Sierra Management System

Programming Reference Manual

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Sierra Management System
Programming Reference Manual

This manual describes the management functions of the Sierra management software application. If further assistance is needed, please contact the distributor from which the Unitec entry system was purchased.
When calling for assistance, you must have the following information available:

Entry System Serial Number: _____

Distributor Name: _____

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Software Version	Release Date	Changes Made
1.78.1	1/2019	Added Wash Upsell feature, added Wash Delay feature, various bug fixes
1.77.2	6/2018	Added protocol for more robust recovery from disconnections, various bug fixes.
1.77.1	5/2018	Added ability for XML credit (Verifone, Gilbarco) to process bundled wash transactions, added Download Database Backup functionality to Sierra Management Interface, improved filters for Accounts, changed Special schedule to allow Specials to run from PM to AM, added security enhancements, various bug fixes.
1.76.4	1/2018	Added Contactless card reader support, Dresser Wayne Fusion support, security enhancements, software updater enhancements, various bug fixes
1.76.2	8/2017	Changed user privileges, added “forgot password” function to kiosk maintenance login, added Priority Billing ID support, various bug fixes
1.76.1	5/2017	Added support for Multi-Factor Authentication
1.75.4	3/2017	Added EMV and NFC Support
1.75.1	4/2016	Bug Fixes
1.74.4	1/2016	Bug Fixes
1.74.3	10/2015	Added SMTP Email variations for email notifications, added Bonus Time feature to Paynode.
1.74.2	7/2015	Added ability to add notes to database backups, added ability to hide financial summary information from summary page, added POS Test Utility, added various bug fixes.
1.74.1	5/2015	Changed available wash packages from 4 to 8 per wash type, added support for MultiMech Bill Dispenser for Sentinel, added various big fixes.
1.73	9/2014	Changed OS from Windows NT to Windows 7 POS Ready. Added support for card redemption for discounts, added accounting report for console printer, added support for barcode redemption for fleet and prepaid accounts, added Site Lynx code service, added batch management functions for credit modems, added multi-site account (shared payment) features, added POS code interface in external server mode, added automatic reboots to device profiles, and added prize promos to promotions.
1.63	1/2014	Added following credit processors: Priority Payment Systems, Tran-Heartland (for 7-11), XML Credit (for Verifone), changed “Internet”

Software Version	Release Date	Changes Made
		credit to Mercury, and changed “Dial-up” to Tran. Added password security. Added code expiration of 00 to ensure codes don’t expire. Added Account Transaction Report. Removed Price and Discount Columns from Fleet Report. Added date range to Summary page.
1.52	11/2012	Added Dresser Wayne interface, Loyalty accounts, Account Listing Report, , added ability to add taxes to credit sales, added hidden wash for fleet customers, added subscription account support to WashPay self -serve, added ability to drop more than one type of token, and revised the Site Revenue report.
1.42	1/2012	Added Remote POS4000 support, Enhanced Added Services, Multi-Wash Sales, Account Reloading, Canadian Currency support, Operations Screen themes, Fleet reports, Console/Sales Screen Enhancements, Daylight Savings Time support, and Credit Modem diagnostics.
1.34	2/2011	WashPay 2/Wash Select II compatibility features added.
1.24	10/2010	Initial Release

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1 Introduction

The Sierra Management Application (or Sierra Server) is a software program that's used by Unitec's Portal Ti, C-Start, Sentinel, WashPay, and the Wash Select II with WashPay integration. It includes a management application that is used for programming the system operating parameters, viewing and printing reports, and managing house accounts and car wash promotions. This document includes step-by-step instructions for their use.

A PC with a standard Internet browser is required to access the Sierra Management Application. The PC can be located either on-site or off-site. The entry system unit's Installation Manual provides guidelines for connecting a PC to the local site network.

1.1 Login

To access the management application, type the following into the address bar:

http://XXX.XXX.XXX.XXX:9810/web (where XXX equals your site IP address).

When a connection to the server is established, the login page should appear (as shown below). At initial startup, you will use the Owner user account (user ID 00, password 00).

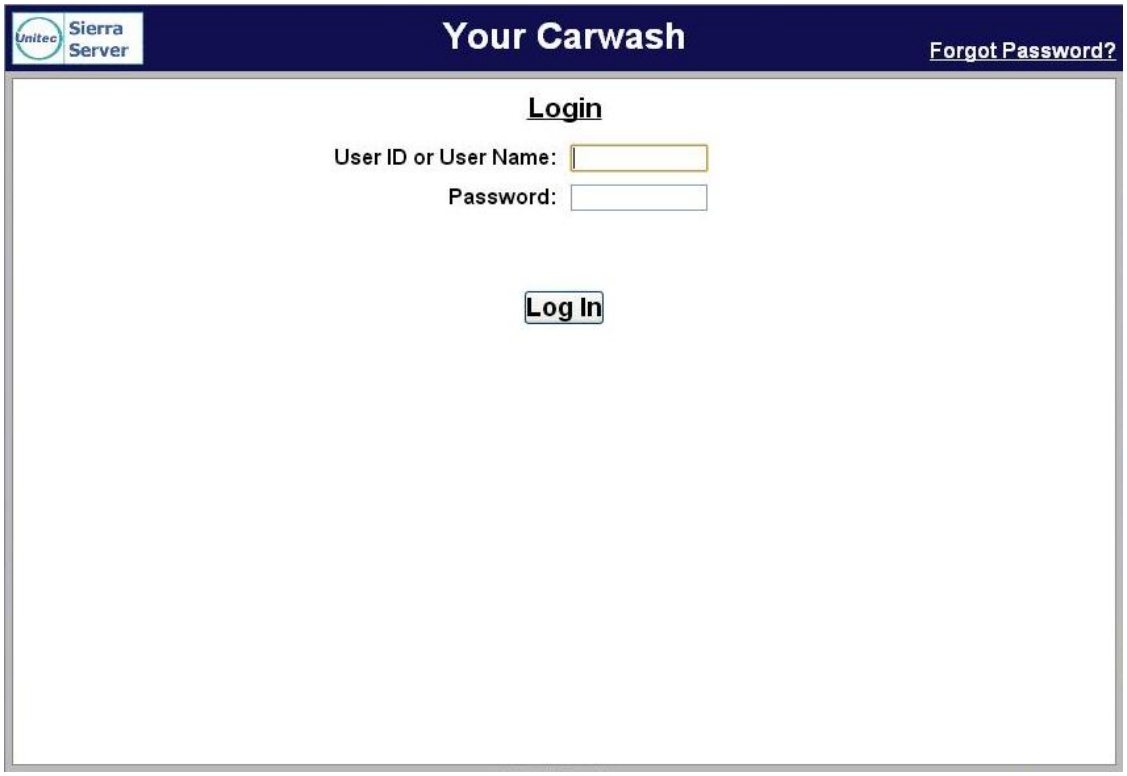


Figure 1.1. Sierra Login Screen

1.2 Passwords

Due to PCI compliance, once you login the first time using an administrative password, you will immediately be prompted to change your password to a more secure password that is at least 7 characters long and contains both letters and numbers, as shown below.

NOTE: An administrative password is a user that has either "User Management" or "Utilities" access privileges under Setup>Users. For more information on Users, see Section 3.5.
NOTE: To setup a non-administrative user to verify and sell codes or sell accounts, "Accounts and Promotions" and "Code and Account Sales" must be checked on the user account.

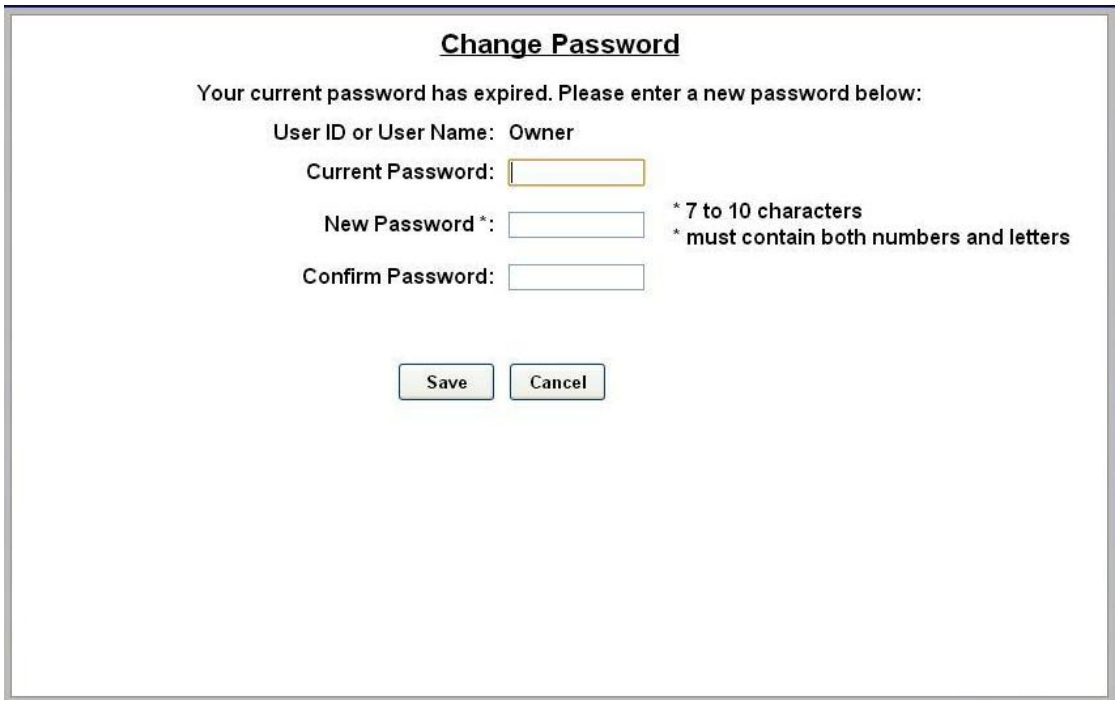


Figure 1.2. Password Change Screen

To change the password, enter your old password, then enter your new password. Enter your new password again, then click Save.

You will be required to create a new password every 3 months. Please make note of the password and keep it in a secure location. You may not use the last 5 passwords.

After setting up your password, you may login to Sierra normally. If you forget your password, you may click on the Forgot Password? link on the top right of the login page (see Figure 1). Your password will be emailed to you. Please note that your email address must have been entered into the User profile in order for the password to be emailed to you. For more information, please see Section 3.5.

NOTE: If you enter your password incorrectly 6 times, you will be locked out of the system for half an hour.

NOTE: The new password will also be required to login to the Maintenance screens on the Portal, Sentinel and C-Start units. A keyboard will appear at units that have a touchscreen. For Portals that have a keypad,

you either must use a keyboard to login, or you must scroll through the keys on the side of the display to enter your password.

1.3 Multi Factor Authentication

Due to PCI requirements, Multi Factor Authentication has been added. Multi Factor Authentication (MFA) is a method of computer access control in which a user is only granted access after successfully presenting multiple separate pieces of authentication.

Sierra will authenticate users with Administrative Access (User Management and/or Utilities) on every login by requiring not only the user ID and password, but also a 6-digit security code that will be sent to the user's mobile phone. This code will differ every time and expire after 5 minutes.

The requirements for MFA are:

- A newly installed Unitec system running 1.76.1 software or higher
- Active Internet connection for Sierra
- Mobile phone with texting capabilities onsite

Note: MFA is only required for remote access points – for example, logging into Sierra through the router, logging in remotely through the Internet, or logging in from secondary units. Local access points do not require MFA. Local access points include logging directly into the Sierra application from the Primary kiosk with a keyboard and mouse, and logging directly into a Sierra Site Controller with a monitor, keyboard and mouse.

Once the administrative password is changed, the MFA screen will be displayed. It explains the requirements.

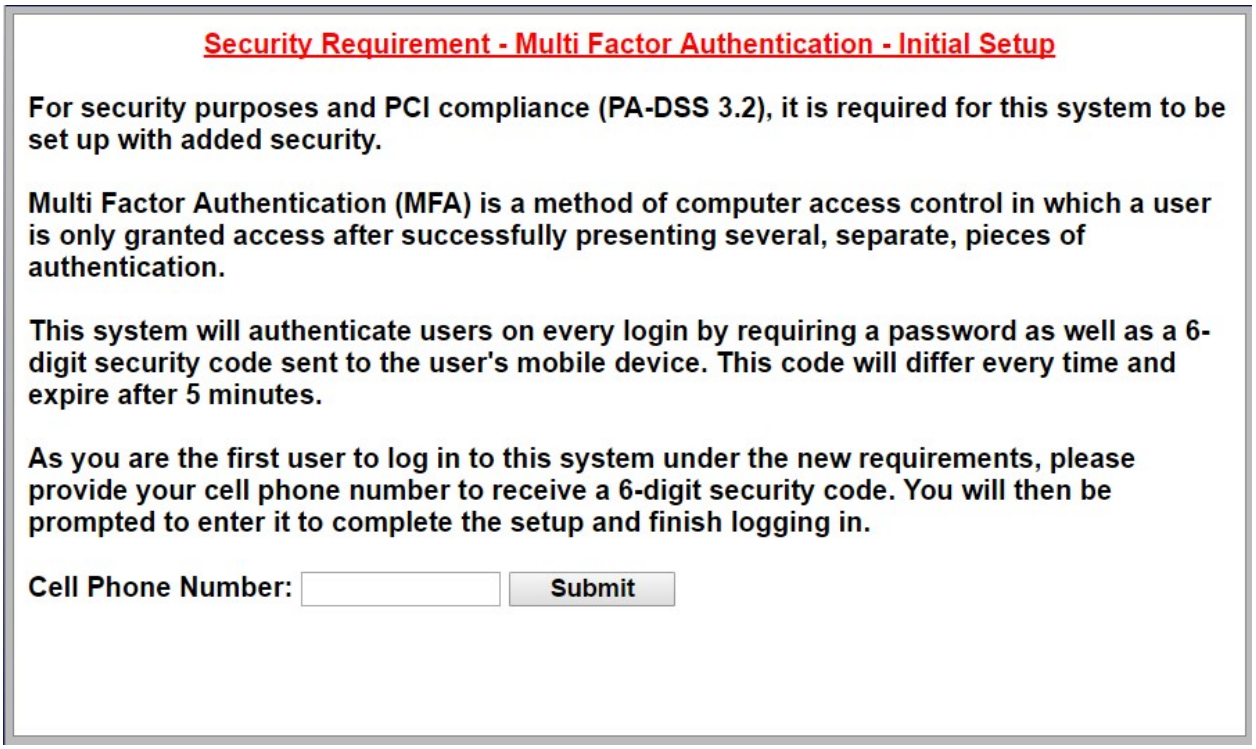


Figure 1.3. Multi Factor Authentication Screen

You must enter their mobile phone number and click Submit.

The next screen will be displayed. You must click the Send Code to… button to generate the security code and send it to their mobile device.

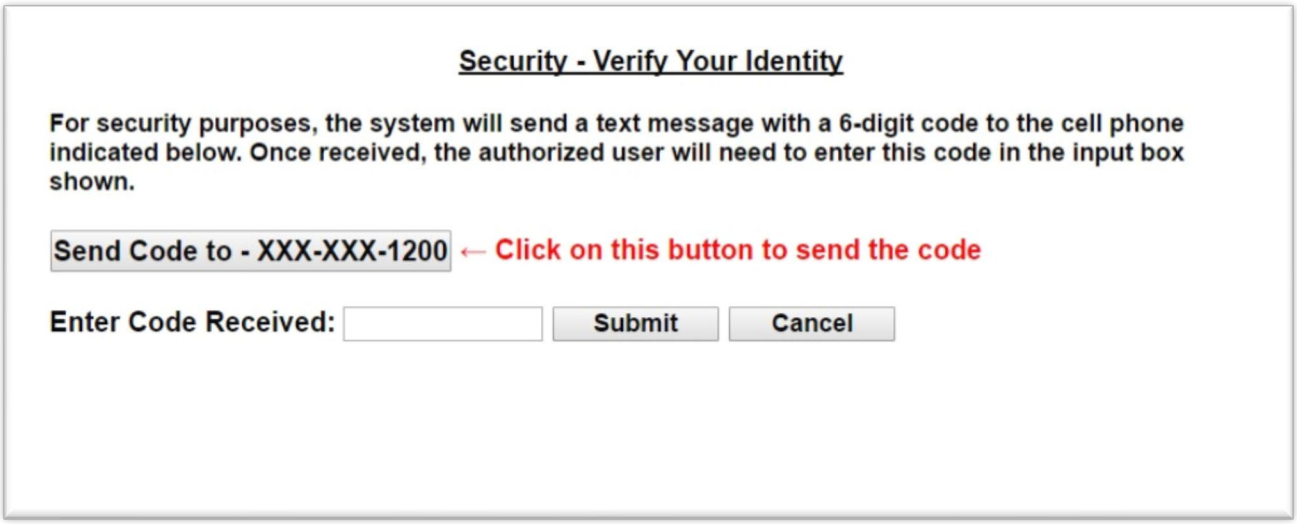


Figure 1.4. MFA Security Screen

Once you receive the code on your mobile device, you must enter it into the field. When that 6-digit code is successfully entered, Sierra will allow administrative access to Sierra and display the Summary screen.

2 Summary Tab

Upon successful login, the Summary page of the management application will appear. This screen displays a list of devices present on the local network with a count of washes provided and associated revenue for the current day. Car counts and revenue results from previous days can be viewed by selecting the desired date in the calendar or by entering the start and end dates in the summary data fields. The current day data can be updated by selecting the Refresh button. If you wish to hide the financial data from the Summary page, click the arrow to the left of Summary Data.

The management functions are shown in a menu bar across the top of the screen. As each function is selected, a secondary menu of related options will appear on the left side of the screen.

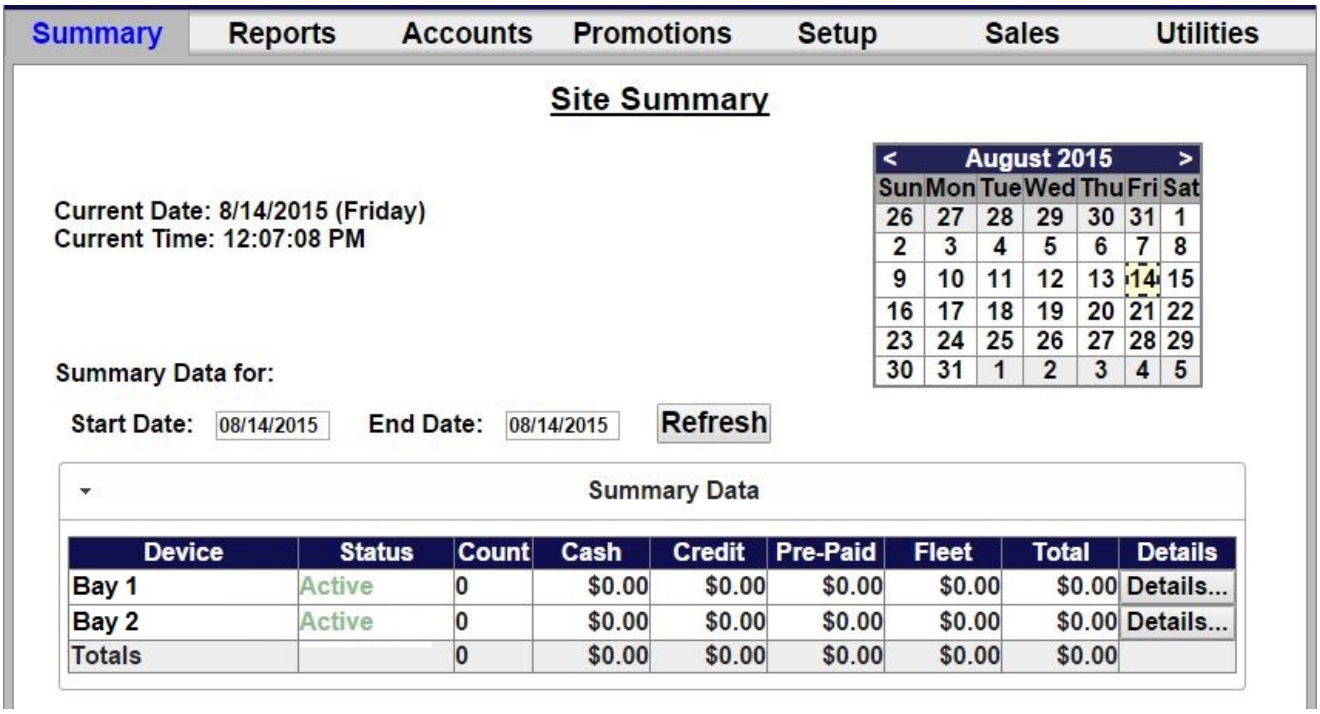


Figure 2.1. Site Summary Screen

3 Setup Tab

Programming functions are accessed through the Setup tab of the management menu. The options available under the Set-up functions include:

- **Site Information** – Enter general site and credit processing information.
- **Products** – Configure wash packages, self-service devices, multi-use accounts and any additional (a la carte) services.
- **Device Profiles** – Create/edit a configuration profile for device hardware set-up.
- **Devices** – Assign a configuration profile to each device (Portal, Sentinel, etc.).
- **User Setup** – Set-up and manage user accounts.
- **POS Interface** – Configure the connection to a C-store POS (for code sales).
- **Sales Screen** – Configure the attendant functions of the optional sales console.
- **Activation Codes** – Authorizes certain functionality for use in the Sierra Server. Most of the time, these codes should be authorized upon purchase and will not need further configuration.

All devices will start up in an 'out of service' condition until a device profile is downloaded onto the device. At a minimum, the site information, product setup, and device profiles should be completed at equipment start-up. The POS interface and Console sales screen setup must be completed if those options are included in the system.

3.1 Site

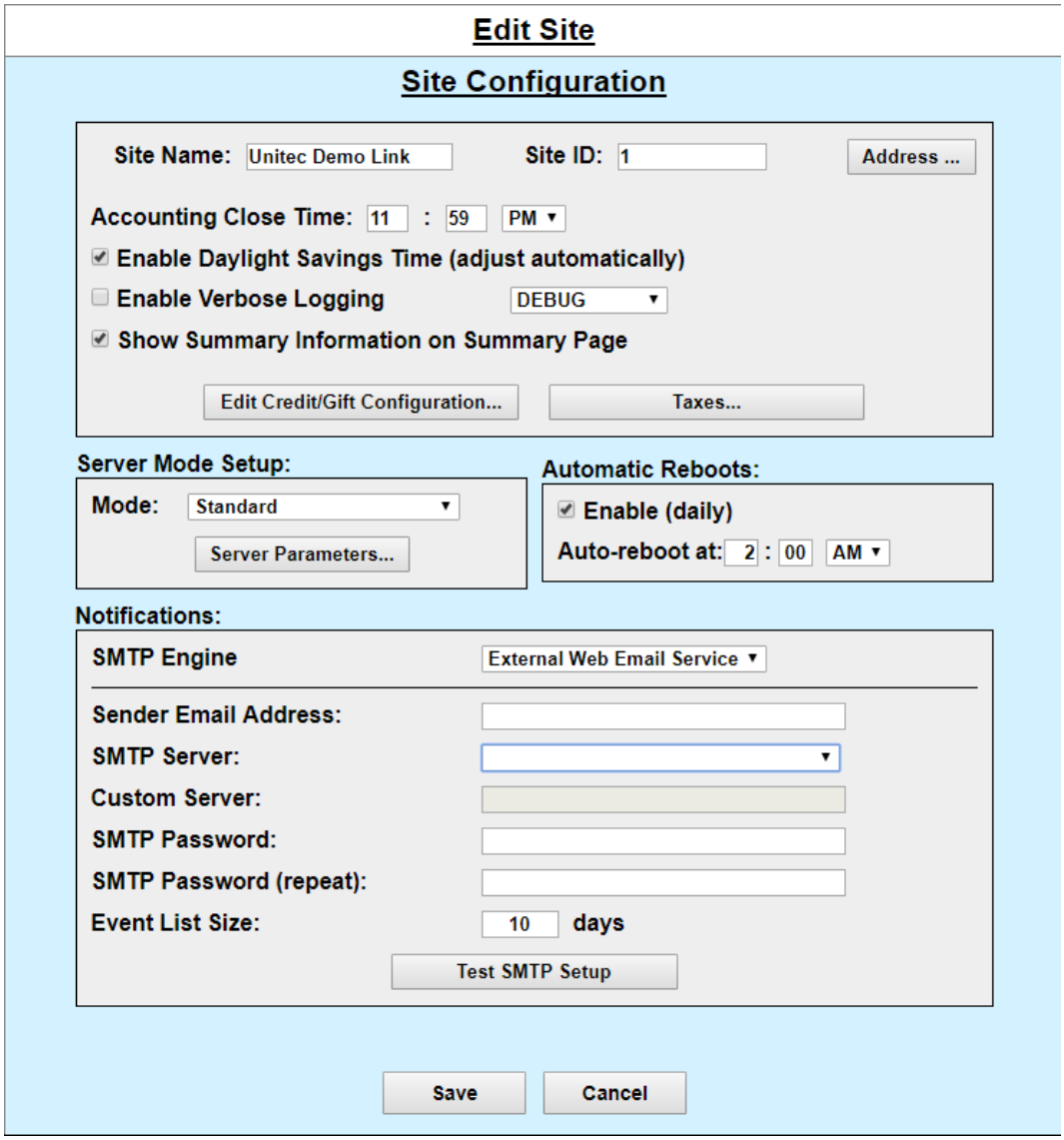


Figure 3.1. Site Information Screen

The Site Configuration screen allows you to provide unique identification for your site, set up credit and gift card processing, chose your accounting close time, and to enable verbose logging on the Sierra Management Application. From the Summary screen, click the Setup tab and then click Site on the left frame to display the Site Configuration screen. Click Edit next to the site name.

1. Enter the Site Name. This field is limited to 25 characters. The site name will appear at the top of the Sierra Management pages and on the system reports.
2. If you wish to do so, click Address and enter the site address and contact information.
3. Enter the Site ID number. The default is set to one. The site ID number is shown in alert notifications sent via text message to identify the site from where the alert is sent.
4. Select an accounting 'close' time. The default is set to 11:59pm.

