- iii. CARDS Read/Update
  - i. Gives the user in question access to the Cards tab, both Read/Update Privileges
- iv. CARDS Summaries
  - i. Gives the user in question access to the Promotional Summary and Card Summary tabs.
- v. CARDS Advanced Search
  - i. Gives the user in question access to the Advanced Search tab.
- vi. ACCOUNTS Read/Update
  - i. Gives the user in question access to the Accounts tab, both Read/Update Privileges.
- vii. ACCOUNTS Summaries
  - i. Gives the user in question access to the Accounts Summary tab.
- viii. ACCOUNTS Advanced Search
  - i. Gives the user in question access to the Accounts Advanced Search tab.
- ix. ACCOUNTS Tools
  - i. Gives the user in question access to the Accounts Tools tab.
- x. WASHPASS Read/Update
  - i. Gives the user in question access WashPass Tab.
- xi. WASHPASS Summaries

- i. Gives the user in question access to the WashPass Summary tab.
- xii. WASHPASS Tools
  - i. Gives the user in question access to the WashPass Tools tab.
- xiii. REPORTS Read/Update
  - i. Gives the user in question access to all reports on the REPORTS tab.
- xiv. VIRTUAL STORE FRONT Read/Update
  - i. Gives the user in question full privileges to the VIRTUAL STORE FRONT tab.
- xv. CLIENT OWNER
  - i. If Client Owner is checked, the user will have access to certain owner level notifications and details. Examples include notification of hosting invoices, access to Credit Card Authorizer information and full access to Cards, Accounts, and WashPass tab details without requiring individual privileges for summaries and tools. The Client Owner option hides no data and is the highest level of access.



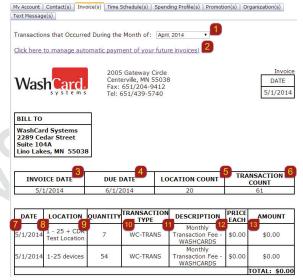
Click the Create Login button to save your changes.

# C. Invoices Back to Index

- i. 1 The date dropdown box allows you to choose which months' invoice you what to view
- ii. 2 Below the dropdown box is a hyperlink "Click here to manage automatic payment of your future invoices!"
  - a. This will be covered in the next section.

#### **Automatic Invoice Payment**

- iii. Information contained on the first data section gives the:
  - 1. 1 Invoice Date: Starting date for this invoice statement.
  - 2. Due Date: The date the invoice is due.
  - 3. 5 Location Count:
    - a. Number of locations included in this billing.
  - 4. Transaction Count:
    - a. The sum of all transactions from all locations that are eligible to be billed.
      - i. In House account transactions are not charged\*\*
        - i. \*\*Abuse of the In House Account by using the cards for anything other than maintenance or courtesy wash/dry will result in the account being shut down and the cards being charged the normal fees.
- iv. Information in the body of the invoice:
  - 1. Date: Starting date the first transactions of its type took place.
  - 2. 8 Location: The name of the location.
  - 3. Quantity: The number of transactions of this type that took place at the named location.
  - 4. Transaction Type: Listed by location with the following types.
    - a. SaleCC-Trans: Direct Credit Card sale without a pre-authorization.
    - b. PreauthCC-Trans: Credit Card sale with a pre-authorization.



- c. WC-Trans: Transaction using WashCards.
- d. Cash-Trans: Transactions conducted in cash.
- e. Check-Trans: Transactions conducted with checks.
- f. Other-Trans: Other transaction fee; from CC processor, etc.
- q. Payment: Your Payment to WashCard (Thank You!)
- h. Support 12: Annual Support Fee.
- i. Web-Host 12: Annual Web Hosting Fee.
- 5. 11 Description: See Transaction Type above.
- 6. Price Each: Unit price in regional currency.
- 7. 13 Amount: Line total of the *Quantity* multiplied by the *Price Each*.

# d. Automatic Invoice Payment Back to Index

- Enter the name as it appears on the credit card you will be using for payment. Company is optional.
- ii. 2 Enter the billing information for the card.
- iii. 3 Enter the card number without spaces...check it twice!
- iv. 4 When the card reaches the Expiration Date it will stop being billed (paying). You will need to enter new card information.

# Return To: Invoice Listing CREDIT CARD INFORMATION VISA FIRST Name: Last Name: Company: WashCard Systems Card Billing Information: Address: City: State/Province: Zip/Postal Code: Country: Phone Number: Email Address: 3 Credit Card Number: Expiration Date: 4 01 - January Update Automatic Payment

# e. <u>Time Schedules</u> Back to Index

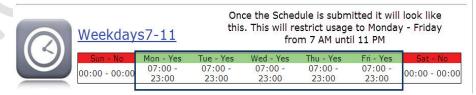
- i. Time Schedules are a handy tool for restricting the usage of cards to a specific time window.
  - 1. Restrict employee cardholders to the hours they work.
  - 2. Restrict fleet account cardholders to the business day.
  - 3. Restrict younger drivers to the hours beforecurfew.

ii. Time Schedules can be implemented at the Card, Card Holder and Account level and determine when each can be successfully used at the client location(s). Card level Time Schedules override Card Holder level Time Schedules which override Account level Time Schedules.

Therefore, a global Time Schedule can be set for an account with a single entry. More specific restrictions can be set on Cards or Card Holders as required to counter abuse, promote off hours business, etc.

Time Schedules are created in the Global Settings tab of the BMC as a first step. After creation, a Time Schedule can be linked to any Card, Card Holder or Account from the Cards & Accounts tab of the BMC.

- iii. To set up a Time Schedule, click on the "Add New Time Schedule ..." link on the Time Schedule(s) tab.
  - 1. Give the schedule a descriptive name such as "M F 7:30 to 5:30".
  - Leave the Enabled checkbox checked to make the schedule active; uncheck it to de-activate it.
  - 3. Check the box next to the days of the week which you want to apply the restriction i.e. Monday, Tuesday, Wednesday, Thursday and Friday.
  - 4. In the **Begin** box enter the time in 24 hour clock time (Military Time). Begin 07:30 (7:30 AM).
  - 5. In the **End** box enter the time in 24 hour clock time (Military Time). End 17:00 (5:00 PM).
  - 6. Be sure to click the Submit button to save your work.
  - 7. The Instructions are posted on the "Add Time Schedule" page.
- iv. The schedule must be applied to a Card, Card Holder or an Account before it will be in effect.
- v. Clicking the link "Return to Time
  Schedule Listing" returns you to the Time
  Schedule(s) tab and shows the list of
  time schedules that have been set up.



Name:

Enabled:

Sunday:

Monday:

Tuesday:

■ Thursday:

Saturday:

Submit 5

Friday:

Wednesday:

Add Time Schedule

<< Return to Time Schedule Listing

00:00

00:00

00:00

00:00

00:00

00:00

00:00

Time Range 4

00:00

00:00

00:00

- 00:00 - 00:00

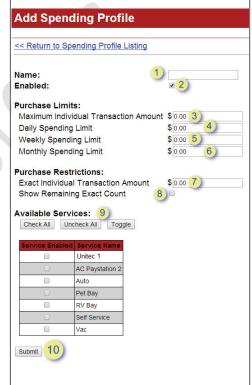
- 00:00

- 00:00

f. Spending Profile(s) Back to Index

Spending Profiles are created on the Global Settings tab of the BMC as a first step. After creation, a Spending Profile can be linked to any Card, Card Holder or Account from the Cards & Accounts tab of the BMC. Spending Profiles can be used to control which devices are used and how much is spent each day, week and/or month. Invoiced, Prepaid, Fleet and WashPass accounts can be restricted to specific equipment such as, but not limited to, automatic, service bays and vacuums.

- i. Adding a Spending Profile
  - 1. 1 Name: Give it a name that will help identify the profile.
  - 2. Enabled: This check box can be used to disable the profile without deleting from the BMC.
  - 3. Purchase Limits:
    - a. 3 Maximum Individual Transaction Amount: This amount will limit the individual amount of the transaction but not the overall amount available. Example: If it is set at \$8.00 and a \$10.00 wash is available at the location it cannot be purchased due to this restriction.
    - b. 4 Daily Spending Limit: This limits how much can be spent per day. Using the Example above, if the daily limit is set at \$16.00 then the account/card holder/card could purchase two washes for \$8.00 each day.
    - c. Weekly Spending Limits: This limits the total spending for the week. Continuing with the **Example**, if this limit is set at \$32.00 then the customer could spend \$8.00 on for separate days, \$16.00 on two days, \$4.57 each day or any combination that adds up to \$32.00 during the week.



- d. 6 Monthly Spending Limits: This limits the total amount that can be spent for the month. If the Monthly Limit is set at \$75.00, using the same Example used above, then the daily average would be \$2.50 or about \$18.75 per week. The idea is to control the spending to accommodate the customer's wishes.
- e. Texact Individual Transaction Amount: If you have an automatic that has several choices and you what to restrict the account to a single choice, then use this function. If you have an \$8, \$10, \$12 and \$14 wash and you want to only use the \$12 wash you would put \$12.00 in this field.

