Swipe @ The Bay
Fleet Card Operations Manual
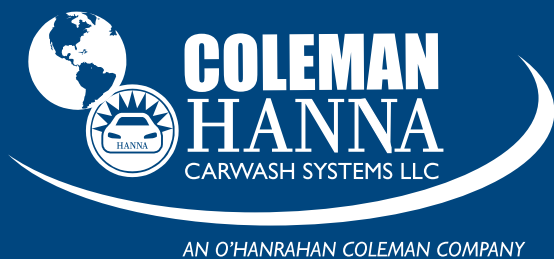
Swipe @ The Bay Software Operational Guide

This portion of the manual will cover the Swipe @ The Bay software that resides on the server. The software controls functions related to accounting, system logs, and maintains site information, all within the server database. Lets start by covering items that will be repeated throughout the document. Many times, you will be asked to provide a time and date to retrieve specific information from reports. The process is the same in every instance. Start by selecting the time you wish to begin the report. The field will appear as **Fig. 1.1**

Fig. 1.1

You will need to type it in the given format and select the correct morning or evening setting to get the correct information you are trying to obtain. Next, you will need to select a date for the report you are going to generate. This is done by typing in the date in its correct format or clicking on the drop down calendar next to the field. See **Fig. 1.2**

Fig. 1.2

Next, you will want to select the Ending Time and Ending Date. These work in the same manner as the Starting Time and Starting Date. You will need to input the time and date in the same format as above: hh:mm and mm/dd/yyyy. **Fig. 1.3** and **1.4** show these fields.

Fig. 1.3

Fig. 1.4

Other information may be required to complete the desired report. Some fields may request a time frame such as Today, Week to Date, Month to Date, and Year to Date as Seen in **Fig. 1.5**. By clicking the dropdown arrow, you can select the report you need.
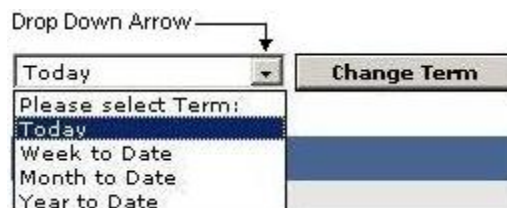

Fig. 1.5

Main Menu and Sub Menu

We will now cover the Main Menu and Sub Menu sections of the interface. The Main Menu is located at the top of the screen and is surrounded by a blue border. It contains five headings: Dashboard, Reports, Utilities, Setup and Logout. Logout will only appear if you are in the server from a remote location (i.e. your home or office computer via the internet). Logout does exactly what it infers…to disconnect you from the site. Again, logout will only appear if you access the site remotely. The Main Menu is shown in **Fig. 1.6**

Dashboard	Reports	Utilities	Setup	Logout

Fig. 1.6

Dashboard
The Dashboard was designed to give a snapshot of the overall heath of the system.

Network Status Bar
  Network Status Bar indicates the status of the connection to the Internet. This will determine if the server can process cards or not (i.e. the bays and vacs). A red or yellow status bar means there is no connection or there is an error in the connection. You will need to determine where the connection is blocked. This issue could stem from the Internet Service Provider loosing connection, to the local router not being setup properly. A green bar indicates the connection is working correctly.

Device Status
  Device Status gives you an overall view of the each individual bay and its status on the server.

Device Title
  Device Title explains what number the device is programmed to (e.g. Wash Bay 1).

Last Boot
  Last Boot indicates the last time the device communicated with the server.

Status
  Status indicates if the device is communicating with the server. A red status indicates the device is offline. You will need to determine why the device is not communicating to the server at this point. This could range from a bad cable or grounding to the programming of the timer. A green status indicates the timer is functioning and communicating properly to the server. To the left of the Green Status Bar is the Last Boot Time. The time that is indicated should read 3:00:00 AM with on a variance of a few seconds unless the bay has been manually restarted or the site has lost power. At the bottom of the page is an overview of the incoming sales data per device. These totals reflect sales for that day.

Refresh Button
  Refresh Button is located at the bottom of the screen. This will force the server to display the current status of each device, otherwise the site will refresh every 60 seconds. See **Fig. 1.7** for the dashboard.
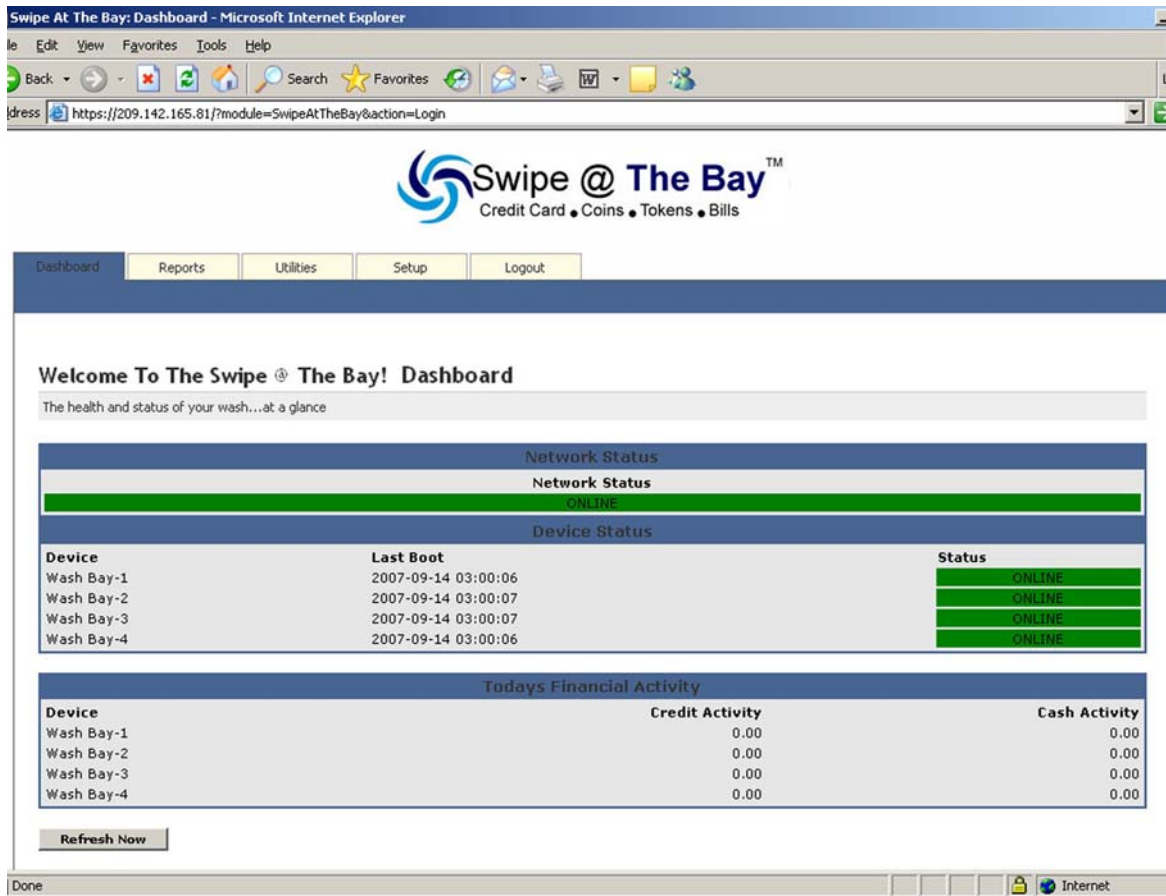
Fig. 1.7

Reports
The Report heading is located next on the Main Menu. By clicking Reports, you can access all of the Sub Menus under Reports. The Reports tab contains the following Sub Menus: Report Summary, Earnings By Date, Device Usage, and Credit Transactions. Start by clicking the desired report located in the dark blue bar. See **Fig. 1.8**

Fig. 1.8

Report summary

Report Summary gives a quick overview of the system's total income. From the dropdown arrow, you can make four selections that will provide different summaries. They are Today, Week to Date, Month to Date, and Year to Date. Select the report needed and click the button to the right of the dropdown box labeled Change Terms. This will display the report and it will have a graph that will accompany the report. See **Fig. 1.9** and **1.9a** for the report and the graph.
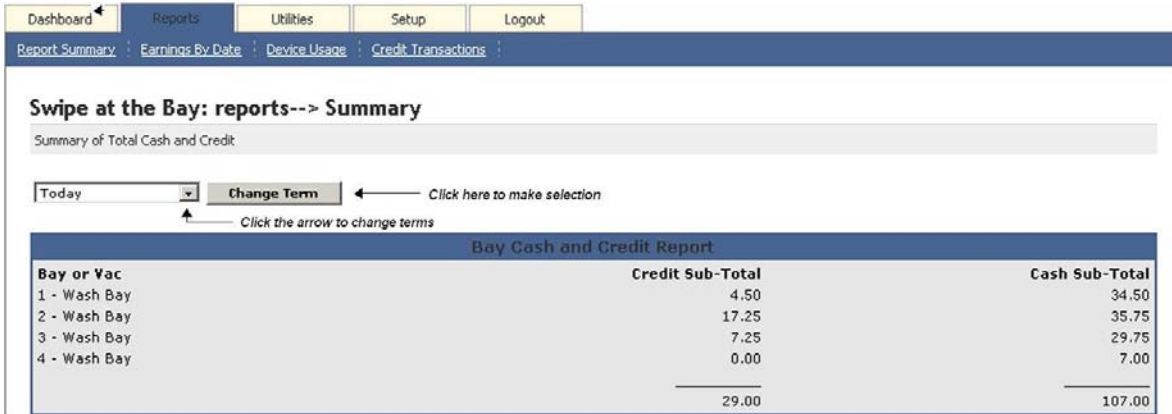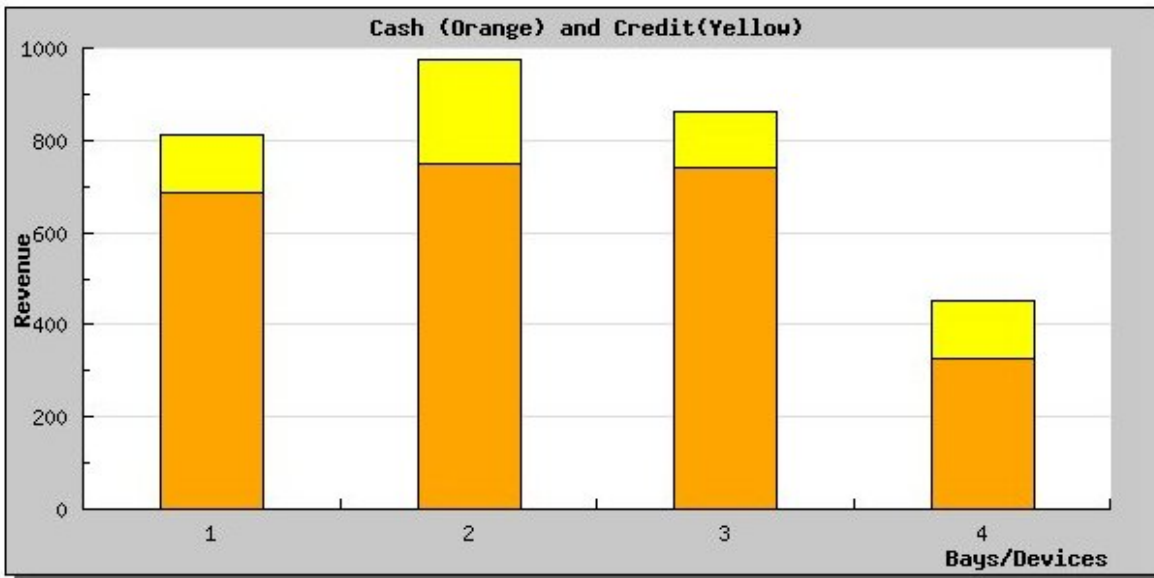
Fig.1.9

Fig. 1.9a

Earnings by Date

Earnings by Date sub menu gives a more specific overview of total income. By selecting the drop down arrow, you can select to view all devices together or each device individually. Next, you will need to provide a time and date for both start date and end date as explained in the beginning of this document. After entering the correct information, locate the Generate report button at the bottom of the selection screen and click it. The report will be displayed in the selected format. The example given displays a report of Wash Bay 1 only. You may select any single device or all devices together to gather information on sales totals. **See Fig. 2.0**
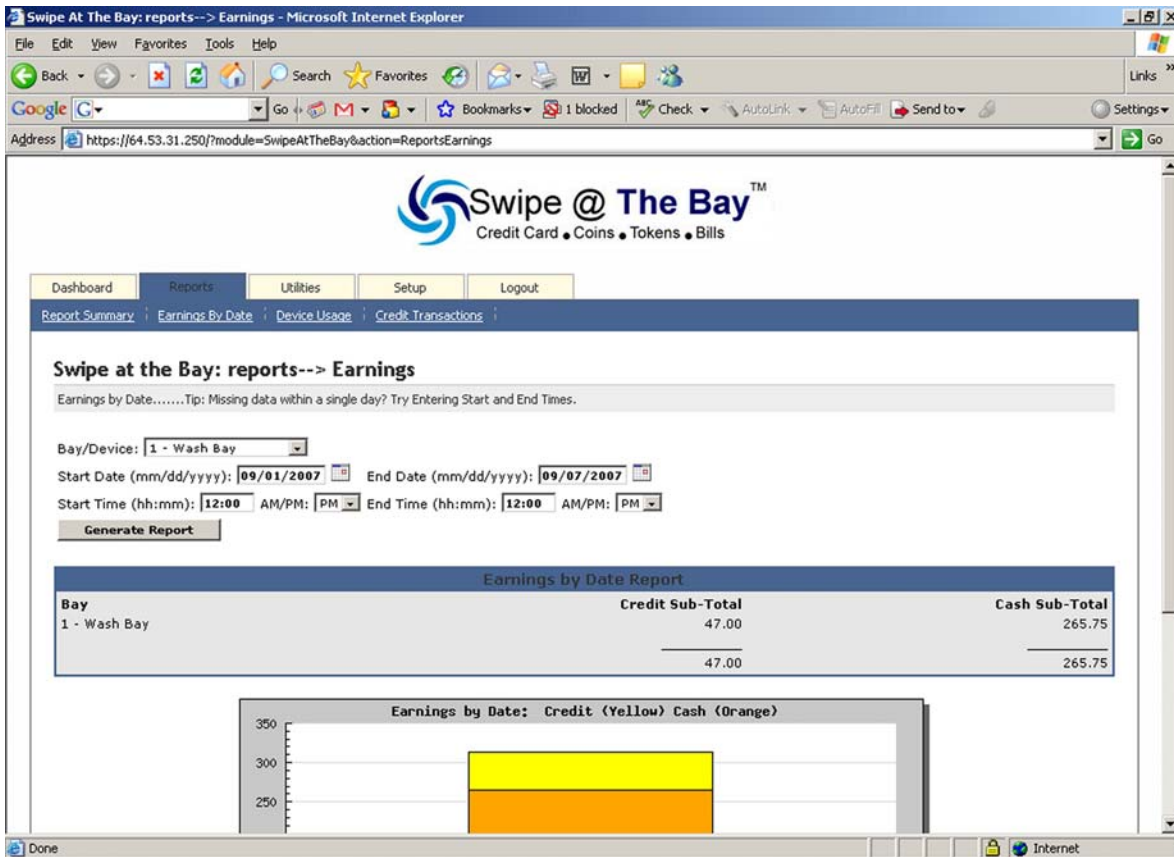
Fig. 2.0

Device Usage

> Device Usage report will list in a percentage format, the amount of time each bay is used. Again, use the date/time format to select the desired timeframe and click the generate report button. The results will be posted beneath the Device Usage heading. The report shows the device number, percentage of usage, and total time used. See **Fig. 2.1**
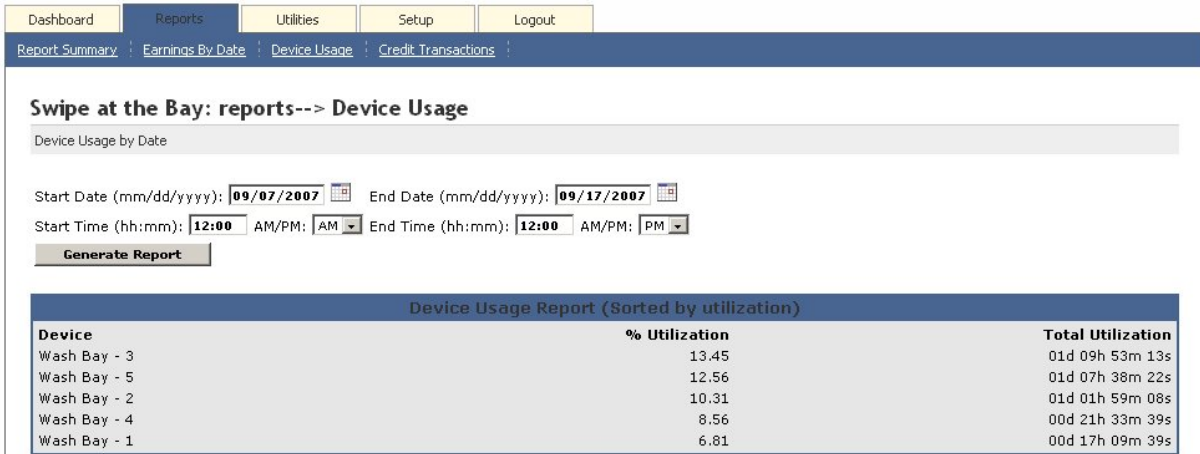
Fig.2.1