5. If your region uses Daylight Savings Time and if you would like the server to automatically update to Daylight Savings Time, select Enable Daylight Savings.
6. If you wish to run debugging logs, click Enable Verbose Logging. This should normally be disabled (unchecked) and only enabled when instructed to do so by a Unitec customer service technician.
7. For server options, choose one of the following:
   - Standard – for standard car washes. You will use this option to configure the Remote Code POS4000, if applicable.
   - External – for sites with WashSoft, Auto Pilot, or other 3rd party servers.
   - Site Lynx – for sites using multi-site management
8. If you would like the system to automatically reboot every day, click Enable and choose a time. The default is set to 3:00AM.
9. Under Notifications, select Local Mail Folder Pickup from the drop down menu for SMTP Engine. Enter the FROM email address that will notify you an email from the site has been sent (for example: Bay1@site123.com).

   NOTE: Due to SMTP mail changes, if you are not receiving email notifications, you will need to use an alternate email notifications setup. Please see Appendix B for setup information.

3.1.1 Server Parameters:

If you have an External Server, Remote Code POS4000 or are using Site Lynx multi-site management, you will need to configure server parameters.

3.1.1.1 External Server Settings

If you will be using an external server (WashSoft, Auto Pilot, etc.), select External Server.

If you will be using an external server to generate POS codes, select External and click Save. No further configuration is necessary. If you are using an external server AND a Remote POS4000 to create POS codes, select Standard and click Save, then configure the Remote POS4000 setting in the Standard Server screen, as follows.

3.1.1.2 Remote Code POS4000 Settings

The Remote Code POS4000 allows car wash owners to sell codes wirelessly across town. The Remote POS4000 issues an encrypted code that is decrypted at the wash entry kiosk.

For Remote Code POS4000 users, select Standard Server and click Server Parameters.

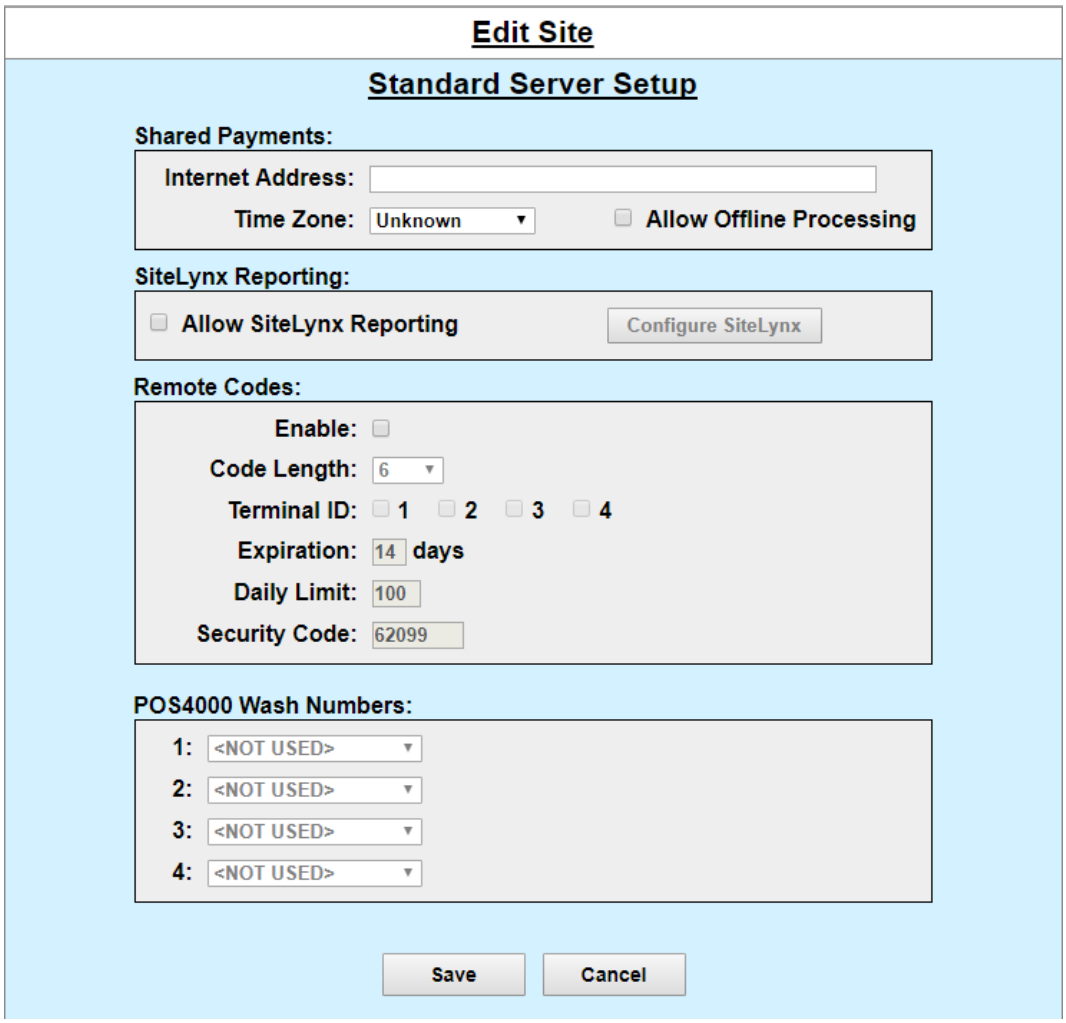


Figure 3.2. Standard Server Remote Code Setup

1. If you are using the Shared Payments function, enter the Internet address of the server and select the time zone from the drop-down menu. If you would like to allow offline processing of account transactions while using Shared Payments, check the box.
2. If you are using a Remote Code POS4000, click Enable.
3. Select a code length. The longer the code length, the more secure the code.
4. Enter the terminal ID.
5. Enter the code expiration in days.
6. Enter the daily code limit.
7. Enter the security code.
8. Enter the wash numbers, one wash per number.

3.1.1.3 Site Lynx Server Settings

Site Lynx is a third-party multi-site management application. If your site is using Site Lynx, you must first gather information from the Kesseltronics Cortex server and then enter it into the Sierra server.

If you will be using Site Lynx multi-site management, select Site Lynx then click on Server Parameters.

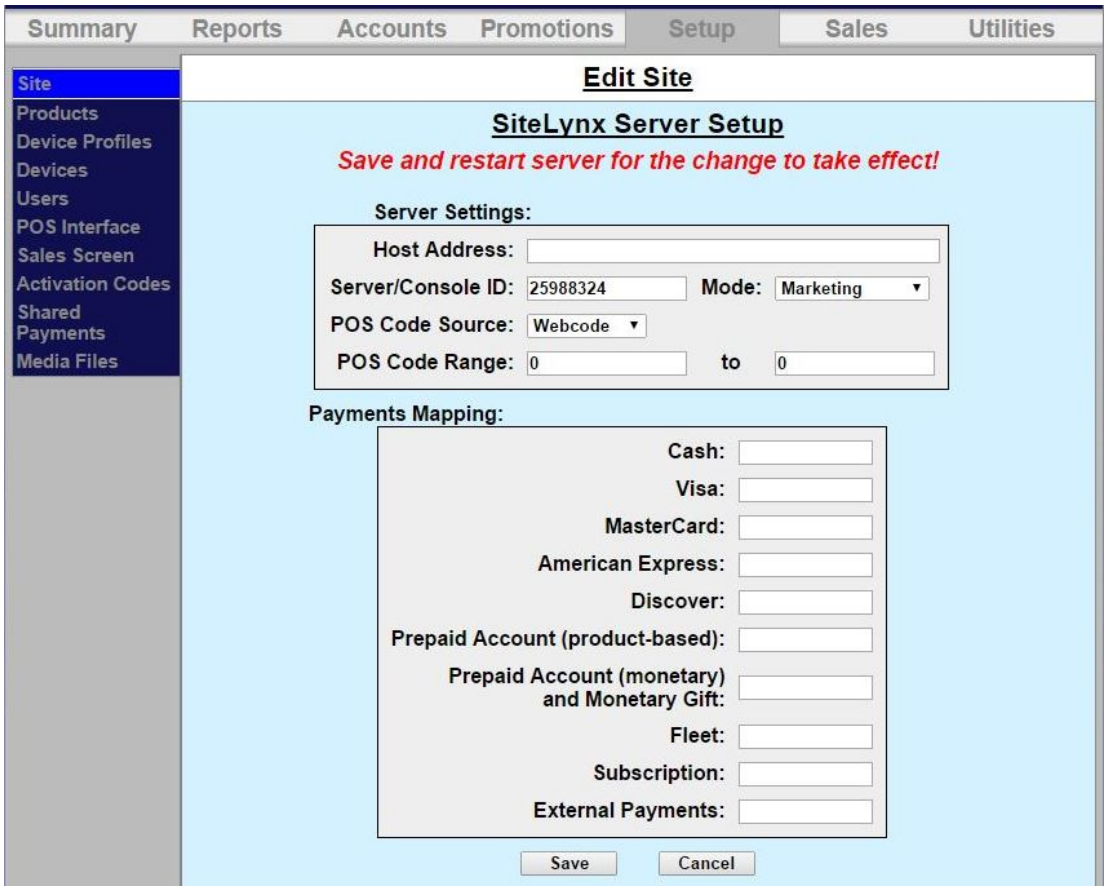


Figure 3.3. Site Lynx Setup

1. Enter the Host Address of the server. The Server/Console ID field will automatically be populated.
2. Select either Reporting or Marketing Mode from the drop-down menu.
3. If you will be using marketing mode and will have code sales from the register, select the POS code source and enter the code range.
4. Enter the Payments Mapping information from the Site Lynx server.
5. Click Save.

3.1.2 Credit Processors and Configuration

Next, you will edit the credit and gift card configuration. Click Edit Credit/Gift Configuration at the bottom of the Site Configuration screen. Please note that WashCard credit has not been released. Choose one of the following payment processors:

3.1.2.1 Priority Payment Systems (PPS)

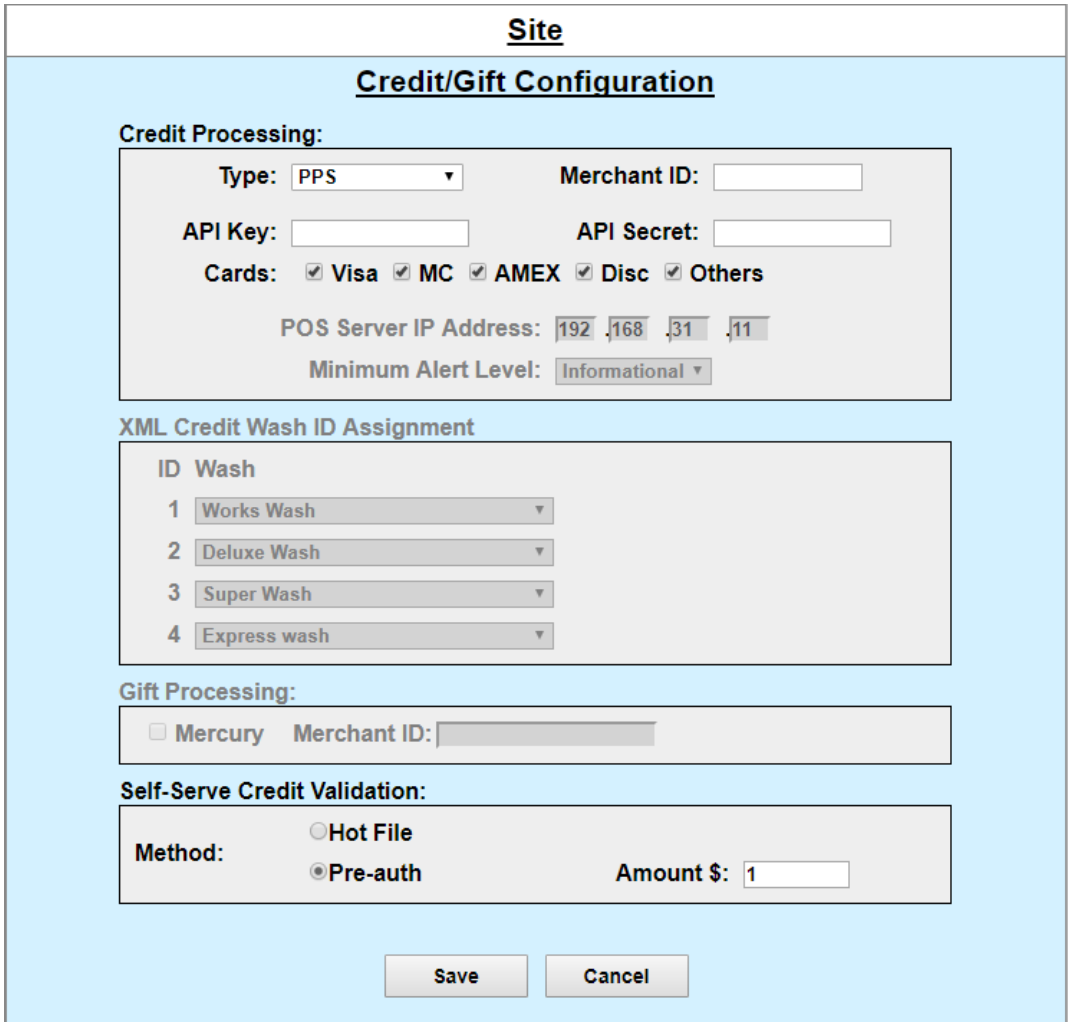


Figure 3.4. Priority Payment Systems Credit Configuration

The PPS credit configuration screen allows you to set up credit for the Unitec entry unit using Priority Payment Systems. PPS is compatible with the standard mag stripe card reader and the contactless card reader.

NOTE: Priority Payment Systems requires every merchant to explicitly grant permission to the Sierra server to post credit card payments to their account. This is a one-time step, which needs to be performed before any credit card transactions can be processed successfully. Please login into your Priority Payment Systems user account and create a new merchant ID for this server and generate a new server key/secret pair.

1. Select PPS for the drop-down menu. If this is changed at a future date, you will need to reboot the entry unit or site server.

2. Enter the Merchant ID, supplied by Priority Payment Systems at account setup.
3. Enter the API Key and API Secret.
4. Select the credit card brands that will be accepted. Check Others if fleet cards are to be supported.
5. Click Save.

3.1.2.2 Mercury

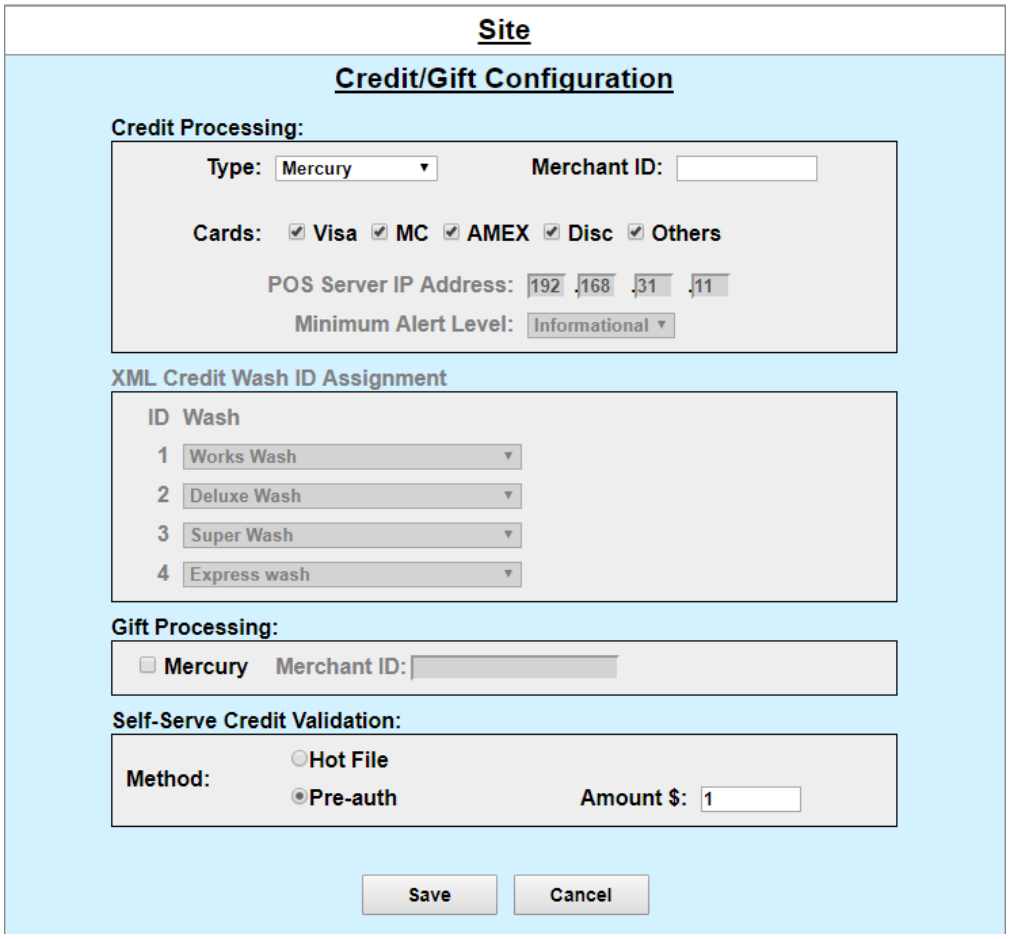


Figure 3.5. Mercury Credit/Gift Configuration

The Mercury credit and gift configuration screen allows you to setup credit and gift card processing for the Unitec entry unit using Mercury/Vantiv Payment Systems. Mercury is compatible with the standard mag stripe card reader and the contactless card reader.

1. Select Mercury from the drop-down menu. If this is changed at a future date, you will need to reboot the entry unit or site server.
2. Enter your Merchant ID account number as provided by Mercury Payment Systems.
3. Select the credit card brands that will be accepted.
4. If Mercury Gift Cards will be accepted, check the box next to Mercury then enter your Mercury Merchant ID. Mercury Gift Cards are only available with Internet credit processing.

NOTE: If you are purchasing the gift card option after the initial purchase of the entry system, you will need an authorization code to activate the gift card function.

NOTE: For WashPay self-serve sites only: If you have WashPay self-serve bays, after the credit processor is selected, go to the Self-Serve Credit Validation box at the bottom of the page and select either Hot File or Pre-Auth. These functions work regardless of the credit processor selected.

- Hot File: No pre-authorization transaction is run prior to the sale of the wash. If the transaction is declined after the sale or if the card is reported as stolen, a "hot file" will be created. Declined credit cards are automatically added to the hot file when it is swiped and the transaction is not authorized. The advantage of this method is that the credit merchant's processing rate will be lower because only one transaction fee is charged per wash. The disadvantage is that you will run the risk of occasionally giving away a free wash because the credit card transaction was declined by the credit merchant for insufficient funds after the sale.
- Pre-auth: The pre-authorization is performed prior to the sale of the wash. The pre-authorization amount should be set to the highest wash package price. The pre-authorization is then captured with the sale. When the sale completes, the pre-authorization hold will be removed and those funds will be available for completing the transaction. The advantage of this method is that cards with insufficient funds (to cover the pre-authorization amount) will not be allowed. The disadvantage is that the merchant's processing rate will be higher for any transaction where the final sale amount does not match the pre-authorized amount.

3.1.2.3 Tran, Tran-Heartland and Washcard

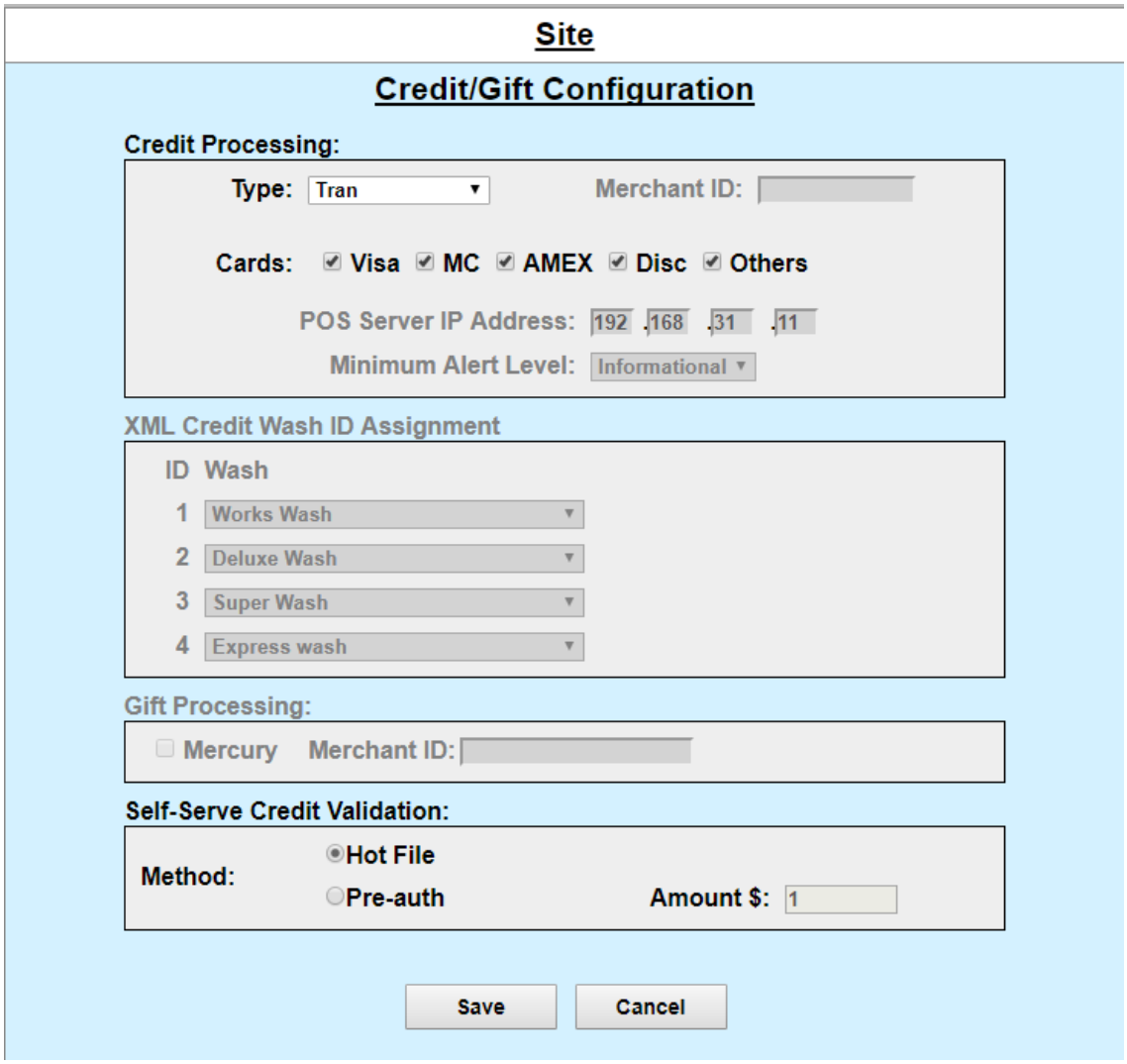


Figure 3.6. Tran Credit Configuration

The Tran, Tran-Heartland, and Washcard credit configuration screens allow you to set up credit for the Unitec entry unit using a DataTran modem. This can be for either dial-up, or high-speed Internet credit processing using the IPTran.

1. Select Tran, Tran-Heartland or Washcard from the drop-down menu. If this is changed at a future date, you will need to reboot the entry unit or site server.
2. Select the credit card brands that will be accepted.
3. Click Save.

3.1.2.4 Dresser Wayne

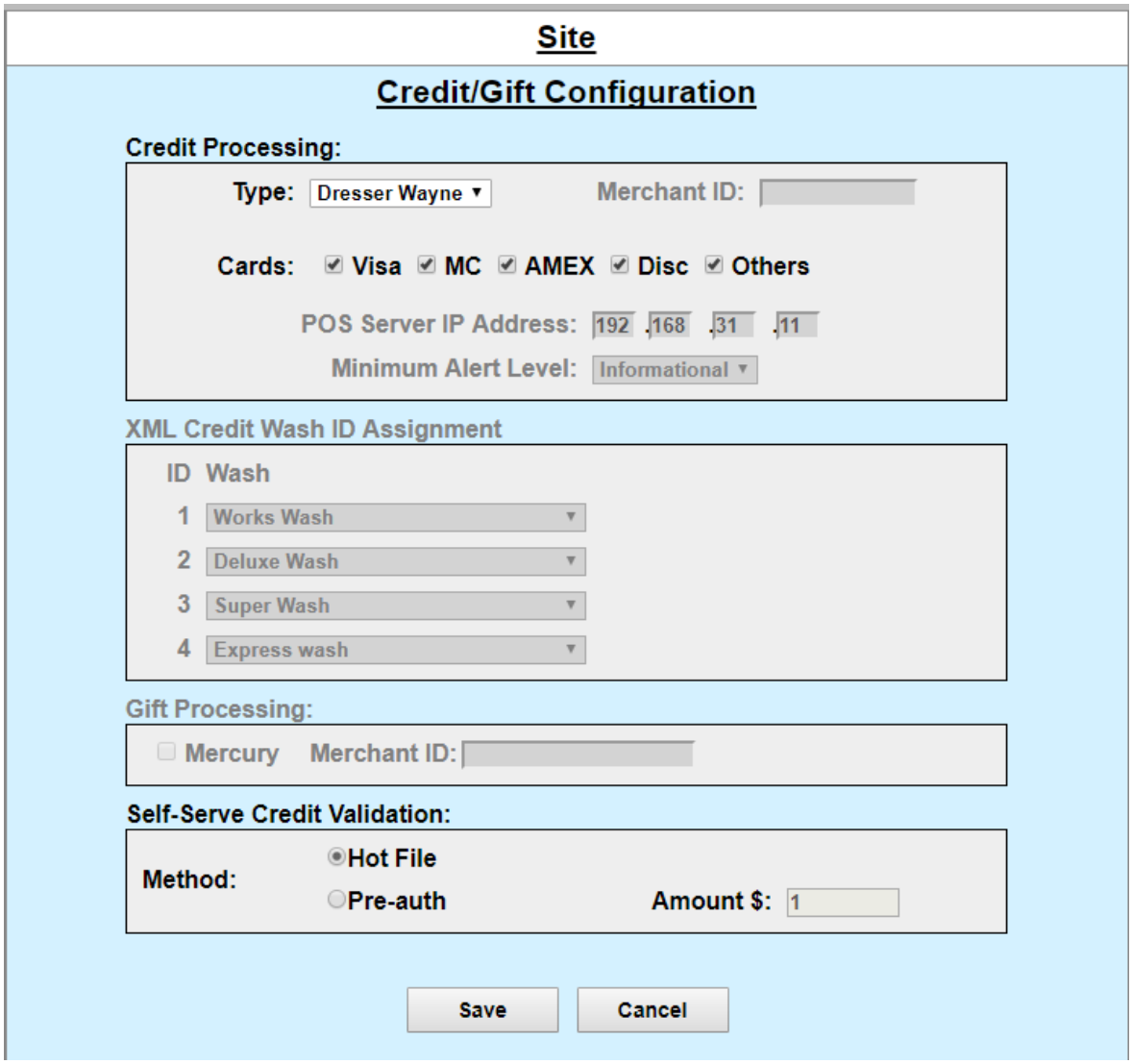


Figure 3.7. Dresser Wayne Credit Configuration

The Dresser Wayne credit configuration screen allows you to set up credit for the Unitec entry unit using a Dresser Wayne POS system, used at C-stores.