- f. 8 Show Remaining Exact Count: Exact Count is used by locations that sell Unit wash packages. Checking this box will display the number of washes remaining on the card after the current use or, as a balance check at a CDR or POS, the remaining number of washes.
- g. 9 Available Services: Each service type that is setup for your locations will be displayed in this list. To allow the service to be used when this spending profile is applied place a check in the box. As an example, if you set a \$10.00 daily limit for Self Service bays, then the bay will stop when the limit is reached.
- Be sure to click the Submit button.
- 4. Edit: Editing the Spending Profile gives you access to the Error Messages.
  - Maximum Transaction Amount: Displayed when a selection for a service exceeds the maximum transaction amount set.
  - b. Maximum Daily Amount: Displayed when a selection of a service would exceed the maximum daily limit set.
  - c. Maximum Weekly Amount: Displayed when a selection of a service would exceed the maximum weekly amount set.
  - d. Maximum Monthly Amount: Displayed when a selection of a service would exceed the maximum monthly amount set.
  - e. Exact Amount: If Exact Amount is used, this will be displayed when a selection is an amount other than the exact amount.
  - f. Service(s): If the customer tries to use a service that has not been authorized; for example, a customer tried to use a self-service bay when only the automatic and vacuums have authorized.
  - g. Be sure to Update your changes.

Error Messages

Maximum Transaction Amount:

Limited to \$8
Please Try the
\$8 Dollar Wash

Maximum Daily Amount:

Sorry Daily Spending
Limit Reached.
Come Again Soon

Maximum Weekly Amount:

Sorry Daily Spending
Limit Reached.
Come Again Soon

Maximum Monthly Amount:

Sorry, Monthly Limit
Has Been Reached
Come Again Soon

Exact Amount:

Please Select
The \$8.00 Wash
Come Again Soon

Service(s):

Sorry, This Service
Has Been Restricted
For This Account

ii. Spending Profiles can be implemented at the Card, Card Holder and Account level and determine which services are available and how much can be spent at the client's location(s). Card level Spending Profiles override Card Holder level Spending Profiles which override Account level Spending Profiles. Therefore, a global Spending Profile can be set for an account with a single entry. More specific restrictions can be set on

Cards or Card Holders as required to counter abuse, limit valid services on location, etc.

#### g. Promotions Back to Index

- i. There are four basic types of promotions, Monthly Usage Bonus, Assignable Promotions, Birthday Washes and Spending Rewards.
  - 1. Monthly Usage Bonus allows you to choose from 3 groups of customers that can get a usage bonus.
    - a. Unregistered Cards are by default, prepaid these are the cards that are sold or given away and have not been registered to an account. It is designed to reward your best customers, the ones the meet the minimum usage that you set. You can select to use any of the three categories.

      My Account Contact(s) Time Schedule(s) Spending Profile(s) Promotion(s)
      Monthly Usage Bonus Assignable Promotion(s) Birthday Wash Spending Reward(s)
      - i. 1 The minimum amount of usage during the month can be set at any dollar amount you choose. Once the minimum is reached the bonus percentage is applied to the total amount used during the month.
      - ii. 2 The percent of the bonus for the usage that occurred during the month.
      - iii. 3 Any notes you would like to include.



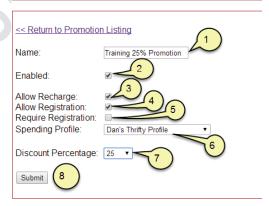
- b. Prepaid Business and Family Accounts: Cards that are assigned to card holders in an account.
  - *i.* 4 The minimum amount of usage during the month can be set at any dollar amount you choose. Once the minimum is reached the bonus percentage is applied to the total amount used during the month.
  - ii. 5 The percent of the bonus for the usage that occurred during the month.
  - iii. 6 Any notes you would like to include.
- c. Invoiced Business and Family Accounts: Accounts that you bill each month for the amount used.

- i. The minimum amount of usage during the month can be set at any dollar amount you choose. Once the minimum is reach the bonus percentage is applied to the total amount used during the month.
- ii. 8 The percent of the bonus for the usage that occurred during the month.
- iii. 9 Any notes you would like to include.
- iv. Don't for get to Update your settings!

#### 2. Assignable Promotions

- a. The first step in creating an assignable promotion is to give it a name that makes it easy to identify. Names like 20% Discount or Training 25% Promotion will help.
- b. The Enabled: Check box should be checked. If it is not checked the Promotion will not work.
- c. Allow Recharge: Check this box if you want to allow the card to be recharged.
- d. Allow Registration: Check this box if you want to allow the card to be registered.
- e. Require Registration: Check this box if you want this card to be registered before it can be used. This is a good way to build the list of accounts and allows you to disable the cards if they are lost or stolen.

# WashCard Systems Promotion Add



- f. Spending Profile: If you want to combine this promotion with a spending profile you would first need to create the Spending Profile then select it from the drop down box.
- g. Discount Percentage: A discount percentage differs from a bonus because the discount is taken at the time of the transaction; a bonus is applied at the end of the month. Setting the Discount Percentage will cause the amounts charged in the Satellite Server history and in the BMC Reports to show up with unusual amounts.
- h. Click the Submit button to save the Promotion; clicking on the promotions name in the Assignable Promotions tab will allow you to edit the setup of the promotion.

#### 3. Birthday Wash

- a. The Birthday Wash is designed to reward your frequent customers with a credit to their account on their birthday. The customer must register the card by creating an account online and entering their birthdate or you can create the account and assign the card(s) and enter the birthdate provided by the customer. The Activity Threshold requires that an account be used within the selected number of days preceding the birthday anniversary. If the card is not used within the specified time frame then the Amount of Credit will not be added to the account.
  - i. There are 2 settings the control the awarding of the Birthday Wash.
    - If the Enabled box is not checked, Birthday Wash will not work for any customers.
    - ii. 2 Amount of Credit: The amount that will be placed in the account of the card holder.
    - iii. 3 Activity Threshold: You decide how big the window is for the activity to take place. Placing a zero (0) in this box will place the credit in the account even if there has been no activity within the past year.
    - iv. 4 The Note field allows you to add a comment to the transaction history to make it easy to identify as a credit for a Birthday Wash.

      "Birthday Wash Credit" works well.



- ii. Email Notification: This allows you to craft a personalized email to your customers.
  - i. 5 Subject: A short text like "A FREE Birthday Reward for You". This appears in the subject line of the email.

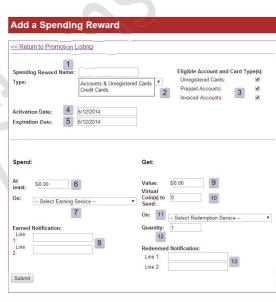
Save Cancel

ii. 6 Body: This is the text that will be in the email. Use it for sales promotions or thanking the customer for being loyal to your location: "Thank you for being a valued customer. Please stop in soon for your free Birthday Wash which has been added your account balance. We look forward to serving you and hope you have a great day!"

iii. 7 Be sure to click Save before exiting the setup.

# 4. Spending Rewards

- Spending Rewards can be a valuable tool in driving traffic to and through your location. Start by giving it a descriptive name then choosing WashCard (Accounts & Unregistered Cards) or Credit Cards.
- ii. 2 Type: There are two choices, Accounts & Unregistered Cards or Credit Cards. If you want to allow both, you will need to setup Spending Rewards for each type.
- iii. 3 Eligible Account and Card Type(s): If you've chosen Accounts & Unregistered Cards in the previous step, then you will need to decide which WashCards will be eligible for the Spending Reward. You can choose any or all but at least one must be chosen.
- iv. 4, 5 Set the Activation and Expiration Dates. Set the expiration date to 1/1/2999 if you want the reward to be continuous.
- v. Spend: What amount has to be spent to earn a reward.
  - i. 6 At least: S: This is the minimum amount that will qualify for the reward.
  - ii. 7 On: Select the device/machine that needs to be used to earn the reward.
  - iii. 8 Earned Notification: This is a 2 line message that will tell the customer that a reward has been earned. Each line is limited to 20 characters.
- vi. Get: The various options to receive as a spending reward.
  - i. 9 Value: Set the dollar value of the reward. This value needs to match the price of the device/machine that will be chosen in the On: field.
  - ii. Virtual Coin(s) to Send: If the device/machine uses coin pulses then be sure to set the Virtual Coin(s) to Send (coin pulses).
  - iii. 11 On: Select the device/machine where the reward can be used (vacuum, dryer, etc).



- iv. 12 Quantity: Usually this is set to 1.
- v. 13 Redeemed Notification: This is a 2 line message that will tell the customer that a reward has been redeemed. Each line is limited to 20 characters.
- vi. 14 Be sure to click Submit to save your setup.

#### h. Organization(s) Back to Index

i. Organizations are used to group and track cards while maintaining individual balances and history of use for the owner of the card. An example would be Fundraising accounts where a portion of spending (usage) is donated to the Organization. Tracking promotions is another use for Organization account.

Tip: Combine an Organization with and Assignable Promotion that requires registration prior to using the card. It's a great way to build a customer base for your marketing!