Credit Transaction

> Credit Transaction report will display each individual credit card transaction and the accompanying details. Select the desired time/date format and click the Generate Report after all of the information has been placed in the correct fields. The report will display several items pertaining to each transaction, such as; bay number, customer name, last four digits of the customer credit card, the amount used in dollars, and the start/stop time. This detailed report is used specifically for credit card totals and will not report any cash sales. See **Fig. 2.2** for a sample report.
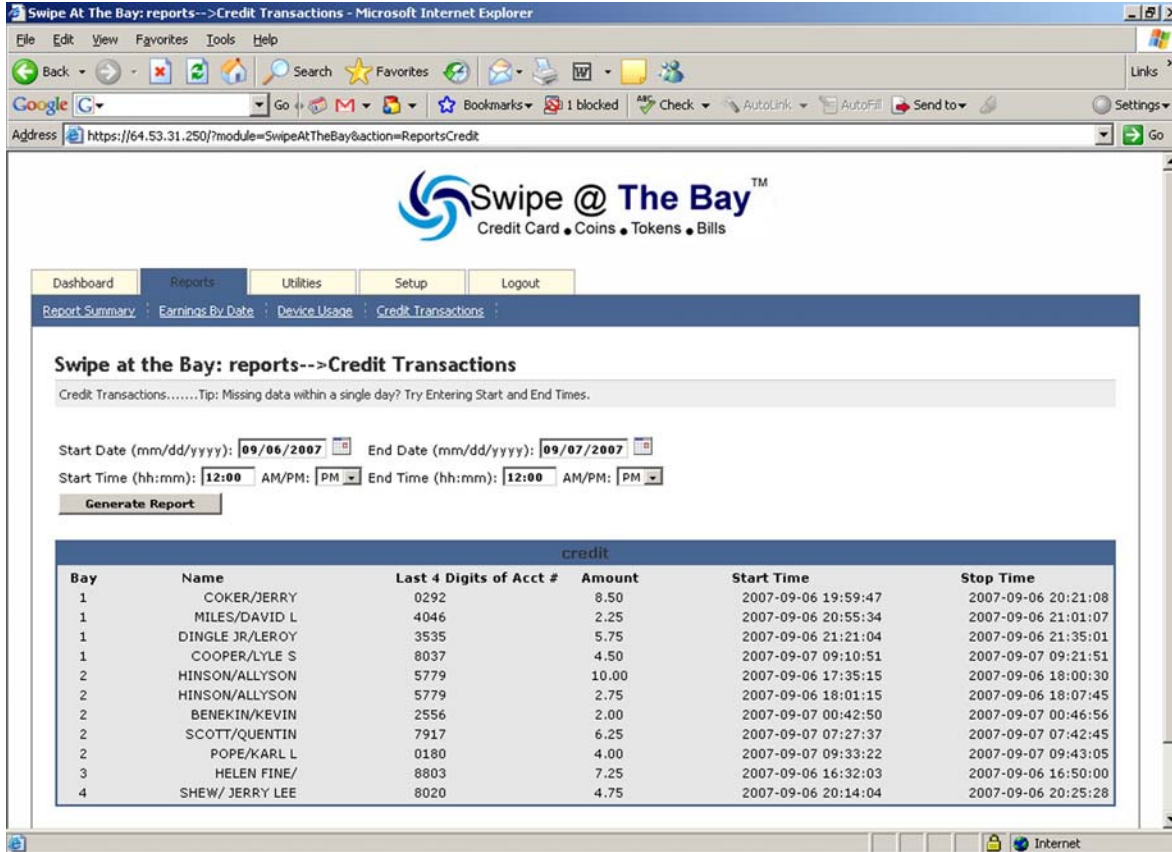
Fig.2.2

Utilities
The Utilities provide control over certain functions within the Swipe @ The Bay server such as what credit card holders are allow to use the site to various error and system logs that can diagnose possible issues. The Sub Menus under Utilities are; Utilities, Manage Credit Card Holders, Logs, and Remote DB Backup.

Lets start with the Utilities Sub Menu. This screen contains only two features, the Reboot SATB server button and Force ConFig.uration Changes Button. The Reboot SATB Server button will do exactly what it denotes, and that is to reboot the server. Clicking this button will shut down the application and restart the computer from BIOS. The application will automatically start after the computer has finished its boot process. Next is the Force ConFig.uration Changes button. This button will force changes that you may have made to the system. For instance, if you add or remove a bay for the device table, you will want to click this button to make the change take effect. See **Fig. 2.3** for the Utilities sub menu.
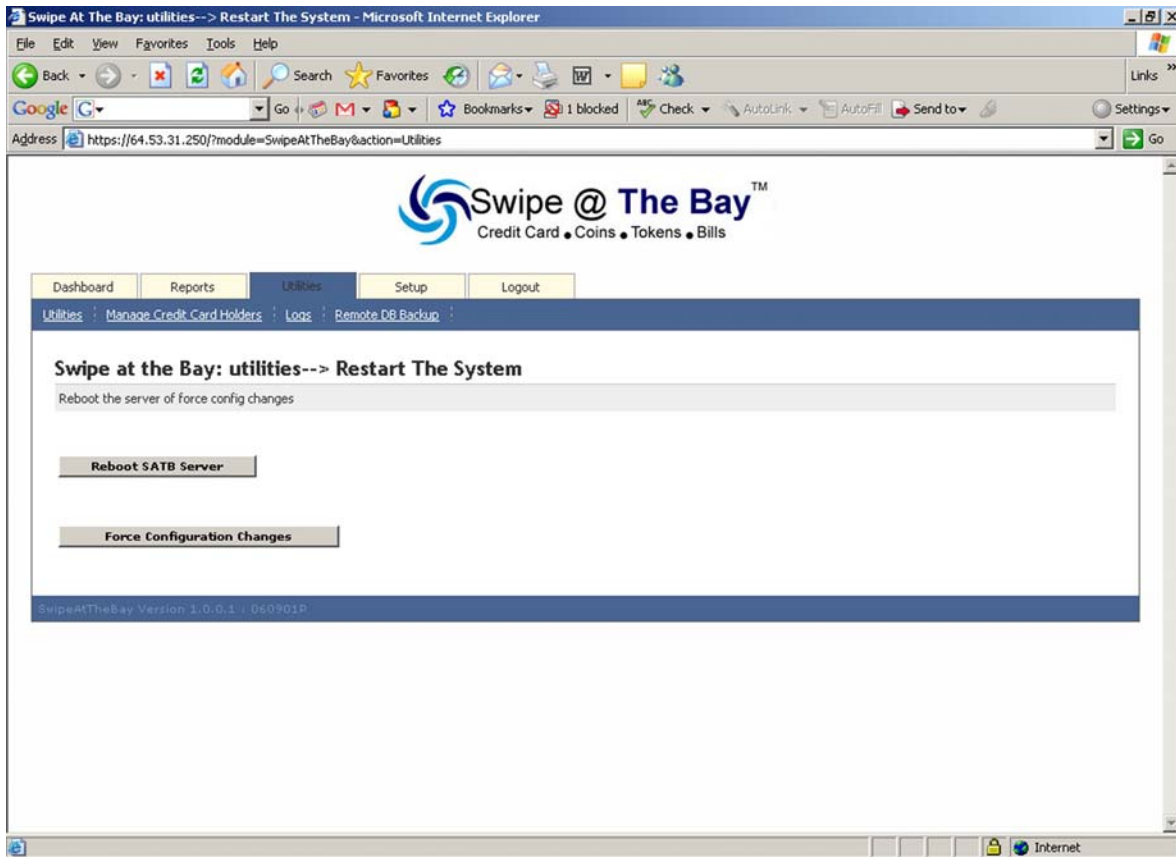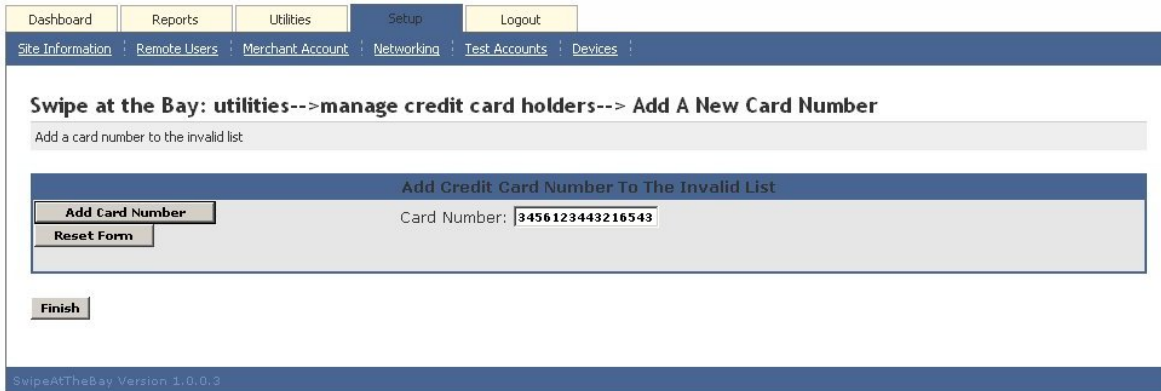
Fig. 2.3

Manage Credit Card Holders

This menu will allow you to add credit card holders that contest charges from your account. Placing a credit card number in this list will deactivate that card and the customer will no longer be able to use that card on the site. This process can also be reversed. Locate the button labeled Add Credit Card Number to Invalid List and click it. See **Fig. 2.4**

Fig. 2.4

After clicking the button, a new window will appear on the screen containing options to add the credit card number to the invalid list. Find the Card Number and type the full credit card number in the provided field. Next, click the Add Card Number button to left of the of the Card Number field. This card will no longer activate any of the devices connected to the SATB server. If there are more cards to add to the list, click the Reset Form button. This will clear the current information from the field and allow another card to be added. When all cards have been added, click the Finish button at the bottom of the screen. See **Fig. 2.5**

Fig. 2.5

After clicking the Finish Button, a new window will appear displaying the credit card numbers that are invalid. To remove a credit card number from the invalid list, locate the delete link to the right of the invalid card number and click it. A menu will appear and ask for conformation of the delete action. Click the Finish button to confirm the deleted number and the card will be active again. See **Fig. 2.6**
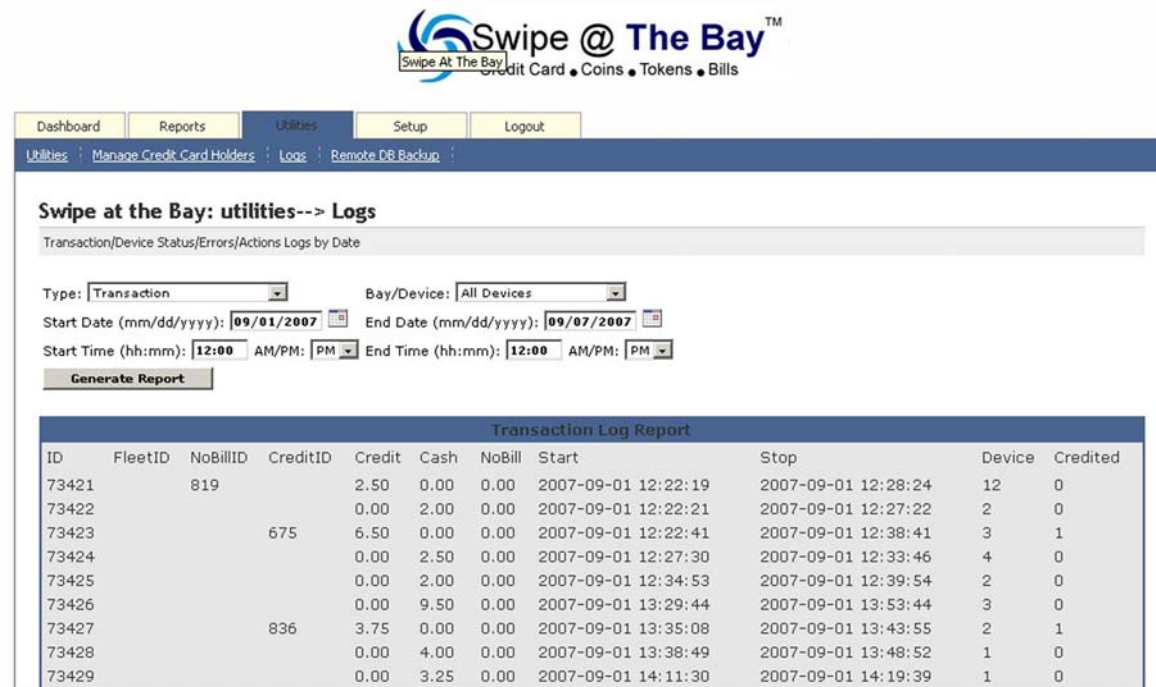
Fig. 2.6

Logs
>The Logs menu performs multiple functions. Under the Type dropdown box are four options, Transaction, Device Status, Errors, and Actions. Two of these options are inert, Device Status and Actions. They will be programmed for other features in later updates of the software but serve no purpose for now. The first option in the list is Transactions. Select this option from the list in the Type drop down box. Next, locate the Bay/Device drop down box and select the desired option from the list (e.g. all devices or Bay #). Now you will need to select the correct Time/Date for start and stop times and click the Generate Report button located beneath the information fields. A report will be generated for the selected data. See **Fig. 2.7**

Fig. 2.7

Error report
>By selecting the drop down arrow, click the Error tab. Next locate the Bay/Device drop down box and select the desired option from the list (e.g. all devices or Bay #). Now you will need to select the correct Time/Date for start and stop times and click the Generate. This will now generate a log for error codes with the devices on site. You can contact technical support with any issues located in the Error log for resolution of the problem.

Remote DB Backup
>This feature will allow you to remotely store your database in case of catastrophic failure to the Swipe @ The Bay server. By clicking the DB Backup button on the left side of the menu, you will be prompted to confirm your selection to backup the database. Click the OK button of the window. Next you will see a File download window appear. Find the Save button at the bottom of that window and click it. This will start the download process. See **Fig. 2.8**
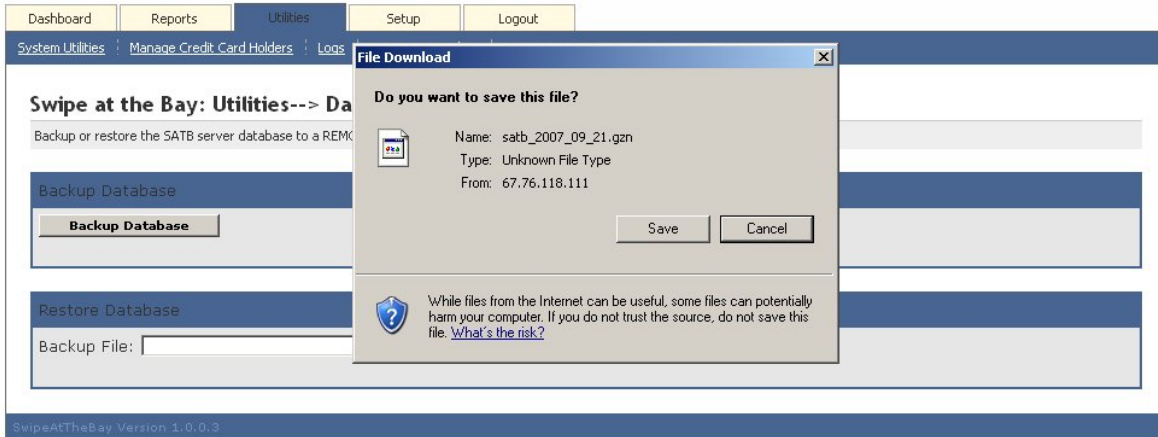
Fig. 2.8

Next, you will be prompted for a download location or where you are going to save the file. On the left hand side of the window, locate the Desktop Icon and click it. This will be the location that we are saving the database, at the bottom of the window, is the filename of the saved file. Leave the name in place without changing it. Locate the Save button in the bottom right corner of the window and click it. A window will appear displaying the progress of the file downloading, wait for this window to complete at 100% and click the close button. The database download is complete. See **Fig. 2.9**

Fig. 2.9

Setup
This menu contains all of the data pertaining to the site such as the site address, merchant info, attached devices, and local area network information. The Setup Menu has six sub menus which are; Site Information, Remote Users, Merchant Account, Networking, Test Accounts, and Devices. Each sub heading completes one area that comprises the site information as a whole. It is important to note that for the site to operate and run correctly the data contained in these fields has to be accurate.