1. elect Dresser Wayne from the drop-down menu. If this is changed at a future date, you will need to reboot the entry unit or site server.
2. Select the credit card brands that will be accepted.
3. Click Save.

3.1.2.5 XML Credit

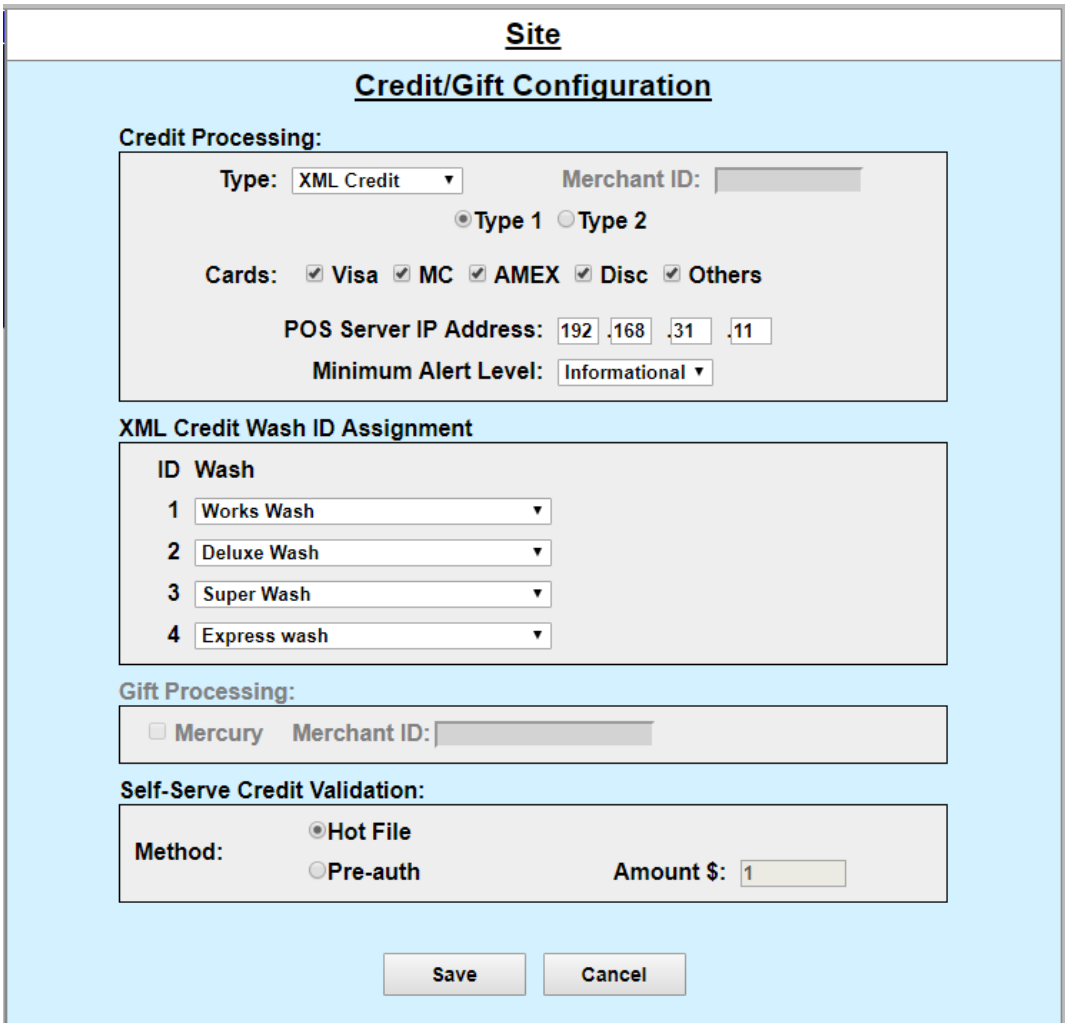


Figure 3.8. Verifone Credit Configuration

The XML Credit configuration screen allows you to set up credit for the Unitec entry unit using a Verifone, Gilbarco, or Kwik Trip POS system, used at C-stores. If you have a Wash Select II with the Sierra server, you will also be able to use Speedpass when using the XML credit interface.

1. Select Unitec XML for the drop-down menu. If this is changed at a future date, you will need to reboot the entry unit or site server.
2. Select Type 1 for Verifone and Gilbarco. Select Type 2 for Kwik Trip.
3. Select the credit card brands that will be accepted. Check Others if fleet cards are to be supported.
4. Enter the POS Server IP Address. For Verifone, enter 192.168.31.11. For Gilbarco, enter 10.5.55.2.
5. For Type 1, Select the Minimum Alert Level from the drop down menu. Informational alerts will send notifications for all functions. Warning alerts will only send notifications when there is an error in a component in the unit. Fault alerts only send notifications when the unit goes out of service.
6. Click Save.

NOTE: The Verifone interface also requires that washes are dispensed in a specific order to match the wash packages sold from the Verifone system.

7. Adjust position of the washes so that the wash number at the leftmost column (labeled "No.") of the Edit Wash Type screen matches VeriFone's Package number. Click Save.

3.1.2.6 EMV

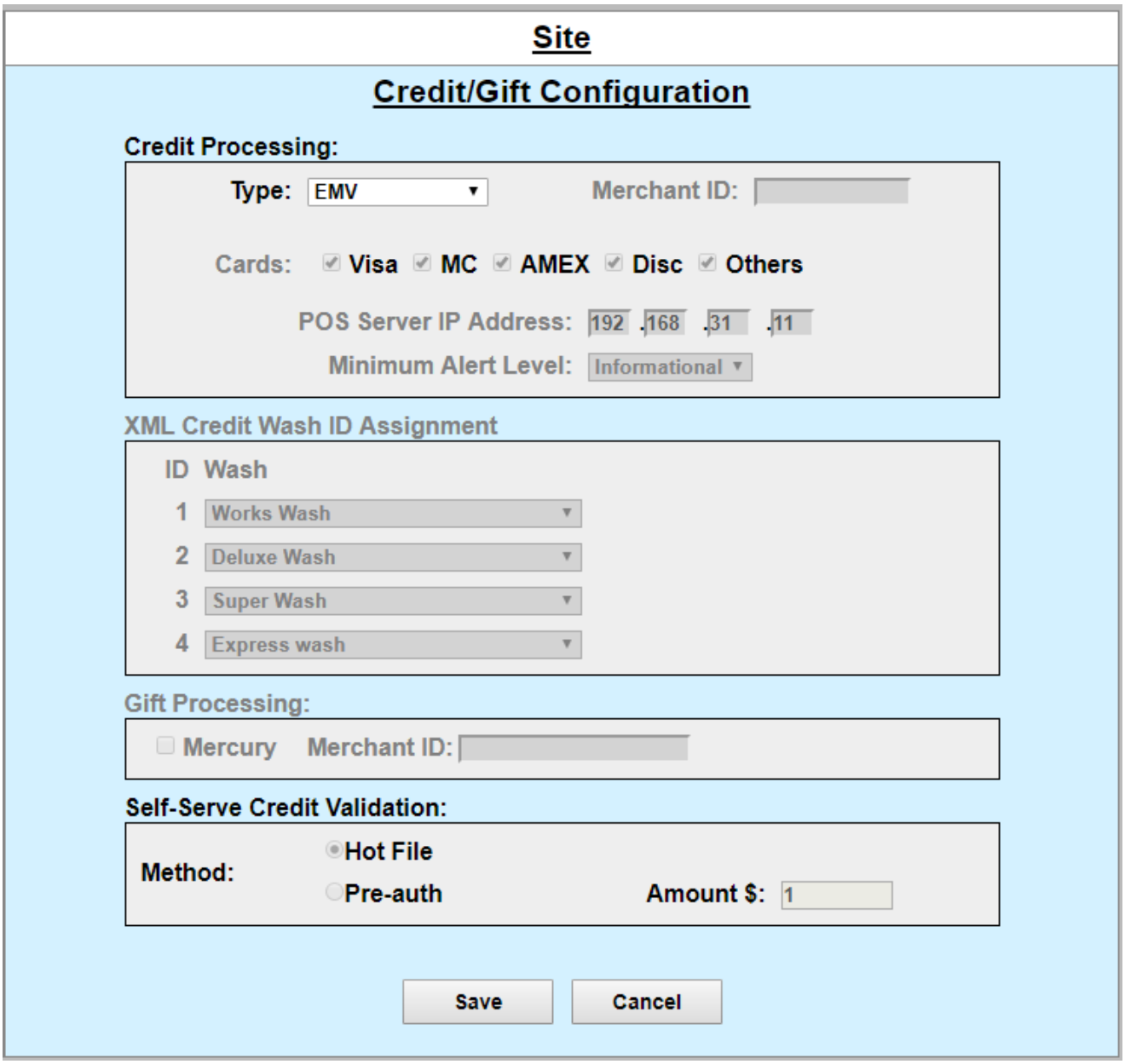


Figure 3.9. EMV Credit Configuration

The EMV credit configuration screen allows you to set up credit for the Unitec entry unit using an EMV card reader. EMV is compatible with the EMV card reader and the contactless card reader.

4. Select EMV from the drop-down menu. If this is changed at a future date, you will need to reboot the entry unit or site server.
5. Select the credit card brands that will be accepted.
6. Click Save.

3.1.3 Taxes

If you live in a state that requires that sales tax be added to credit card sales, click Taxes on the Site Configuration screen.

NOTE: For cash purchases, taxes should be included in the display price.

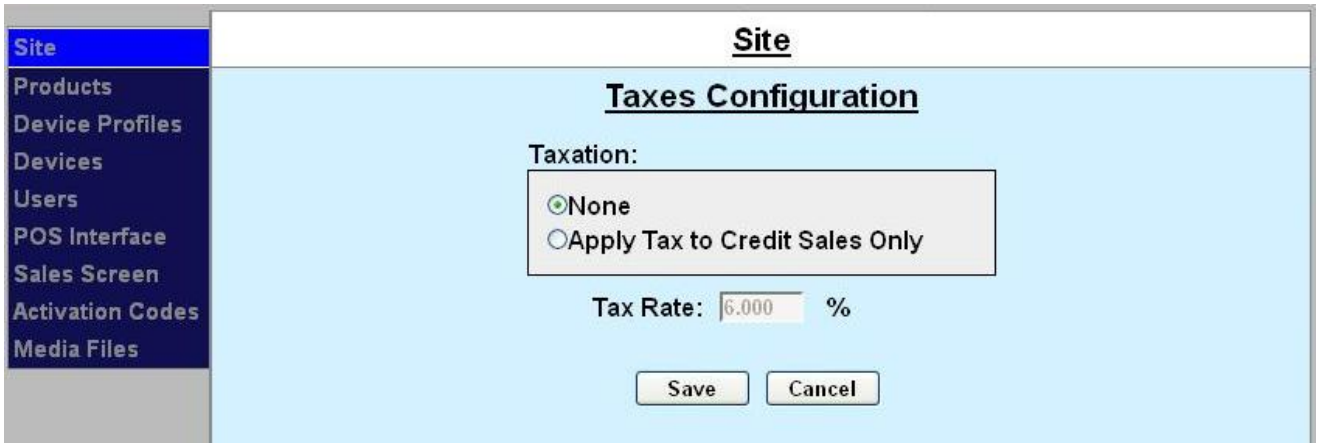


Figure 3.10. Credit Sales Tax Configuration Screen

1. Click Apply Tax to Credit Sales Only, then enter your state's sales tax percentage. Click Save.
2. Click Save on the Site Configuration screen to save all changes and return to the Site screen.

3.2 Products

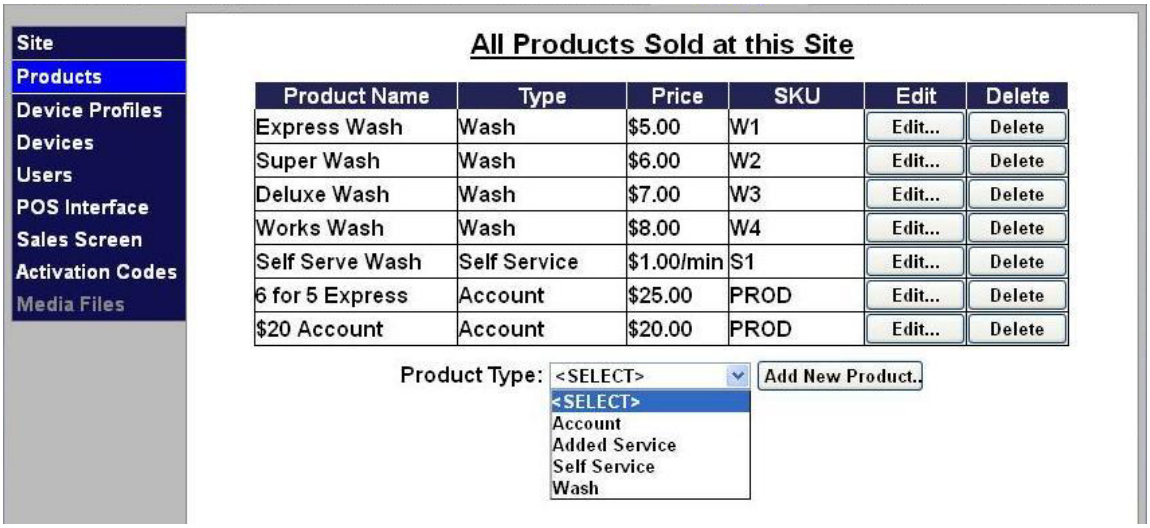


Figure 3.11. Products Main Screen

The names and prices for wash packages, self -serve devices, added services, and multi-wash accounts are configured through the Products screen. This screen allows the user to add, delete and edit wash packages and added services. The system is pre-loaded with 4 default wash packages.

- Wash – Four default wash packages are pre-programmed. You may add as many wash packages as you like, but you may only assign eight wash packages per device. You will not be able to delete the default wash packages while they are assigned to any device profile. If you wish to delete a default wash package, you must first delete them from each profile.
- Added Service – Services that can be added to wash packages or made available as upgrades for account sales. You may add unlimited added services, such as Rain X, Tire Shine, Bug Scrub or a combination of services, but only 4 added services may be added per transaction.
- Self Service Device (WashPay Only) – Wash package assigned to self-service devices. You may add as many self -service wash packages as you wish. Only one wash package may be assigned to a bay at one time.
- Account (Portal, Sentinel and C-Start Only) – Accounts are house account programs configured for a multi-use wash bundle redeemed with a code. For example, the customer buys a "4 washes for the price of 3" bundle. The customer then receives a receipt with a code printed on it to redeem the remaining washes. You may create as many multi-wash accounts as you wish, but only 4 accounts may be assigned per unit.

  NOTE: You must create a Product-based house account or loyalty account first, then add the account as a product. For more instructions on how to do this, see Section 6.1. It is also suggested that regular wash packages should be assigned to one wash type and multi-wash bundle packages should be assigned to another. For more information on wash types, please see Section 3.3.4- Wash Types and Washes Dispensed.

Once the wash packages, self -serve devices, added services and accounts are configured, they will need to be assigned to the appropriate device through the device profile programming pages as described in the Device Profiles section.

NOTE: If changes are made to a product's displayed name or price, the affected devices will need to be updated by downloading a device profile as described in the Devices section.

3.2.1 Wash and Added Services Products

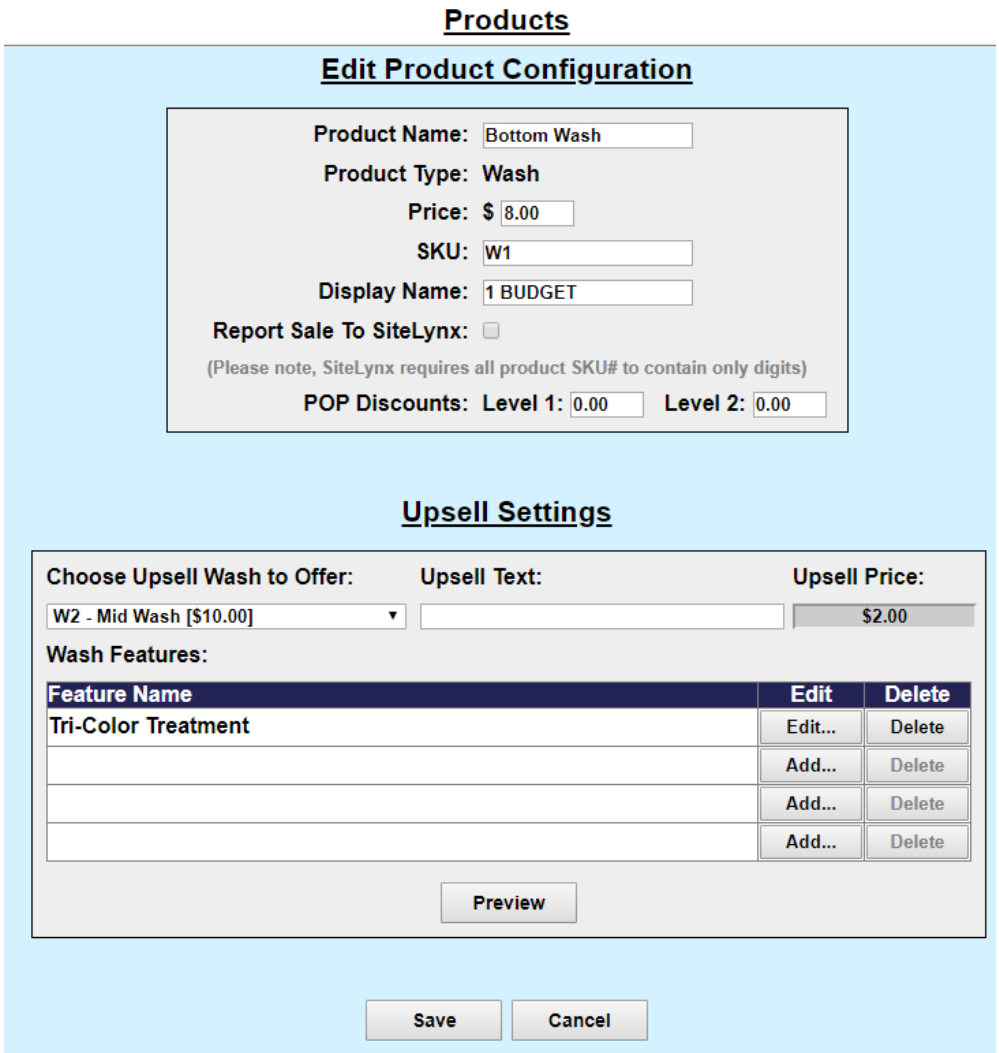


Figure 3.12. Edit Product Screen

1. Click the Setup tab at the top, then click Product in the left frame. To add a new product, select Wash, Added Service, Self Service or Account from the drop-down menu below the products table then click the Add New Product button. To customize a default wash or configure an added service, click the edit button next to the product name.
3. Enter the Product Name. This field is limited to 24 characters and will be the product name, which is displayed on reports.
4. Enter the wash package/added service price for the Wash Select II/Portal/Sentinel: Enter the price for the wash package or added service in numbers and decimals only. NOTE: If the price is set to 0, the wash package will NOT display on the operations screen.
5. SKU – This not used in a standard application and should be left blank

6. Enter the Display Name. This field is limited to 24 characters. This name will be displayed to the consumer (on the wash selection screens).

   NOTE: The Wash Select II will only display the first 10 characters of the wash name.

7. If you have multi-site management and want this product to report to the Site Lynx server, check Report Sale to Site Lynx.

8. If you wish to use Point of Purchase (POP) discounts on your pump or register interface, enter the amount of the discount for Level 1 and Level 2.

9. If you wish to enable and use the Upsell feature (see section 3.3.1, Step 7), perform the following steps:

   a. Select the wash package to offer. This should be the next highest wash package for the wash package configured in the previous steps.

   b. Enter any Upsell Text, if desired, and the Upsell price.

   c. If you wish to add a product graphic or video to encourage your customers to upsell to the next wash, click Edit in the Feature Name table.

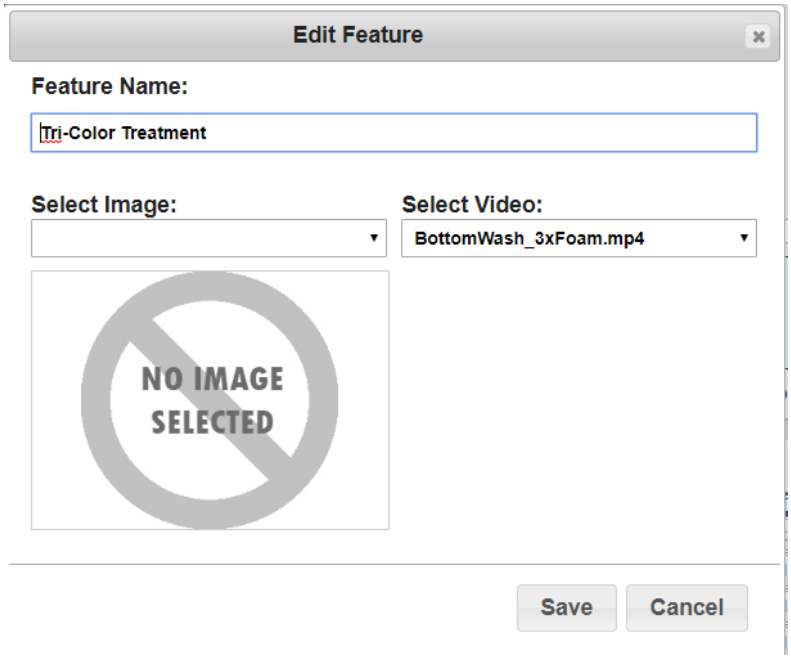


Figure 3.13. Edit Feature Screen

   d. Enter the Feature Name.

   e. Select and Image and a Video, if desired. Click Save.

      Note: The image files must be .jpeg format. The video files must be .mpeg format. Both must be preloaded to the “media” folder on the D: drive.

10. Click Save.

3.2.2 Self Service Product (WashPay Only)

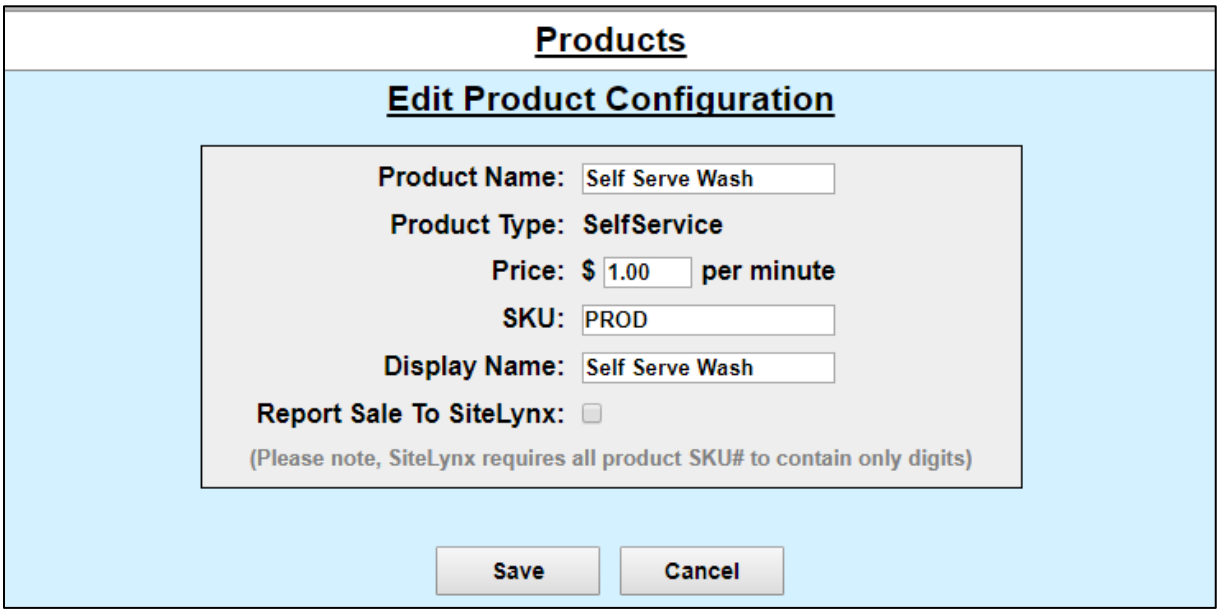


Figure 3.14. Self Service Product

1. Enter the Product Name. This field is limited to 24 characters and will be the product name, which is displayed on reports.
2. For Self Service: Enter the price per minute. To calculate the price per minute, divide the initial dollar amount (cash or credit) by the number of minutes allocated for the initial wash cycle. (For example, if you are charging $6 for a 9 minute wash, the price per minute will be 0.6666.)
3. SKU – This not used in a standard application and should be left blank
4. Enter the Display Name. This field is limited to 24 characters. This name will be displayed to the consumer (on the wash selection screens).
5. If you have multi-site management and want this product to report to the Site Lynx server, check Report Sale to Site Lynx.
6. Click Save.