- 1 Name: Enter the name of the group E.g. "Rockingham Boy Scouts Troop 987" or company.
- 2 Point of Contact: Enter the person's name responsible for the account.
- Address: Fill in the remaining contact information.
- 4 Phone Number: A valid number to make contacting the person easier.
- 5 Email Address: This is important way to contact the customer if you are giving a Residual Percentage to the Organization.
- 6 Residual Percentage: A percent of all transactions from all the cards/accounts that are assigned to this organization.
  - a. This percentage is not deducted or sent to the organization directly but it is calculated for you in the Recharge and Residual Summary report. You will need to send a check to the organization if the residual percentage is part of your agreement.
- 7. Be sure to click the Submit button to save your work.



Training Org

**Add Organization** 

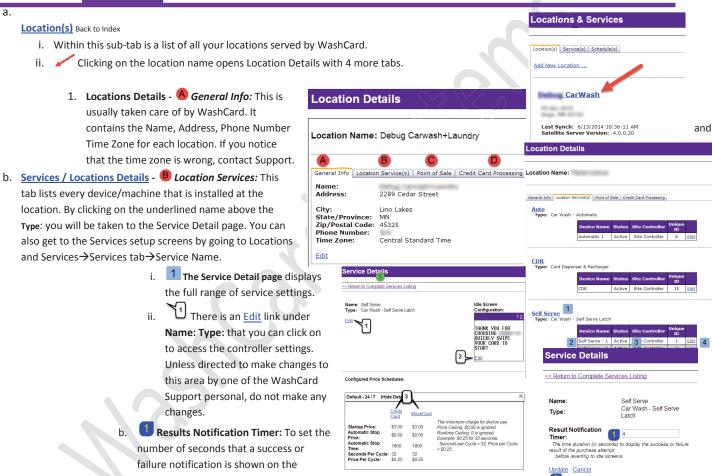
Name:

<< Return to Organization Listing

i. Text Messages(s) Back to Index

- The text message setup allows the cell number that is entered to receive a business-wide activity summary at the selected time each day.
  - Carrier: Your cell phone company must be one that is in the drop down list (Note the last entry "Z For additional carriers please call WashCard Support").
  - 2 Enter your cell number without the Country Code prefix (the number 1 in the US) and without any dashes or spaces.
  - 3 Select the time of day that you want the summary delivered to you. This is set on a 24 hour clock i.e. 6 PM is entered as 18:00:00.
    - Click Insert to start receiving the summary.





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Display ( Always <u>Update</u>) and Idle Screen Configuration where you can edit the text that is displayed on the WashCard LCD display.

- c. Idle Screen Configuration: Click Link to access the Idle Screens.
  - i. If it is for a laundry device then the top two lines are the only ones used.
     There are 2 pages as indicated by the numbers 1 and 2 in the upper right corner of the Field. You can change from page to page by clicking on the numbers.
     The text can be up to 20 characters on each line including spaces. Be sure to click
     3 Update to save your changes before leaving the page.
  - ii. If it is a car wash device then all four lines can be used. 1 There are 2 pages as indicated by the numbers 1 and 2 in the upper right corner of the Field. You can change from page to page by clicking on the numbers. 2 The text can be up to 20 characters on each line including spaces. Be sure to click 3

d. Configured Price Schedules: Self Service Latching - This is the area where the prices and runtimes are set for each Self Service Latching bay at the location.

Update to save your changes before leaving the page.

i. For car wash self service bays there are two columns of price setups; one is for <u>Credit Cards</u> and the other is for <u>WashCards</u>. By clicking on either one of the links you are taken to the Pricing Details page; to edit the price settings, click on <u>Edit</u>. There are 5 settings for each type card.



Idle Screen Configuration:

THANK YOU FOR

QUICKLY SWIPE

CHOOSING STUJO'S!

YOUR CARD TO START

Current

Position:

Line 3:

Line

- i. Startup Price: This is the price that is charged when the card is first swiped. The startup price also includes the initial time allotment for the bay
  - \*\*\*The startup *Time* is calculated by dividing the Startup Price by the Price Per Cycle. This gives the number of times the Seconds Per Cycle are multiplied by the Price Per Cycle.
  - E.g. If the Startup price is \$3.00 and the Price Per Cycle is \$0.25 and the Seconds Per Cycle are 32 then \$3.00 / \$0.25 = 12. Then  $12 \times 32 = 384$  seconds or 6.4minutes at Startup. Start Up Price and Price Per Cycle can be different for Credit Cards and WashCards.

- a. \*\*\*The Startup Price <u>MUST</u> be evenly divisible by the Price Per Cycle or the system will not function properly.
- Automatic Stop Price: Either the Automatic Stop Price or the Automatic Stop Time needs to be set for this service but not both.
  - i. The stop price for Credit Cards should be the same or lower than the Pre-Auth Amount set for the Credit Card Processing. If the Stop Time or Stop Price is higher, then once the preauth amount is reached, another pre-auth is initiated. This usually causes problems with the customers. It is best to avoid this.

WashCard Systems © 2014

- ii. The stop price for WashCards can be any amount that you feel is reasonable. The Bay will run until the card runs out of money or the stop price is reached.
- Automatic Stop Time: Either the Automatic Stop Price or the Automatic Stop Time needs to be set for this service but not both.
  - i. Setting the Stop Time in place of the Stop Price for Credit Cards should take into consideration the issue of the pre-auth amount and the stop time should not exceed the amount of time the pre-auth allows for.
  - ii. The stop time for WashCards can be any length that you feel is reasonable. The bay will run until the card/account runs out of money for the stop time is reached.
  - iii. If stop times are different for Credit Cards and WashCards then the lesser time will be the controlling time length. It is suggested that, if you are going to use stop, times that you make them both the same.
- Seconds Per Cycle: Sets the seconds the each amount (\$0.25, \$0.50, etc) in the Price Per Cycle adds to the wash time.
- Price Per Cycle: The price per cycle should be \$0.25, \$0.50, or an amount the is evenly divisible into the Startup Price. The price per cycle is the smallest amount that can be added to the total charge after the startup time has been used.
  - minutes of wash time then the Seconds Per Cycle would be set at 30. (\$2.50/\$0.50 = 5, 5 x 30 seconds = 150 seconds or 2 ½ minutes). After the first 2 ½ minutes are used the system will add another 30 seconds to the wash time and charge \$0.50 to the total amount.

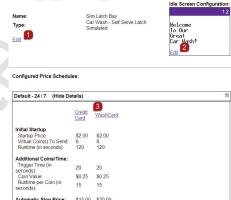
Example 1: If you set the startup price at \$2.50 and the price per cycle is \$0.50 and you want to give  $2\,\%$ 

Update Cancel

ii. Example 2: If you want to do a tighter control of the time and amount used and the Startup Price stays the same, then the Price Per Cycle could be set at \$0.25 and the Seconds Per Cycle to 15. (\$2.50/\$0.25 = 10b@t2man6, 10 x 15 seconds = 150 seconds or 2 ½ minutes). After the first 2 ½ minutes are used the system

will add another 15 seconds to the wash time and charge \$0.25 to the total amount.

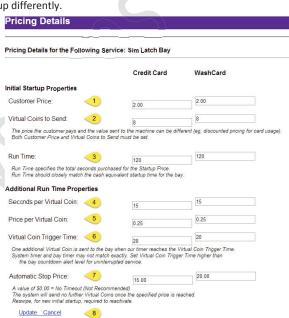
vi. When you are finished making changes, be sure to click on <a href="Update">Update</a> to save your changes. 12 3



- e. **Configured Price Schedules**: *Simulated Latching Pricing Details*: The simulated latching setup is different from the latching bays. The settings for Credit Cards and WashCards can still be setup differently.
  - i. Please see the section above for these functions.
  - ii. Customer Price: Equal to Startup Price. This is the minimum price the customer will pay.
  - iii. 2 Virtual Coins to Send: The number of coins to send to the coin switch in the bay. (The most typical coin value is \$0.25. If the value on your setup is different you will need to make corrections for that value).
    - The total value of the coins to send can be different than the Customer Price. This can be useful in giving a discount for WashCard usage.
      - a. Example 1: Customer Price for WashCards is set at \$2.00 and the Virtual Coins to Send is set to 10. This is a \$0.50 bonus that is built in at the startup.
  - iv. 3 Run Time: This time is in seconds and should closely match the runtime for cash. If 12 Quarters buys 4 minutes of wash time then the Run Time:

should be set to 240 seconds. This may need to be adjusted a few second to account for any lag time between the WashCard system startup and the bay pump startup.

- v. Additional Run Time Properties
- vi. 4 Seconds per Virtual Coin
  - i. This should equal the seconds that each additional quarter would add to the wash time. In the example above, each quarter is equal to 15 seconds.
- vii. 5 Price Per Virtual Coin



- i. This should equal the cash value of the coins accepted.
- viii. 6 Virtual Coin Trigger Time
  - i. Most timers have a warning buzzer when the timer counts down to 1 minute. There are two ways to keep the buzzer from going off each time the timer runs below the buzzer trigger time.
    - a. The bays that are using the G2 Terminal Controller can be configured to use a relay output that can be connected to a secondary relay that interrupts the buzzer circuit and prevents it from activating.
    - Setting the Virtual Trigger Time so that it sends another coin pulse before the buzzer is activated; usually around 60 seconds.
- ix. 7 Automatic Stop Price
  - Setting the Automatic Stop Price will prevent any further coin pulses from being sent once the set value is reached.
  - ii. It is necessary to re-slide the card to continue, starting with the initial startup price being charged.
- x. 8 Always click Update to save your changes!
- f. Configured Price Schedules: Pulsing: Pulsing is used most often with vacuums but can be used with other devices. There is

normally no display and only an indicator light to communicate success or failure of the transaction. Setup is straight forward and requires only 2 settings.