Site Information
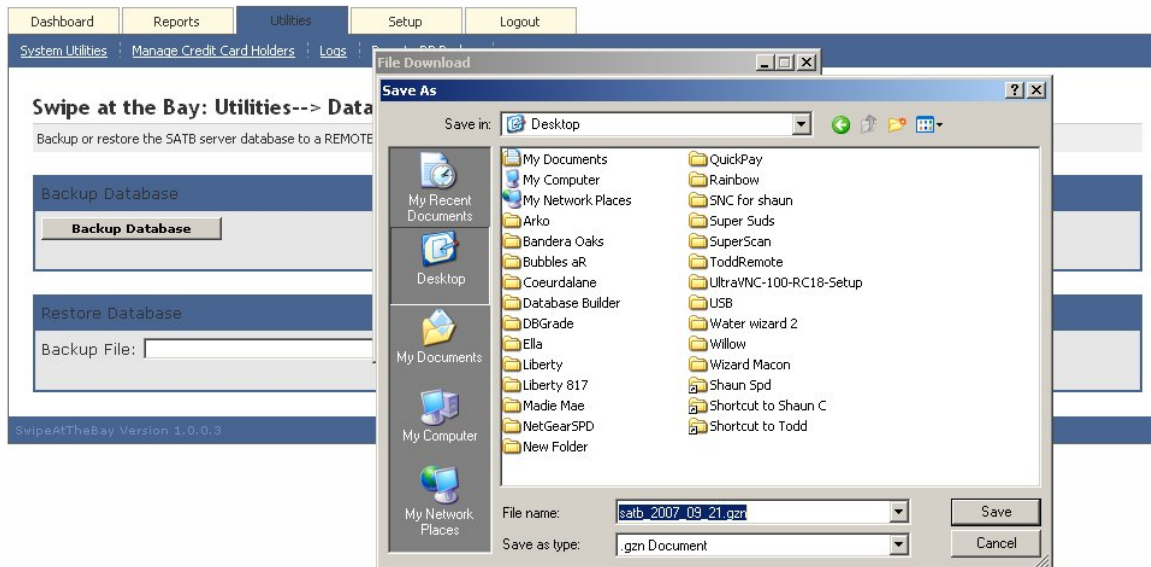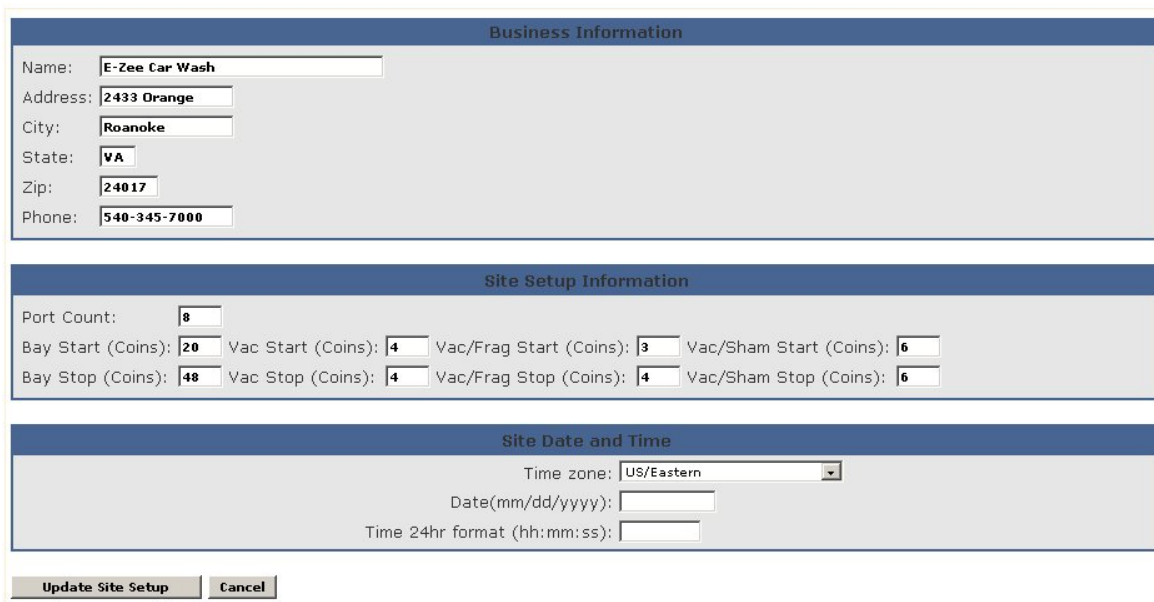The first portion of this sub menu is fairly strait-forward. In the section listed for Business Information, fill out the corresponding fields with the correct information. You will need the following information to complete this portion on the setup; Name (Name of the Business), Address, City, State, Zip, and Phone. If there is no phone number for the site then provide "0" for a ten-digit phone number (e.g. 000-000-0000). Below the Business Information is the site setup information. This sets the credit card start and stop price for the bays. The first field is port count. This number will always be 8 because that is the number of ports on a 1035 board. Next is the starting and stopping price for each type of device that can be connected to the Swipe @ The Bay server. These counts are in quarter (25 cent) increments. Provide the correct price to start and stop price to each corresponding device that is connected to the server. An example would be Bay Start 4 and Bay Stop 8. This would mean that it takes $1.00 to start the device and it will stop when $2.00 is reached on the timer. Apply this logic to each device on the site. If the device is not on site, for example there are no Shampoo Vacuums on the site, then the value amount is irrelevant and the default integer is acceptable. Last is the Date and Time field and this should be filled out in Military format for time. When all information is filled out correctly, click the Update Site Setup button located at the bottom of the window. Changes or correction may be made to the site information by simply inputting the correct information and clicking the Update Site Setup button again. See **Fig. 3.0**

Business Information

Name:	E-Zee Car Wash
Address:	2433 Orange
City:	Roanoke
State:	VA
Zip:	24017
Phone:	540-345-7000

Site Setup Information

Port Count: 8

Bay Start (Coins): 20	Vac Start (Coins): 4	Vac/Frag Start (Coins): 3	Vac/Sham Start (Coins): 6
Bay Stop (Coins): 48	Vac Stop (Coins): 4	Vac/Frag Stop (Coins): 4	Vac/Sham Stop (Coins): 6

Site Date and Time

Time zone: US/Eastern
Date(mm/dd/yyyy):
Time 24hr format (hh:mm:ss):

Update Site Setup   Cancel

Fig. 3.0

Remote User

This menu will change the User ID password. There are two separate users listed in the menu. The first is the Admin ID and the second is the Attendant ID. Both users have full permissions to the unit in the current version of software but this should change in later updates of software. The default ID's are acceptable for purposes of using the site so it is optional to change the User Name and password to the system. If viewed remotely, the system does not offer the ability to change the password in the system, only name and email. When viewed on the actual Swipe @ The Bay server, a field for entering and re-entering the password will be available at the bottom of the screen. When all changes are complete, click the Update button below the corresponding user. The Fig.ure provided is from a remote view and not the server so the password fields are not viewable. See **Fig. 3.1**

Swipe at the Bay: setup--> Remote User Setup

Setup User Information for Remote Users: admin and attendant

Remote User Setup	
UserID: admin	**UserID: attendant**
First Name: Chris	First Name: FirstName
Last Name: Hartness	Last Name: LastName
Email: chris@springcho.com	Email: email@email.com
Phone: 540-345-7000	Phone: 303-303-3030
Update	Update

Cancel

Fig. 3.1

Merchant Setup

This menu contains the credit card information that is unique to each site. It is very critical that this information be correct. If it is incorrect, then issues will range from the bays and vacuums not taking credit cards to another merchant account receiving funds that are intended for your account. YOU ARE RESPONSIBLE FOR MAKING SURE THAT YOUR ACCOUNT IS RECIVING THE CORRECT CREDIT. You may check the account by contacting the merchant provider and/or the banking establishment that is holding the account. Jim Coleman Company will have your merchant information available for the initial site setup. This information will not change so it is best that this field be left alone after the site has been setup. If you need further assistance with your merchant information, please contact the Jim Coleman Company Help Desk. See **Fig. 3.2** for the layout of the Merchant account setup.

Swipe at the Bay: setup-->Merchant Account Setup

Configuration for your high speed credit card processing

General High Speed Settings

Server URL: `https://netconnect1.paymentech.net/NetConnec`

Merchant Number: `300000082553`

Terminal Number: `001`

Client Number: `8100`

User ID: `EW997885`

Password: `••••••••••`

Timeout: `10`

Auth Amount: `1000`

Accept Visa: Yes: ○ No: ●
Accept MC: Yes: ○ No: ●
Accept Amex: Yes: ○ No: ●
Accept Discover: Yes: ○ No: ●
Accept MC Fleet: Yes: ○ No: ●

[Update Site Setup]   [Cancel]

Fig. 3.2

Network

> This table contains all networking information pertaining to the site and allows the server to process credit cards over the high-speed connection. The Swipe @ The Bay server is only compatible with a high-speed connection. This means that you will need an incoming DSL or cable modem connection directly to the site and ran through our pre-conFig.ured Netgear FVS-318 Router. The network settings are as follows; IP address, Network Mask, Gateway Address, DNS Address 1, DNS Address 2, and DNS Address 3. Again this information will be placed into the system at setup and should not be changed. If you have any questions about the Network settings, please contact the Jim Coleman Company Help Desk. See **Fig. 3.3** for the network settings menu.

Swipe at the Bay: Setup-->Network Setup

Enter or Edit TCP/IP Network settings

Network Setup

IP Address: `192.168.0.199`

Network Mask: `255.255.255.0`

Gateway Address: `192.168.0.1`

DNS Address 1: `68.10.16.245`

DNS Address 2: `68.10.16.30`

DNS Address 3: ` `

[Update Network Settings]   [Cancel]

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Fig. 3.3

Test Accounts
This menu is used for the testing of devices on site for credit card acceptance. By placing a credit card number in the correct fields, the operator can test the credit card system without his card being billed. Start by selecting the menu and clicking Add Test Account button on the primary screen. This will bring up a new window containing the fields Add Card Number and Reset Form. Place the credit card number in the Add Card field and click the add button located at the bottom of the window. This credit card will now be in the database as a card that will not be charged. The account will be visible under the Test Accounts menu. To delete the account, find the link labeled Delete next to the account number and click it. The card will now be active and will be charged the next time the user swipes the card. See **Fig. 3.4** for the Test Account menu.

Fig. 3.4

Device
This menu allows you to add and remove devices from the Swipe @ The Bay Server. Start by clicking the Devices menu at the top of the screen. Next Click the Add a new Device button located at the bottom of the screen. See **Fig. 3.5**
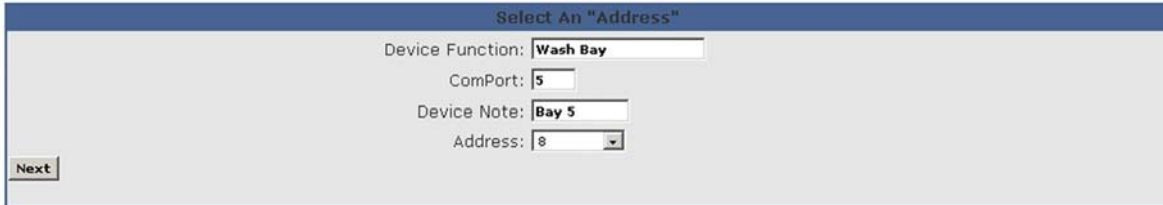
Fig. 3.5

This will bring up a new window to add the specifics of the device that you will be adding. Four fields will need to be filled out to complete the first part of adding a device; Device Function: which is the device type (e.g. Wash Bay or Vacuum); Com Port: which is the position on the 1035 Board located in the Swipe @ The Bay Server; Device Note: which is a self proscribed description; and Address: which will be the number that the timer is set to. See **Fig.. 3.6** for the menu.

Fig. 3.6

To further explain how you determine what numbers you will use in the appropriate fields, we will need to cover some aspects of the physical media and how they work. Lets Start with the device address. This will be determined by the programming of the timer that this device is plugged to. We will use Bay 5 as our example. The timer that is in Bay 5 will be programmed as such, in other words, when we are programming the timer, the "*" portion of the timer programming is the Device Address Number. IT IS IMPARATIVE THAT EACH 2 WIRE CONNECTION IS LABLED FROM EVERY DEVICE. Next, you will need to know the Com Port number the device is attached to. This is determined by where the device is plugged on the 1035 board. The 1035 board is found on the inside of the server cabinet, mounted to the back of the case. It will have eight columns with three outlets in each one. The first column of three outlets starting from the left is considered Com 1. This means that all three plugs are related to Com 1 and when programming for the Com Port, they will be considered Com 1. The next row of three is considered to be Com 2 and any device attached to any of these outlets will be considered on Com 2. This trend follows all the way through to Com 8. The attached diagram in **Fig. 3.7** will display each Com Port as they appear from left to right.
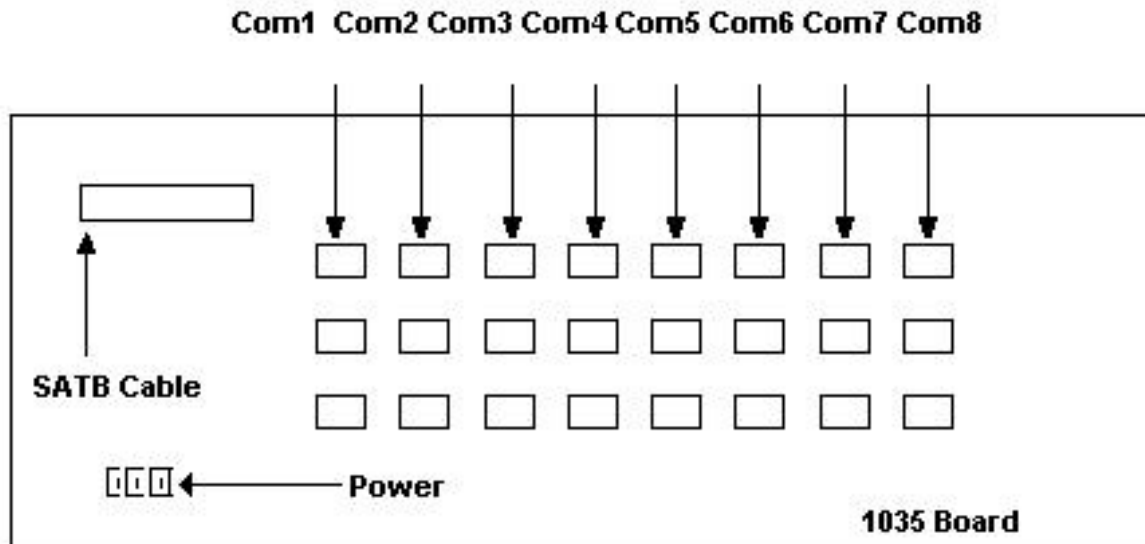

Fig. 3.7

Device Note

> This number is equal to the Address number so following this logic Address number 5 would equate to Bay 5. So you would type Bay 5 in the field. After setting all of the numbers correctly, click the Next button and follow that by clicking the Finish button. The device has now been added to the unit. To ensure communication to the device, go back to the Utilities main menu and click the Force ConFig.uration button at the bottom of the screen. The device can be view in the Dashboard menu as online. To delete a device, locate the delete link to the right of the device in the Device menu. You will be asked to confirm the deleted device by clicking the finish button.

Logout

> You will only receive this option if you are in the site remotely. By clicking the Logout link, you will end the session that you are currently in and the Login menu will appear. You may log back into the site from this point or close the browser completing the session.

> **This concludes the software portion of the Swipe @ The Bay Manual.**

Programming the 1041 Timer

When in program mode, the SET button will allow you to toggle through the options for the specific step. Pressing MODE will enter your selection and take you to the next step.

1. **Entering Program Mode:**
    a. Hold **MODE** (est. 5 sec) or until display no longer scrolls.
    b. If holding **MODE** has no response, turn timer off.
        i. While depressing the **MODE** button turn timer back on. This will automatically put you in PROGRAM MODE.
2. **Function**
    a. Enter the function you are using.
    b. ex: **baY / vac / VENd / FVAC / SVAC / AUTO**
3. **Unit number: ***
    a. This step is to determine which bay/vac/vend this unit is in
    b. Ex: ***4** will indicate that this unit is installed in bay number 4
4. **Nationality**
    a. **DOM** for domestic use, **AUS** for Australia, **INTR** for International
5. **Swipe-N-Clean**
    a. This step sets the timer for use with a vendor, if NOT using for a vendor, proceed to the step 6.
    b. **SNCY** for Swipe-N-Clean sites and **SNCN** for non Swipe-N-Clean sites
6. **Tokens: T**
    a. This option is ONLY used when the location has DUAL coin acceptors. If NOT using tokens, proceed to step 7.
    b. Set the value of one token equal to the number of quarters. If NOT using tokens go to step 7.
    c. **T 01 – T 20** maximum value of 1 token= 20 quarters =$5.00
7. **Money: A**
    a. This step should be set to how much it costs to start the primary service.
    b. Minimum value is **A 0.25,** Maximum value is **A 9.75.**
8. **Time: B**
    a. This step sets the amount of wash time for each quarter deposited.
    b. Ex: $1.50 for **B4: 30**
    c. **SET** in this step will go from B *4*:00 to B 4:*3*0 to B 4:0*0*
9. **Bonus: C**
    a. This step sets the amount of wash time for each quarter deposited.
    b. Ex: deposit $1.50 for 4:30 min bonus time = **C 0:45**
    c. **SET** in this step will go from B *4*:00 to B 4:*3*0 to B 4:0*0*
    d. **If programming a BAY/VAC only it will take you to step 15.**

10. **Switching**
    a. The next four steps only apply to combination vacuum units - **FVAC/SVAC.** If not using these units, proceed to step 15.
    b. **NOSW** for no switching.
    c. **SW** for switching from shampoo/fragrance to vacuum and vice versa by recalculating the paid time at the different rates

11. Switch Time: S
   a. This option gives the customer an amount of time required before switching from vacuum to fragrance/shampoo.
   b. Ex: **S0: 10** ten seconds before customer can switch from vacuum to fragrance/shampoo or vice versa.