3.2.3 Account Product (Portal/Sentinel/C-Start Only)

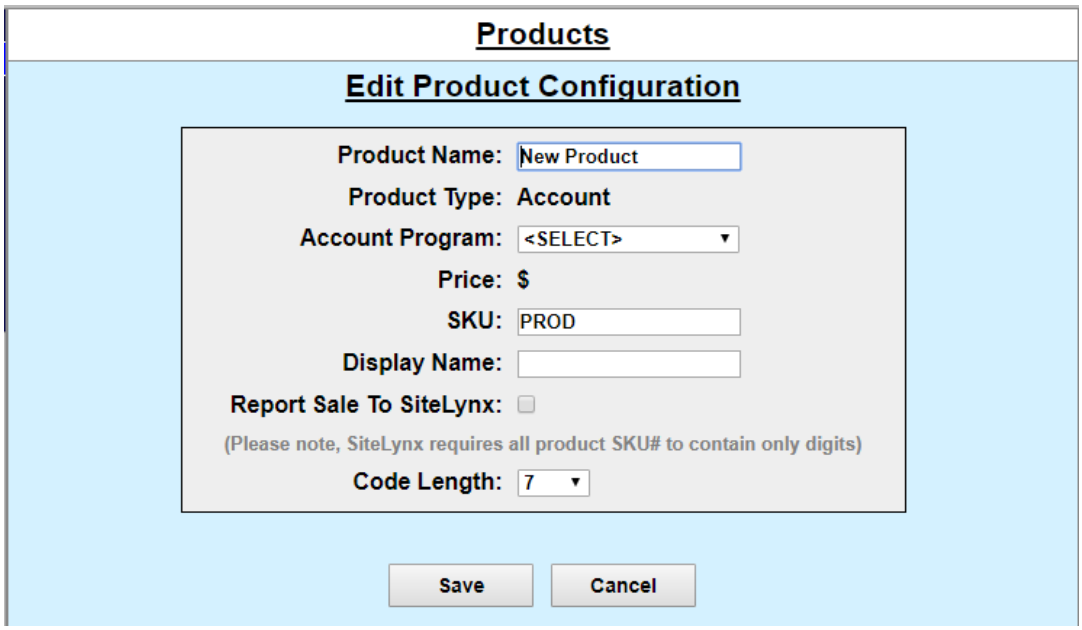


Figure 3.15. Account Product

NOTE: You must create a Product-based house account first then add the account as a product. For more instructions on how to do this, see Section 6.1.

1. Enter the Product Name. This field is limited to 24 characters and will be the product name, which is displayed on reports.
2. Select the account program from the drop-down menu.
3. SKU – This not used in a standard application and should be left blank
4. Enter the Display Name. This field is limited to 24 characters. This name will be displayed to the consumer (on the wash selection screens).
5. If you have multi-site management and want this product to report to the Site Lynx server, check Report Sale to Site Lynx.
6. Click Save.

3.3 Device Profiles

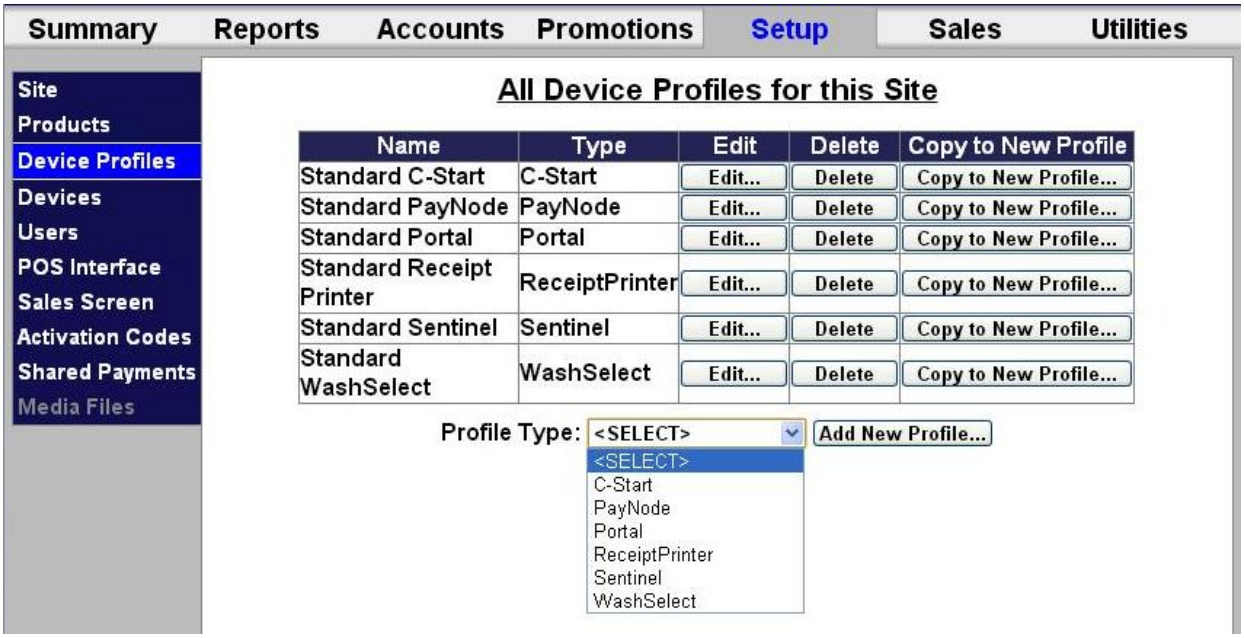


Figure 3.16. Device Profiles Screen

Device Profiles are configuration files that control the operation of the associated Unitec payment devices on site. A single profile should be set up and downloaded to all devices at a site if they are to operate in the same manner. If operation will vary by device (for example, one unit is on an in-bay automatic and the other on a conveyor), one or more additional device profiles will need to be set up. These additional profiles can be configured from scratch or created by copying an existing profile and changing the required parameters.

There are several screens of configuration information associated with each entry unit's device profile. These screens are listed in the left frame. To navigate through the screens, select the next or previous buttons at the bottom of the page. Once all required changes are made, select the save button at the bottom of the screen to save changes before exiting the device profile screens. The parameters that can be configured through the device profile vary by device type as described in the following sections.

You may also navigate through the configuration pages by selecting the desired screen from the list on the left side. When following this process however, make sure you select the save button to save your changes before selecting another screen from the list.

To add a new profile, select the device from the drop down menu below the table then click the Add New Profile button. To configure the existing profile, click the edit button next to the profile name.

The first screen in the device profile (shown below) is used to name the profile and set some general operating characteristics.

3.3.1 Information Screen

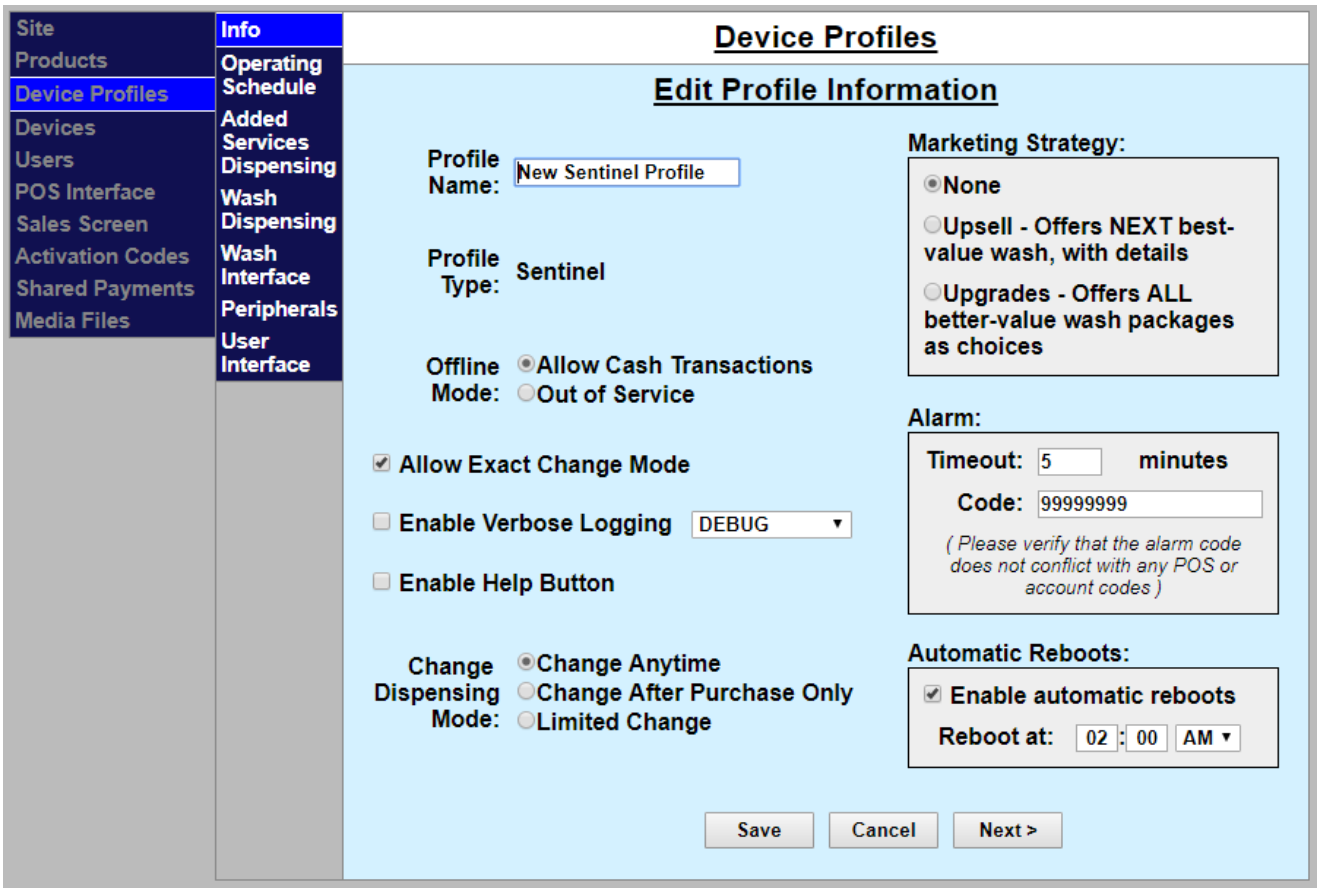


Figure 3.17. Example Sentinel Profile Information Screen

1. Click the Setup tab, then click Device Profiles in the left frame. To add a new profile, select the device from the drop down menu below the table then click the Add New Profile button. To configure the existing profile, click the edit button next to the profile name.
2. Enter the Profile Name. The default name for a new profile is Sentinel, Portal or C-Start.
3. Offline Mode: At sites with multiple devices, one device will run the Sierra Server application and function as the 'Master' unit, the other devices are secondary units. In the event that a secondary unit loses its connection to the Master, only cash transactions will be possible. The offline mode setting will determine whether the secondary should remain in operation for cash transactions only or go out of service. The default setting is to allow cash transactions.
4. **Portal and Sentinel Only:** The Exact Change Mode setting will cause the device to display an 'Exact Change Only' message when the unit detects that it is unable to dispense change. The default setting is with the message enabled.
5. If you wish to run debugging logs for the device, select Enable Verbose Logging. This should normally be disabled and only enable when instructed by Unitec Customer Support personnel.
6. If you wish to enable a help button that links directly to the intercom on the unit, select Enable Help Button. The Help Button will be displayed in the lower left corner of the sales screen. This will enable the intercom.

7. Marketing Strategy: If you would like to offer an Upsell wash package or upgraded wash packages for pre-purchased washes, check which option you would like to allow. To configure this feature, refer to section 3.2.1, Step 9.
   - Selecting None will not allow an upgrade to be purchased.
   - Selecting Upsell will offer the next best wash, with details.
   - Selecting Upgrades will offer all better-value wash packages as choices.

     Note that no upgrade option will be allowed if the customer has purchased the most expensive wash.
8. **Portal and Sentinel Only:** Change Dispensing Mode: If you would like your unit to allow change to dispense at any time, select Change Anytime. If you would like your unit to only dispense change after a wash package is purchased, select Change After Purchase Only. Note that Change Anytime option does not return the bill from the validator but rather dispenses change from the coin and bill dispensers.
9. **Sentinel Only:** To enable the alarm, enter the alarm timeout (up to 10 minutes). The default timeout is 5 minutes. To be able to toggle the alarm on and off, enter an alarm code. The code can be up to 8 digits long. Once the alarm is enabled, a bell icon will be displayed in the upper left corner of the sales screen. If you open the right (vault) side door of the unit without logging into Maintenance Mode, the alarm will chirp, then sound after one minute. Logging into Maintenance mode will silence the alarm. Once the doors to the unit have been closed and locked for one minute, the alarm will reactivate.

   NOTE: Please ensure that the alarm code does not interfere with any existing POS or house account codes. Codes starting with the digits 44 will not be allowed.
10. If you would like to enable automatic reboots for the unit, click Enable Automatic Reboots, then enter the reboot time.
11. Click Next to navigate to the Operating Schedule page.

3.3.2 Operating Schedule

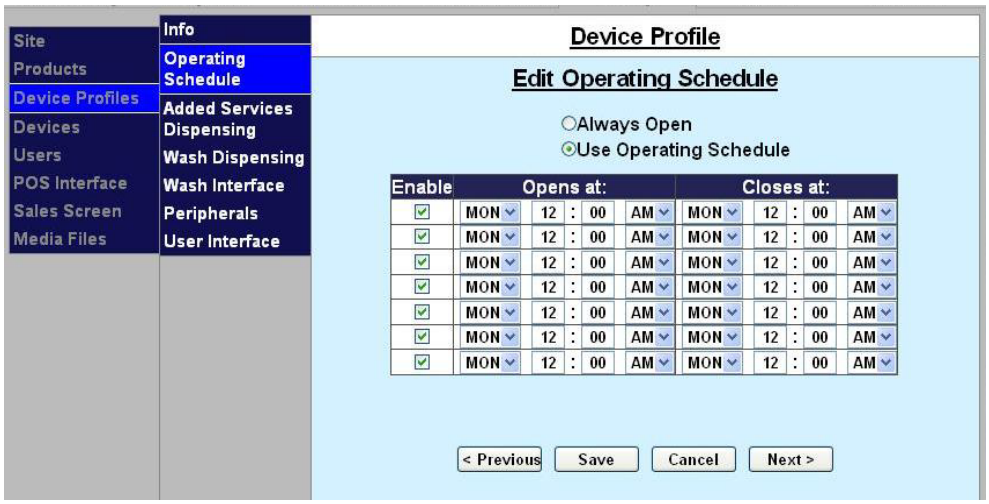


Figure 3.18. Operating Schedule Screen

The Operating schedule is used to automatically take the Portal or Sentinel out of service when the site is closed. The message that's displayed in this out of service condition is programmed through the User Interface set-up page. This feature is designed to allow the operating hours to vary by day of the week. The default setting is 'Always Open' (no schedule is applied).

To setup the site Operating Schedule, change operating mode from Always Open to Use Operating Schedule. With Use Operating Schedule selected, click the box next to each day the site will be open, and select the opening and closing times from the drop-down menus. If you wish to keep your wash bay open overnight, make sure your open and close times are set to different days. Click Next to proceed to the Added Services Dispensing page.

3.3.3 Added Service Dispensing

Figure 3.19. Added Services Screen

NOTE: In order to configure the dispensing features for added services, you must first set up the added service in the Products menu.

Any added services that will be offered at the entry units using this profile must be listed and configured here. You may assign up to 4 added services per transaction. To add a new added service, select the service from the drop down menu at the top of the screen and click the Add to List button. Click the Product Settings button next to the service to configure the service. If you wish to delete an existing Added Service, click the Remove from List button.

Figure 3.20. Added Services Settings Screen

1. Select the relay(s) that will activate the added service, if necessary.
2. Enter the Delay time in milliseconds. The delay time is the amount of time between when the wash relay activation completes and added service relay is energized.

3. If you will be dispensing tokens with the added service, enter the quantity of tokens that will be dispensed.
4. Enable the Receipt Required setting if the customer will need a receipt as 'proof of purchase' to redeem the Added Service. If the printer is out of service or out of paper, the Added Service will not be offered.
5. Click Save to return to the main Added Services page and the Next to proceed to the Wash Dispensing page.

3.3.4 Wash Types and Washes Dispensed

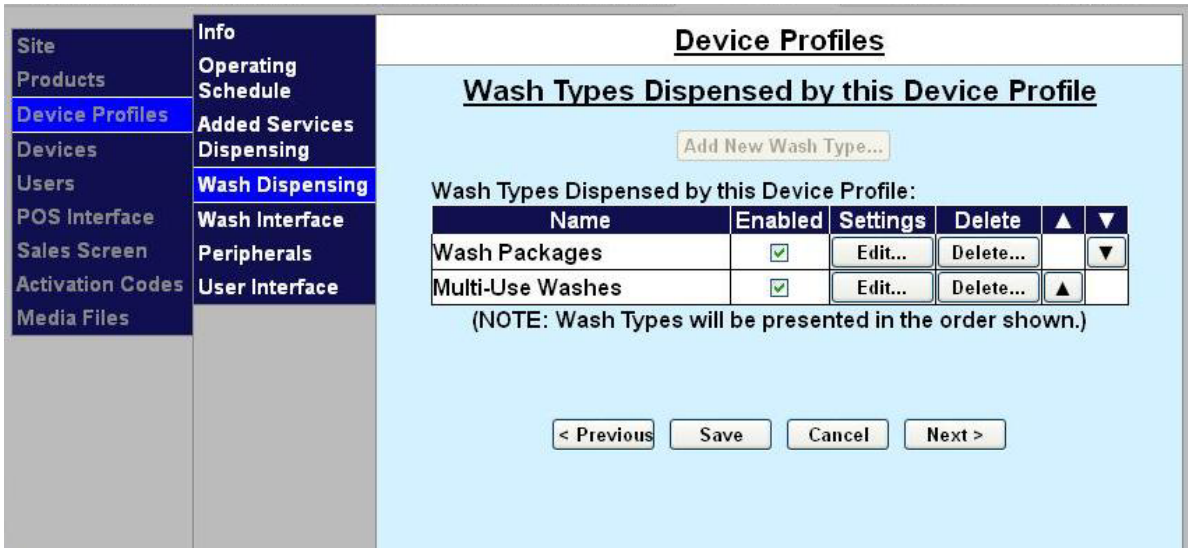


Figure 3.21. Wash Types Dispensed Screen

The main page for Wash dispensing shows Wash Types that are configured in the profile. Each wash type can be configured to offer up to (8) wash packages and up to (2) wash types are available (allowing up to 16 products to be sold). When (2) wash types are configured, the first screen a user will encounter will prompt them to select the desired wash type. A typical application for multiple wash types would be a Flex Serve operation where customers may choose to purchase only an exterior wash or a wash and express detail package. In such a case, the products that are offered through the 'Exterior Wash Only' type would be different than those offered through the 'Wash plus Detail'.

If you plan to offer (2) wash types, click on the Add New Wash Type button to add the 2nd type. Please note that the Wash Type selection button displayed to the customer will include the Wash Type Name (as shown in the table) so both the default and new wash types will need to be renamed.

To configure the wash packages, click the Edit button for the associated Wash Type.

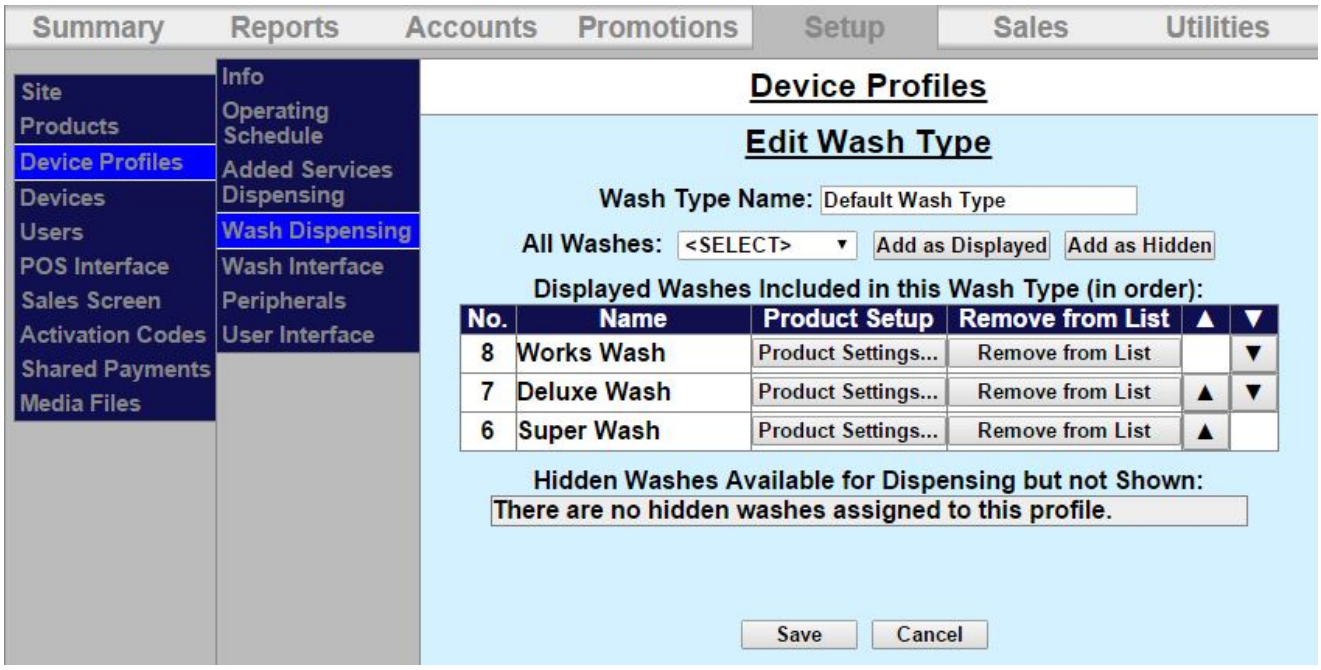


Figure 3.22. Washes Dispensed Screen

To add a new wash package, select the desired wash from the drop down menu at the top of the screen and click Add to List. Click the Product Settings button next to the wash name to configure the wash. To delete an existing wash package, click the Remove from List button. To change the order of the washes displayed, press the arrow keys to move the wash up or down in the list. For the Portal, the order that washes are displayed will match the wash order shown in the list (from top to bottom). For the Sentinel, the wash that's at the top of the list will be displayed on the left and the remaining washes will be displayed, in order, from left to right.

A hidden wash is a wash that is assigned to a certain customer that is not available to all customers. You must first create the wash under Products, then you may add the wash in the Washes Dispensed screen. To add a hidden wash, select the wash from the All Washes drop-down menu then click Add as Hidden.

Once the wash packages to be offered are selected, configure them by selecting the associated Product Settings button in the table.

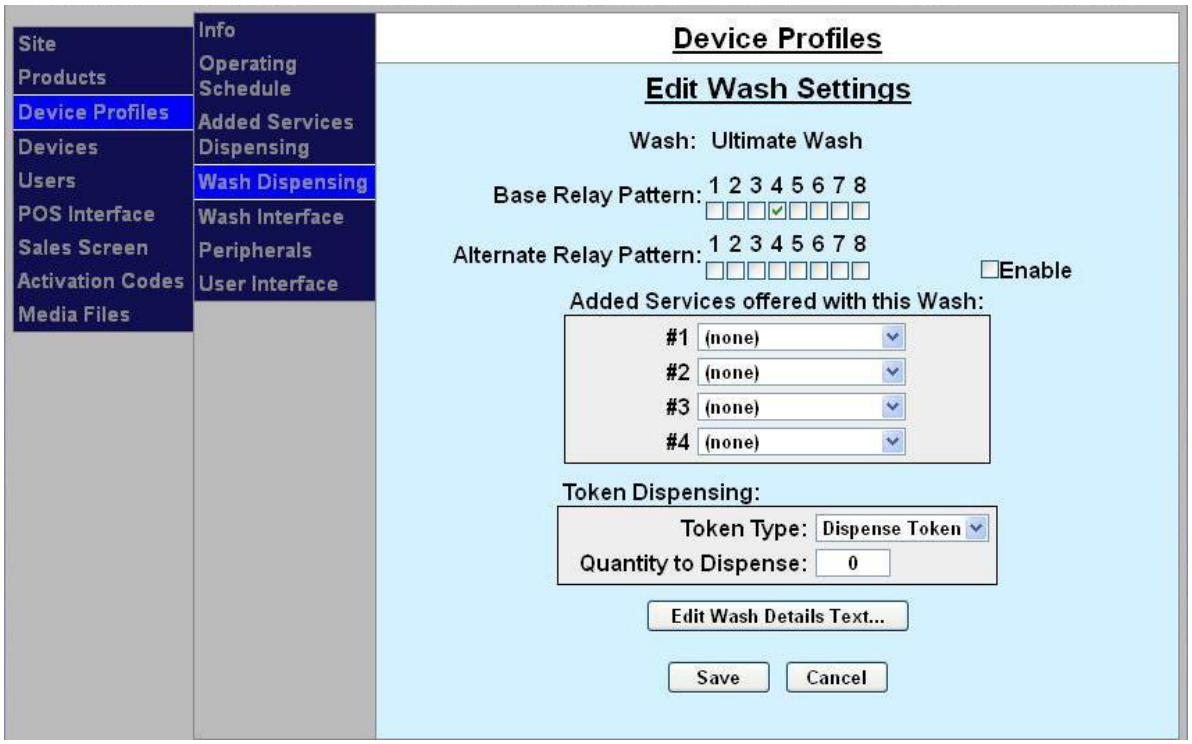


Figure 3.23. Wash Settings Screen

1. Select the relay pattern that the wash equipment requires to deliver the desired wash package. Normally, only one relay output is turned on for each wash package. The alternate relay pattern is used to notify the wash controller of a change that's required in the wash service. A typical use would be to set a 'hybrid' wash for either a 'touch free' or 'soft touch' wash delivery. When an alternate relay pattern is enabled, a customer option message must also be set in the User Interface set-up.
2. Select any Added Services you wish to offer with this wash package from the drop-down menus in the order you wish them to be displayed.
3. If you will be dispensing tokens with the wash package, enter the quantity of tokens that will be dispensed.
4. Click on Edit Wash Details. Enter Details for the wash, if desired. These details are displayed when the Wash Info button is pressed on the Sales screen. The wash details screen allows (7) lines of 16 characters per wash. You may also choose to highlight the wash details on the Sentinel and C-Start screens. Click Save.
5. Edit each wash package as stated above and click Save. When you are finished, click Next to proceed to the Wash Interface page.