- Show and Edit All Options: There's only one option available and that is the number of times the LED indicator light flashes when the card is declined.
   3 is the default number.
- ii. To set the price for a pulsing device, click on either the Credit Card or WashCard link. This will allow you to edit the Price charged and how many coin pulses are sent.



iii. Be sure to check the coin amount setting on the equipment. If it is set to \$0.25 then set the Virtual Coins to Send: at 4 per dollar; if it is set for \$1.00 then set only 1 pulse per dollar.

Per Swipe Pricing Details

iv. 1 Customer Price: This is the amount the customer will be charged. Usually, it is set so that the price is equal to the number of pulses that are sent to the timer as coin pulses. If the coins are set as \$0.25 and the device needs to have 4 coin pulses to start then the price would be \$1.00. If you want to give a discount for

Credit Card WashCard

Customer Price:

1.00

Virtual Coins to Send:

2

4

The price the customer pays and the value sent to the machine can be different (eg, discounted pricing for card usage).

Both Customer Price and Virtual Coins to Send must be set.

Per Swipe Pricing Details for the Following Service: Pulsing only Vac

be \$1.00. If you want to give a discount for Update Cancel
WashCard, the price can be set at \$0.80 and the pulses are still set at 4.

- v. 2 Virtual Coins to Send: This is the number of coin pulses that are being sent to start the device. Once the times is used up the customer will need to slide the card again.
- vi. Customer Price: and Virtual Coins to Send: can be set separately for credit cards and WashCards.

i. 3 Be sure to click Update to save your changes.

<< Return to Complete		
Name:	AC 2 1st	
Type:	AC Paystation	
Welcome Message:	Welcome to Our Car Was	
Wash Name 1:	Economy	
Wash Value 1:	5.50	
Token Value 1:	5.50	
Wash Name 2:	Regular	
Wash Value 2:	6.00	
Token Value 2:	6.00	
Wash Name 3:	Deluxe	
Wash Value 3:	7.00	
Token Value 2:	7.00	
Wash Name 4:	Premium	
Wash Value 4:	8.00	
Token Value 4:	8.00	
Paystation Name:	American Changer	
Paystation #:	1 6	
Serial Port:	COM3 ▼	
Stacking:	8	
Max Wakeup Delay:	0	
Max Wash Busy:	0	
Min Busy:	0	
Relay Pulse Time:	15	
10 = 1 second		
Hopper 1 Type:	Quarters ▼	
Hopper 2 Type:	Quarters ▼	
Free Play Note Value	: 0	

- g. Configure American Changer (AC) Paystation: Integration AC Paystations are configured to work with a process called Integration. WashCard has worked with American Changer so that the AC Paystations can accept WashCards. This is different than the Latching, Pulsing, Automatic and Auto Entry setup in that there is no Terminal Controller involved.
  - The AC Paystations connect through a serial port that is part of the WashCard Computer (Server, SMC). The settings on the AC Paystation and the AC Paystation Details must match in order to perform properly.
    - i. 1 Welcome Message: Limited space and only one line.
    - ii. 2 3 4 5 Wash Name 1 4: This is the name for the selection that will be displayed at the Paystation.
      - a. Wash Value 1 4: The customer Price for the wash.
      - b. Token Value 1 4: Token value for the wash. Must be the same as the Wash Value; we send our pulse signal through the Token acceptor.

- iii. 6 Paystation Number: If there is more than one they must have unique numbers.
- v. 8 Stacking: Check the box to allow stacking. Un-checking the box will result in customers losing money/credit if the wash is in use.
- vi. 9 Max Wakeup Delay: = Set to 0.
- vii. 9 Max Wash Busy: = Set to 0.
- viii. Min Busy: = Set to 0.
- Relay Pulse Time: = Set to 20. Numbers are in  $10^{ths}$  of seconds so a setting of 20 = 2 seconds.
- x. Hopper 1 Type: Select Not Used, Quarters or Dollar Coins.
- xi. Hopper 2 Type: Select Not Used, Quarters or Dollar Coins.
  - a. Note that setting this to Quarters when the hopper is filled with Dollar Coins will result in a loss of cash.
  - b. If you make changes to the AC Paystation hoppers, please let us know.
- xii. 12 Free Play Note Value: Set the value of WASHBUCKS in number of quarters.
- xiii. 13 Always save your changes by clicking the <u>Update</u> link.
- ii. Configuring Step Items for: Laundry Dryers, Washers

iii. Configured Price Schedules: Dryers

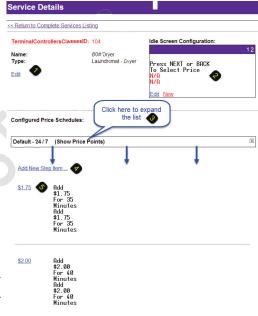
**⊘ ⊘** 

ii. Click on the Default – 24/7 (Show Configured Price Points)

- a. If there are any Step Items (Step Items are price levels) they will show up when "(Show Price Points)" is clicked. Even though it doesn't look like a link or button, it is!
- b. To add a new price level click on Add

# New Step Item... → **Dryers**

- The Step Item Add page is displayed.
- ii. 1 Line 001 through Line 004 are lines for the display screens associated with the Service. For laundry, two lines are available (for car wash all four lines can be used). Just remember that there are only 20 spaces per line allowed.

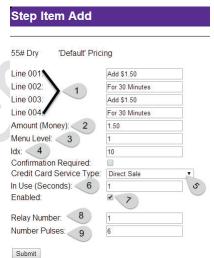


- iii. Amount (Money): The price that will be charged to the customer. Enter in XX.XX format
- iv. 3 Menu Level: Laundry Dryers- Menus can have more than one level. This allows for setting a Startup Price at level 1 and Top-Off Price for additional run time at level 2. This prevents customers from trying to start a dryer with an amount that is less than the required startup price.
- v. 4 Idx: This is the order that this Step Item will be displayed within the Menu Level using the NEXT button. All level 1 items will be shown before level 2 items are displayed. Changing the Index will change the order the Step Items are shown.
- vi. Confirmation Required: Not Used (if checked it would require that the card be swiped again as a confirmation that the customer really wanted to activate the machine).

Authorization/Capture or Direct Sale: The normal selection for laundry is Pre-Authorization/ Capture. When a pre-auth is done, the preset amount is authorized and atransaction fee is charged for it. Any card usage after the authorization, up to the amount of the pre-auth, does not get chargeda transaction fee. Once the Pre-Auth amountis reached another Pre-Auth is done. Direct Sale would be used for large ticket items likeSuper Load equipment with costs near thePre-Auth amount where the next use of the card would

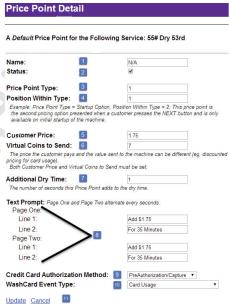
viii. 6 In Use (Seconds): The number of seconds the dryer will run if this option is chosen; 3 minutes = 180 seconds.

create another Pre-Auth.



- ix. Enabled: If the Step Item is no longer wanted or needed, un-checking this box will remove the Step Item from the displayed list.
- x. 8 Relay Number: For Laundry, this is always 1.
- xi. 9 Number of Pulses: Usually this is 1 pulse for each \$0.25 in price. Some machines may be set for 1 pulse for each \$1.00.
- c. Edit Step Item
  - i. Once the step Item has been added to the Configured Price Points list, it can be edited by clicking on the dollar amount on the left side of the Item which will open the Price Point Detail page. At the bottom of the page, click <u>Edit</u>.

- ii. 1 Name:
- iii. 2 Status: Un-checking this box will disable the Step Item and it will not show up in the BACK NEXT button menu.
- iv. 3 Price Point Type: This is the same as the Menu Level: in the Stem Item Add page.
- v. 4 Position Within Type: This is the same as the Idx: in the Stem Item Add page.
- vi. 5 Customer Price: This is the same as the Amount (Money): in the Stem Item Add page.
- vii. 6 Virtual Coins to Send: This is the same as the **Number of Pulses:** in the Stem Item Add page.
- viii. 7 Additional Dry Time: This is the same as the In Use Second (Seconds): in the Stem Item Add page.
  - x. 8 Page One: Line 1 & Line 2, Page
    Two: Line 1 & Line 2. Lines for the
    display screens associated with the Service
    - Two: Line 1 & Line 2. Lines for the display screens associated with the Service. Only 20 spaces/characters per line! These lines will be alternately displayed every 3 seconds.
  - x. 9 Credit Card Authorization Method: This is the same as the Credit Card Service Type: in the Stem Item Add page.
- xi. WashCard Event Type: Card Usage, Card Recharge, Wireless Terminal: Card Usage should always be selected unless instructed by WashCard to make a different selection.
- xii. III Always click on <u>Update</u> to save your changes.