12. Money: D
   a. This step sets the amount of MONEY needed to start the second service, such as fragrance/shampoo.
   b. Ex: **D 0.75**

13. Time: E
   a. This step sets the amount of TIME for the second service.
   b. **SET** in this step will go from B *4*:00 to B 4:*3*0 to B 4:0*0*
   c. Ex: **E0: 45**

14. Bonus Time: F
   a. This step sets the time for EACH additional coin.
   b. **SET** in this step will go from B *4*:00 to B 4:*3*0 to B 4:0*0*
   c. Ex: $0.75 for 0:45 seconds bonus time = **F 0:15**

15. Horn: H
   a. This step adjusts the length of time the horn will sound when the customer has less than 1 minute remaining on the service.
   b. Ex: **H 10** will set the horn to sound for 10 seconds when 1 minute remains.

16. Blow Out Cycle: I
   a. **I 03** determines the number of blowout cycles to prevent freezing.
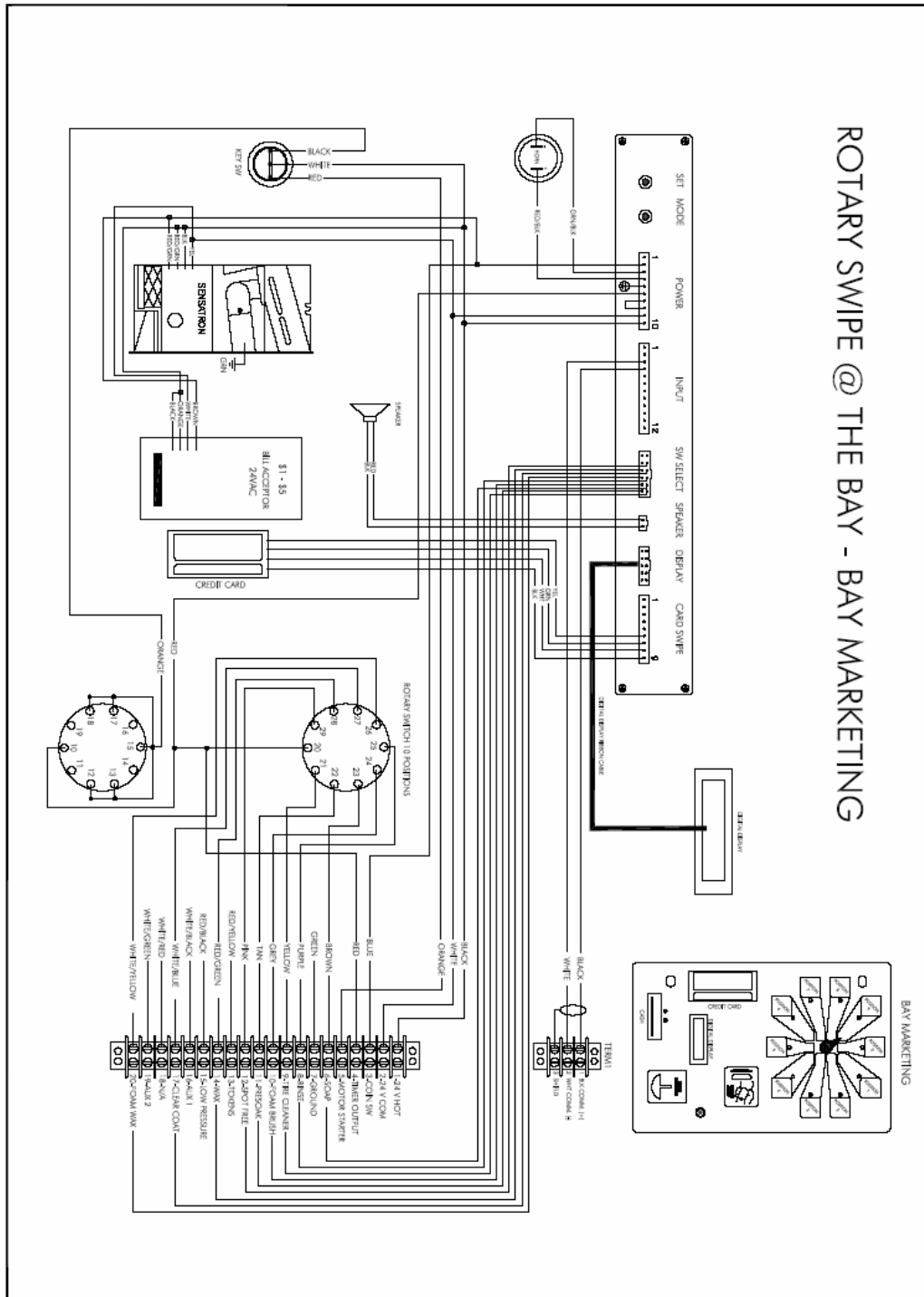
17. Blow Out Time: J
   a. **J1:00** determines the blowout weeping time in minutes and seconds.
   b. **SET** in this step will go from B *4*:00 to B 4:*3*0 to B 4:0*0*

18. Blow Out Rest: K
   a. **K1:00** determines the rest time between blowout weeps.
   b. **SET** in this step will go from B *4*:00 to B 4:*3*0 to B 4:0*0*

19. Place Time in Military format.

ROTARY SWIPE @ THE BAY - BAY MARKETING

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Swipe @ The Bay

Receipt Printer Installation

NOTE: If your unit came with anything pre-assembled (i.e., the electrical box, plug, cover, and printer bracket), skip to the step that continues from that point.

Components:

Plug Cover

Printer Power
Supply Cables

Card Swipe
Power Supply

110 Plug

Plug Box
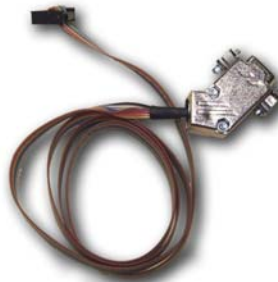
Printer
Ribbon Cable

Print Server
Power Supply

Paper Chute

Printer Retaining Clip

Lock Assembly

6-32" Screws/Nuts

Print Server

Printer

Printer Bracket

Print Server Bracket
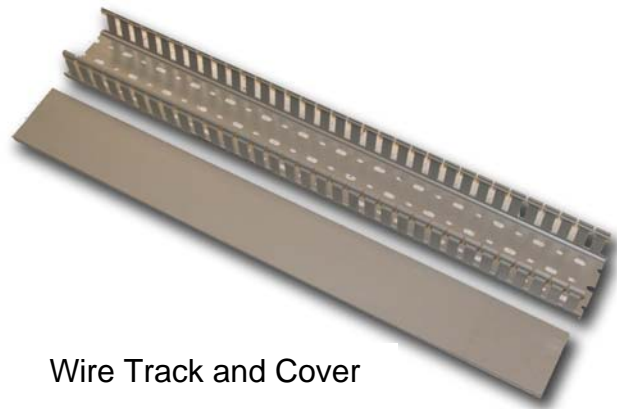
Wire Track and Cover

Card Swipe/Cable

Location of door jamb
to be removed

Step 1: Using the following measurements, remove the section of the door jamb.

3-1/4"

8-3/4"
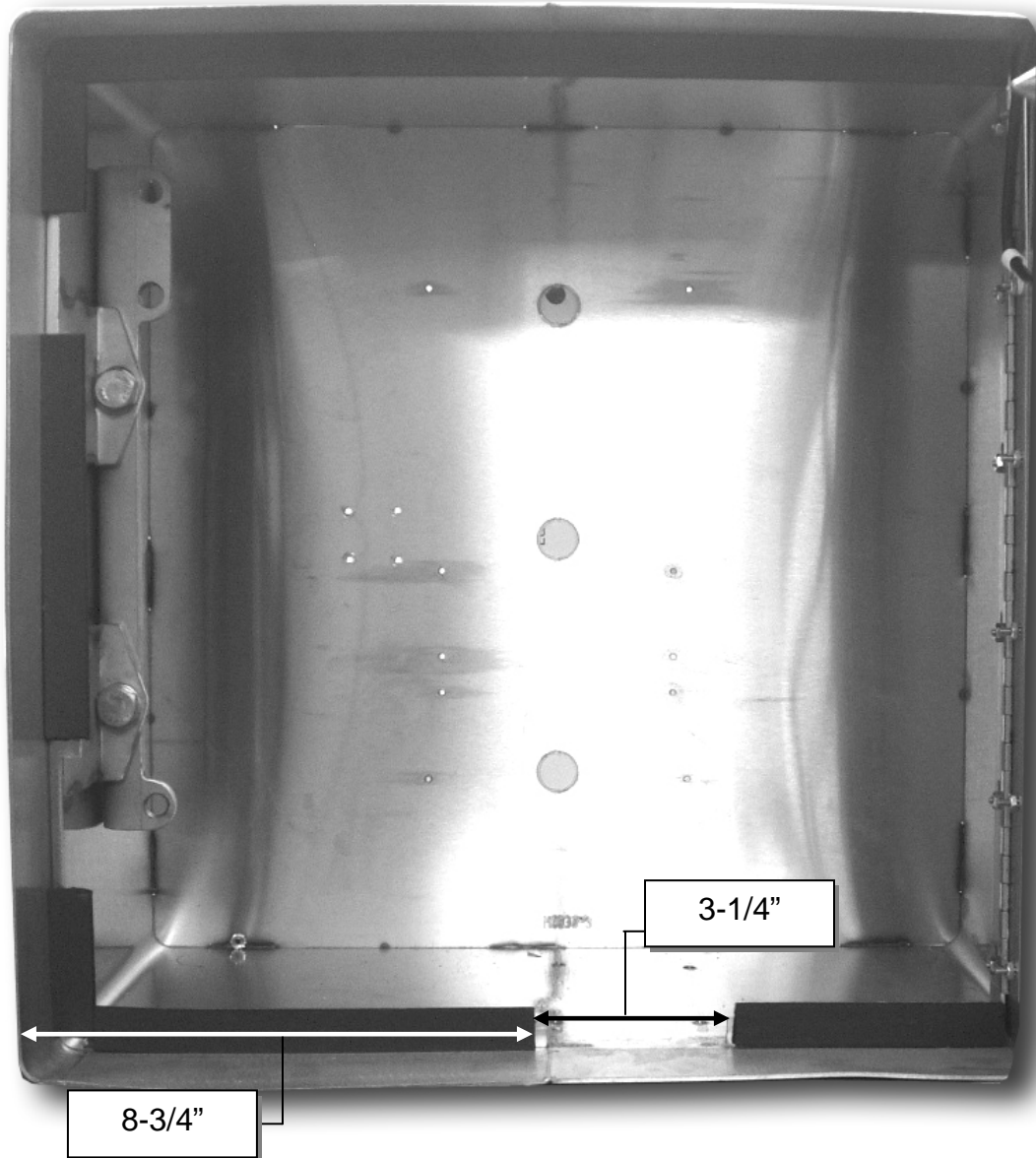
- Measure 8-3/4" from left inside of cabinet wall and make cut in door jamb

- Measure 3-1/4" from the above cut and make another cut in door jamb

- If door jamb piece doesn't fall out you will have to grind any spot welds

Step 2.: Measure location of electrical box to be drilled and tapped
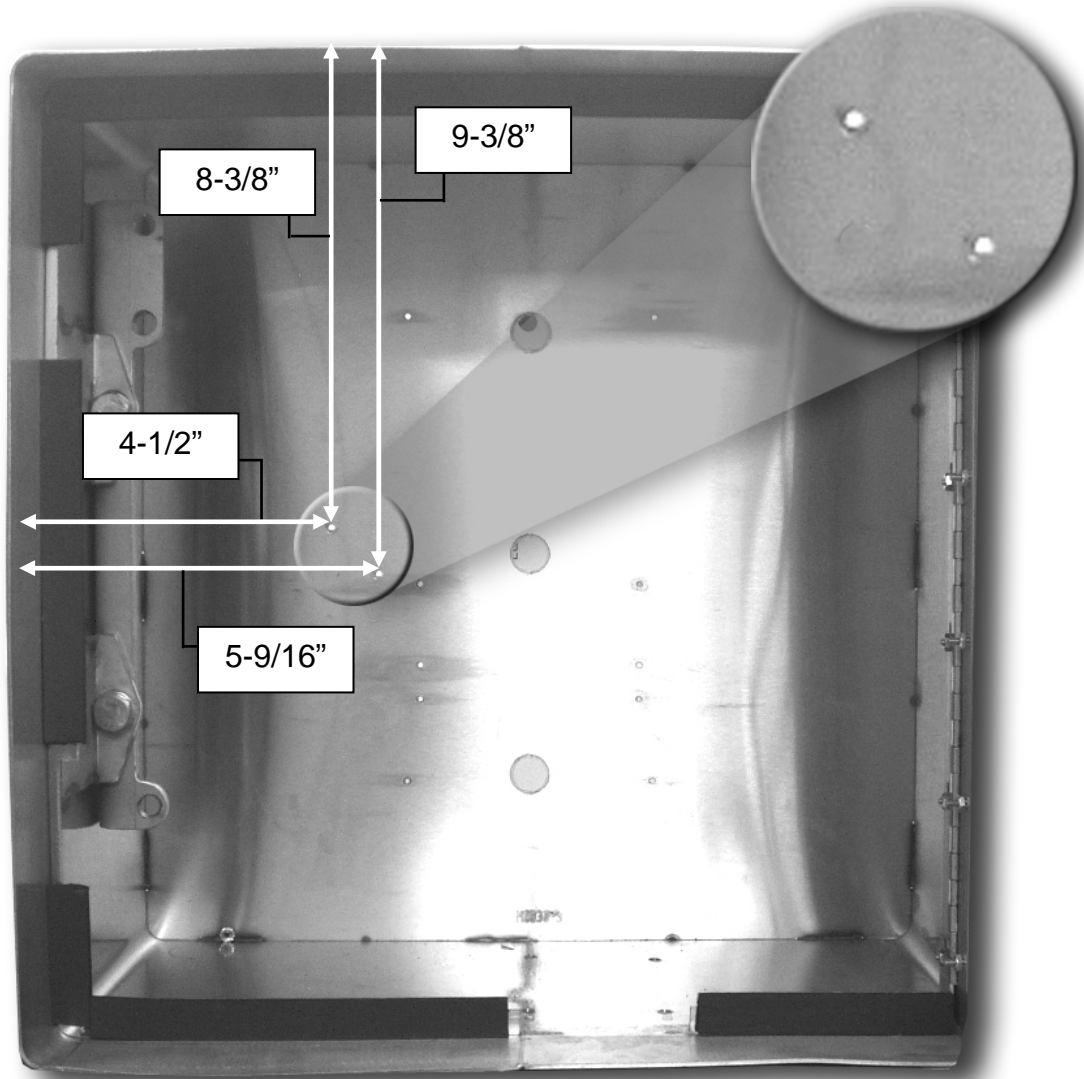
- Measure 4-1/2" from left inside of cabinet wall to top left hole

    - Measure 8-3/8" down from inside cabinet top to top left hole

    - Measure 5-9/16" from left inside of cabinet wall to bottom right hole

    - Measure 9-3/8"" down from inside cabinet top to bottom right hole

    - Drill two holes and tap with 6-32" bit and tap

Step 3: Install Electrical Box, Plug, and Cover Plate
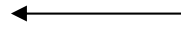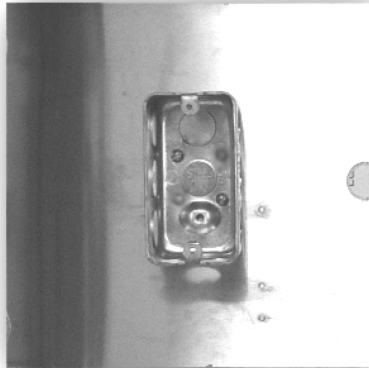
Secure box with two of the provided 6-32"x1/2" screws.
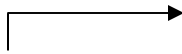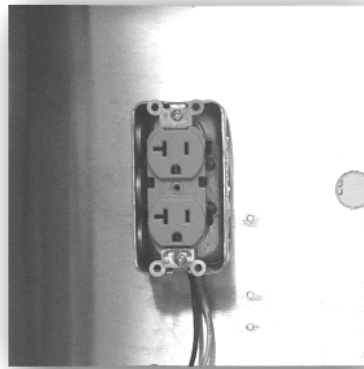
Connect incoming power supply cord to plug. Secure plug into box with two screws.
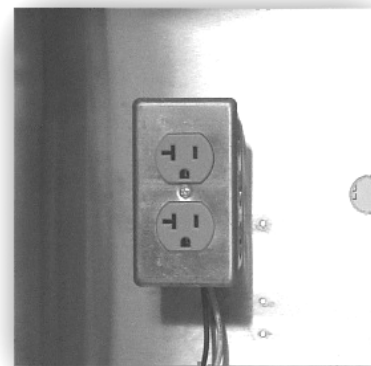
Attach cover plate with screw.