If you have multi-use wash types enabled, add the wash bundles then select Product Settings and repeat steps 3-5, above. When you are finished, click Next to proceed to the Wash Interface page.

3.3.5 Wash Interface

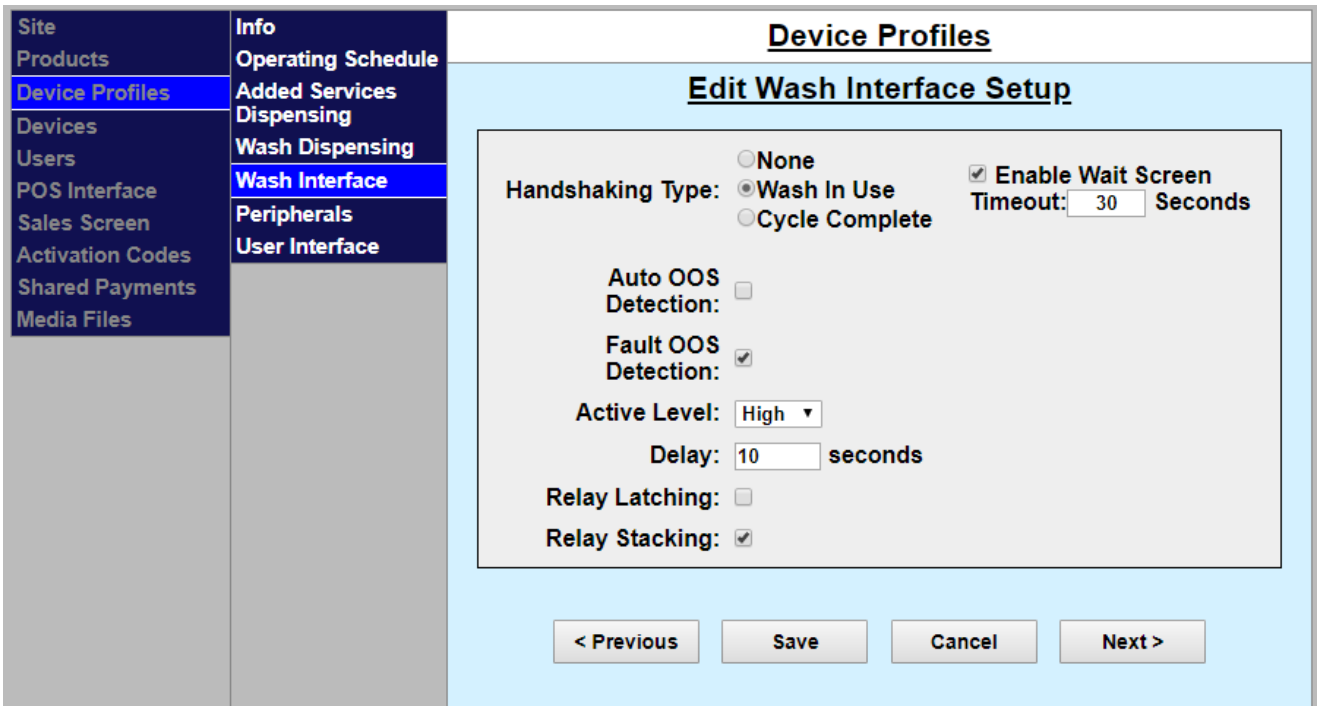


Figure 3.24. Wash Interface Screen

This screen allows you to setup the wash interface configurations. Click the box next to the feature to select it. Please consult your wash manufacturer's instructions for details on interfacing with the wash equipment.

1. Select the Handshaking Type. The entry units support three types of handshaking:
   - None – This handshake is used in attended tunnel applications. The wash equipment does not send a wash-in-use signal to the unit. The unit will automatically reset to the wash menu screen 20 seconds after a transaction is completed.
   - Wash-In-Use (voltage present) – The car wash activates the wash-in-use signal for the entire time the car wash is in use. This option needs to be selected if an entry gate is being used in conjunction with the entry unit.
     - If you would like to enable a wait screen for code entry, check Enable Wait Screen and set the timeout (in seconds). This feature allows you to avoid cases where the stacked car may lose their code when the wash in the bay is delayed due to driver error
   - Cycle Complete – The "Wash-In-Use" is normally on (voltage present). When it is given a "wash is completed" signal (no voltage present), the car wash will deactivate the "Wash-In-Use" signal for about two seconds and it will be reactivated. If your car wash supports the "Wash-In-Use" method, you should not use the "Cycle Complete".
2. Select Start Button Operation for conveyor wash applications where the customer will need to press a start button to activate the conveyor. This option is only displayed when handshaking is set to "None."
3. Auto OOS Detection – Check this box if the wash controller will toggle the Wash in Use high or low to signal an out of service condition.

4. Fault OOS Detection – Check this box if a separate fault signal is available from the wash equipment to indicate an out of service condition, then select the whether the wash signal will go high or low and enter the delay in seconds.
5. Relay Latching – The relay output can be either Latched or Pulsed. Checking the Relay Latching box sets the relay output to Latched. This needs to be "off" if an entry gate is being used in conjunction with the entry unit.
6. Relay Stacking – When Relay Stacking is enabled, the entry unit wash interface will not send arming signals to the wash while it is in use. This needs to be "on" if an entry gate is being used in conjunction with the unit.
7. Click Save then Next to proceed to the peripherals set up page.

3.3.6 Peripherals

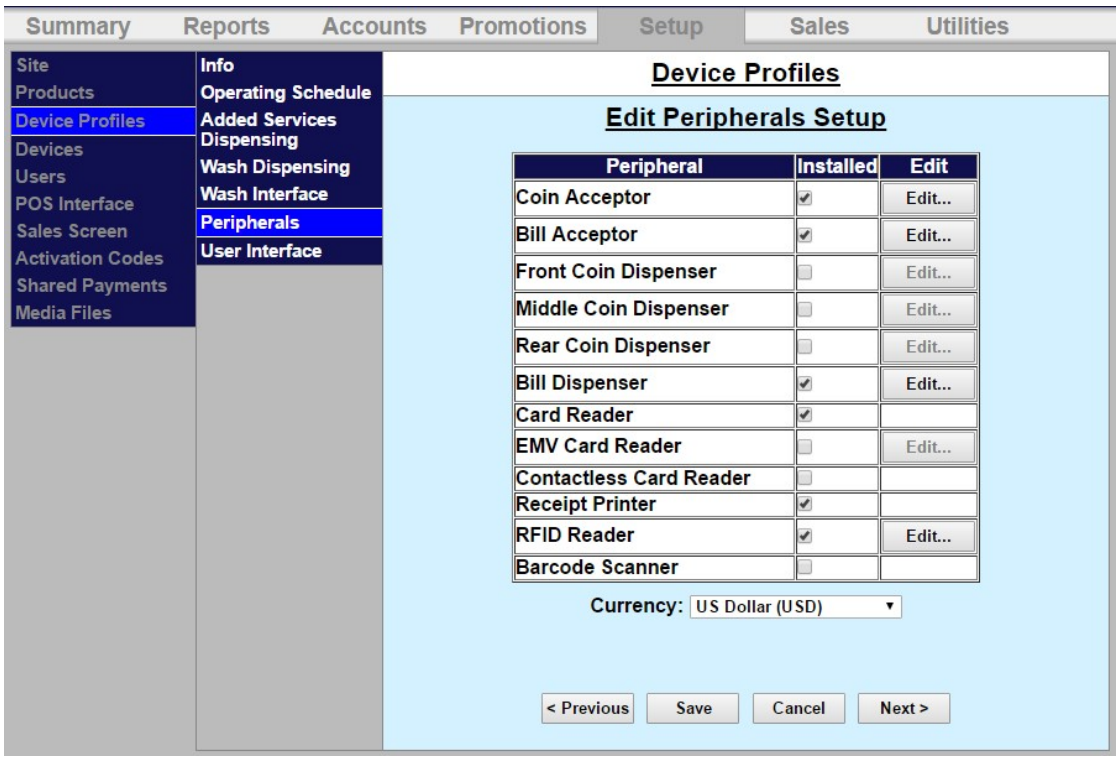


Figure 3.25. Peripherals Screen

Verify that the hardware components that are used in your entry unit are enabled (the box is checked in the installed column). Please note that the coin dispensers in the Portal and Sentinel are labeled differently due to different locations. Click the Edit button next to the component to configure the component interface. If you are in the United States, ensure that USD is selected for Currency. The Portal and Sentinel also support Canadian and Australian currencies. When all peripherals have been configured, click Next to proceed to the User Interface set up page.

NOTE: The acceptor and dispenser functions are not present in the C-Start profile.

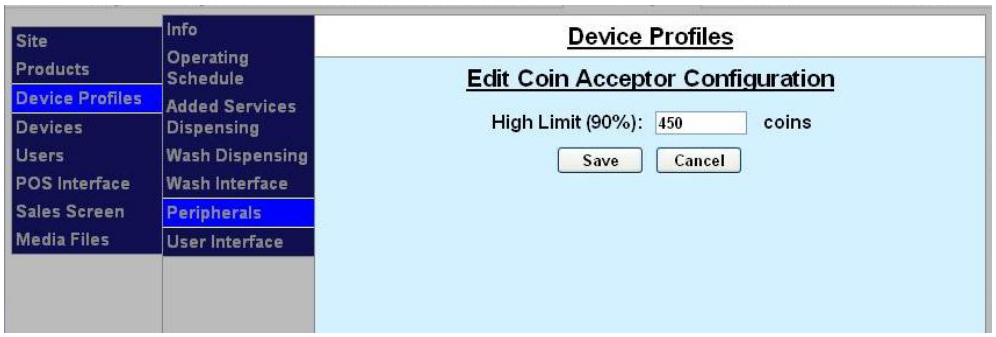


Figure 3.26. Coin Acceptor Configuration Screen

1. The High Limit setting is used to determine when a notification is to be sent to warn that the coin acceptor is nearly full. The recommended setting is to send a warning when it's 90% capacity and the default setting is 450 coins.
2. Click Save.

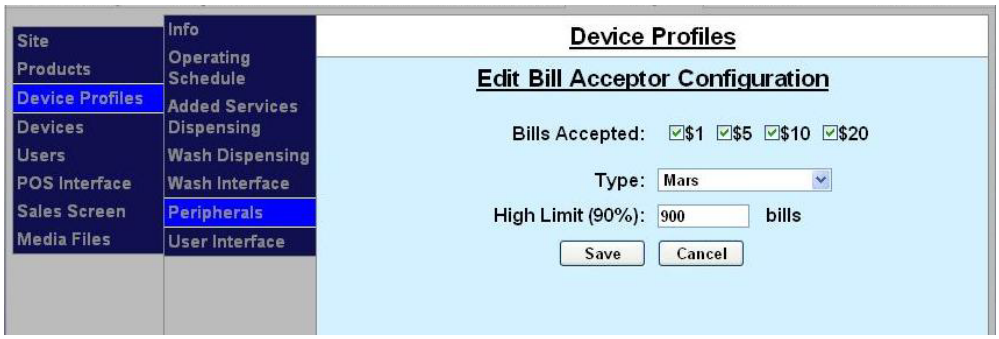


Figure 3.27. Bill Acceptor Configuration Screen

1. Select the bill denominations you will accept.
2. Select the bill acceptor manufacturer from the drop-down menu. **NOTE:** Please ensure the manufacturer is correct! The bill acceptor may malfunction if the incorrect manufacturer is selected.
3. The High Limit setting is used to determine when a notification is to be sent to warn that the bill acceptor is nearly full. The recommended setting is to send a warning when it's at 90% capacity and the default setting is 900 bills.
4. Click Save.

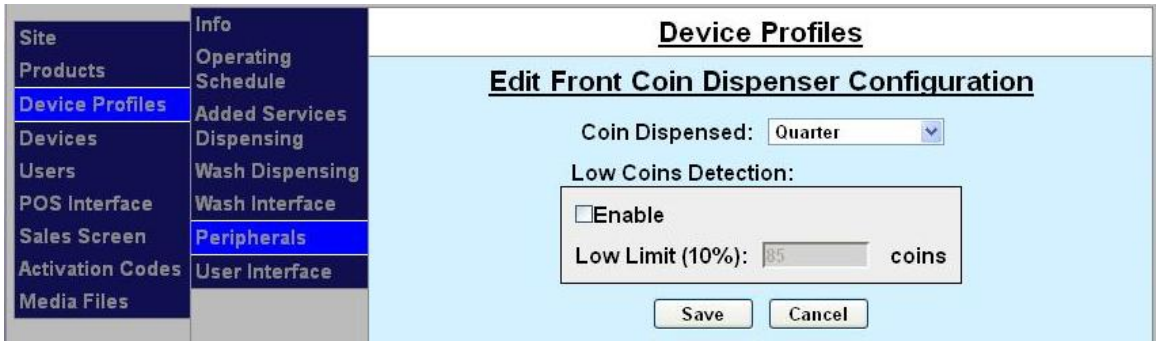


Figure 3.28. Coin Dispenser Configuration Screen

1. For US Sites: Select either quarter, dollar coin or token from the drop-down menu.
2. For Canadian Sites: Select either one-dollar, two-dollar coin or token from the drop down menu.
3. For Australian Sites: Select either twenty cent coin, half dollar coin, one-dollar coin, two-dollar coin or token from the drop down menu.
4. The Low Limit setting is used to determine when a notification is to be sent to warn that the coin dispenser is low on change. Select whether or not you wish to receive a notification when the coin dispenser reaches the Low Limit by clicking Enable. The recommended setting is to send a warning when it's at 10% capacity and the default setting is 45 coins (400 coins for the main coin hopper in the Portal)
5. Repeat this process for each Coin Dispenser used.

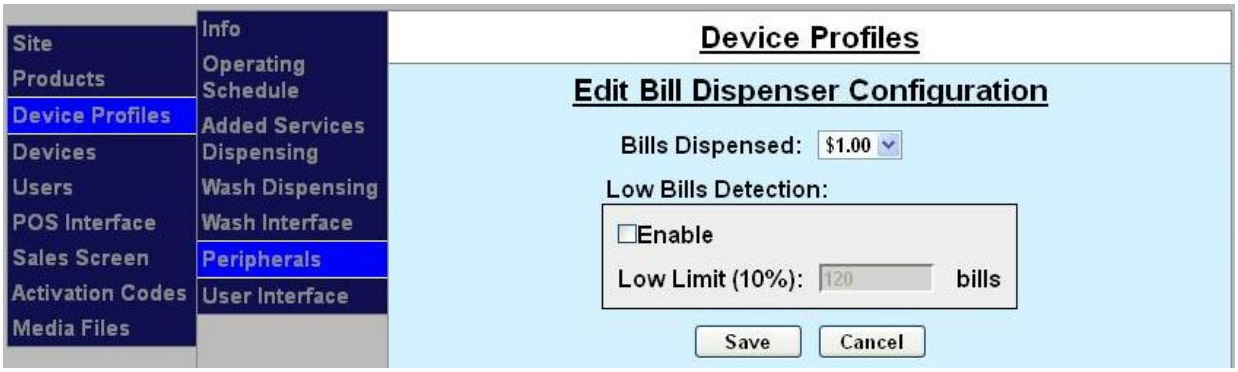


Figure 3.29. Portal Single Bill Dispenser Configuration Screen

1. Select either one dollar, five dollars or ten dollars from the drop-down menu.
2. The Low Limit setting is used to determine when a notification is to be sent to warn that the coin dispenser is low on change. Select whether or not you wish to receive a notification when the bill dispenser reaches the Low Limit by clicking Enable. The recommended setting is to send a warning when it's at 10% capacity and the default setting is 120 bills.
3. Click Save.

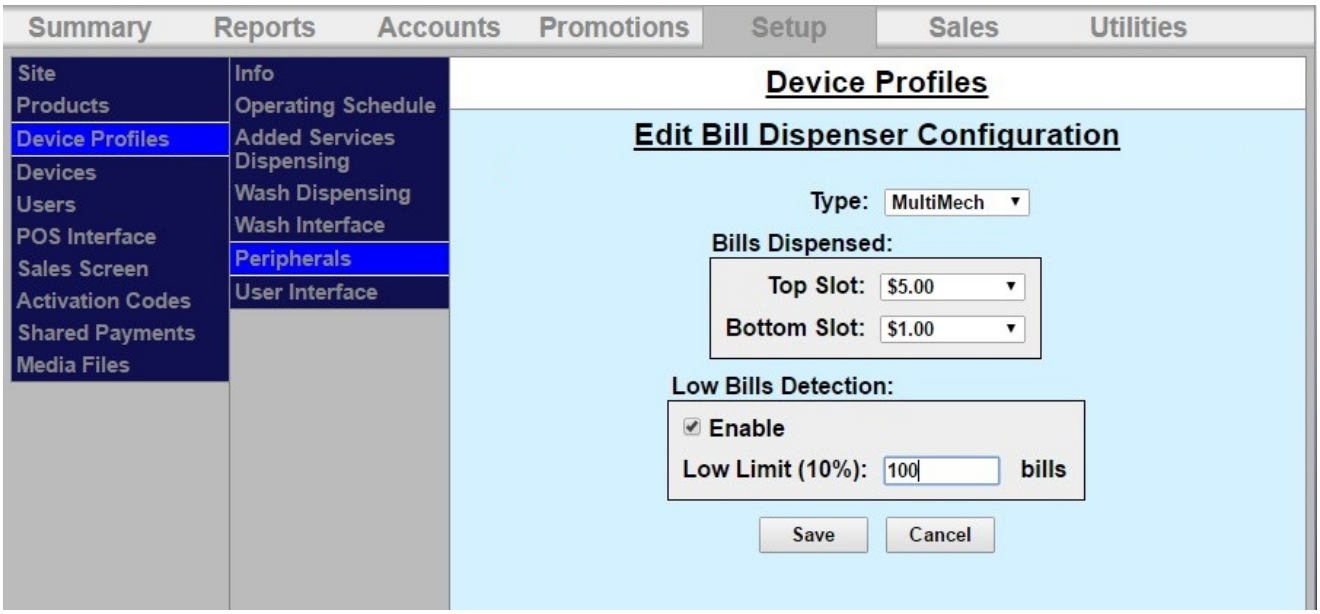


Figure 3.30. Sentinel Dual Bill Dispenser Configuration Screen

1. Select the bill dispenser manufacturer from the drop-down menu: LG, MultiMech, or Telaris.

   NOTE: For the MultiMech dispenser, the top slot will be $5 and the bottom slot will be $1.

   MultiMech cassette capacities: TOP - 450 banknotes, BOTTOM – 750 banknotes

2. Select the bill denomination for each slot: $1, $5 or $10.
3. The Low Limit setting is used to determine when a notification is to be sent to warn that the coin dispenser is low on change. Select whether or not you wish to receive a notification when the bill dispenser reaches the Low Limit by clicking Enable. The recommended setting is to send a warning when it's at 10% capacity and the default setting is 200 bills.
4. Click Save.

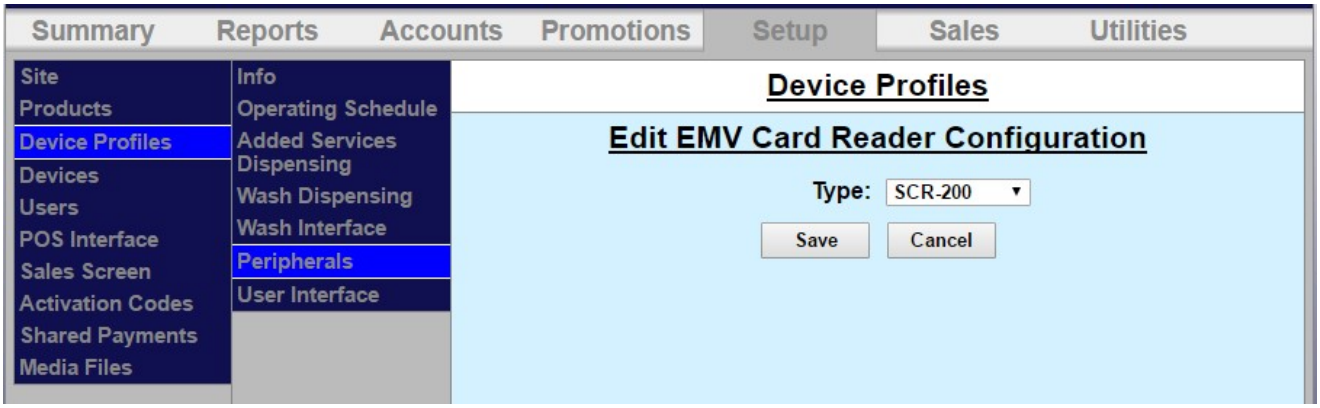


Figure 3.31 EMV Configuration Screen

1. Select the model of the EMV Reader from the drop-down menu.
2. Click Save.

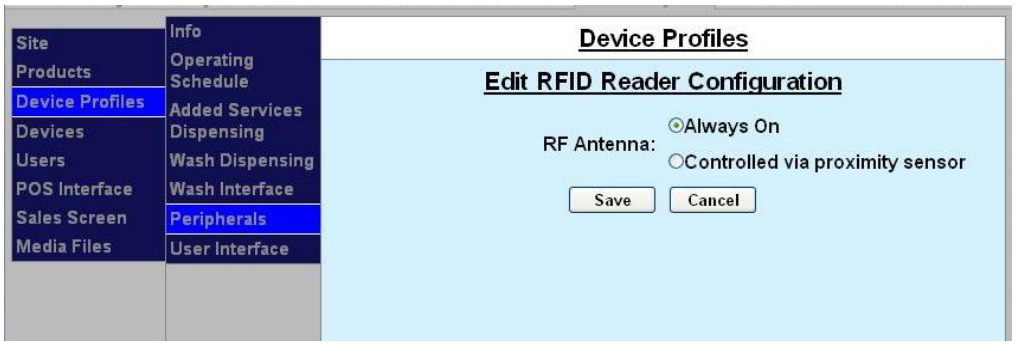


Figure 3.32. RFID Configuration Screen

The ReachFree ID screen allows you to define settings for an RFID reader, if the reader is installed onsite. You may set the reader to be on continuously or to be activated when a vehicle is detected by the Entry unit's proximity sensor.

1. Select either Always On or Controlled Via Proximity Sensor. The default and recommended setting is Always On.
2. Click Save.

3.3.7 User Interface Screen

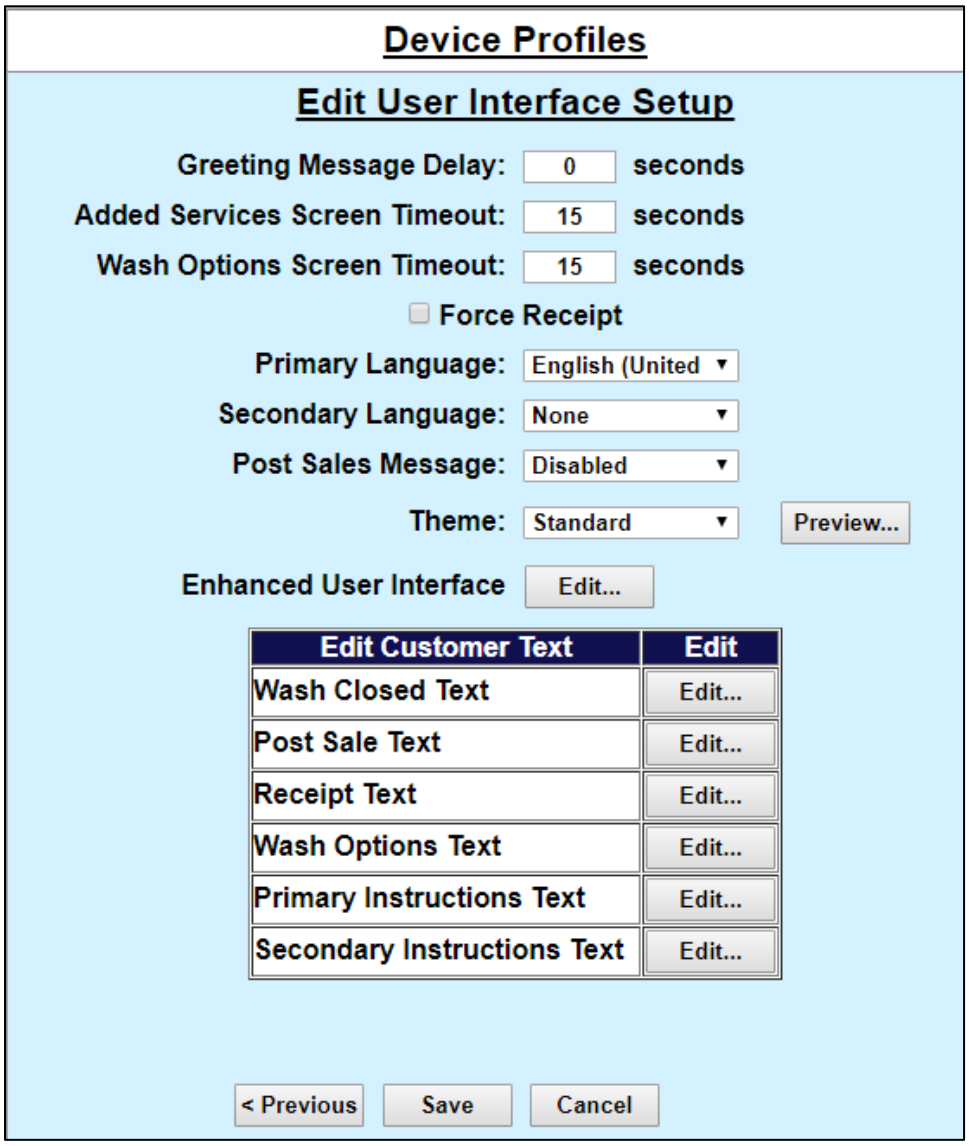


Figure 3.33. User Interface Screen

The User Interface screen allows you to define settings with which the customer interacts. You can set a message delays and timeouts, force a receipt, and customize the primary and secondary languages, post-sales messages, themes, and customer texts.