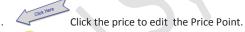


# iv. Configured Price Schedules: Washers

 The procedure for configuring the prices for washer is identical to that of the Dryers except for the Additional Dry Time/In Use Seconds that are not in use or visible in the Washer setup.

# v. Configured Price Schedule: Automatic & Auto Entry

- The procedure for configuring the prices for Automatics and Auto Entry devices is similar to Dryers except that Additional Dry Time/In Use Seconds and Price Point Type/Menu Level are not used.
- Each button on the entry station should have a corresponding Step Item/Price Point.



- b. Click Edit to change the setup information and price.
  - i. 1 Name: If you have names for your washes like Basic or Deluxe, put them here.
  - ii. 2 Status: With a check in the box the Price Point is active.

    If it is removed, the Price Point will no longer be active.

# Price Point Detail

#### A Default Price Point for the Following Service: AUTO

Name: Mongo Wash Status: Active

Order of Presentation:

Example: This price point is the third push button on an automatic; set Order Presentation to 3.

\$11.00

 Line 1:
 \$11.00 Wash

 Line 2:
 Please Insert

 Line 3:
 Card To Authorize

 Line 4:
 Now. Thank You.

Credit Card Authorization Method: Direct Sale WashCard Event Type: Card Usage



Customer Price:



iii. 3 Order of Presentation: This determines the order in which the Price Points are assigned to the Inputs on the Terminal Controller. If the wrong amount is displayed when a button is pushed it can be corrected by changing the Order of presentation number.

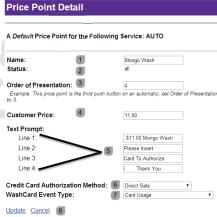
Price Point Detail

A Default Price Point for the Following Service: AUTO

iv. 4 Customer Price: This is the amount the card will be charged.

v. 5 Text Prompt: Short, Simple instructions. You only have 20 characters per each of 4 lines.

vi. 6 Credit Card Authorization Method:
Usually, the Direct Sale is selected for an automatic wash. The exception would be if you have vacuums that use the WashCard system and you have a lot of customers that

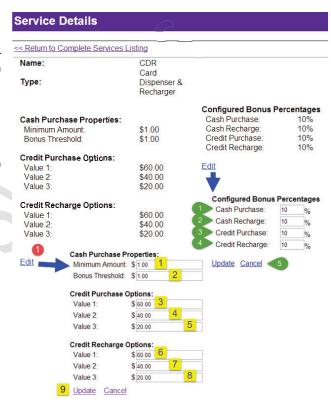


use the vacuums after using the automatic wash. In this case it might be beneficial to choose PreAuth/Capture.

vii. 7 WashCard Event Type: Do not change this setting unless directed to do so by someone from WashCard Support.

viii. 8 Always click <u>Update</u> to save your changes.

- h. Configuring a Card Dispenser & Recharger: Service Details
  - i. The Name: and Type: Fields cannot be edited.
  - ii. On the Service Details page, click on Edit in the lower left corner.
  - iii. Cash Purchase Options:
    - i. Minimum Amount: Enter the minimum amount of cash that is needed to purchase a wash card. \$1.00 in the lowest minimum that can be entered. Entering a higher amount could result in customers putting in less than the minimum and not getting a card. Call Support for suggestions on how to avoid this.
    - ii. 2 Bonus Threshold: The purchase of a card below this amount will not get a bonus amount added to the card. Amount greater than the Bonus Threshold amount will get the percentage bonus that is specified in the CDR setup.
  - iv. Credit Purchase Options: There are 3 values that can be set for credit card purchases.
    - i. 3 Value 1: This is the value that will
      - show on the left side of the display for the F2 button. Usually this is the lowest amount allowed for credit card purchases and should be high enough to cover the cost of the card and transaction fees; \$5.00 or more.
    - i. 4 Value 2: This is the value that will show in the middle position for the F3 button
    - iii. 5 Value 3: This value will display on the right side for the F4 button.
  - v. Credit Recharge Options: There are 3 values that can be set for credit card Recharges.
    - i. 6 Value 1: Values can be the same or different than the purchase options.
    - ii. 7 Value 2: Values can be the same or different than the purchase options.



- iii. 8 Value 3: Values can be the same or different than the purchase options.
  - a. 9 Be sure to click <u>Update</u> to save your changes.
- i. Configured Bonus Percentages Service Details
  - i. 2 Click Edit under the Configured Bonus Percentages.
    - i. Cash Purchase: Set the bonus percentage at the level you think is appropriate. This bonus will not apply until the bonus threshold is reached for the purchase.
    - ii. Cash Recharge: This percentage will be added to any cash recharge.
    - iii. Credit Purchase: This percentage will be added to any credit purchase.
    - iv. Credit Recharge: This percentage will be added to any credit recharge.
- c. <u>Locations & Services Schedule(s)</u> Back to Index: This tab contains tools that allow you to set discount pricing for the selected times and days for most types of devices. It is best to call Support to have Schedules setup. The setup screens are still a work in progress and are not self explanatory.



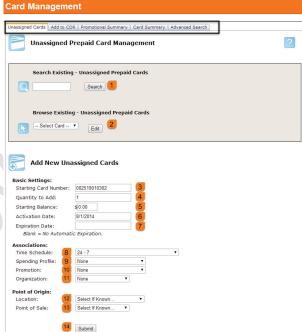
Anytime you see this symbol in the BMC it is a link to a video help file.

**CARDS** 

4

a. <u>Unassigned Cards Tab</u> Back to Index - Unassigned Prepaid Card Management

- i. 1 Search Existing Unassigned Prepaid Cards
  - Enter the full 12 digit card number and click on Search. If the card number is found, the Search Results will show the Card Number, Balance on the card, Last Use and Status. The Card Number and the Balance are both links that will take you to the Card Details and Card Activity Summary respectively.
- ii. 2 Browse Existing Unassigned Prepaid Cards
  - The dropdown list will show all\* Unassigned Prepaid cards that
    are active in the system. Scroll through the list then click on the
    card number then click on Edit to view the Card Details page for
    the selected card.
- iii. Add New Unassigned Cards
  - 1. All cards must be entered into the system before they can be used. This is the place to add new cards.
    - a. Basic Settings
      - Starting Card Number: If you are entering multiple cards then enter the lowest number, all 12 digits, in this space. If you are just adding one card then enter the number in this space.
      - ii. 4 Quantity to Add: If adding multiple cards, enter the number of cards in this space. The default is 1; the maximum number that can be entered at one time is 500.
      - iii. 5 Starting Balance: If the cards are to have a Starting Balance then the amount should be entered here. Keep in mind that the system will remember that there is a balance on the card. Keep them separated from cards with zero balance.
      - iv. 6 Activation Date: This defaults to the date that you are adding the cards. If you want to keep cards out of the system until a certain date you can set that date in this field.
      - v. 7 Expiration Date: Leaving this field blank will set the cards to Not Expire.
    - b. Associations: Any Time Schedules, Spending Profiles, Promotions and/or Organizations that are selected in this section will apply to all cards Added at this time.



- i. 8 Time Schedule: The default schedule is 24 7. If you have setup Time Schedules in Global Setting they will be available for selection in the dropdown list.
- ii. 9 Spending Profiles: Default is None. If you have set up Spending Profiles in the Global Settings they will be available for selection in the dropdown list.
- iii. Promotions: Default is None. If you have set up Promotions in the Global Settings they will be available for selection in the dropdown list.
- iv. Organization: Default is None. If you have set up Organizations in the Global Settings they will be available for selection in the dropdown list.
- c. Point of Origin: If you have multiple locations these setting can help you track where each card is added.
  - i. 12 Location: The dropdown list will contain a list of all of your locations. If you only have one location or if tracking the addition of cards is not important to you then you can leave the default select If Known.
  - ii. Point of Sale: If your cards are all going to be sold through one of the places listed in the dropdown and you want to track that information, then select the appropriate Point of Sale. If there are going to be several ways used to sell the cards then leave the default *Select If known*.
    - i. Submit: When you click the Submit button, *Please Wait* will appear right below the button. When all the cards have been entered into the system a list of the card numbers will be generated and show in a box below the button. Within the Add Card Summary will be a 15 Total number of cards added, the count of cards added

**Successfully** and a count cards that were **Unsuccessful.** Next to each card number is the Result and if unsuccessful anexplanation such as *Unsuccessful* (*Duplicate*).

ii. 16 There is a Close [x] link in the upper right corner of the Add Card Summary box. If you want to add more cards you will need to close the box to reset the Add New Unassigned Cards function.



- b. Add to CDR Back to Index tab A simplified version of Add New Unassigned Cards.

  Both add cards to the WashCard system.
  - i. If your locations has a Card Dispenser & Recharger (CDR) be sure to add cards to the system before you put them in the CDR.

- a. A This is a link to a video help file.
- b. Add New Unassigned Cards to CDR
  - i. Basic Settings: The highest card number (+1) Already in the system will be displayed.
    - i. 1 Starting Card Number: The highest card number (+ 1) already in the system will be displayed. If you are entering multiple cards then enter the lowest number, all 12 digits, in this space. If you are just adding one card then enter the number in this space.