Electrical
box, plug,
and cover
plate
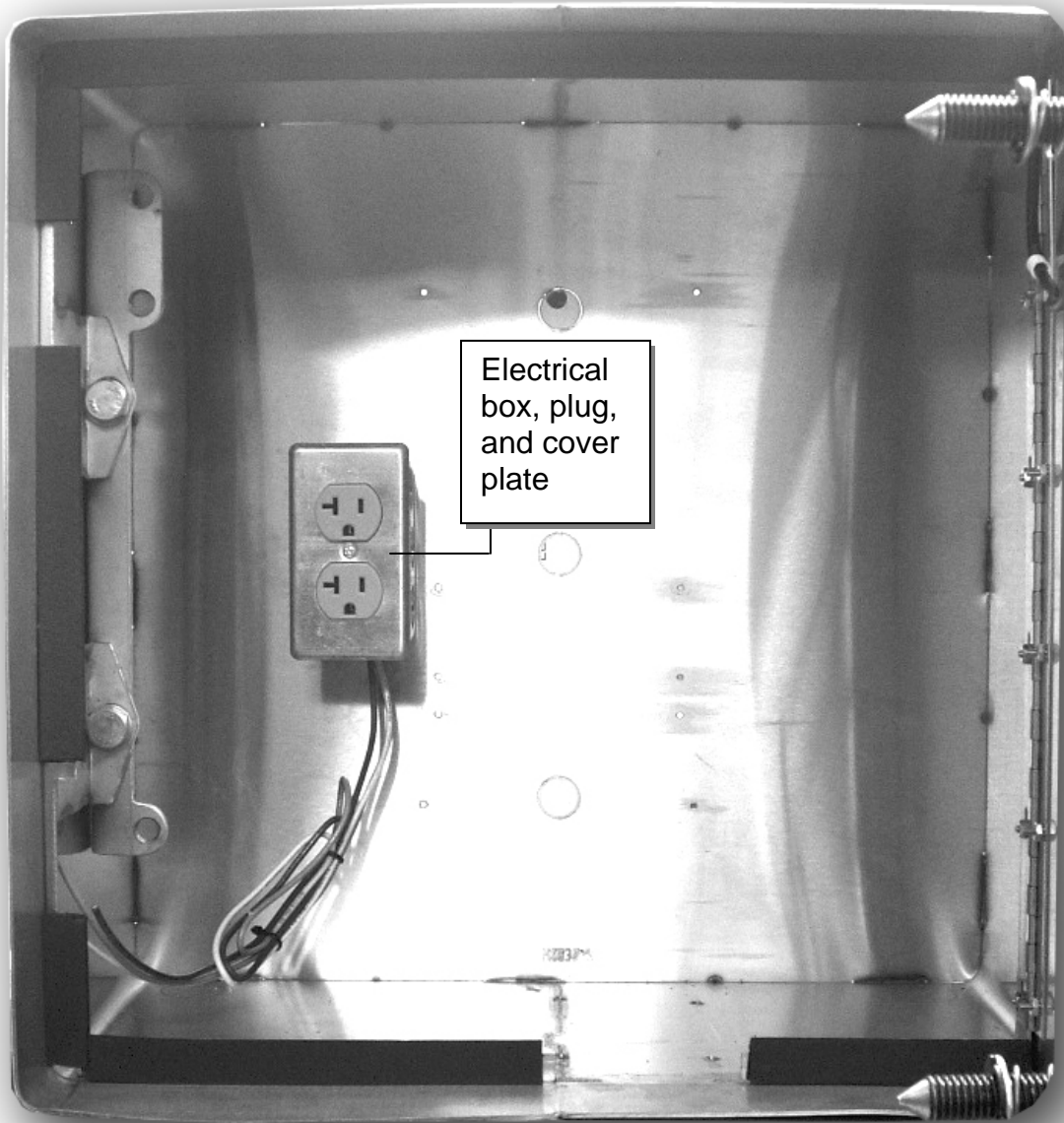
Completed installation of Electrical Box

Step 4: Measure holes for installing printer bracket
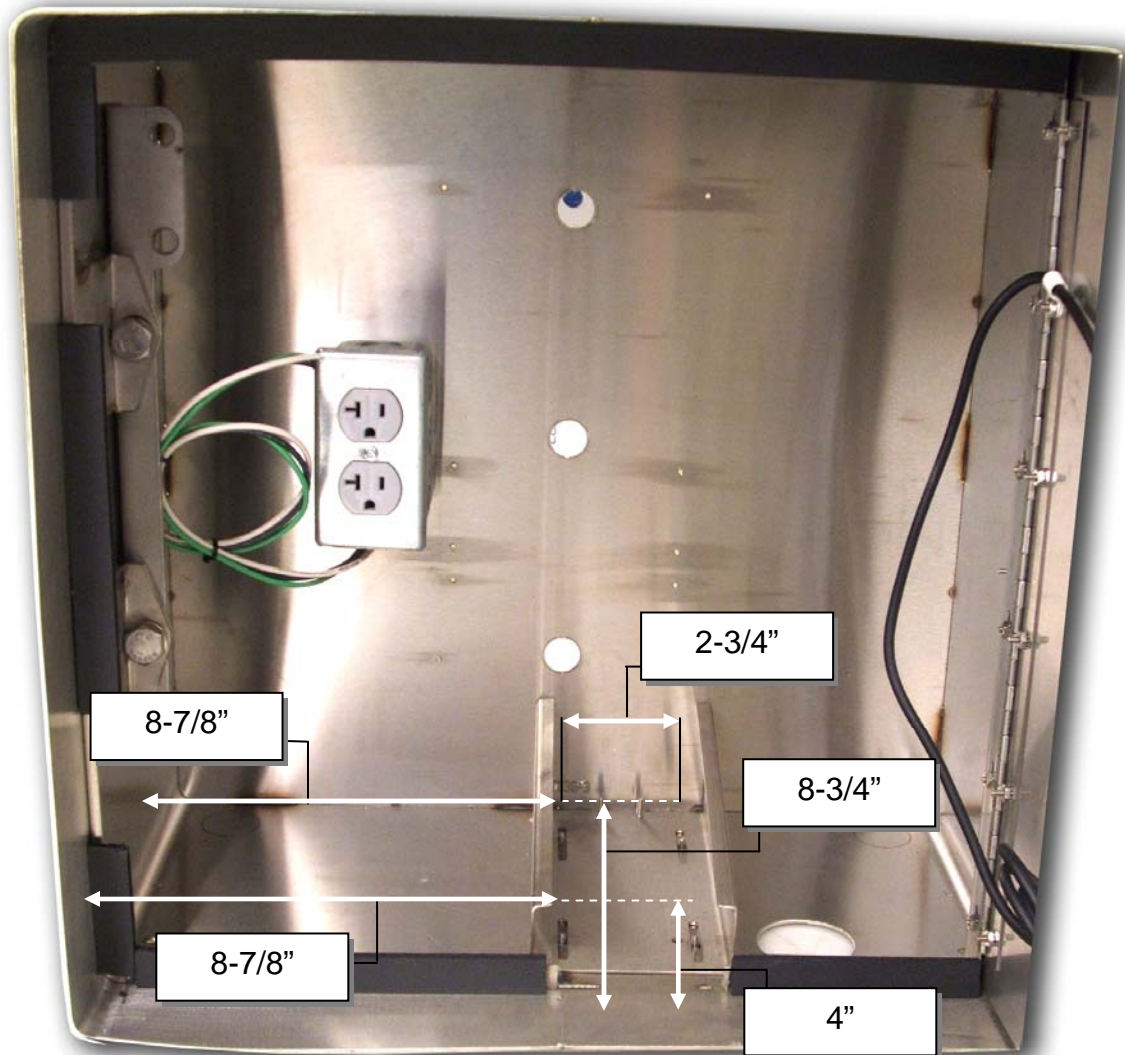
- Measure 8-7/8" from left inside of cabinet wall to left hole (front and back)

- Measure from left hole 2-3/4" and mark for right hole (front and back)

- Measure 4" and 8-3/4" from cabinet lip to center of holes

- These holes should be drilled and tapped with 6-32" bit and tap

Step 5: Install the wire track

3" Wire Track

- Measure distance from top left to top right of inside cabinet and cut wire track to mount just below inside top. Use 3M double-stick tape to keep in place.

Step 6: Install the Print Server bracket
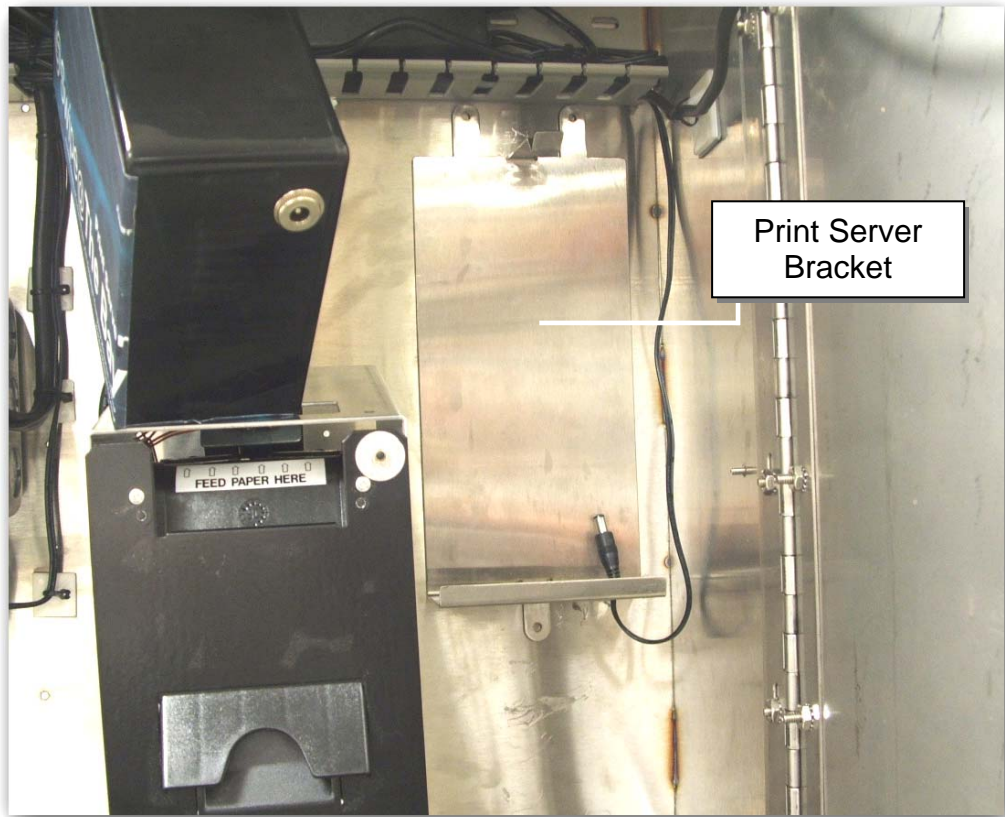
- With 3M double-stick tape, mount the print server bracket just below the 3"
  wire track on the far right of the cabinet.

Step 7: Plug in the Print Server
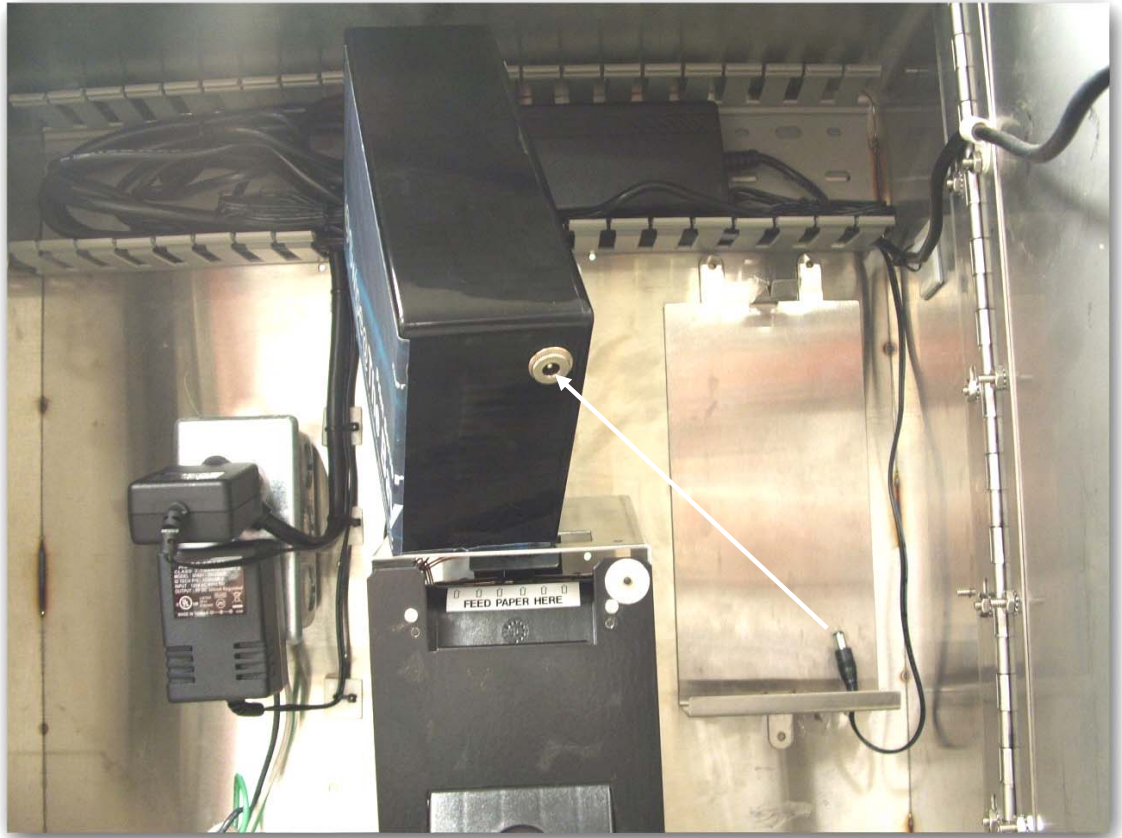
- Plug the cable into the bottom of the Print Server

Step 8: Install Door

Credit card swipe cable

Printer paper chute bracket

- Place door and hinge on existing screws

- Attach printer paper chute with two screws

- Secure plastic clamp around credit card swipe cable and over one of the screws

- Attach with six 6-32" nuts

Step 9: Install locks onto door

Bracket

Plug Lock
Housing

Washer

Plug Lock Bolt

Plug Lock

Snap Ring

Nut
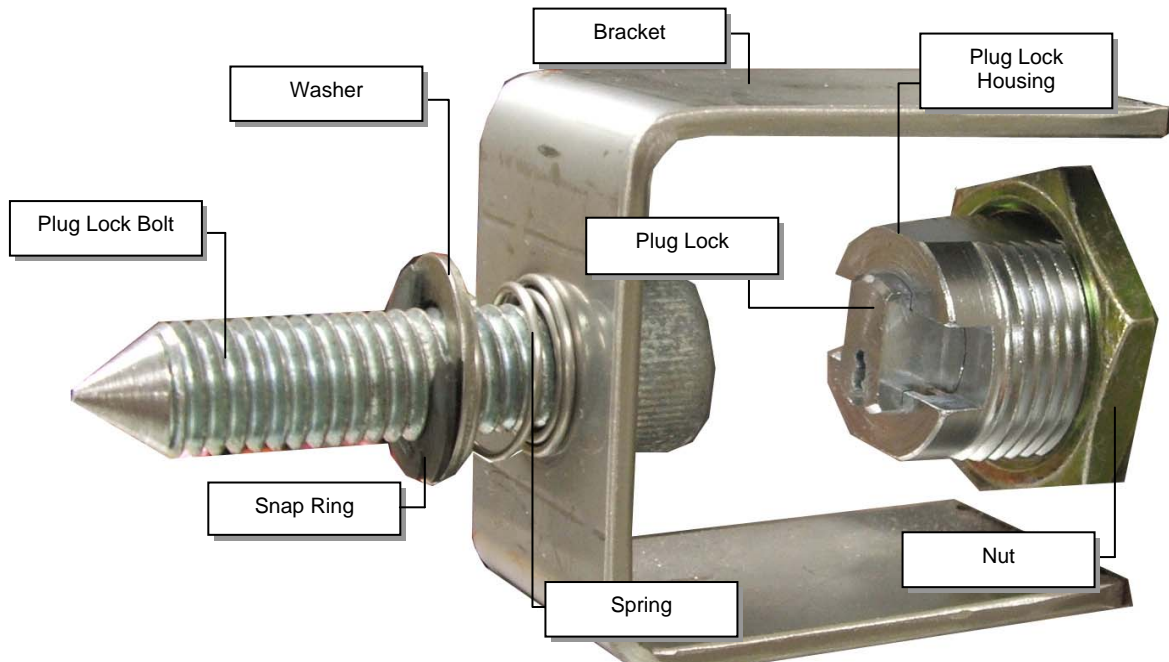
Spring

- Install the plug lock bolt through opening first

- Place spring over the bolt on the outside of the bracket

- Place washer onto the bolt and push until spring is about half as long

- Push the snap ring in place onto the threads against the outside of the washer

- Insert plug lock housing through hole from front of door

- Place nut over plug lock housing and tighten

- The plug lock will be inserted after the door is closed and plug lock bolt is tightened using the provided hex tool