1. Enter a Greeting Message Delay (in seconds). This is the amount of time in seconds from when the proximity sensor activates until the voice-greeting message is played.
2. Enter an Added Services Screen timeout (in seconds). This is the amount of time in seconds that added services offer will be displayed to the customer. If no selection is made within the timeout period, the transaction will continue with no added services selected.
3. Enter a Wash Options Screen timeout (in seconds). This is the amount of time in seconds from when the wash options selection is displayed. If no selection is made within the timeout period, the transaction will continue with the standard wash type provided.

4. If you wish a receipt to be automatically printed with each transaction, select Force Receipt. When this feature is disabled, receipts will not be printed unless the customers request one when prompted. The default setting is disabled.
5. Select a Secondary Language from the drop-down menu, if desired.
6. If you would like a post-sales text , see step 11. If you would like a post-sale video to be displayed, you must upload the video, then it will be displayed on the drop-down menu. Post Sales videos must be in the following format:
   - Video file formats are : **wmv and mpg**.
   - Optimize the size and aspect ratio of the video media control for 640x480 resolution (Portal) and 800x600 resolution (Sentinel and C-Start)
   - English: The post sale video file must be named PostSaleVideo.* and stored in **d:\bin\Portal\Video\English** (for an English transaction).
   - Spanish: The post sale video file must be named PostSaleVideo.* and stored in d**:\bin\Portal\Video\Spanish** (for a Spanish transaction).
   - The video must be loaded using the Utilities>Files function. For more information, see Section 8.5.
7. Select a theme from the menu. You may preview the sales screen from this screen. All themes are displayed in Appendix A.

   NOTE: The Enhanced User Interface has not been released.
8. **Portal 10" Only:** Click Edit next to Banner Text. Enter the Banner Text. This text will be displayed at the top of the entry unit's Welcome (or Idle) screen. This field is limited to 25 characters. Click Save.
9. Click Edit next to Wash Closed Text. Enter the Wash Closed Text. This text will be displayed on the entry unit's Out of Service screen when the wash is closed. Each line is limited to 29 characters. Click Save.
10. If you chose to display a Post Sales message in step 6, click Edit next to Post Sale Text. Enter the Post Sale Text. This text will be displayed on the entry unit's screen after a wash is purchased until the wash is available to the customer. Each line is limited to 29 characters. Click Save.
11. Click Edit next to Receipt Text. Enter the Receipt header and footer text. This text will display on the top and bottom of the receipt. Each line is limited to 27 characters.
12. Click Edit next to the Wash Options Text. Enter the base (or standard) wash text and the alternate wash text.
13. If you have any secondary text to be displayed for loyalty accounts, enter it here ad click Enable.
14. Click Save.

3.3.8 Wash Select II Device Profile

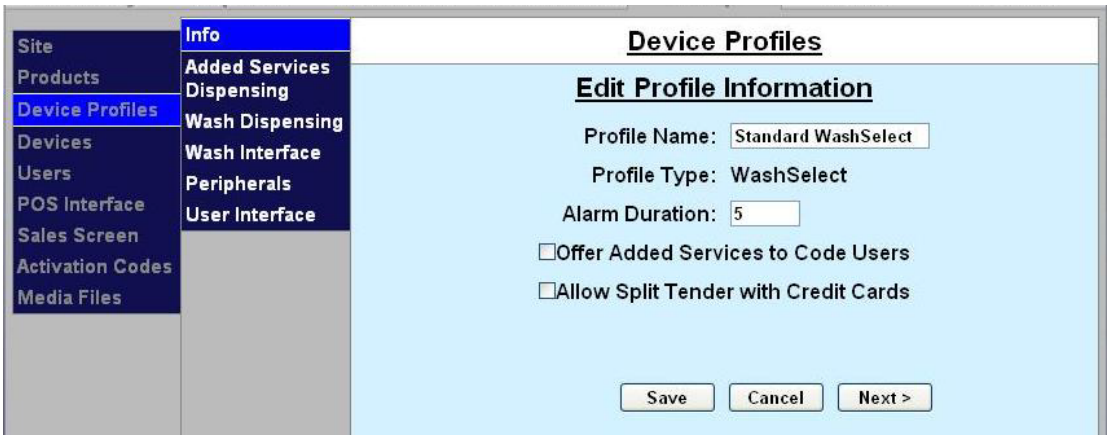


Figure 3.34. Wash Select II Profile Information Screen

1. Enter the Profile Name. The default name for a new profile is Standard Wash Select.
2. Enter the Alarm Duration in minutes.
3. If you wish to offer added services to customers that purchased their wash with a code, check Offer Added Services to Code Users box.
4. If you wish to allow customers to purchase a wash with a combination of credit and cash, check the Allow Split Tender with Credit Cards box.
5. Click Next to navigate to the Added Services dispensed page.

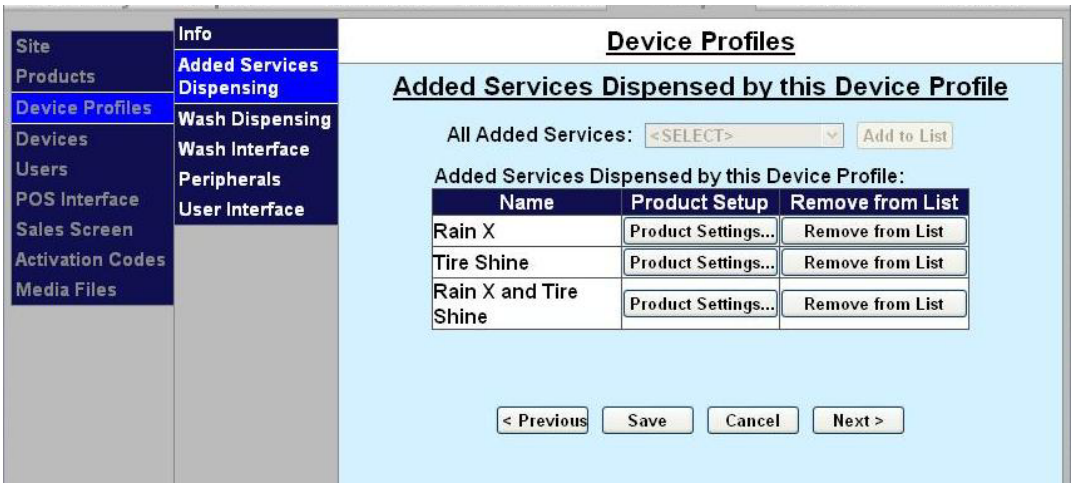


Figure 3.35. Wash Select II Added Services Dispensed Screen

NOTE: In order to configure the dispensing features for added services, you must first set up the added service in the Products menu. Once the added services are configured on the server, you MUST configure the relays for the added services at the Wash Select II!

Any added services that will be offered at the entry units using this profile must be listed and configured here. To add a new added service, select the service from the drop down menu at the top of the screen and click the Add to List button. Click the Product Settings button next to the service to configure the service. If you wish to delete an existing Added Service, click the Remove from List button.

Figure 3.36. Wash Select II Added Services Settings Screen

1. Enter any additional information about the added service, if you wish. This field is limited to 16 characters.
2. Click Save to return to the main Added Services page and then Next to proceed to the Wash Dispensing page.

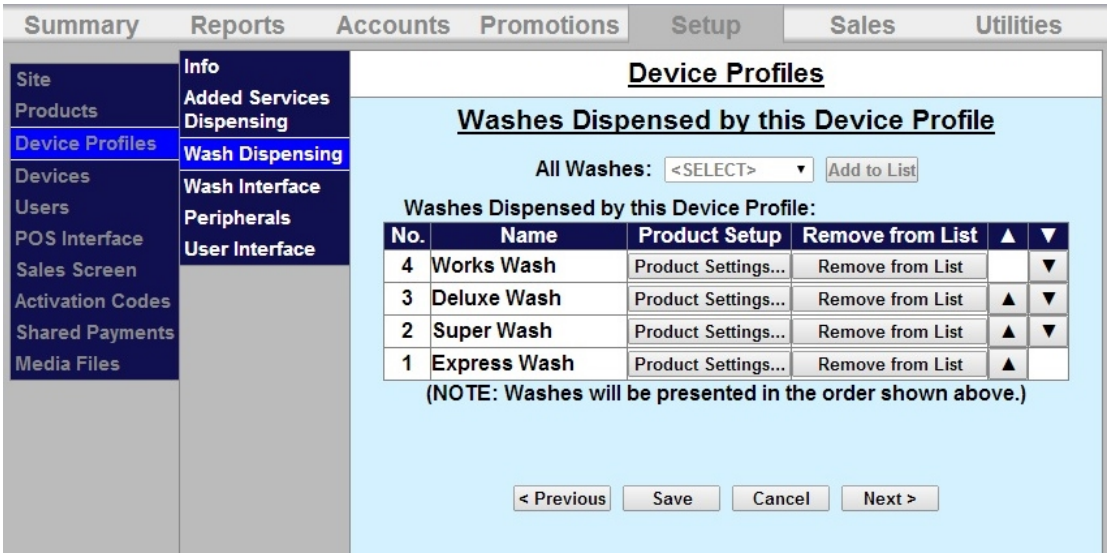


Figure 3.37. Wash Select II Wash Dispensing Screen

Click the Product Settings button next to the wash name to configure the wash. To delete an existing wash package, click the Remove from List button. To change the order of the washes displayed, press the arrow keys to move the wash up or down in the list. For the Wash Select II, the order that washes are displayed will match the wash order shown in the windows (from top to bottom). **NOTE:** If you change the order of the wash packages, you must change the wash relay patterns at the Wash Select II to match the new order.

Once the wash packages to be offered are selected, configure them by selecting the associated Product Settings button in the table.

Figure 3.38. Wash Select II Wash Settings Screen

1. The alternate relay pattern is used to notify the wash controller of a change that's required in the wash service. A typical use would be to set a 'hybrid' wash for either a 'touch free' or 'soft touch' wash delivery. When an alternate relay pattern is enabled, a customer option message must also be set in the User Interface set-up.
2. Select any Added Services you wish to offer with this wash package from the drop-down menus in the order you wish them to be displayed.
3. Enter any additional information about the wash package, if you wish. This field is limited to 16 characters.
4. Edit each wash package as stated above and click Save. When you are finished, click Next to proceed to the Wash Interface page.

   NOTE: The wash interface settings must be set up at the Wash Select II unit!

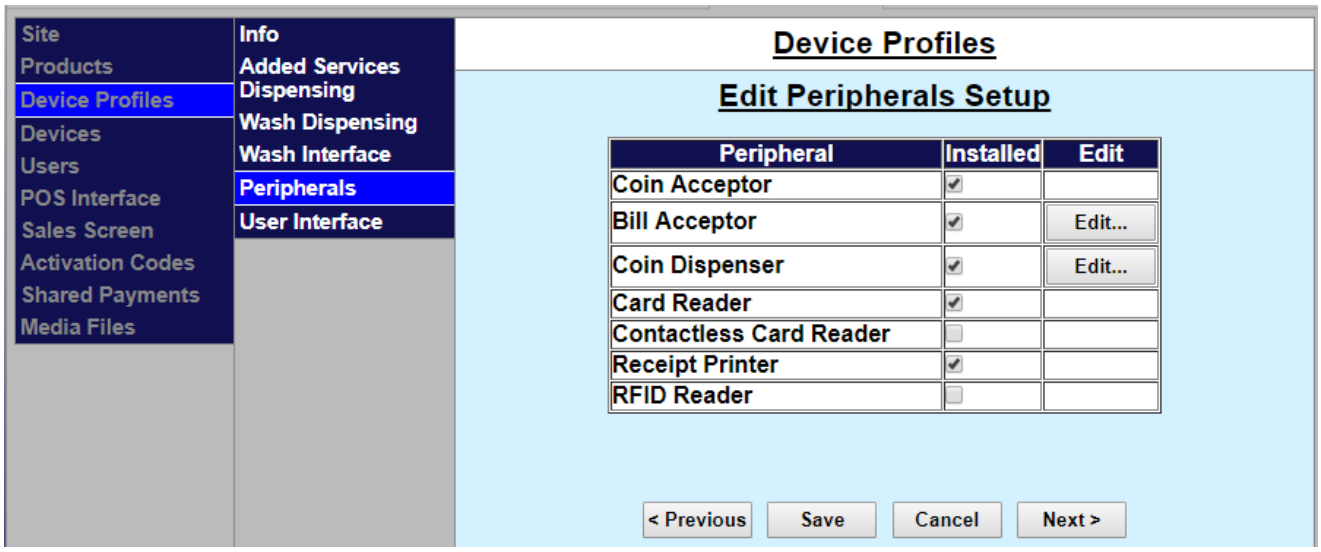


Figure 3.39. Wash Select II Peripherals Setup Screen

To set up peripheral devices for the Wash Select II, click the devices that are installed in the unit. Click Edit next to Bill Acceptor and chose the bill acceptor that is installed – either Coinco or Mars. Click Edit next to Coin Dispenser and chose the value of the coin being dispensed. Choices are Quarter, One Dollar Coin and Two Dollar Coin (Canada and Australia only). Click Save then Next.

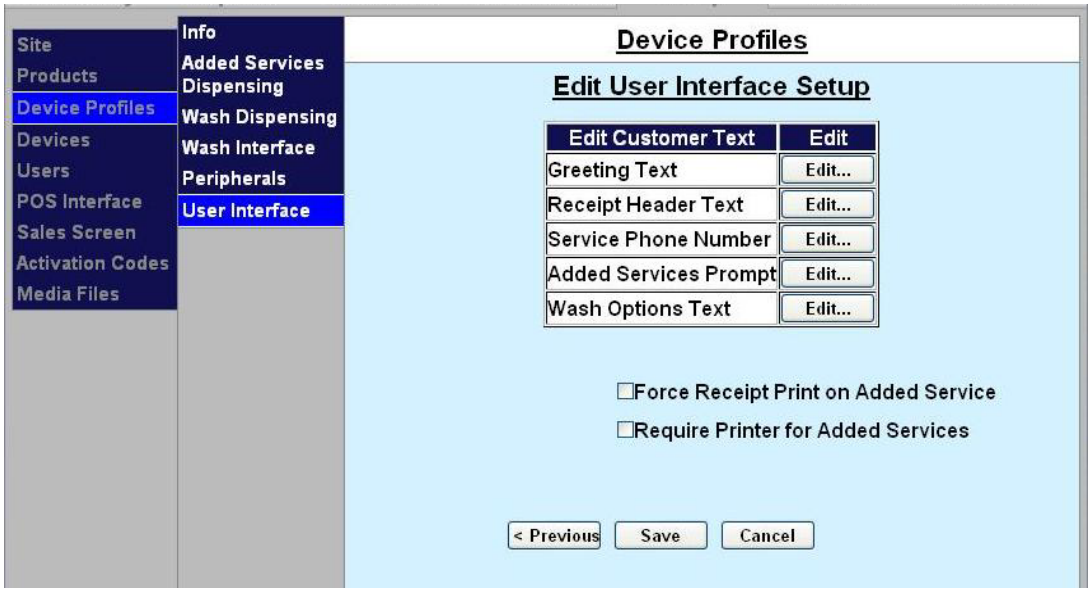


Figure 3.40. Wash Select II User Interface Setup Screen

1. If you would like the unit to print a receipt each time an added service is purchased, select Force Receipt Print on Added Service.
2. If you would like to require that the receipt printer be present and online for added services, select Require Printer for Added Services.
3. To enter a welcome message, select Edit next to Greeting text.

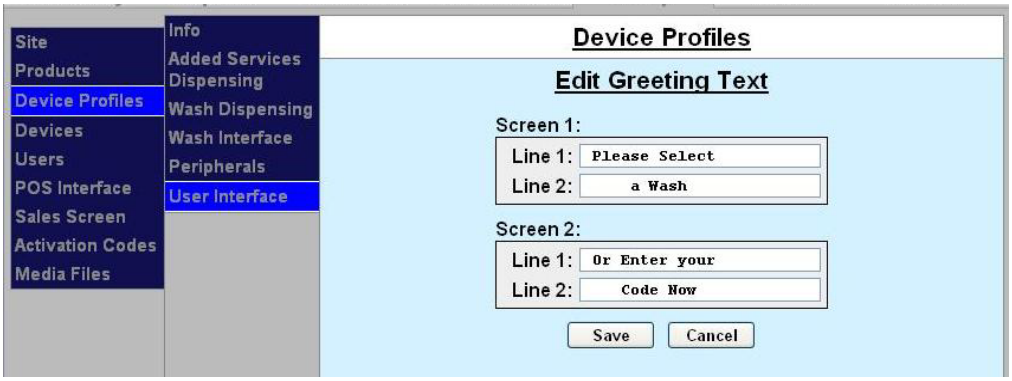


Figure 3.41. Wash Select II Greeting Text Screen

Enter your welcome message into the 4 lines. Each line is limited to 16 characters. Click Save.

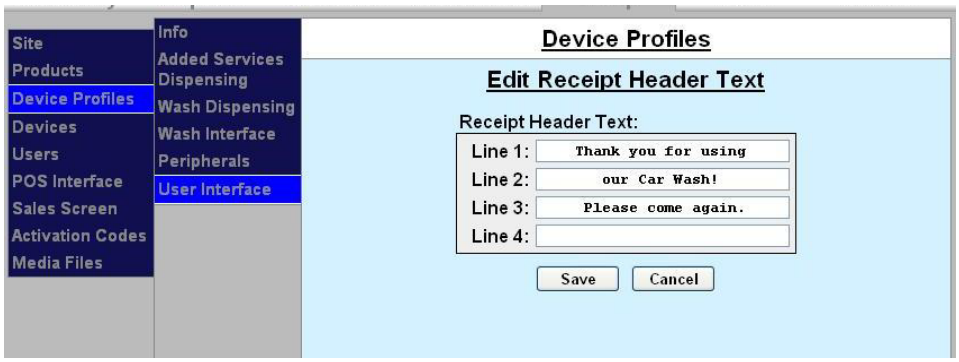


Figure 3.42. Wash Select II Receipt Header Text Screen

Enter the text you would like displayed on the receipt header. Each line is limited to 25 characters. Click Save.

Figure 3.43. Wash Select II Service Phone Number Screen

Enter the service phone number. This will be displayed on the receipt footer. Click Save.

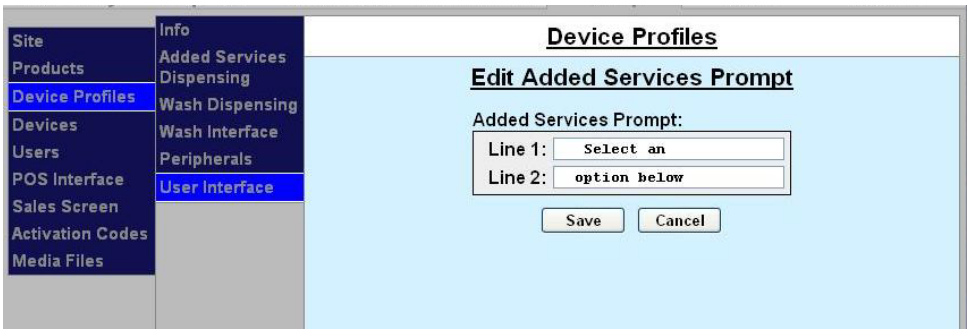


Figure 3.44. Wash Select II Added Services Prompt Screen

If you wish the change the default Added Services Prompt, enter your text then click save.

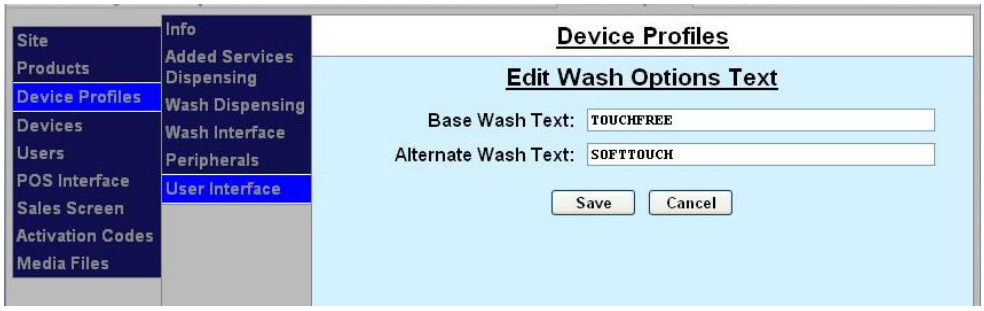


Figure 3.45. Wash Select II Wash Options Text Screen

If you would like to change the default wash options text, enter the text here, then click save.

3.3.9 Paynode Device Profiles

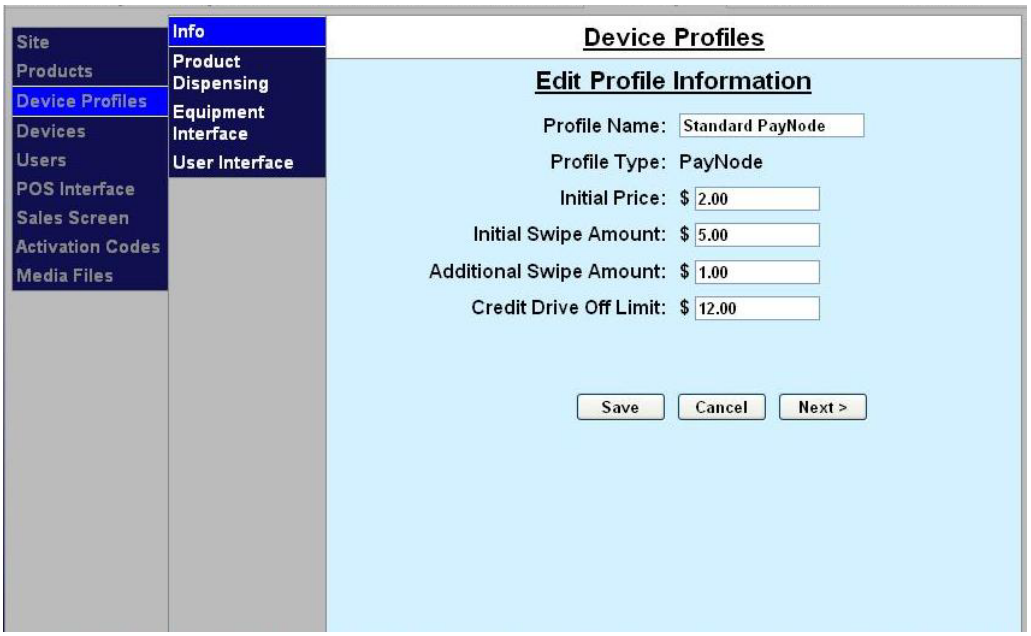


Figure 3.46. Paynode Information Screen

1. Enter the name of the profile.
2. Enter the amount of the Initial Price (for cash). This is the minimum amount of cash that must be deposited before power is applied to the wash bay.
3. Enter the amount for the Initial Swipe Amount (for credit) – This is the amount that will be charged to a credit card the first time it is swiped during a transaction. The initial swipe can be used to start a transaction or to extend the time of a transaction.
4. Enter the amount for the Additional Swipe Amount (for credit) – This is the amount that will be charged to a credit card for any transaction in which a credit card has already been used to start or extend the time of a wash. Typically it is set to a lower value than the initial swipe amount.
5. Enter the amount for the Credit Drive-Off Limit. This setting is used in Count Up mode only. In Count Up mode the transaction is stopped whenever the stop button is pressed and the minimum charge is met or when the transaction reaches this value. This will be the maximum amount a customer will be charged if they start a transaction and do not press the stop button when they are done. Click next.

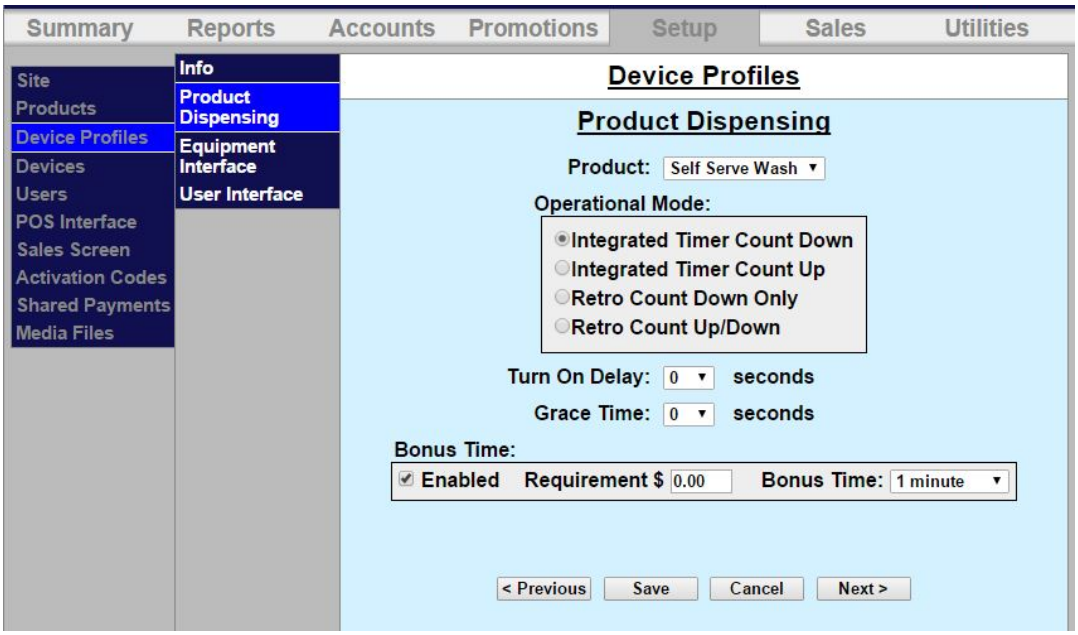


Figure 3.47. Paynode Product Dispensing Screen

6. Select the name of the product from the drop-down menu.
7. Select from the following Operational Modes:
   - **Integrated timer** - in this Operational Mode the WashPay Terminal is a stand-alone device. An external meter box with timer is not required. The WashPay Terminal will accept payment, perform the timer functions, and control the power to the wash bay. The Mode setting on the Timer Tab will also need to be set to have the WashPay Terminal function in either Count Up or Count Down mode.