- ii. 2 Quantity to Add: If adding multiple cards, enter the number of cards in this space. The default is 1; the maximum number that can be entered at one time is 500.
- iii. 3 Starting Balance: If the cards are to have a Starting Balance then the amount should be entered here.
- iv. 4 Point of Orgin: If you have more than one location and wish to track where the cards are sold, select the location from this dropdown box.
  - a. 5 Submit: When you click the Submit button,
    Please Wait will appear right below the button.
    When all the cards have been entered into the
    system a list of the card numbers will be generated
    and show in a box below the button. Within the
    Add Card Summary will be a 6 Total number of
    cards added, the count of cards added Successfully
    and a count cards that were Unsuccessful. Next to

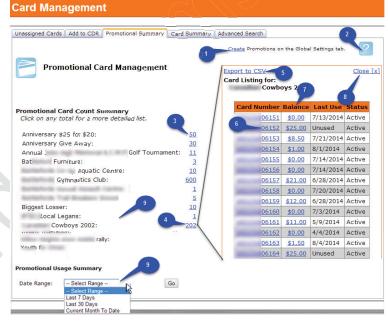


- each card number is the Result and if unsuccessful an explanation such as *Unsuccessful (Duplicate)*.
- b. There is a <u>Close [x]</u> link in the upper right corner of the Add Card Summary box. If you want to add more cards you will need to close the box to reset the Add New Unassigned Cards function.
- C. Promotional Summary tab Back to Index
  - i. Promotional Card Management

- 1. Promotional Card Count Summary: Any promotion that has been setup in the Global Setting will be displayed by name with a count of all of the cards that have the promotion assigned to them.
- Create this link will take you to the Add New Assignable Promotions page.
- 3. This is a link to a help video.
- 4. The listing of the Promotions and the number of cards associated with each Promotion.
- 5. The count number is a link that, when clicked, will display a Card Listing for: box the will list the Gard Number as a link to the card information, Balance on the card as a link to the usage history, Last Used date and the card Status, either Active of Disabled.
- 6. The Card Listing for: box has links for Export to

CSV (comma separated value) and Close [x].

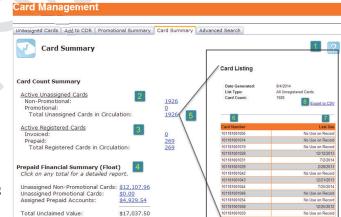
- a. Clicking the link to Export to CSV will generate a list that is downloaded to the designated Download file. The file
  - can be viewed using Excel or other spreadsheet program.
- b. Clicking the  $\underline{\text{Close } [x]}$  will close the box.
- c. Promotional Usage Summary: The display box will show a report for each of the Promotions, the Usage and Payments for each.



- Date Range: Select the Summary from Last 7 Days, Last 30 Days,
   Current Month To Date and Previous Month.
- ii. Clicking the Close [x] will close the box.

		Close [x
Summary of Last 7 Days		
Promotion	<b>Usage Payments</b>	
Anniversary \$25 for \$20:	\$80.00	\$20.00
Anniversary Give Away:	\$0.00	\$0.00
Annual Memorial Golf Tournament:	\$10.00	\$0.00
Furniture:	\$0.00	\$0.00
Co-op Aquatic Centre:	\$0.00	\$0.00
Gymnastics Club:	\$185.00	\$140.00
Spitistinik Serval Sossuli Gerbin	\$0.00	\$0.00
Trail Breakers Snowmobile Club:	\$0.00	\$0.00

- d. Card Summary tab Back to Index
  - i. 1 This is a link to a video help file.
    - 1. Card Count Summary
      - a. Active Unassigned Cards
        - Non-Promotional: This is a count of active, non-promotional card in the system.
          - i. 5 Clicking on the count Number will open a new tab in your browser and display a listing of Unregistered Non-Promotional Cards by Card Number 6 and Last Used 7 date. This list can be exported to CVS by clicking on the 8 Export to CVS link in the upper right corner.

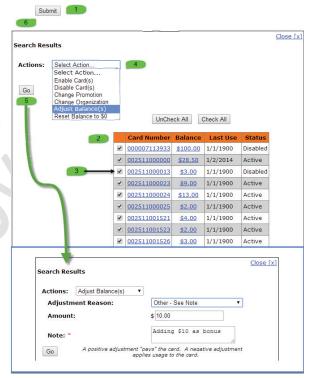


- ii. Promotional: This is a count of active, promotional card in the system.
  - Clicking on the count Number will open a new tab in your browser and display a listing of Unregistered Promotional Cards by Card Number and Last Used date. This list can be exported to CVS by clicking on the Export to CVS link in the upper right corner.

- ii. Total Unassigned Cards in Circulation: The Sum of Non-Promotional and Promotional cards that are active in your system.
- iii. 6 Clicking on the count Number will open a new tab in your browser and display a listing of Total Unassigned Cards in Circulation by Card Number 6 and Last Used 7 date. This list can be exported to CVS by clicking on the 8 Export to CVS link in the upper right corner.
- b. 3 Active Registered Cards
  - i. Invoiced: A count of cards that are assigned to Invoiced accounts.
    - i. Solicking on the count Number will open a new tab in your browser and display a listing of Invoiced Cards by Card Number and Last Used date. This list can be exported to CVS by clicking on the Export to CVS link in the upper right corner.
  - ii. PrePaid:
    - i. 5 Clicking on the count Number will open a new tab in your browser and display a listing of Prepaid Registered Cards by Card Number and Last Used date. This list can be exported to CVS by clicking on the Export to CVS link in the upper right corner.
- 2. 4 Prepaid Financial Summary (Float)
  - a. Unassigned Non-Promotional Cards:
    - i. Clicking on the dollar total will open a pop-up box that shows the total amount divided by the number of unassigned non-promotional card to give you the average per card.
  - b. Unassigned Promotional Cards:
    - i. Clicking on the dollar total will open a pop-up box that displays a list of Promotions, the total Float and the Avg./Card for each promotion.
  - c. Assigned Prepaid Accounts:
    - i. 6 Clicking on the dollar total will open a pop-up box that shows the total amount divided by the number of prepaid accounts to give you the average per account.
      - i. Total Unclaimed Value:
        - a. This is the total of the value that has been collected and/or bonus amounts for which you are indebted for to your customers in wash value.

#### e. Advanced Search tab Back to Index

- i. Advanced Search
  - To get a list of <u>all unregistered</u> cards, scroll to the bottom of the Advanced Search page and click **Submit**. The list will be generated but may take some time depending on the number of cards in the system.
  - 2. The list will contain the Card Number, Balance on the card, the date it was Last Used and the Status, either Active or Disabled.
  - 3. There is also a check box on the left side that is used in conjunction with the Actions: dropdown list. The list will allow you to carry out actions on the cards that have been checked.
  - 4. Select the action, select the cards and click on GO.
    - a. It will appear that the action was not carried out but if you 6 rerun the search you will see that the action was, indeed, completed.



ii. Filter By - 💇 2 To use one or more filter options, check the box near the filter names and provide the required data. Click Submit (at the bottom of the list) to generate a filtered, actionable card listing.



Remember to watch the help videos!



Filter By – Card Number

- a. Check the box.
- b. You will need to supply the Starting Card Number and Ending Card Number. Entering just the Starting Card. Number will return all cards that have a higher number.
- c. Click Submit.



Filter By – Origin

- a. Check the box.
- b. Select the location.
- c. Click Submit.



Filter By – Organization

- a. Check the box.
- b. Select the organization from the dropdown list.
- c. Click Submit.



Filter By - Promotion

- a. Check the box.
- b. Select the promotion from the dropdown list.
- c. Click Submit.



Filter By - Spending Profile

- a. Check the box.
- Select the Spending Profile from the dropdown list.
- Click Submit.





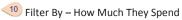
#### Filter By – When They Spend

- a. Check the box.
- b. Use the date picker tool to choose the Starting Activity Dare and Ending Activity Date (you must select both dates).
- c. Click Submit.



#### Filter By – Idle Time

- a. Check the box.
- b. Use the date picker to choose the date. Any card that has not been during the time from the date chosen until the current date will be displayed. This is handy for deactivating cards that are not being used.
- c. Click Submit.



- a. Check the box.
  - i. Card Balance
    - i. Use the dropdown box to select Less Than or Equal To, Exact Amount, Greater Than or Equal To or Not Used.
    - ii. Enter a dollar amount to use in the search. This is a handy filter if you are looking for a card that has a specific amount on it.
    - iii. Click Submit.

#### Average Transaction amount

- a. Use the dropdown box to select Less Than or Equal To, Exact Amount, Greater Than or Equal To or Not Used.
- b. Enter a dollar amount to use in the search.
- c. Click Submit.
  - i. The results will show the cards that meet the criteria but the card Balance does not show the average transaction.