Step 10: Connect Printer, Cat 5 Cable, and Card Swipe to Print Server

Printer cable goes here

Cat 5 cable goes here

Card Swipe cable goes here
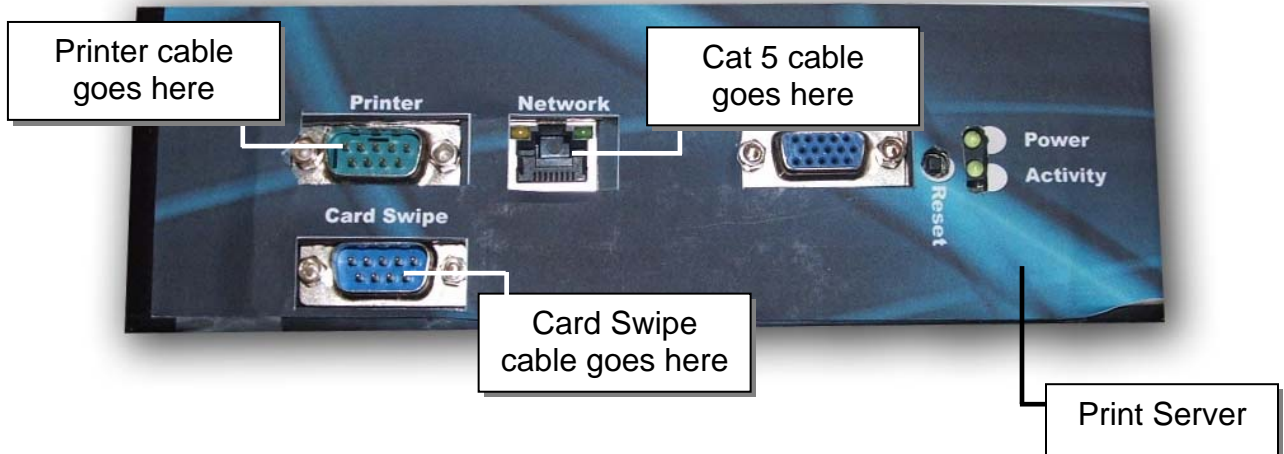
Print Server

Step 11: Snap Print Server into bracket (bottom goes in first)

Bracket top
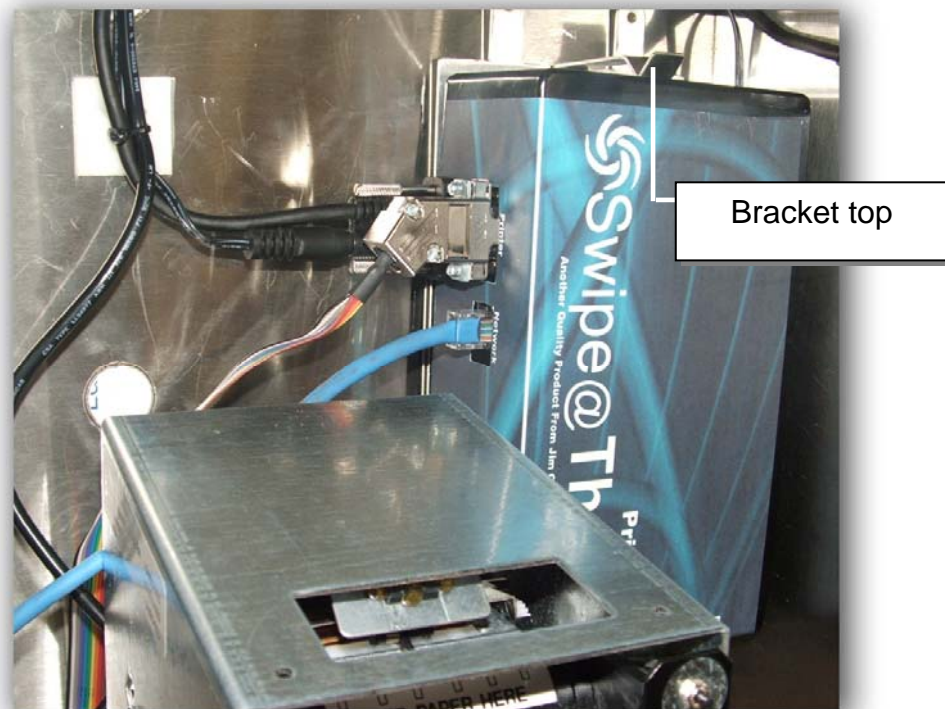
Step 12: Install printer onto printer bracket and secure
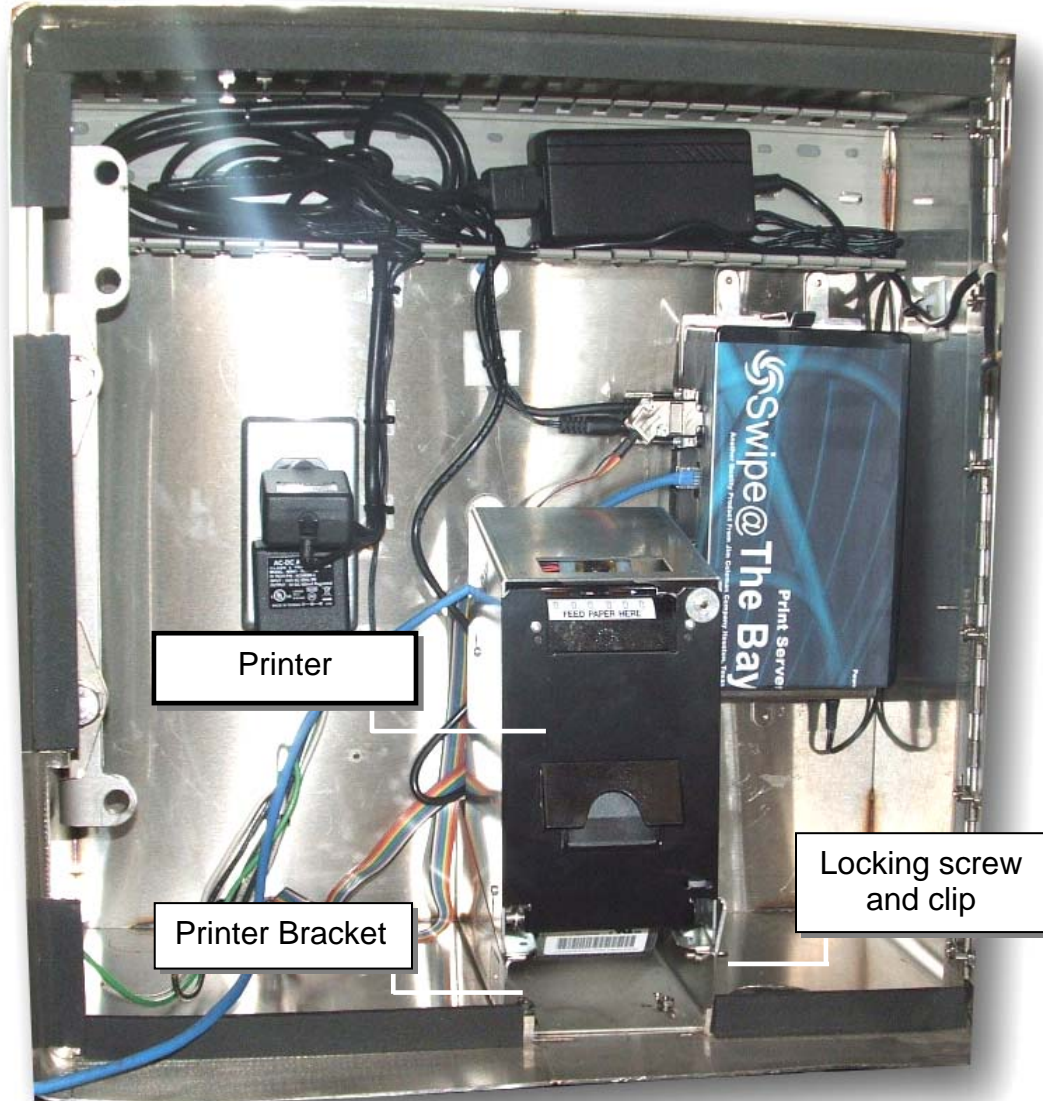
- After cables are connected from the print server to the printer, slide printer onto bracket and secure with supplied locking screw and clip.

NOTE: The Cat 5 cable for internet use connects to a router or the high speed box provided by your internet service.

Step 13: Plug the Card Swipe, Printer, and Print Server into the 110 Plug

Printer

Print Server

Card Swipe
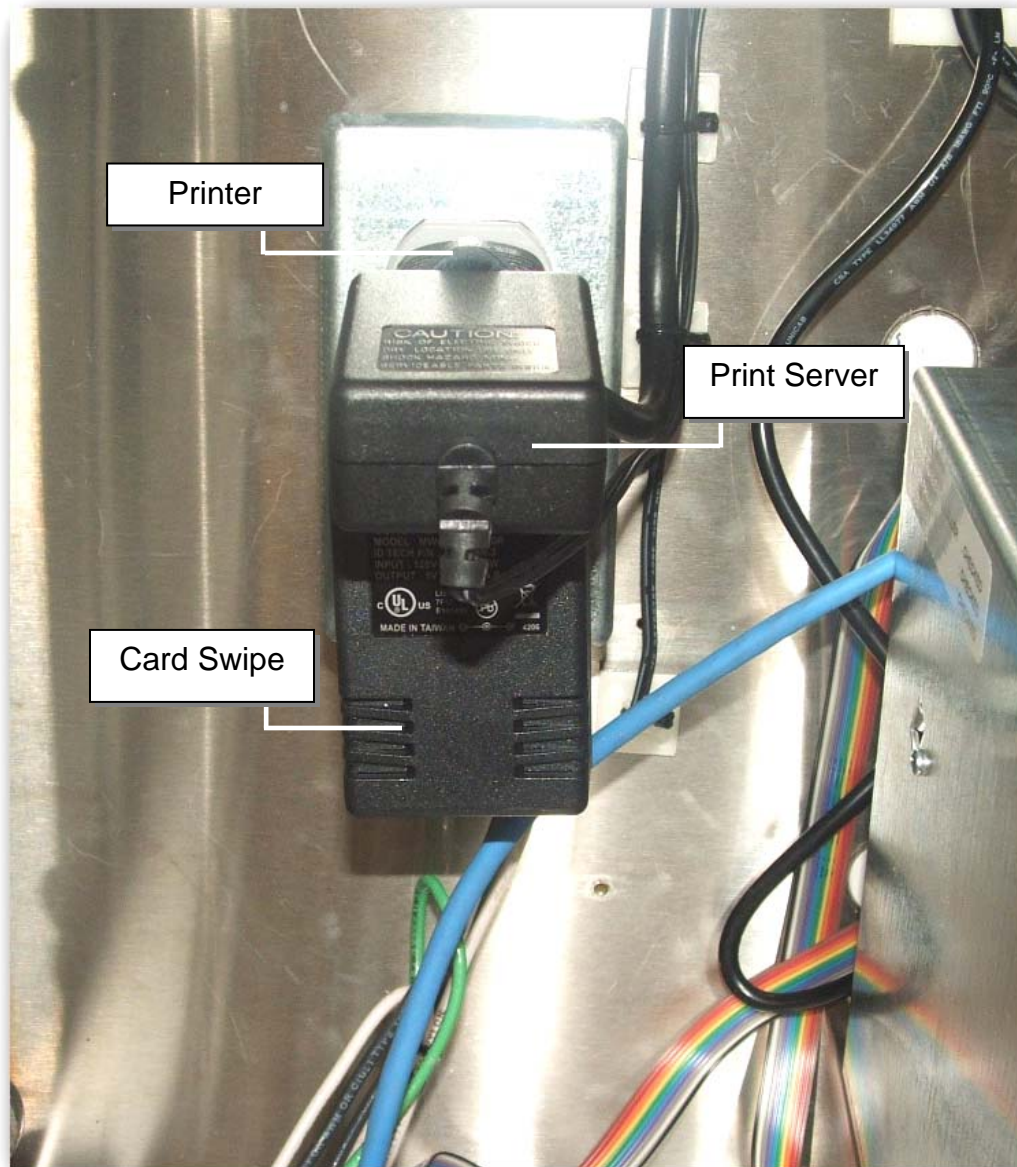
Step 14: Snap wire track cover into place

Wire Track Cover
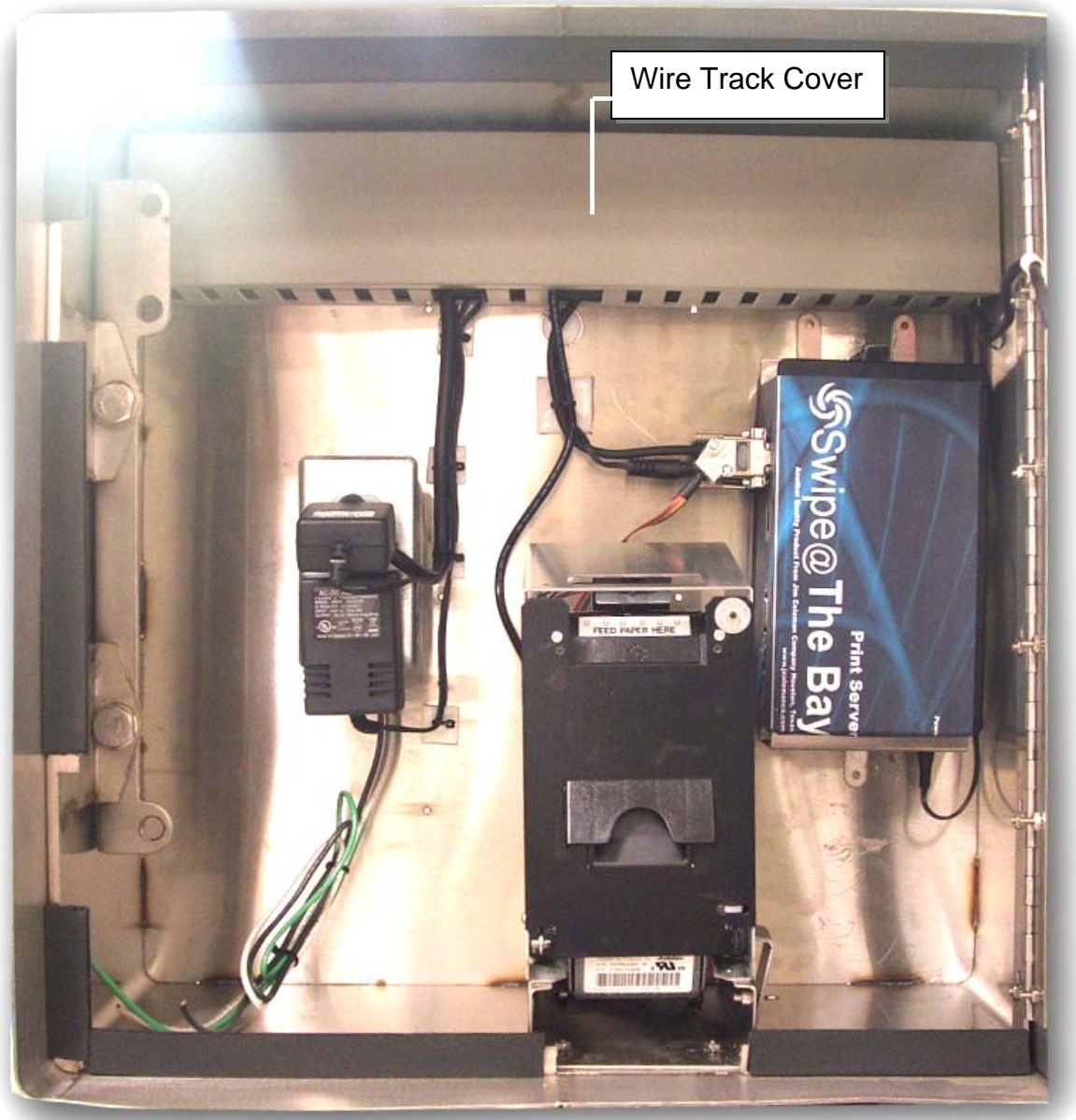
Fleet Card System

Table Of Contents

Introduction

The Swipe @The Bay SATB Fleet System is an integral part of SATB. The features and functions of the system are similar to that of the Credit Card System; however, the Fleet System will provide more control of marketing your car wash, and maintaining control of "your money".

The Fleet System is highly integrated into the overall design of SATB. The setup, reporting, and billing are simple, straightforward, and easy to use. The system requires minimal setup and maintenance, and in most cases handles billing and reporting to your customers automatically.

The system requires no additional hardware to run the Fleet System, and is backward compatible with your existing SATB Server. The only other requirement to have full functionality of the Fleet System is a valid email account for any user that you setup on the system. The Fleet System uses email as a means of notifying users of account balances and payments on their account. No billing statements other than email are currently supported. Please do not consider using the Fleet Card System unless this criterion is met.

There are currently two types of accounts supported on the Fleet System.
1. Auto Bill Account
2. Pre-Pay or In-House Account

There are future plans to provide other account types with other features, however, these are still under development, and are being reviewed by customers that are testing the software, and providing feedback on features that will enhance the system capabilities.

The instructions give an overview of the look and feel of the Fleet menu system. Please look at all of the features and functions in the example menus, then, follow the step-by-step instructions for setting up cards and accounts.

Please read all of the instructions before performing any action with the Fleet System. Failure to do so may result in the creation of unwanted accounts or cards that cannot be deleted. There will be explanations later as to why deletion of cards and accounts is not allowed.