     Count Down mode is when the customer purchases a block of time. The timer will apply power to the wash bay and then display the purchased amount of time. The time will then be decremented. When the time reaches zero, the power will be removed from the wash bay. In count down mode the customer pays for the transaction up front.

     Count Up mode can only be used with a credit transaction. The customer will swipe their card at the WashPay Terminal. When the transaction is approved, the WashPay terminal will apply power to the wash bay and start a timer to keep track of the amount of time that is used. When the customer finishes their wash, they will press a stop button. This will stop the timer and remove power from the wash bay. The customer will then be charged for the amount of time they used. In Count Up mode, the customer pays at the end of the transaction.
   - **Retro Count Down Only** – in Retro operational mode, the Wash Pay terminal works in conjunction with an external meter box and timer. The external timer will always control the power applied to the wash bay. During credit transactions, the WashPay Terminal will output coin pulses to the external timer for the amount purchased. For cash transactions, the WashPay Terminal will monitor the cash inputs of the external timer for accounting purposes.
   - **Retro Count Up/Down** – For transactions that start with cash, the Retro Count Up/Down mode works just like Retro Count Down mode. When a transaction is started using a credit

card, the WashPay Terminal will run in Count Up mode. It will control the power applied to the wash bay and keep track of the amount of time that is used by the customer.

8. Select the number of seconds for Turn On Delay. This is the number of seconds after the minimum payment is deposited that the equipment will be turned on.
9. Select the number of seconds for Grace Time. This is the number of seconds after the wash turns off that the customer can deposit additional payment to continue the wash without having to deposit the higher initial amount of payment needed to start the wash.) Click Next.
10. Bonus Time (Count Up Only): The Bonus Time feature encourages higher spending by providing additional time when the transaction value reaches a certain dollar amount. To setup Bonus time, check the Enabled box, then enter the required transaction amount, then enter the bonus time earned.

    Count Up Mode (Credit and House Accounts only) – When the transaction reaches the qualifying value, the paynode stops accumulating charges and continues to run for bonus time period. The transaction ends when the bonus time expires or the stop button is pressed.

    Count Down Mode (Cash and Credit) – When the When the transaction reaches the qualifying value, the Paynode continues to run for bonus time period. Any additional payment added while in bonud time will increment the timer.

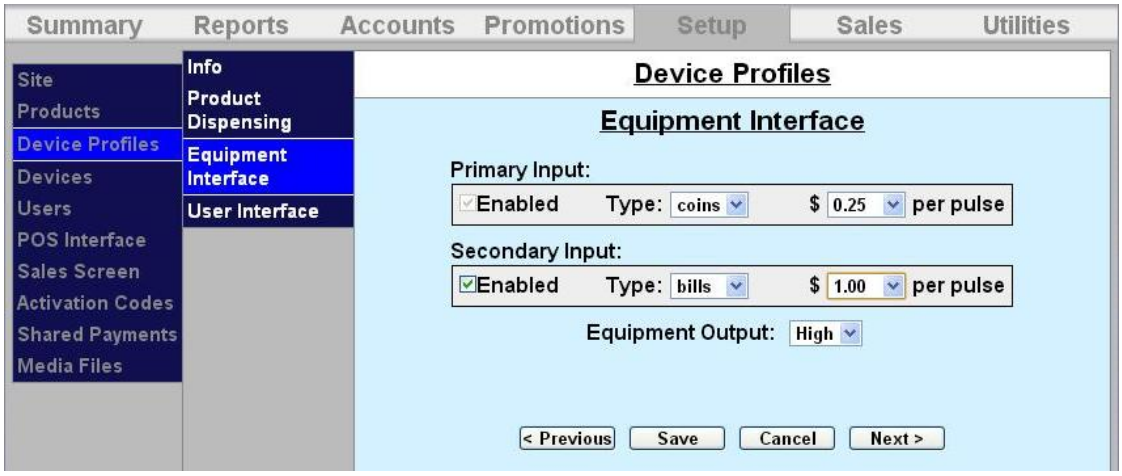


Figure 3.48. Paynode Equipment Interface Screen

1. Select coins for the Primary Input and select $0.25 per pulse.
2. If your coin box allows a secondary type of cash input, select either coins or bills from the drop-down menu, then select the corresponding amount per pulse ($0.25 for coins, $1.00 for bills).
3. In the Equipment Output box, select “High” or “Low.” Select “High” to use high current relay output. Select “Low” to use low current relay output. The WashPay card terminal uses low current relay output by default. Click Next.

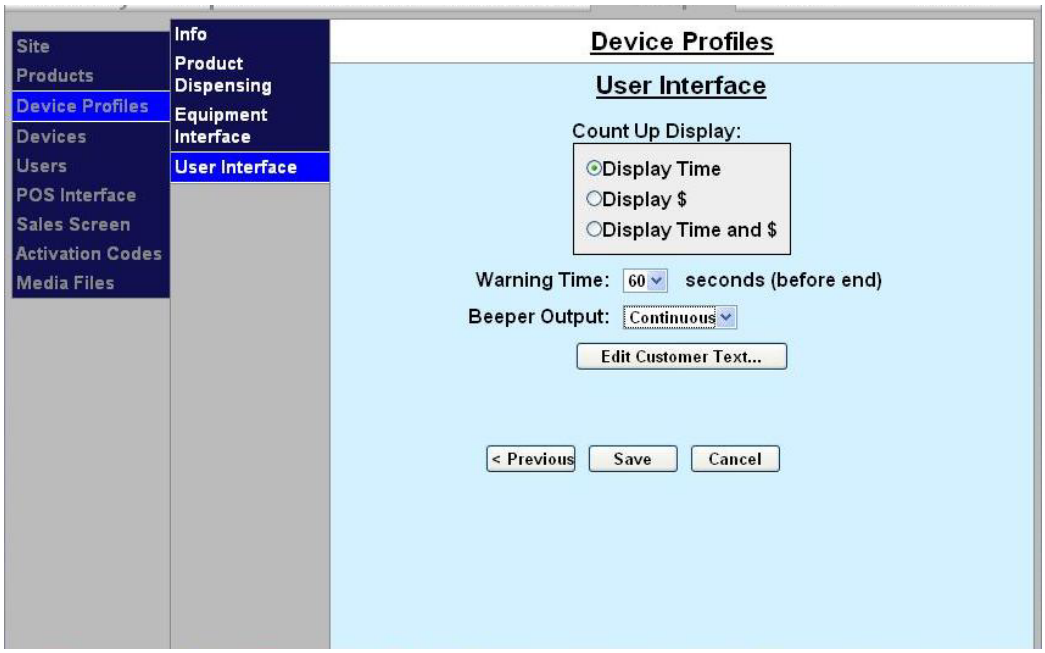


Figure 3.49. Paynode User Interface Screen

1. Select one of the following options for the Count Up Display:
   - Display Time
   - Display $
   - Display Time and Display $
2. Select the Warning Time (seconds before end of wash) This is only used in Count Down mode. When the remaining transaction time reaches this value, the LCD display will start to blink.
3. Select Continuous or Pulsed for Beeper Output. Select "Continuous" if you are using a continuous-tone Sonalert. Select "Pulsed" if a pulse-output Sonalert is being used.
4. Click Save then click Edit Customer Text to customize messages.

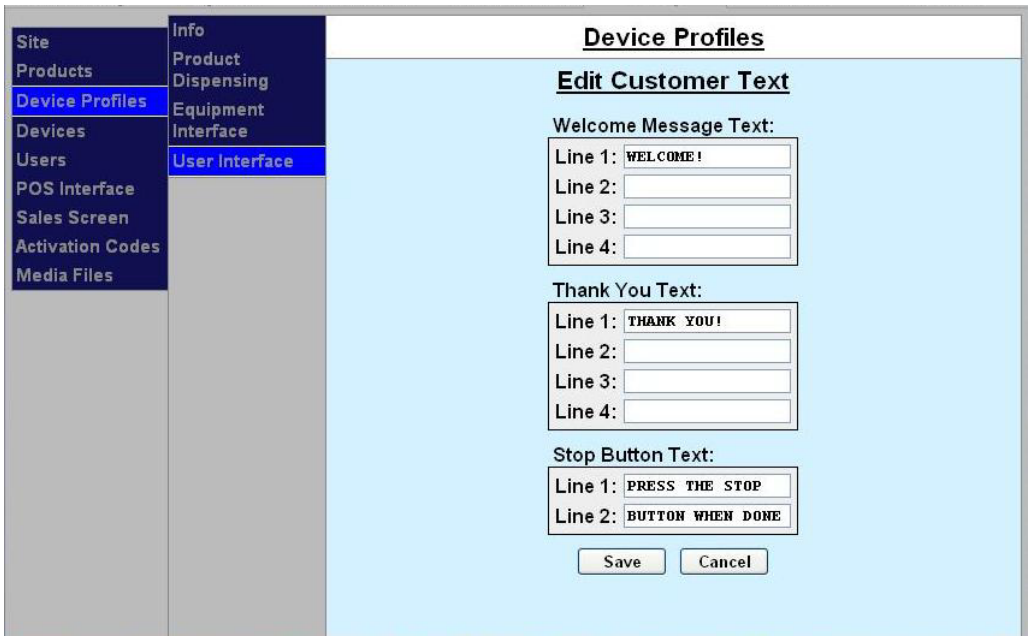


Figure 3.50. Paynode Customer Text Screen

This screen allows you to enter custom Welcome and Thank You messages on the card terminal. The Welcome message will be displayed along with the wash prices when the wash is not in use. The Thank You message will be displayed at the end of the transaction.

1. Enter a Welcome Message (4 lines of text, 16 characters per line). All letter characters will be displayed on the LCD as upper case characters, regardless of how they appear on the input screen.
2. Enter a Thank You Message (4 lines of text, 16 characters per line). All letter characters will be displayed on the LCD as upper case characters, regardless of how they appear on the input screen.

   There are two special character sequences that can be used. When the WashPay detects these sequences, the WashPay will substitute a transaction amount for the sequence. The two sequences are:

   ##:## - Whenever the WashPay detects this character sequence in the Thank You message, it will replace by the amount of time used in the transaction. The time format will be “mm:ss,” where “mm” is the amount of minutes and “ss” is the amount of seconds that were used on the transaction.

   $@@.@@ - Whenever the WashPay detects this character sequence in the Thank You message it will be replaced by the amount charged for the last transaction. The format will be $dd.cc where “dd” is the amount of dollars and “cc” is the amount of cents.
3. Enter a Stop Button Message, if you do not wish to use the default text (2 lines of text, 16 characters per line). Click Save.

3.3.10Printer Device Profiles

WashPay receipt printer device profiles require minimal configuration. You only need to assign a name and enter the receipt text.

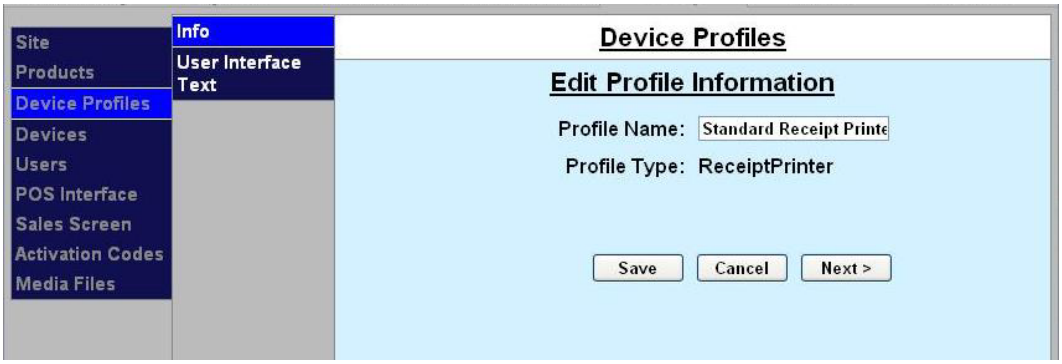


Figure 3.51. Receipt Printer Information Screen

Enter the Profile Name for the receipt printer. Click Next.

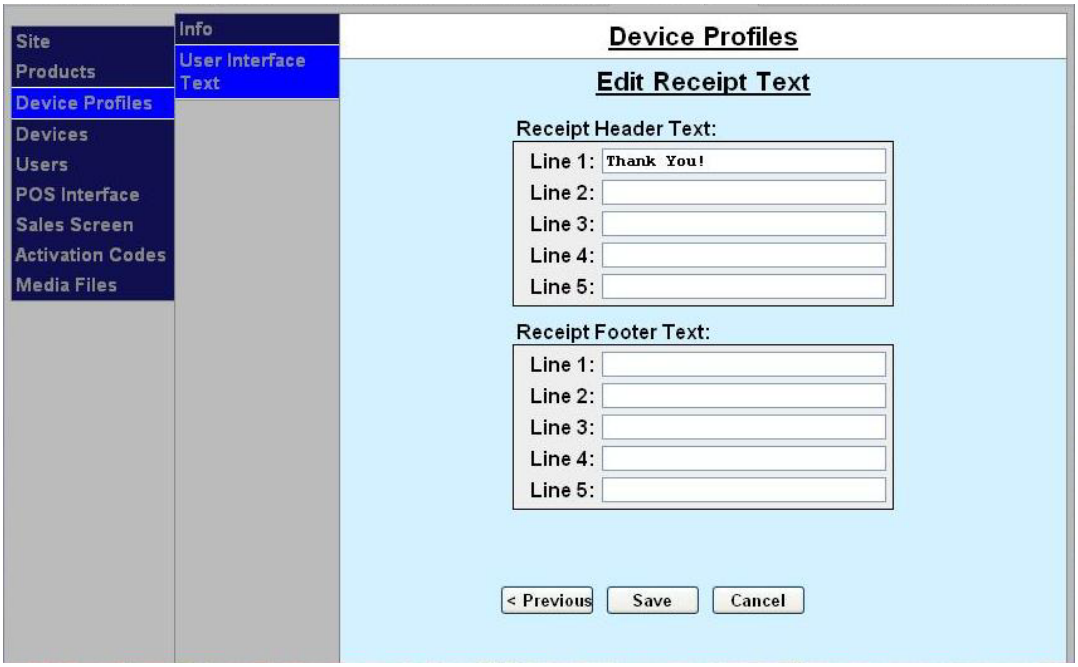


Figure 3.52. Receipt Printer Text Screen

Enter the text you want displayed for the receipt header and footer (up to 5 lines, 26 characters per line will be printed). Click Save.

3.4 Devices

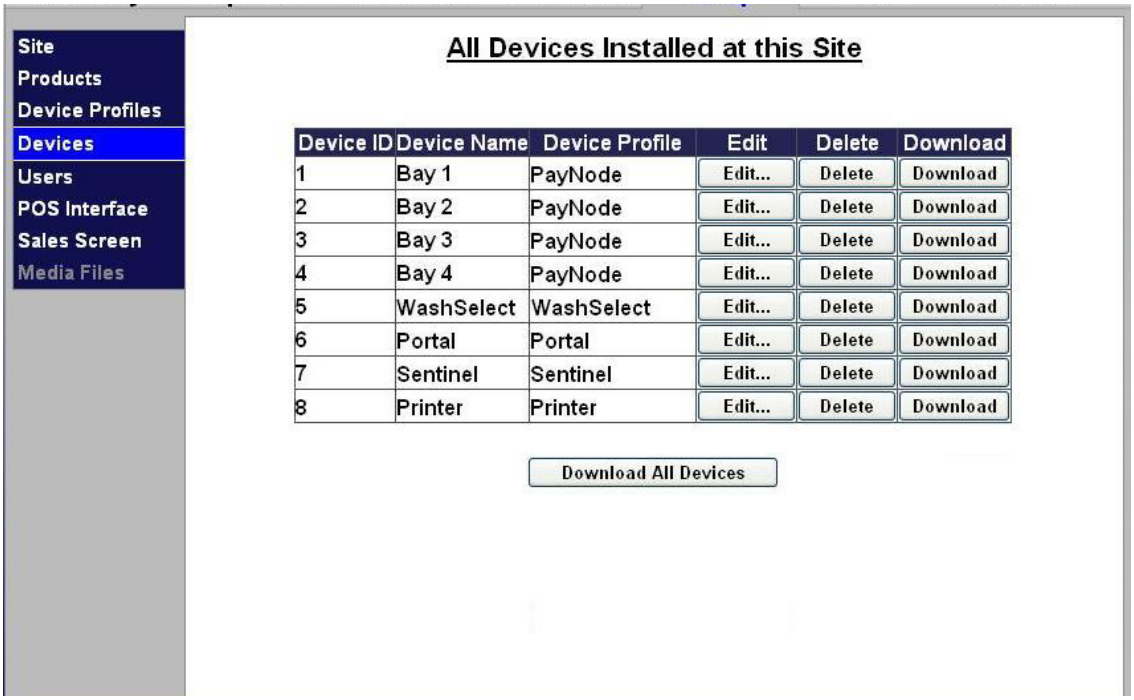


Figure 3.53. Devices Screen

The Devices screen displays all of the Unitec devices that are connected to the network and detected by the Sierra Management Application. This screen allows you to edit or delete devices, and download configuration profiles to each device individually or to all of them simultaneously.

To assign a profile to a device, click the Edit button next to the device name to enter details assigned to that device.

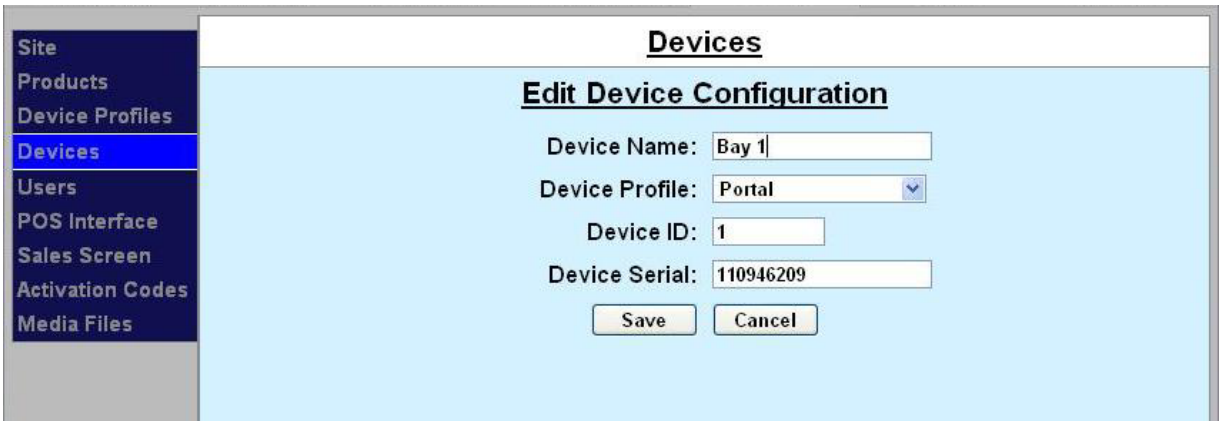


Figure 3.54. Edit Devices Screen

1. Enter the Device Name. The device name will appear on system reports.
2. Select a profile from the drop-down menu.

3. Enter the Device ID in numeric characters. The device ID is automatically assigned and changing it could affect reporting. The default ID should not be changed unless directed to do so by Unitec technical support representative.
4. If you have Site Lynx multi-site management, enter the Device Serial number.
5. Click Save.

Once the profile is assigned to the unit, you will need to download the profile to the unit. If you make changes to the profile, you will need to download the device again. Click the Download button next to the device you wish to download to. If you make changes to a profile that has several devices assigned, you will click the Download All Devices button. Once the download is complete, the following screen will be displayed:

Figure 3.55. Download Device Screen

3.5 Users

The Users section allows you to set access permissions for different levels of users. Owner is the default Administrator. The Sierra Server also has Attendant and Service Provider users set up by default. To edit existing users or create new users, click Users on the left frame. To ensure security of the system, all factory default passwords should be changed.

Figure 3.56. Edit User Screen

3.5.1 Access Privileges

Access privileges are a set of rules that identify which aspects of the system individual users can access. Access rules are enforced for Sierra Management, Kiosk Maintenance, and Console logins.

3.5.2 Administrative Users

Users who have access configured that allow them to modify credit settings, user settings, or the underlying software are considered Administrative Users. Any user granted User Management and/or Utilities access fall into this classification. As a result, these users are subject to the following rules:

- Passwords must be 7-10 characters in length, and must include both alpha and numeric characters.
- Passwords expire every 90 days, and re-use of a password is restricted for the last 5 used.
- Accessing Sierra Management from across a network will require MFA, a text-message based secondary login.

Non-administrative users are excluded from these restrictions.

3.5.3 Default Users

Sierra includes several pre-configured Default Users "out of the box," with specific Access assigned.

- Owner (00,00) – Administrative user with all access privileges
- Attendant (01,01) – Non-admin user with only Device Access and Code/Account Sales access
- Service Provider (02,02) – Non-admin user with only Device Access and Device Setup access
- Manager (10,10) – Non-admin user with all access privileges EXCEPT User Management and Utilities

3.5.4 Forced Password Changes

Under certain circumstances, the Sierra Management Interface will force a user to change their password. These include:

- First-time login with Default Password for <u>all</u> Default Users
- Expired password for Admin Users

If you encounter the Change Password page under these conditions, the 7-10 alpha-numeric rules will be enforced regardless if the user is Admin or Non-admin.

3.5.5 Forgotten Passwords

3.5.5.1 <u>Sierra Management Interface</u>

Sierra Management includes a "Forgot Password" feature that allows a user who has email notifications setup to have their current password emailed to them.

3.5.5.2 <u>Maintenance Interface</u>

The Maintenance Login screen now displays the Database ID and a message to call Unitec for password assistance. Entering the Support Code based on the Database ID into the Password field will allow limited Maintenance access (Setup, Test Hardware). Sierra Management can then be accessed on the kiosk under Setup> Basic Setup, and a user's credentials changed as normal.

3.6 <u>Adding a New User</u>

Click Add New User under the table or Edit next to an existing user's name to set their access privileges.

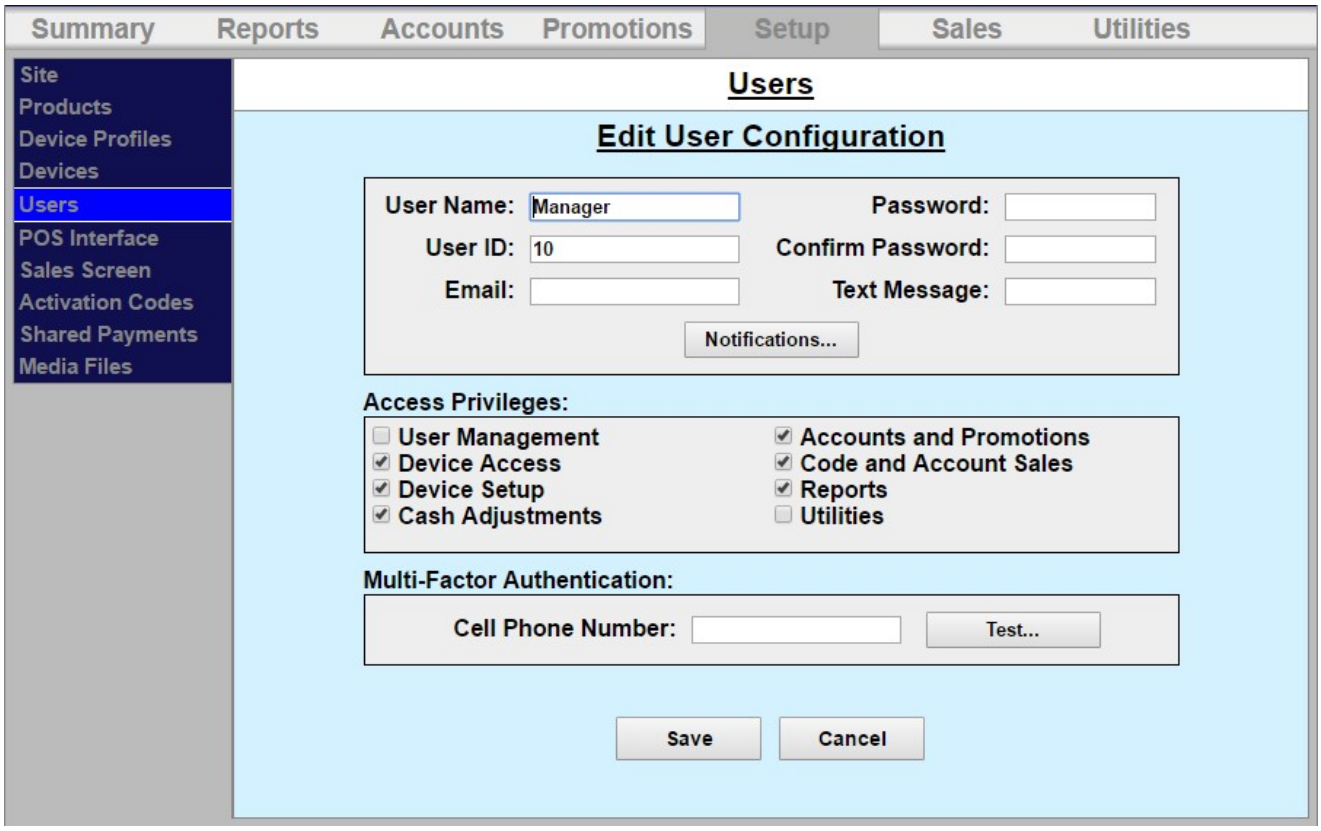


Figure 3.57. Edit Users Configuration Screen

1. Enter the User Name.
2. Enter the User ID (any 2-digit number between 00 and 99).
3. Enter the user password in the Password field (any number from 1 to 8 digits).
4. Enter the user password again in the Confirm Password field.
5. Enter the user's email address. This allows the Sierra platform to email the user his password if it is forgotten, and for email notifications. **NOTE**: If this field is not filled out or is not correct, there is NO WAY to recover a lost password.
6. Enter the SMS address of your cell phone to receive text messages (for example, XXXXXXXXX@vtext.com where x is your cell phone number) from the entry unit. Contact your wireless carrier for this information.
7. User access to software functionality is managed using access privileges. Access privileges are a set of rules that identify which aspects of the system individual users can access. Select the Access Privileges you wish to assign to that user.