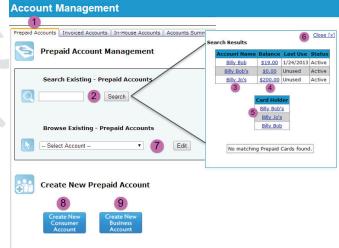
## Filter By – What They Purchase

- a. Check the box.
- b. Only the devices that are used at your locations will be available to select. Check the devices you want to use. You can select more than one.
- c. Click Submit.
- d. After running a search, you must Close [x] the results before you can run another search.
- e. You can combine more than one filter for a search.

5. ACCOUNTS

### a. Account Management

- i. 1 Prepaid Accounts Management Back to Index
  - 1. 2 Search Existing Prepaid Accounts
    - a. The input box for the search requires that you enter between 4 and 25 characters.
      - i. You can enter full or partial names. Example, entering bill will return Billy.
      - ii. You can click on the Account Name, the Balance or the Card Holder to go to the account information.
        - i. 3 The Account Name link takes you to the Account Details page.
        - ii. 4 The Balance link opens the Account History page.
        - iii. 5 The Card Holder link will open the Card Holder Details page.
      - iii. You can enter a full card number or 4 or 5 digits of a card number.
        - i. The Card link will take you to the Card Details page.



- b. 6 You must Close the Search Results box before doing another Search.
- 2. 7 Browse Existing Prepaid Accounts
  - a. The dropdown box contains the list of all Prepaid account names.
  - b. Click the arrow and type the first letter of the name to go to that portion of the list. Example, enter "R" to go to Randy or "Z" to go to Zane.

- c. Click on the name.
- d. Click on Edit and the Account Details opens.
- ii. 8 Create New Prepaid Account
  - 1. Create New Consumer Account
    - a. Click on the blue Create New Consumer Account button; the Account Information section opens.

Create New Prepaid Consumer Account

Address Inf

Address:

State/Province:

Zip/Postal Code:

Create Account Cancel

nt has been successfully created (Click to View/Edit): Jimmy Zugnert

Starting Balance:

Add Cards to Account

10 Close [x]

9

Account Name Information: 1

First Name:

Last Name:

Contact Inform

Associations:
Time Schedule: 24 - 7

Organization

Point Of Origin:

Spending Profile: None

- i. In the Account Name Information:
  - i. First Name:
  - ii. Last Name:
- ii. 2 Contact Information:
  - Phone: Be consistent in how you enter the number; use (XXX) 123-4567 format or XXX-123-4567 or XXX.123.4567 or XXX1234567 All are allowed.
  - ii. Email: Enter the email address; this will be useful in doing some of the transactions that you will use with the account.
- iii. 3 Address Information
  - i. Address: There are 2 lines for the street address.
  - ii. City: City name.
  - iii. State/Province: A 2 or 3 letter abbreviation.
  - iv. Zip/Postal Code: Applicable postal code.
- b. 4 Associations: Selections made here will apply to all Card Holders and Cards within the account. If you want to have Time Schedules or Spending Profiles applied to just selected Card Holders or individual Cards, that needs to be done at a later time.
  - i. Time Schedules: A dropdown list of all time schedules that you have created. The default is 24 -7.
  - ii. Spending Profiles: A dropdown list of all Spending Profiles that you have created. The default is "None".

- iii. Organization: A dropdown list of all Organizations that you have created. The default is "None".
- c. 5 Point of Origin: This dropdown list lets you select the location where the card was sold.
- d. 6 Starting Balance: If there is to be a Starting Balance, such as a bonus amount for signing up for an account, enter that here. For a better record of payments, use the Account Details after setup is complete.
- e. Add Cards to Account? Check box
  - i. Check the box and the Starting Card Number field appears along with the Quantity field.
  - ii. Enter the lowest card to be assigned to the account and then the number of cards to be added.
- f. 8 Click Create Account
  - i. 9 A box appears with a link New Name to the Account Details page. Any cards that you added to the account are listed with the status of Successful or Unsuccessful. Click the Name or 10 Close [x]
- iii. 9 Create New Business Account
  - 1. Business accounts are setup in the same way as consumer accounts. The difference is that the business name is used to list the account and a main contact name is used for questions and communication for the account.
- b. <u>Invoiced Account Management Back to Index</u>: Search Existing Browse Existing and Creating New Invoiced Accounts for Consumers and Business is the same as for Prepaid accounts.
- c. <u>In-House Account Management</u> Back to Index: Search Existing In House Accounts, Browse Existing In House Accounts are the same as for Prepaid accounts. The Account creation should always be done under the <u>Invoiced Accounts</u> tab and use <u>Create New Business Account</u>. Once the account has been created, contact WashCard to have it made into an In-House Account (Admin function only).
  - i. In House accounts are to <u>only</u> be used for maintenance, testing and giving customer complimentary services/washes. Any other use of the account could result in the account being removed from the In House listing. Being removed from the In House status will result in the cards being charged a transaction fee.
  - ii. In-House Account Reports

In-House Account Detailed Activity Report link: This report gives you the ability to view account activity and individual transactions for a selected date range, Card number range, the Account (if there is more than one), individual Card Holders and by Location.

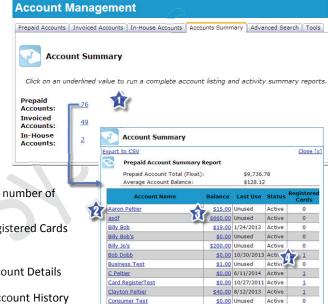
a. This can help you spot abuse by employees and track the times when the card holders used the cards.



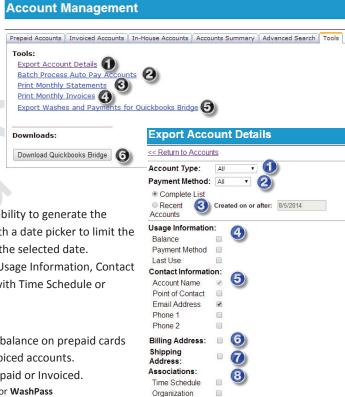
#### d. Account Summary tab Back to Index

- i. The Summary gives a total for the number of active accounts for each of the 3 types of accounts; Prepaid Accounts:, Invoiced Accounts:, and In-House Accounts.
  - 1. Clicking on the underlined number will generate a report with a list of the accounts.
    - a. The Prepaid Accounts report shows the Prepaid Account Total (Float), the Average Account Balance per account then the list of accounts by Name, Balance on the account, Last Used date, Status of the account and the number of Registered Cards.
      - i. The underlined Names, Balance and Registered Cards are links to:
        - i. Names takes you to the Account Details
        - ii. Balance takes you to the Account History
        - ii. Registered Cards takes you to a Card Listing
    - b. Invoiced Accounts report shows the Outstanding Account Balance (Overall), and the Average Account Balance then the list of accounts by Name, Balance on the account, Last Used date, Status of the account and the number of Registered Cards. The links work the same as the links for Prepaid Accounts.
    - c. In-House Accounts report is similar to the Invoiced Accounts. The difference is in the title of the outstanding balance. In this report it's called Total In-House Account Balance instead of Outstanding Account Balance (Overall).

      All other functions are the same.
    - d. Each report has a link to Export to CSV.



- e. Advanced Search tab Back to Index
  - i. The functions of the available filters as the same as described in the Advanced Search under the <u>Cards</u> tab (see page 38). In the Accounts search, 3 filters have been removed; Filter by Promotion, Filter by Spending Profile and Filter by Idle Time.
- f. Tools tab
  - i. Tools
    - 1. Export Account Details:
      - a. Clicking on this link will open the Export Account Details page.
        - Account Type: dropdown allows you to choose the type of account from All, Business and Consumer.
        - ii. 2 Payment Method: This dropdown gives you the choice of All, Prepaid and Invoiced.
        - iii. 3 Two radio buttons give you the ability to generate the Complete List or Recent Accounts with a date picker to limit the list to accounts Creat ed on or after: the selected date.
      - The information section is separated into Usage Information, Contact Information, Addresses and Associations with Time Schedule or Organization.
        - i. Usage Information:
          - i. **Balance:** Returns the current balance on prepaid cards and the debit amount for invoiced accounts.
          - ii. **Payment Method:** Shows Prepaid or Invoiced. \*does not show payment method for **WashPass**
          - iii. Last Use: Displays the last date the account was used.



Export 9

- ii. 5 Contact Information:
  - i. \*The account name will be the Business name for Business Accounts.
  - ii. Point of Contact: Is the name of the main contact for a Business Account.
  - iii. \*Email Address: The email listed for the account.
    - a. \*Selected as Default selections for the details export.
  - iv. Phone 1: Primary phone.
  - v. Phone 2: Cell or secondary phone.
- iv. OShipping Address: If different than the billing address.
- v. 3 Associations: Control devices associated with the Account/Cards.
  - i. Time Schedule See Global Settings.
  - ii. Organization See Global Settings.
- vi. 9 Click the Export button to have the information downloaded in a CSV file format.

② Batch Process Auto Pay Accounts: Only Invoiced accounts can be setup for Auto Pay. 1 This is done in the Account Details page by clicking on the Auto Pay tab and filling in the requested information including the credit card number that

will be used to pay the account. Then, each month, you can come back to the Tools tab and run the Batch Process Auto Pay Accounts to have the invoice paid automatically.