Fleet Dashboard

Dashboard	Reports	Fleet	Utilities	Setup	Logout

Fleet Accounts Fleet Cards

WashSiteName: Fleet Accounts

Review, Add or Edit Fleet Accounts

Filter By Fleet Account Status: | Active ▼ |

Filter

Fleet Accounts ASC By Account #

Account #	Resp. Party	Phone #	Type	Status	ID		
A20080604028881	Name Of Party	124.123.1234	Auto	Active	291	📝	🗑
A20080604471234	Name Of Party	124.123.1234	Auto	Active	290	📝	🗑
A20080605206829	SetAccountTodisablePostBill	32323232323	Auto	Active	295	📝	🗑
P2008060409	THIS and THAT	123-123-1234	PrePay	Active	289	📝	🗑
P2008060549	fdsdsff	24423423432	PrePay	Active	296	📝	🗑

Account Balances DSC By Balance

Account#	Balance	Charge Amt	Recharge Amt	T	ID	
P2008060409	9.00	0.00	0.00	P	289	📝
A20080604471234	50.00	50.00	10.00	A	290	📝
A20080604028881	104.00	50.00	10.00	A	291	📝
A20080605206829	117.00	100.00	50.00	A	295	📝
P2008060549	100.00	0.00	0.00	P	296	📝

Add Account

Figure 1

The figure above is the opening menu for the "Dashboard" for accessing the Fleet System. When you purchase the Fleet package, this tab will appear across the top of your system, allowing you to access all the features of the Fleet System.

This page shows examples of accounts that have already been created. The first time you open the Fleet Dashboard on your system, there will be no accounts to view. The accounts depicted here are for explanation only.

The information displayed is a "snap-shot" of the pertinent fields associated with each account. From this page the user can add, edit, view, disable, or archive an account.

IMPORTANT: Before adding an account to the system, you must first add cards to the system. See instructions below for adding Fleet Cards to the system.

By clicking on the edit icon next to an account, the user is allowed to edit any information about the account. By clicking on the trashcan icon next to the account, the user can archive or close the account. This hides the account from view, and disables all users associated with the account.
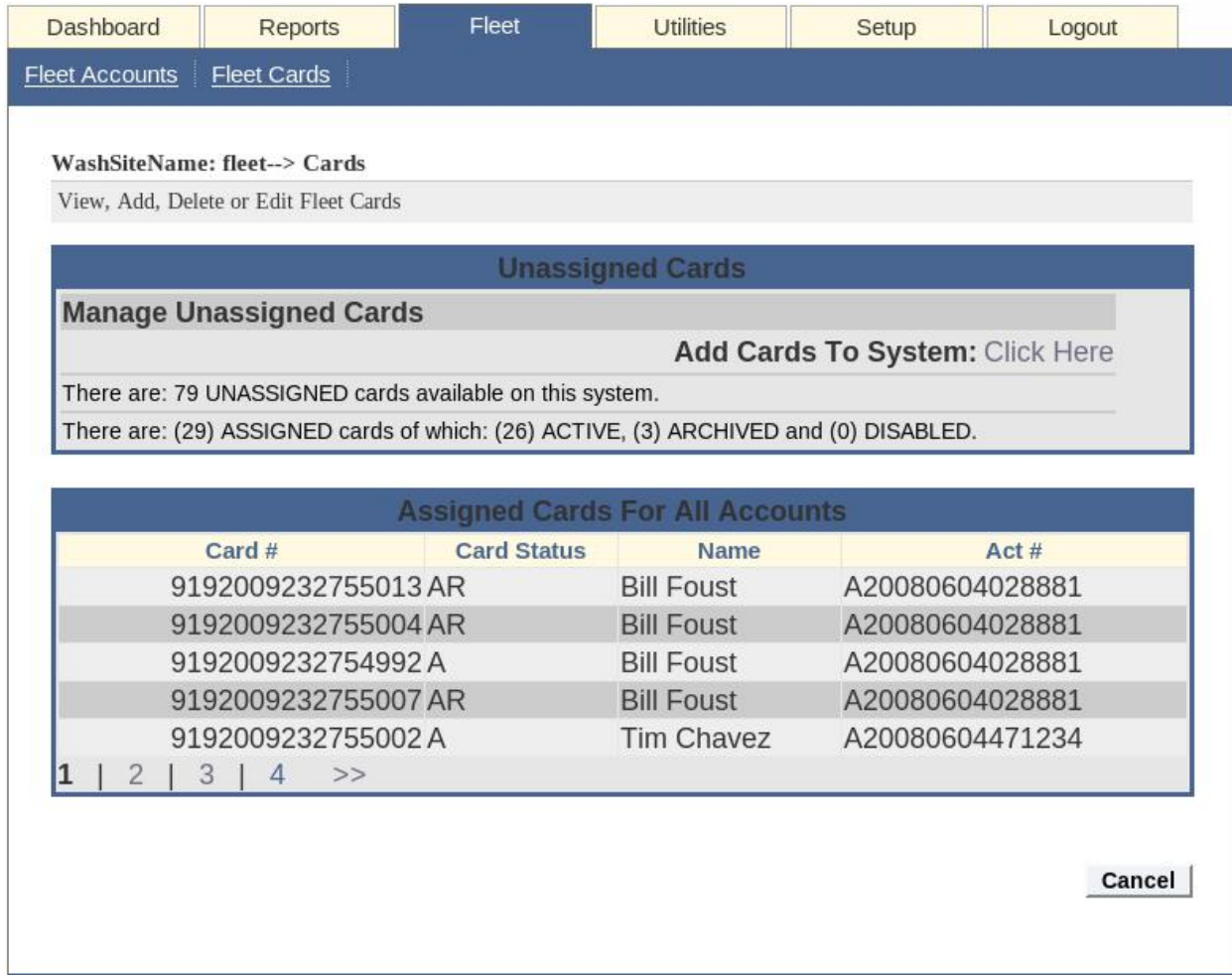
The Fleet System does not allow the owner to delete an account. If account deletion were allowed, all history, and activity for the account would also be deleted. The concept of deleting an account and all history associated with the account therefore is not allowed.

Filtering and Sorting Accounts

The drop down combo box allows the user to easily view accounts by their status. The default view is to see Active Accounts. There are also the options to see Disabled, and Archived or (Closed) Accounts by selecting the appropriate view from the drop down menu box, and clicking on the Filter command button.

The header above each of the columns allows the user to quickly sort the Accounts by that heading simply by clicking on the text in the appropriate column. For instance, if you would like to see the Accounts sorted by the account number, click on the "Account #" text, and the system will re-order all Accounts by account number.

Fleet Cards Menu

| Dashboard | Reports | Fleet | Utilities | Setup | Logout |

Fleet Accounts   Fleet Cards

WashSiteName: fleet--> Cards

View, Add, Delete or Edit Fleet Cards

Unassigned Cards

Manage Unassigned Cards

Add Cards To System: Click Here

There are: 79 UNASSIGNED cards available on this system.

There are: (29) ASSIGNED cards of which: (26) ACTIVE, (3) ARCHIVED and (0) DISABLED.

Assigned Cards For All Accounts

Card #	Card Status	Name	Act #
9192009232755013	AR	Bill Foust	A20080604028881
9192009232755004	AR	Bill Foust	A20080604028881
9192009232754992	A	Bill Foust	A20080604028881
9192009232755007	AR	Bill Foust	A20080604028881
9192009232755002	A	Tim Chavez	A20080604471234

1 | 2 | 3 | 4   >>

Cancel

Figure 2

The Fleet Cards Menu shown in Figure 2 is where you will add cards to your system. Please do not add cards to the system yet. Please continue reading the instructions so that you fully understand the system before creating accounts and cards.

The menu depicts cards that have been assigned, and also shows levels of cards that are in the system, but still unassigned. The cards that are assigned show the card number, card status, user name, and account number. By clicking on the text associated with each of the column names will sort the information by that column.

To add cards to the system, click on the "Click Here" menu to the right of the **Add Cards To System** text. This will take you to the next menu screen.

Add Cards To Pool
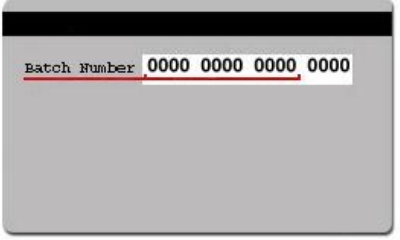
Figure 3
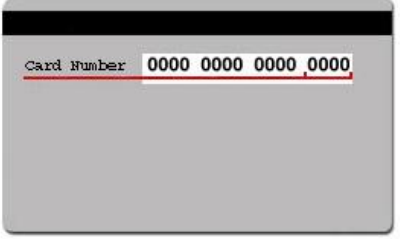
The menu in Figure 3 indicates the required information to add cards to your system. Each card has a unique number associated with it. To add cards to the system, you will enter the first twelve numbers on the back of the card called the batch number. Then, in the "First Card Number In Batch" box, take the first sequentially numbered card, and enter the last four digits of this card in this box. Then take the last card, and enter the last four digits of that card in the box. Then you will click on the "Add Cards" button to add this group of cards to the system.

Adding An Account

To add an account to the Fleet System, click on the "Add Account" button at the lower right corner of the Fleet Dashboard. This will take you to the menu that requires you to make a choice of the type of account you are creating. Figure 4 below indicates the currently supported account types.
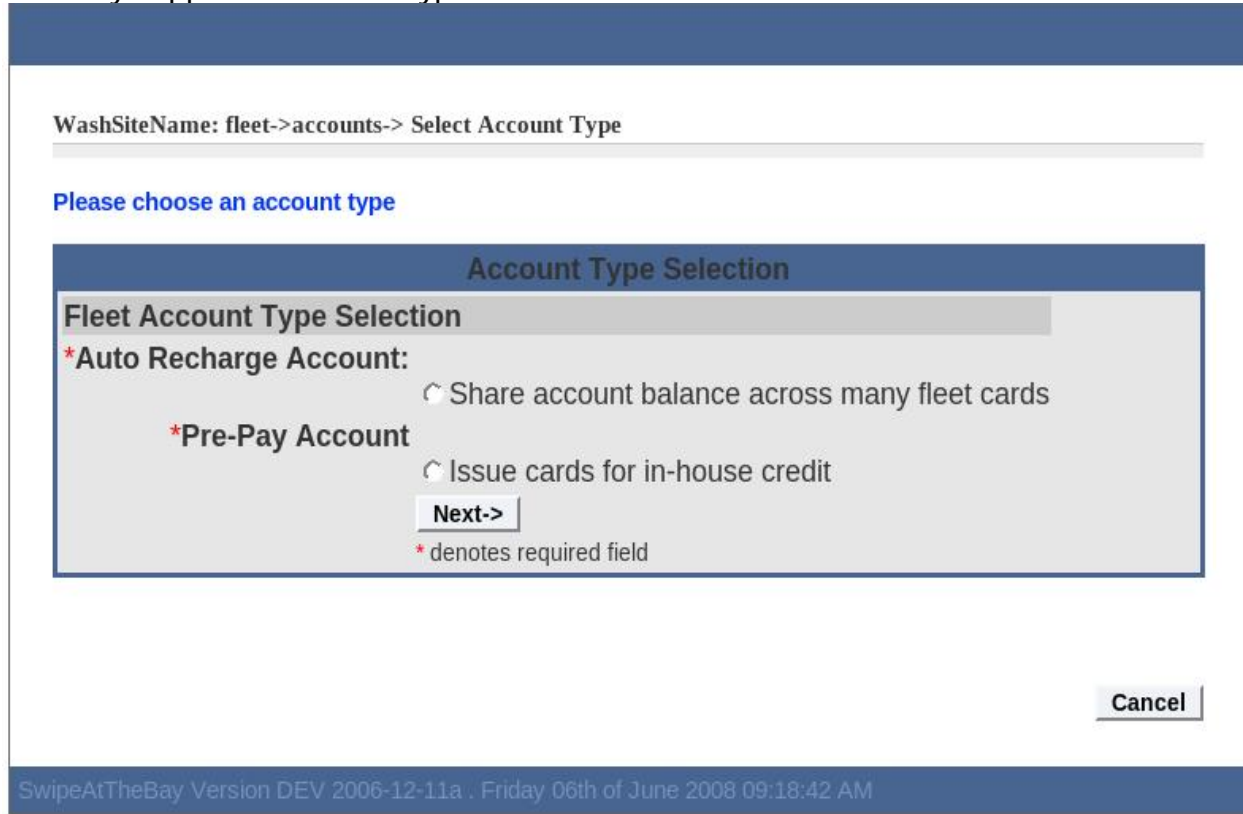
Figure 4

Auto Recharge Account

The Auto Recharge Account is one that allows the car wash owner to accept a credit card (only) for the payment on an account. The car wash owner sets up the account, assigns cards to the account, and all users (cards) on the account share the same balance. The car wash owner and account holder establish the guidelines for how much the account holder will be billed initially, as well as setting the level at which the credit card will be auto charged to maintain a reasonable balance on the account. Once this type of account is established, there is very little maintenance required on either the car wash owner, or account holder.
Each time the account reaches the "low water mark", established by the account holder, the system automatically bills the credit card on file for the amount agreed upon when the account was established. When the account is billed a statement is automatically emailed to the required email address on the account. The account holder can request at anytime that the auto-billing

feature be turned off, or billed to a different credit card and the car wash owner can easily make the changes. If the auto-billing feature is disabled, the users on the account may continue to use the system until the amount remaining on the account is used up.

Pre-Pay or (In House Account)

The Pre-Pay type account allows you to create accounts with or without collecting money from the account holder. When the account is established you select the amount that the account is worth, assign cards to the account, and establish the criteria for what functions the users on an account have access to. This allows you to sell washes at a value, but give the customer a greater value because the purchased the washes in advance.

Setting Up Accounts

Auto Recharge Account

Figure 5

The menu depicted in Figure 5 is the menu for created a new Auto Recharge Account. The fields with the red asterisk to the left of the name are a required field. The system will check the criteria in the field to verify, as

much as possible, that the information provided is correct. The system will not create the account until all information required has been entered. When you have finished entering all of the required, and non-required information, click the "Next" button to continue.

The system will now attempt to process the credit card with the information that you have provided to create the account. At this point you will see one of two screens. If the credit card processed successfully, the screen depicted in Figure #4 will be displayed. If, for some reason, the credit card failed to process, the screen depicted in Figure #5 will appear.
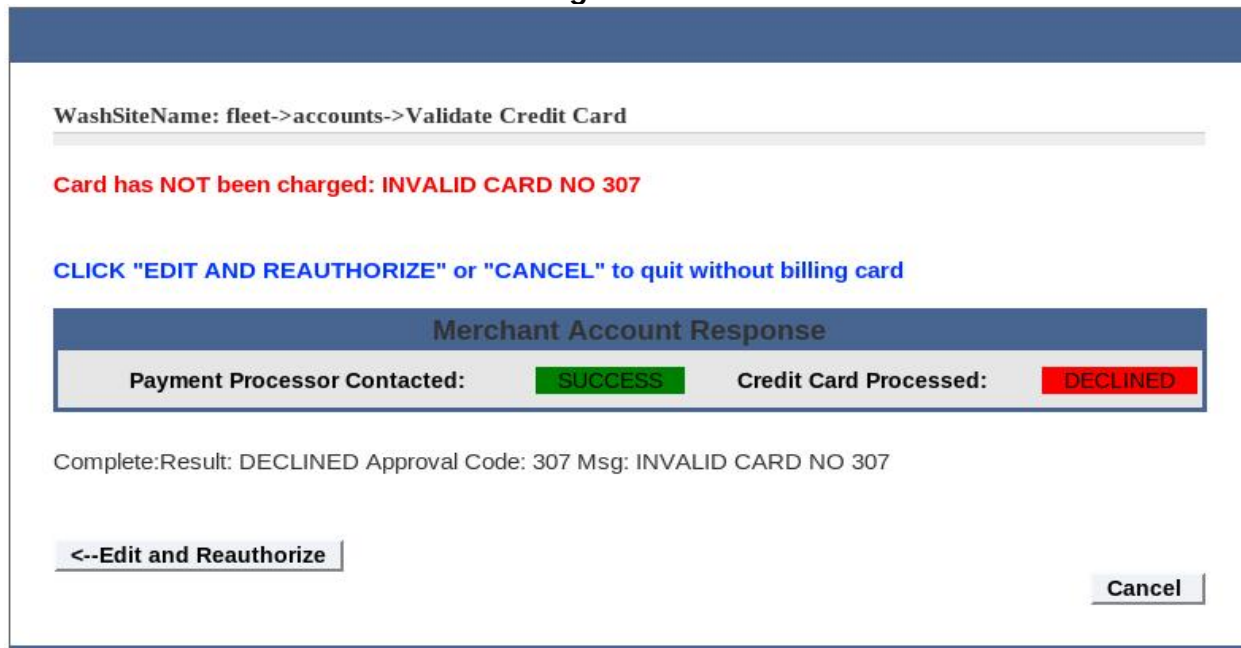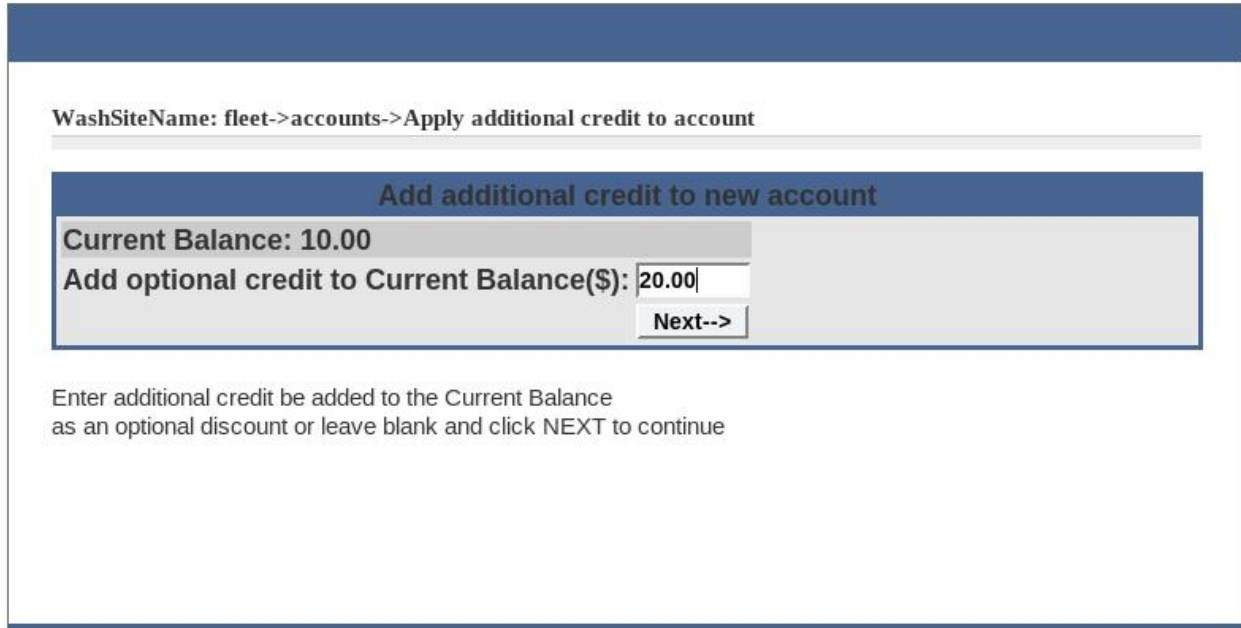
Figure 6

Figure 7

If the credit card denial is encountered, click on the "Edit and Reauthorize" button, and verify that all of the credit card information is correct. Once you have changed the information, resubmit the information for processing. If the credit card is still declined, consider asking the user attempting to create the account if they would like to try another credit card. The reason for the denial of service message is shown. Once the credit card has been approved, click on the "Next" button to setup the balance of the account.