#### **Batch Process Automatic Payments**

An attempt will be made to pay each checked account invoice in the list below.

Uncheck any account invoices you do not wish to pay at this time, and click SUBMIT

Account Name Balance Due Result

Account Name Balance Due Result

1 Fire Protection \$7.65 Not Processe

Submit 2

- a. 1 Select the accounts you want to pay.
- b. 2 Click Submit.

# Automatic Payment Configuration

First Name:		
Last Name:		,
Company:	Franks N Beans	
Card Billing Address:		_,
City:		1
State/Province:		,
Zip/Postal Code:		9
Country:		
Billing Phone Number:		
Email Address:		,
Credit Card Number:		*
Expiration Date:	01 - January ▼	2014

- 3 Print Monthly Statements Covered in Reports: This link takes you to the same page as the Reports tab link.
- 4 Print Monthly Invoices Covered in Reports: This link takes you to the same page as the Reports tab link.
- Export Washes and Payments for QuickBooks Bridge: If you are using QuickBooks Bridge this option (additional cost) allows you to configure the data that is transferred to QB. You can export Payments or Charges (Washes), Only New Payments since the last Export or from a Specific Date Range. You can also select the customers whose data will be transferred.
- **6** Download QuickBooks Bridge: Contact WashCard Support for help with this option. This is an extra cost tool.

#### Virtual Store Fron

- a. The Virtual Store Front tab is the gateway for setting up your web site.
  - Basic Settings Back to Index: Divided into 2 parts.
    - 1. The top part gives you a link to Your Virtual Store. Front: <a href="https://a.LinkToYour">https://a.LinkToYour</a> StoreFront.com/vsf.aspx.
      - a. This is the link your web builder will use to link your web site to the WashCard Virtual Store Front (VSF). You can click on the link to view the main page for the VSF.
      - b. Offer French Translations?: By clicking on the Edit link you can choose to offer a French translation or not.
    - 2. The lower portion gives you the choice to:
      - a. Allow Online Card Purchases: By allowing this, customers odate Cancel be able to enter their account information and enter a purchase choice. Once the information is completed a request will be emailed to you and a notification will be posted on t Home page of the BMC letting you know who purchased a card, how much to apply to the card and an address where to so
      - b. Allow Card Registration: Normally, this selection is left in the Yes mode (box checked). About the only exception would be if you only wanted to have the VSF available for printing receipts then all of "Allow" options would be unchecked.
      - c. Allow Account Login: Normally, this selection is left in the Yes mode (box checked). About the only exception would be if you only wanted to have the VSF available for printing receipts then all of "Allow" options would be unchecked.
        - i. Just click the Edit link. 2





**Virtual Store Front** 

#### i. Purchases & Payments

1. To make changes, click Edit.

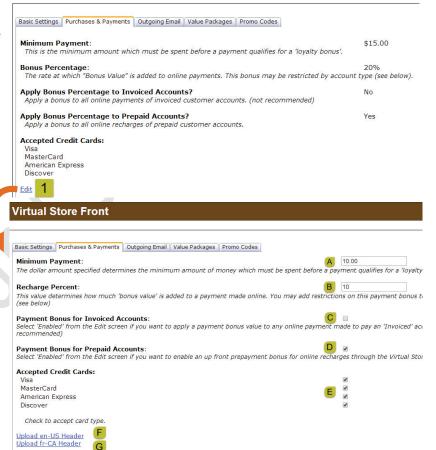
Minimum Payment: This sets the amount that must be spent to qualify for the Loyalty Bonus. This should be in line with any advertising or signage. If you advertise that any purchase gets a bonus, then this amount should be set to \$0.00.

B Bonus Percentage: This determines how much of a "Bonus" is added to qualifying purchases and/or recharges.

Payment Bonus for Invoiced Accounts:

Normally, a bonus is not applied to invoiced accounts. You can enable this feature if you wish.

Payment Bonus for Prepaid Accounts: By enabling this selection you will be applying the Bonus Percentage to all prepaid

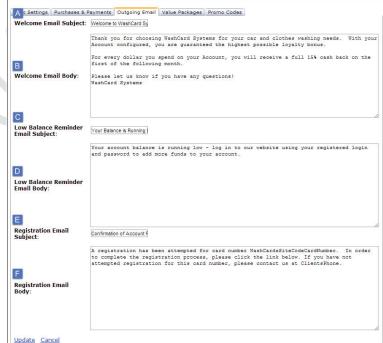


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Update Cancel

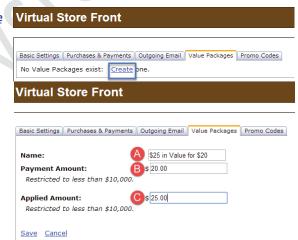
account purchases and recharges done through the Store Front.

- **E** Accepted Credit Cards: Check the box for the credit cards you want to accept in the Store Front.
- Upload en-US Header: Clicking this link will open an new tab that will allow you to choose, from your computer, an English header for the Store Front.
- G <u>Upload fr-CA Header</u>: Clicking this link will open an new tab that will allow you to choose, from your computer, a French Canadian header for the Store Front.
- h. As with all Edits in the BMC, click the Update link to save your changes.
- ii. Outgoing Email Back to Index: Click the Edit link to make changes.
  - A Welcome Email Subject: Welcome to WashCard Systems: This is the subject line that your customers will see when they receive their Welcome email. Luckily, this can be changed to reflect the name of your business.
  - **Welcome Email Body:** Edit this text to match the style of you business and relay a warm welcome to your new customer.
  - Chow Balance Reminder Email Subject: This subject line should let your customer know where the email is coming from and the reason for the email: Billy Bob's Laundry Low Balance Reminder.
  - Low Balance Reminder Email Body:
    It's a good idea to include a link to your
    web site (www.mywebsite.com) so that
    your customers can just click on the like to
    be taken to your home page.



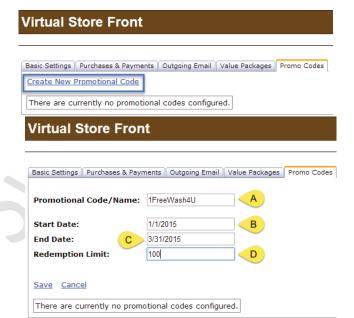
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- Registration Email Subject: This email is sent when anyone tries to register a card. It is sent to the email address that is entered on the registration form. If the email is not confirmed, the registration will fail. This is done to ensure that fraudulent email address are not being used.
- Registration Email Body: Use this space to explain to your customer that they must click the conformation link to complete the regitration and that this is done for their protection. Also include your phone and email (<a href="mailto:sendtome@usa.com">sendtome@usa.com</a>) as contact information in case they (the recipient) did not try to register a card.
- h. Remember to click the <u>Update</u> link to save your changes.
- iii. Value Packages Back to Index
  - If No Value Packages Exist: you will need to click on the <u>Create</u> one. link.
  - A Name: Give the package a name like \$25 in Value for \$20.
     This is what will be seen on the Store Front, so make understandable.
  - 3. Payment Amount: This needs to be entered in the dollars.cents format (10.00). The Payment Amount is the amount the customer will be charged for the package.
  - 4. **Applied Amount:** This also needs to be entered in the *dollars.cents* format (10.00). This is at amount that you will need to apply to the card before giving it to the customer.
  - 5. Click Save.
  - 6. You can add as many Value Packages as you like.



#### iv. Promo Codes Back to Index

- To get started, click the <u>Create New Promotional Code</u> link.
- 2. Promotional Code/Name: This is the name/code that will need to be entered on the web to access this Promo Code.
- 3. **B Start Date:** Each Promo Code must have a start date and an end date. Set the start date from the date picker.
- 4. C End Date: Make sure the end date is *after* the start
- 5. Redemption Limit: Enter the number of times you want to allow this promotion to be claimed.
- 6. Click Save.
- You're not finished yet, you have just created the Code; now you need to add the packages that are part of the Promotion.





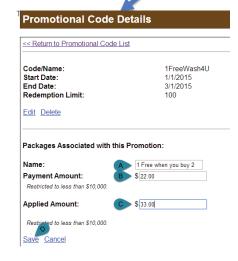
#### v. Promotion Code Packages

- After you have created the name for the Promo Code, click on the Promo Code tab again, this will refresh the list and show you all the promo codes. Select the one just created by clicking on the underlined link.

  Promotional Code Details
- The Promotional Code Details page opens. At the bottom of the page is the heading Packages Associated with this Promotion and below that you will see There are currently none: <u>Create</u> one. Click on <u>Create</u>.
- 3. In the *Name:* field enter a descriptive name for the package.
- 4. B In the *Payment Amount:* field, enter the amount the customer will be charged for the package. Use the dollars.cents format (10.00).
- 5. In the *Applied Amount:* field, enter the total value of the Promotional package. Use the dollars.cents format (10.00).
- 6. Be sure to click <u>Save</u> to save your work.



Packages Associated with this Proportion:



- a. Additional Promotional Code packages.
  - i. 1, 2 The numbers represent the packages that you have created. There is no practical limit to the number of packages that can be created for a Promotional Code.
  - j. Click the <u>Create Another Promotional Package</u> link to add more packages.