Apply Additional Credit To Account

WashSiteName: fleet->accounts->Apply additional credit to account

Add additional credit to new account

Current Balance: 10.00
Add optional credit to Current Balance($): 20.00

Next-->

Enter additional credit be added to the Current Balance
as an optional discount or leave blank and click NEXT to continue

Figure 8

Figure 6 shows the menu screen for adding any additional money to the account. For instance, maybe you would like to tell the account holder that if they sign up for a fleet account today, you will give them ten dollars in free washes. You would enter this amount here, and the additional amount would be added to their account. If you leave the amount empty, the account is created for the amount that their credit card was billed for.
Click the next button to setup the default card permissions that will be assigned to this account.

Auto Recharge Card Permissions

WashSiteName: fleet->accounts-> Choose wash permissions

Please choose wash site permissions
Note: All new fleet cards assigned to this account will receive these permissions by default

Wash Site Permissions	
Group Name:Master Default	
Device Permissions	
Allow Wash Bay: ☑	
Allow Vacuum: ☑	
Allow Vending: ☑	
Allow Automatic: ☑	
Day Of Week Permissions	
Allow Sunday: ☑	
Allow Monday: ☑	
Allow Tuesday: ☑	
Allow Wednesday: ☑	
Allow Thursday: ☑	
Allow Friday: ☑	
Allow Saturday: ☑	
Time of Day Permissions	
*On Time (24 Hr Format) `0000`	
*Off Time (24 Hr Format) `0000`	
Amount Limitations Default is blank "no limitations"	
Max Amt Allowed Per Day :$	
Max Amt Allowed Per Week:$	
Max Amt Allowed Per Month:$	
Notes: This is the Master Group created by Default	

Next->

* denotes required field

The permissions shown on this page will be assigned to all of the new cards assigned to this account. Although you can edit these permissions later on a card-by-card basis, be careful of the selections that you make here because they will be assigned to all of the cards for this account.

__The time of day fields are the only two fields that must contain a value.__
__These are the times (in twenty four hour format) that validate what hours of__
__the day the card may be used. If these values are left at the default of 0000,__
__the cards may be used at all hours of the day.__
__The limitations field is used for those customers that choose to prevent one__
__individual cardholder from using all of the money in the account pool. You__
__may place limitations on each card, preventing this from happening. The__
__default is to allow any cardholder to use as much of the account pool, until__
__the entire amount is depleted.__

Assigning Cards To Auto Recharge Account
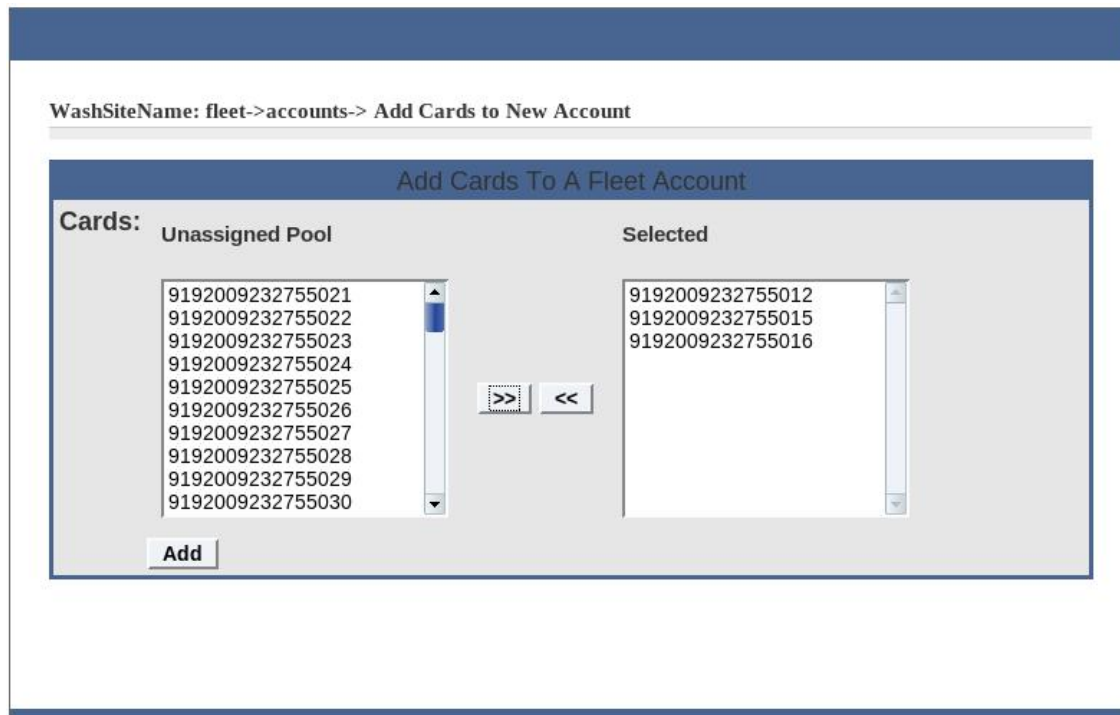
Figure 9

The menu in Figure 7 on the left side shows the cards that are available in the pool to assign to the account. On the right side are cards that will be assigned. To add cards to the account, select them on the left side by highlighting them with your mouse, then click on the >> button to add them. If you make a mistake, highlight the card on the right side with your mouse, and click the << button to remove it.   When you are satisfied that you have assigned all of the cards for this account, click on the "Add" button to add the cards.   You may also edit this account later and add more cards to the account if you make a mistake, or if the account holder chooses to add more cards to their account.

Pre-Pay Or In House Account

Figure 10

Figure 8 shows the menu for the creation of Pre-Pay Account. All of the fields with the asterisk are required fields; the remaining fields are optional for your use.

This type of account provides a lot of flexibility. Because you set the beginning balance, and you decide whether any money changes hands, this account type can be setup as a Pre-Pay, Promotion, Fleet account. You may offer customers a means of paying up front for a predetermined discount, or put money on an account via a check or money order on a monthly basis.

All users on this type of account share money from the same pool. When the balance on the account reaches zero, all cards on the account cease to function until more money is added to the account. You may edit this account at anytime, and add funds to the account when payment is received.   When all of the fields have been filled out, click on the "Next" button to proceed with assigning default permissions to the cards.

Pre-Pay Card Permissions

WashSiteName: fleet->accounts-> Choose wash permissions

Please choose wash site permissions
Note: All new fleet cards assigned to this account will receive these permissions by default

Wash Site Permissions
Group Name:Master Default
Device Permissions
Allow Wash Bay: ☑
Allow Vacuum: ☑
Allow Vending: ☑
Allow Automatic: ☑
Day Of Week Permissions
Allow Sunday: ☑
Allow Monday: ☑
Allow Tuesday: ☑
Allow Wednesday: ☑
Allow Thursday: ☑
Allow Friday: ☑
Allow Saturday: ☑
Time of Day Permissions
*On Time (24 Hr Format) 0000
*Off Time (24 Hr Format) 0000
Amount Limitations Default is blank "no limitations"
Max Amt Allowed Per Day :$
Max Amt Allowed Per Week:$
Max Amt Allowed Per Month:$
Notes: This is the Master Group created by Default
Next->
* denotes required field

Figure 11

On this menu you set the default permissions for newly assigned cards to this account. You should choose these options carefully. Once the permissions are assigned to the cards, they can be modified, however, you will have to edit the permissions on a card-by-card basis, which will be time consuming.

The limitations field is used for those customers that choose to prevent one individual cardholder from using all of the money in the account pool. You may place limitations on each card, preventing this from happening. The default is to allow any cardholder to use as much of the account pool, until the entire amount is depleted.

Assigning Cards To Prepay Account

Figure 12

This menu allows you to assign cards to your newly created Prepay (In House) Account. The unassigned cards in your card pool are shown on the left side. To add cards to this account, highlight the card, or cards, that you wish to add to the account, and click on the >> button. If you make a mistake, and add cards that you did not want assigned to the account, highlight the card, or cards in the selected box, and click on the << button to place them back in the pool. Once you are satisfied with the cards assigned to the account, click on the "Add" button.

View (Edit) Existing Account

Dashboard	Reports	Fleet	Utilities	Setup	Logout

Fleet Accounts   Fleet Cards

WashSiteName: fleet-->account--> Edit Account

Edit An Existing Fleet Account

Account Tools

Account Type: Auto Recharge Account

Manage Fleet Cards: Click Here

Default Permissions For New Cards: Click Here

Manually Credit or Debit This Accounts Credit Card Click Here

There are: 1 cards ASSIGNED to this account: (1) ACTIVE, (0) ARCHIVED and (0) DISABLED.

AutoRecharge Account Setup

Contact Info for Acccount#: A20080606228881

*Responsible Party Tim Chavez

*Primary Phone 303-555-1212

Secondary Phone:

*Primary Email: tchavez@yahoo.com

Secondary Email:

Account Functions

Modify Account Status Active

Current Account Balance: 30.00

Other Information

Notes:

[Update Account Information]

General Credit Card Informaiton

*Card Holder Name: Tim Chavez

Credit Card Company Phone:

Card Billing Address:

Card Billing City:

Card Billing State:

Card Billing Zip:

*Credit Card Charge Amount: 10.00

*Credit Card RECHARGE Amount: 5.00

[Update Card Information]

Credit Card Number, Code and Exp Date

* denotes required field

Card Number: ************8881

Card CCV Code: 009

Card Exp Date (mmyyyy): 1111

Update Credit Card Number, Code or Exp Date: Click Here

Credit Card Transaction History For This Account

DateTime	Type	Last4	Amt	Result	AuthCode	Msg
2008-06-06 11:36:22	Charge	8881	10.00	APPROVED	094600	APPROVED

[Back]

Figure 13

This link allows you to view or edit all settings for an existing account. In this view you will be able to manage cards, set card permissions, add or remove credit from an account, disable an entire account, modify account balances, and view the credit card transaction history associated with the account.

Manage Fleet Cards

The Manage Fleet Cards link takes you to the Fleet Cards associated with this account. From here you can add more cards to this account, remove cards from this account, or change permissions and settings on an individual card.

Set Default Permissions

The Default Permissions link will set the default permissions for** "newly created cards"* ***on this account. Existing cards on the account are not affected. If you need to change permissions on existing cards, you will need to edit each individual card, and change permissions on that card.

Credit / Debit Account (Credit Card)

This link allows the user to do a "return" on a credit card for a customer that wants their money back, or, to do a "sale" on a card for a customer that wants to purchase more credit. You will enter all of the required information and submit the charge for authorization / approval.

Getting Started

Now that you have read all of the features and functions of the system, it is time to setup cards and accounts. Please follow these steps, and refer back to previous sections when you have a question or need help.

Entering Cards Into SATB

This is the first step in setting up the system. You should have already received the Fleet Cards for your system. If you have not received any cards, do not proceed. The Fleet Cards must be entered into the system, before an account creation can be completed.

To add cards to the system, click on the Fleet Dashboard, and then click on the "Fleet Cards" link. Now click on the "Add Cards To System" link. The graphic will appear that shows what the back of the Fleet Card looks like, and where you will find the information that will be required to enter cards into the system.

It is perfectly acceptable, and recommended, that you enter the entire batch of the Fleet Cards that you have purchased into the system. The cards are sequentially ordered, and it is highly recommended that you keep them this way to make it easier to enter cards into the system. The Fleet Cards themselves do not have a value associated with them until you assign the value; so adding all of the cards into the system at the same time is convenient and safe.

First look at the first card in the batch, and the last card in the batch for the group of cards that you plan to enter into the system. Make certain that the batch number is the same for both the first card in the batch, and the last card in the batch. If the batch numbers are not the same, you will need to find the last card in the card series that has the same batch number, and enter any remaining cards into a different batch of sequentially numbered cards. Now enter the batch number into the appropriate "Batch Number" field.

Now enter the last four digits of the first card in the batch, and the last four digits of the last card in the batch. Once you have completed this, click on the "Add Cards" button.

Entering Accounts Into SATB

To enter an account, click on the Fleet Dashboard, and then click on the "Add Account" button. Now is the time to select the type of account you want to create. You should already be familiar with the account types. Select the account type that you would like to setup. If you are not, familiar with the account types, please review the section on account types under the "Adding Accounts" section of the instructions.
Now fill out all of the required information to create an account. After the account is created, you will assign cards permissions for the account, and then you will assign cards to the account. This successfully completes setting up an account.

Glossary of Terms:

Account Pool:

The Account Pool term is used to refer to the remaining balance associated with an account. All users on an account use the same balance (or pool) when using the car wash. Once the pool (balance) is used up, the system will either automatically process the credit card associated with the account (for Auto Recharge Account), or all cards will stop working until the balance is manually adjusted (Pre-Pay Account).

Batch Number:

The batch number here refers to the first 12 digits of the fleet card. The batch number only needs to be entered once when adding cards to the system. The last four digits of the card is considered the Personal Identification Number (PIN) for the batch.

Fleet Dashboard:

The Fleet Dashboard is the menu that appears as a tab on the opening screen once you have logged in to SATB. The Fleet Dashboard currently has two menu options, Fleet Accounts, and Fleet Cards.

Low Water Mark:

This term is used for the Auto Recharge type account. As users on the account deplete the account balance to the low water mark by using the car wash, the system will automatically bill the credit card provided by the account holder, and bring the account balance back up to the appropriate level that was established by the account holder when the account was initially setup.

Personal Identification Number (PIN):

The PIN number is the last four digits of the 16-digit fleet card number.

Pre-Pay or (In House) Account:

A Pre-Pay account is an account type that is used by the car wash owner to establish an account where a user may choose to issue funds via cash, check, or money order. You, the owner, set the account balance, and when depleted, all cards on the account stop working until the balance has been reset by you. This type of account could also be used as promotion, or wash giveaways. The account requires manual intervention by you for maintenance etc.

Frequently Asked Questions:

How do I handle a lost, stolen, on non-functioning card?

You will need to know the last four digits of the card number. Obtain one of the following pieces of information from the user:

1. *Account number.*

2. *Name of the responsible party for the account.*

3. *Phone number on the account.*

Now follow these steps:

1. *Click on the Fleet Tab, and then Click on the Fleet Accounts menu. With one of the pieces of information provided, locate the account.*

2. *Click on the Edit Icon for this account.*

3. *Click on the Manage Fleet Cards link.*

4. *Find the card using the last four digits of the card number*

5. *Click on the Edit Icon for this card.*

6. *Select the combo box labeled "Fleet Card Status", and set the card to "Disabled". We recommend that you put a reminder in the notes field for this card as to what you did, why you did it, and the date that you performed the action.*

7. *Click the "Update" button.*

Now you will optionally issue a new card to the user for this account by following these steps:

1. *Click on the Fleet Accounts menu. Locate the account that you just edited.*

2. *Click on the Edit Icon for this account.*

3. *Click on the Manage Fleet Cards link.*

4. *Click on the Add Fleet Cards link.*

5. *Select the new card you wish to assign to this account.*

6. *Click on "Finish" when you are complete.*

Why is a valid email address important for Account Holders?

The Fleet System sends an email to the address that you setup whenever a customers credit card is billed. This email will be the only statement generated by the system for the transactions. This statement is used as the receipt for the transaction. There is no means of printing a statement from the SATB server