   NOTE: An administrative password is a user that has either "User Management" or "Utilities" access privileges under Setup>Users. An administrative user MUST enter a cell phone number.

   NOTE: To setup a non-administrative user to verify and sell codes or sell accounts, "Accounts and Promotions" and "Code and Account Sales" must be checked on the user account.

8. Click on Notifications.

Figure 3.58. Edit Users Notifications Screen

1. Select the format for the notifications you would like to receive: email or text message. You may select one or both.
2. Select which categories of notifications you wish to receive from the entry unit.
3. Click Save.

Once the users are configured, you will need to download the device profiles to update the user information.

3.7 POS Interface

If your carwash is located onsite with a convenience store and gas pumps, you may sell codes through the pumps and through the register inside the store. In order for the entry unit to communicate with the register and pumps, the POS Interface must be configured. To configure the POS Interface, click POS Interface on the left frame.

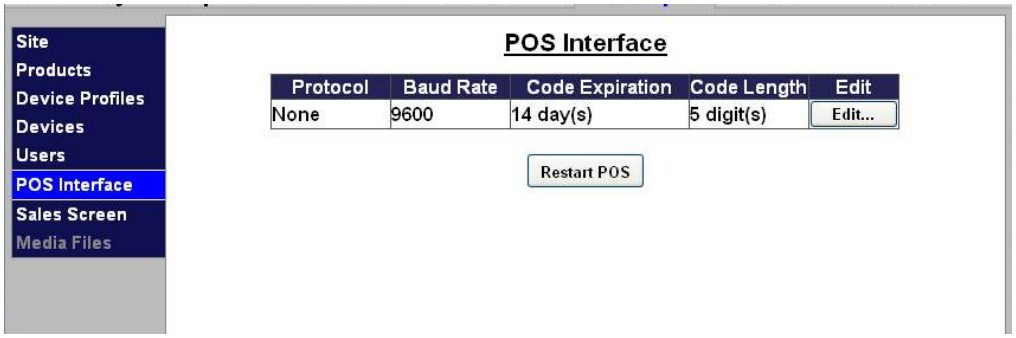


Figure 3.59. POS Interface - Main

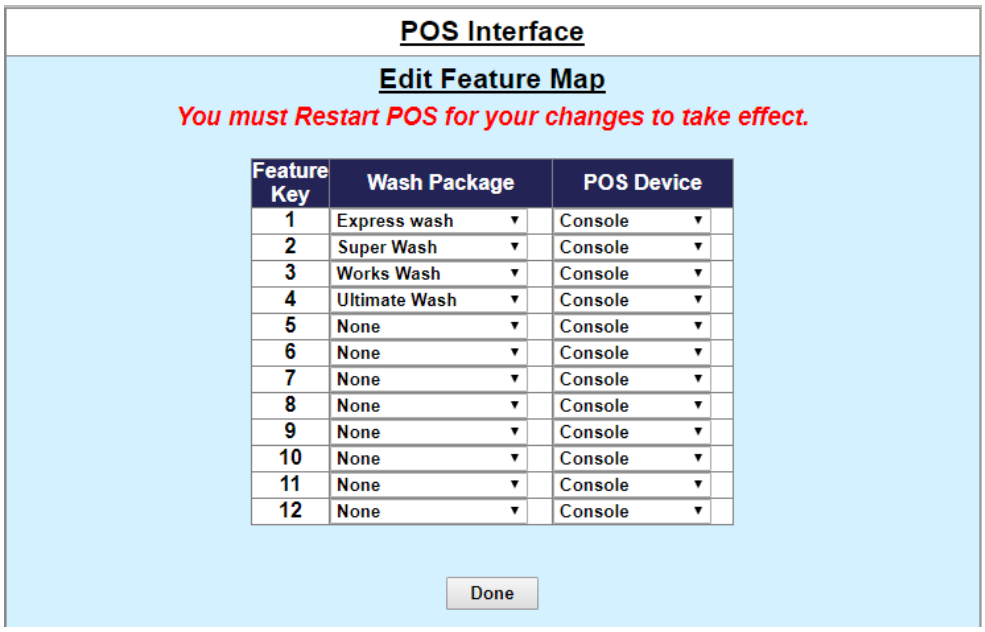
Click Edit in the POS Interface table.

Note: You may also restart the POS connection from this page.

Figure 3.60. POS Interface Configuration

1. Select the code length from the drop down menu. Your options are 5, 6 or 7 digits.
2. Enter the Expiration period, from 00 to 99 days. The factory default setting is 00, which disables code expiration.
3. Select either POS1 or POS2 for the POS interface protocol from the drop down menu. Consult C-Store POS manufacturer for proper setting.

4. Select either 1200, 2400. 4800, 9600, or 19200 for the Baud Rate of the register/pump interface from the drop down menu. Consult C-Store POS manufacturer for proper setting.
5. Select whether you want the entry unit to send code expiration and wash status to the C-Store register.
6. Select whether you want the entry unit to use hardware handshaking when communicating with the C-store POS register.
7. Click on Feature Map.



POS Interface

Edit Feature Map

You must Restart POS for your changes to take effect.

Feature Key	Wash Package	POS Device
1	Express wash	Console
2	Super Wash	Console
3	Works Wash	Console
4	Ultimate Wash	Console
5	None	Console
6	None	Console
7	None	Console
8	None	Console
9	None	Console
10	None	Console
11	None	Console
12	None	Console

Done

Figure 3.61. POS Feature Mapping

1. The feature keys should match wash ID numbers (or car wash keys) that are programmed into the C-store POS register. In most cases, only 3 or 4 washes (or feature keys) would be programmed. Determine the feature keys that will be used in the POS interface and select the desired wash package from the drop down menu.
2. Assign the feature key to a POS device: Console, Pump or Register. This setting is used for reporting with wash codes purchased under the associated feature key reported as sold from the assigned POS device.

   NOTE: If you are using the Dresser Wayne credit interface, you will also be allowed to have accounts selected for the POS device.
3. Repeat this process for each wash package and each device you wish to sell wash codes.
4. Click Done.

3.8 Sales Screen

If you have a WINCON console or would like to issue codes from a PC, tablet or smart phone, the Sales screen allows you to setup buttons on the console for car wash code sales, discounts, account programs, reloading accounts, issuing rewash codes, and printing the Revenue and Sales reports. This function is available on the Sales tab, by IP address, or on the console. To view samples of the Sales screen, see Section 7.

NOTE: To setup a non-administrative user to verify and sell codes or sell accounts, "Accounts and Promotions" and "Code and Account Sales" must be checked on the user account. See Section 3.5 for more information.

Figure 3.62. Sales Screen - Main

Click on a button to configure it.

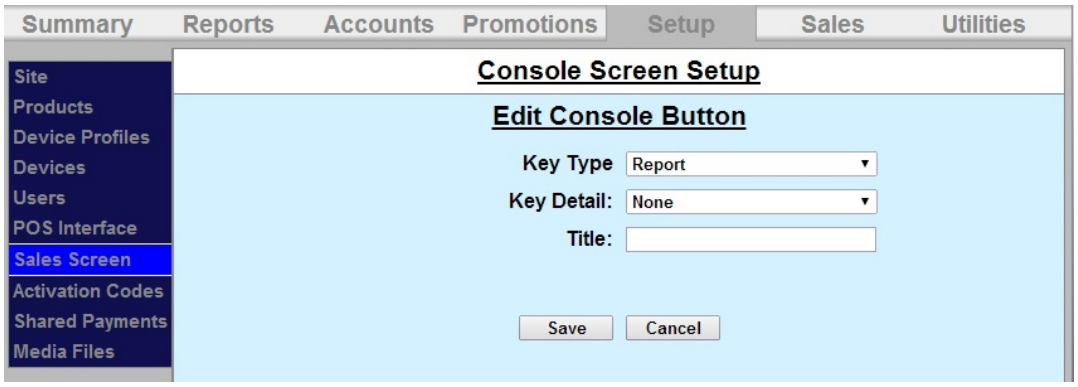


Figure 3.63. Console Screen Setup

1. Select the key type from the drop down menu. Your options are Product, Report, Account, Reload, and Rewash.
2. Select the either the wash package or report type from the Key Detail drop down menu.
3. Enter a title for the key. This field is limited to 16 characters. Some functions are automatically named.
4. Select Save to save the button configuration.

4 Reports Tab

The Reports function allows you to view accounting information and product usage, filtered by ranges and dates you specify. When a report is generated, the associated data will appear on the screen with Print and Save functions. By selecting the Print button, you can print a copy of the report at your local printer. The Save function allows the report data to be saved in .CSV format so it can be viewed and/or sorted in standard 3rd party software applications (such as Microsoft Excel).

- **Revenue Report** – Reports revenue at a summary level for a user-defined time period.
- **Sales Report** –Lists items that were sold (e.g. Washes, Added Services, Wash Codes etc.) for a user-defined time period.
- **Cash Report** – Daily report of cash received and dispensed by the unit.
- **Transaction History** – Listing of transactions recorded at the unit for a user-defined time period.
- **Code Listing** – Listing of wash codes (sold at a C-store POS or Pump) currently stored in memory.

4.1 Site Revenue Report

Revenue reports can be generated for the current business day, previous day or for a user specified date range. From the report view, the user can print a report copy or save an electronic version in .CSV format. To view the Site revenue report, perform the following steps:

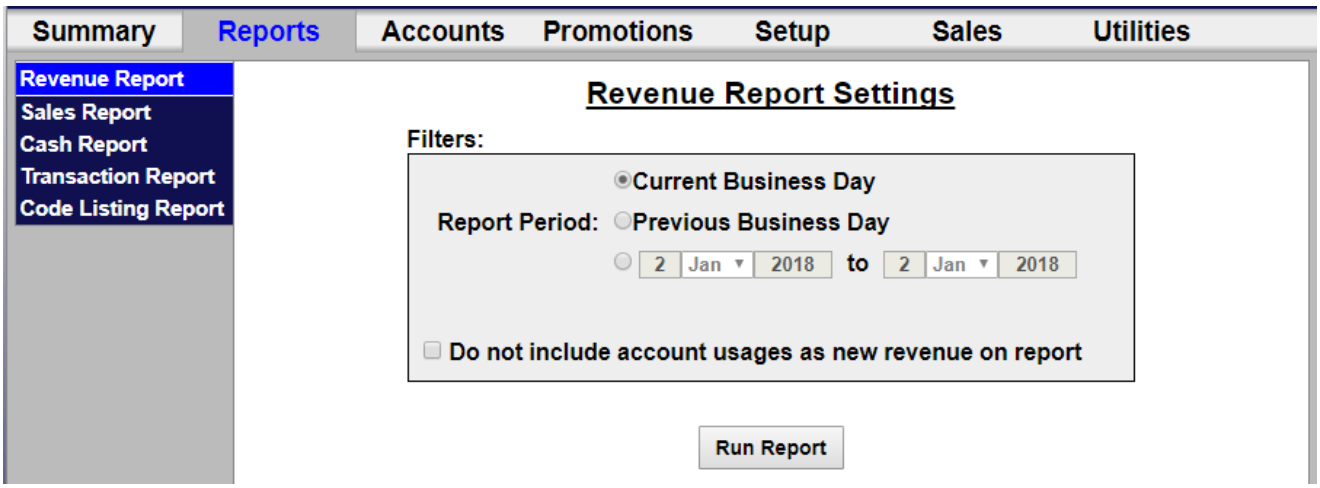


Figure 4.1. Site Revenue Settings

Select the day or date range and click Run Report.

An example report is shown below with descriptions of the included data.

Revenue Summary

Wash Packages

	Qty	Paid	Revenue	Prepaid	Total	Subscription	Sales Net Avg
Express	12	12	$96.00	$0.00	$96.00	$0.00	$8.00
Deluxe	16	16	$144.00	$0.00	$144.00	$0.00	$9.00
Supreme	27	27	$257.00	$8.97	$265.97	$0.00	$10.33
Works	79	79	$900.00	$31.33	$931.33	$0.00	$12.00
Total	134	134	$1,397.00	$40.30	$1,437.30	$0.00	$10.95
Added Services							
Total	0	0	$0.00	$0.00	$0.00		$0.00
Automatic Totals			$1,397.00	$40.30	$1,437.30	$0.00	$10.95
Self Serve Products							
Self Serve Wash	122	107	$481.13	$0.00	$481.13	$0.00	$4.50
Dog Wash	3	1	$10.00	$0.00	$10.00	$0.00	$10.00
Vacuum	45	45	$68.50	$0.00	$68.50	$0.00	$1.52
Self Serve Totals	170	153	$559.63	$0.00	$559.63	$0.00	$3.66
Car Wash Totals	304	287	$1,956.63	$40.30	$1,996.93	$0.00	

Code Sales

	Qty	Paid	Revenue	Average
Code Totals	0	0		

Account Sales

	Qty	Revenue
Gift Card	1	$97.83
Total	1	$97.83

Account Reloads

Total	0	$0.00

Site Totals

	Revenue	Prepaid	Subscription
	$2,054.46	$40.30	$0.00
Tax Collected	$0.00	$0.00	$0.00

Total Payments	$2,054.46	$40.30	$0.00
Fundraisers Due	$0.00	$0.00	$0.00
Net Revenue	$2,054.46	$40.30	$0.00

Tender Summary

Payment Type	Wash Products	Codes	Accounts	Total	Over/Under Payments
Visa	$1,153.10		$0.00	$1,153.10	$2.20
MC	$212.63		$0.00	$212.63	$0.00
Fleet	$11.65		$0.00	$11.65	$0.00
Cash	$579.25		$0.00	$579.25	$0.00
(external)		$0.00	$97.83	$97.83	$0.00
Total Payments	$1,956.63		$97.83	$2,054.46	$2.20
Prepaid Type					
Monetary Acct	$40.30		$0.00	$40.30	
Total Prepaids	$40.30			$40.30	
Subscription Type					
Subscription				$0.00	

Discounts Applied

Type	Count	Value
Fleet Acct	2	($18.00)
Total	2	($18.00)

Figure 4.2. Sample Site Revenue Report

Revenue Summary - Provides a wash count, breakdown of purchased and pre-paid transactions, and average sales value. The prepaid column includes prepaid house accounts and 3rd party gift cards (through Mercury Payment Systems).Added services and self serve (if applicable) totals are also displayed.

Average sales metrics are provided with and without discounts applied and the value of all discounts is identified. This value includes promotions and any discounts provided to fleet customers.

Code Sales - Provides a breakdown of washes purchased from the pumps and registers.

Account Sales - Provides a breakdown of accounts offered on the sales screens

Account Reloads – Provides a breakdown of accounts that were re-purchased at the sales screen.

Site Totals – Displays the total of all revenue, pre-paid accounts, and subscription accounts (if any).

Tax Collected – Displays the total taxes charged for credit purchases (if required in your state).

Fundraisers Due - Identifies any amounts due from the use of fundraiser promotion types.

Net Revenue - Identifies the net revenue, with taxes and fundraisers subtracted from the previous sales totals.

Tender Summary – Provides a breakdown of the payment types submitted, included credit card type, cash, external fleet, prepaid cards or accounts, and subscriptions.

Discounts Applied – Provides the type of discount and monetary value of the discount.

4.2 Sales Report

The Sales report shows the products that were purchased in the reporting period. This report can be generated for a specific payment device or for all devices on site. The available report periods are current day, previous day or a user-specified date range. Sales reports can be printed or saved in .CSV format. To run a Sales report:

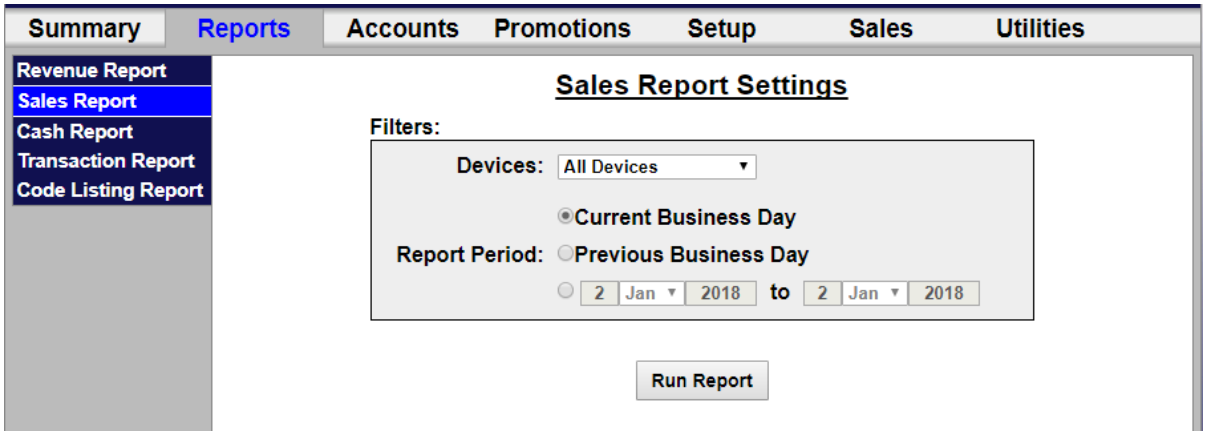


Figure 4.3. Sales Report Settings

Select the device from the drop down menu then select the date. Click Run Report.

An example report is shown below with descriptions of the included data.

Sales Report

Site: Your Carwash

Settings... Print Save

Run Date: 26 Jan 2012

Report Period: 1 Dec 2011 - 1 Dec 2011

Device(s): All Devices

Wash Activations

Product	Purchases	Code Use	Maintenance	Total	Usage
Express Wash	2	0	0	2	6.06 %
Super Wash	3	0	0	3	9.09 %
Deluxe Wash	6	0	0	6	18.18 %
Works Wash	22	0	0	22	66.67 %
Total	33	0	0	33	100 %

Self Serve Activations

	Cash		Credit		Account		Maintenance	
Product	Count	Avg.	Count	Avg.	Count	Avg.	Count	Avg.
Self Serve Wash	11	10.9 min	3	12.82 min	0	0 min	0	0 min
Dog Wash	3	5.82 min	1	10.57 min	3	8.62 min	0	0 min

Added Services

Product	Count	Usage
Total	0	0 %

Prepaid Upgrades

Product	Count	Amount	Usage
Express Wash	0	$0.00	0 %
Super Wash	0	$0.00	0 %
Deluxe Wash	0	$0.00	0 %
Works Wash	0	$0.00	0 %
Total	0	$0.00	0 %

Code Sales

Product	Pump	C-Store	Remote Console	Total	Usage
Express Wash	0	0	0	0	0 %
Super Wash	0	0	0	0	0 %
Deluxe Wash	0	0	0	0	0 %
Works Wash	0	0	0	0	0 %
Total	0	0	0	0	0 %

Payments

Type	Count	Usage
MasterCard Credit	10	18.52 %
Visa Credit	5	9.26 %
Debit	0	0 %
Cash	21	38.89 %
Discount	0	0 %
Fundraiser	0	0 %
Fleet Account	0	0 %
Prepaid Wash	0	0 %
Prepaid Account	10	18.52 %
Free Wash	6	11.11 %
Special	0	0 %
Subscription Account	2	3.7 %
Total	54	100 %

Figure 4.4. Sample Sales Report

Wash Activations - Provides a count of washes dispensed, broken down by wash type, and includes washes dispensed using codes or maintenance accounts. The usage metric shows the percentage of activations for each wash type. Self-serve wash packages are displayed by purchase type - cash, credit, house account, or maintenance account.

Added Services - Provides a count of added services that were purchased, broken down by service type. The usage metric shows the percentage of customers that selected the service.

Prepaid Upgrades – Provides a count of and dollar amount earned for upgrades purchased with a wash package. The usage metric shows the percentage of activations for each wash type.

Code Sales – Provides a count of code sales and is displayed by POS device – pump, c-store register, or remote console. The usage metric shows the percentage of activations for each wash type.

Payments - Provides a list of payment methods used with the percentage of use (based on $ value).

4.3 Cash Report

The cash report provides details on cash, coupons and tokens that were received and dispensed during the business day. The report can be generated for the current day (as a real time snapshot) or for any previous day. To run a Cash report:

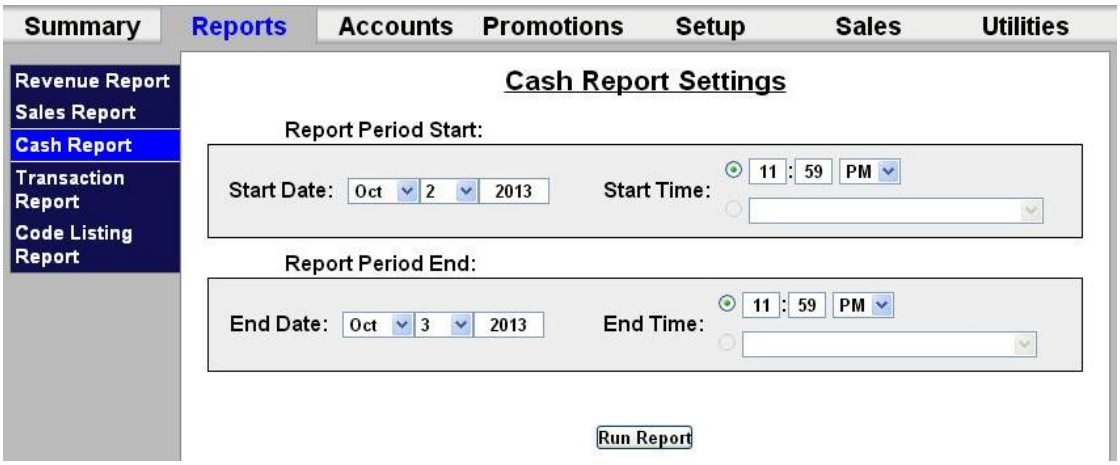


Figure 4.5. Cash Report Settings

Select the start date and time, then select the end date and time. Click Run Report.

An example report is shown below with descriptions of the included data.

Cash Report

Site: Your Carwash

Settings... Print Save

Run Date: 27 Jan 2012 9:28 AM

Report Period: 23 Jan 2012 11:59 PM - 27 Jan 2012 11:59 PM

All Devices:

Net Cash Received: $203.00
Net Deposit: $433.00

Date/Time	Device	User ID	Type	Bill Acceptors	Coin Acceptors	Bill Dispensers	Coin Dispensers	Total
1/26/12 7:42 PM	SENTINAL 1	00	remove	$315.00	$1.50	$0.00	$0.00	$316.50
1/26/12 7:44 PM	SENTINAL 2	00	remove	$282.00	$18.50	$0.00	$0.00	$300.50
1/27/12 6:39 AM	SENTINAL 1	00	add	$0.00	$0.00	$94.00	$2.50	$96.50
1/27/12 6:43 AM	SENTINAL 2	00	add	$0.00	$0.00	$85.00	$2.50	$87.50

Device: SENTINAL 1

Cash Summary

Type	Amount
Starting Balance	$1,736.00
Ending Balance	$1,609.00
Cash Received	$168.25
Cash Dispensed	$75.25
Net Cash	$93.00
Cash Added	$96.50
Cash Removed	$316.50
Net Deposit	$220.00

Cash Received

Type	Count	Value
Quarter	5	$1.25
Dollar Bill	7	$7.00
Five Dollar Bill	6	$30.00
Ten Dollar Bill	3	$30.00
Twenty Dollar Bill	5	$100.00

Change Dispensed

Type	Count	Value
Quarter	9	$2.25
Dollar Bill	28	$28.00
Five Dollar Bill	9	$45.00

Other Receipts

No data available.

Other Dispensed

No data available.

Device: SENTINAL 2

Cash Summary

Type	Amount
Starting Balance	$1,700.00
Ending Balance	$1,597.00
Cash Received	$174.50
Cash Dispensed	$64.50
Net Cash	$110.00
Cash Added	$87.50
Cash Removed	$300.50
Net Deposit	$213.00

Cash Received

Type	Count	Value
Quarter	50	$12.50
Dollar Bill	12	$12.00
Five Dollar Bill	10	$50.00
Ten Dollar Bill	4	$40.00
Twenty Dollar Bill	3	$60.00

Change Dispensed

Type	Count	Value
Quarter	6	$1.50
Dollar Bill	18	$18.00
Five Dollar Bill	9	$45.00

Other Receipts

No data available.

Other Dispensed

No data available.

Figure 4.6. Sample Cash Report

The top section displays the cash adjustments record that is generated when an employee uses the cash removal or deposit functions (from the Maintenance functions) to restock change devices or remove cash from a cash acceptor or dispensing device. The adjustment record shows the date and time of the event, the user ID of the employee that performed the adjustment, and lists the amount of cash that was added or removed. The total amount of cash that was added and removed through these adjustments should match the associated entries in the Cash Summary section.

The bottom of the report displays the cash information for each device.

Cash Summary - Shows starting and ending balance of all cash in the unit (in both bill and coin acceptors and change dispensing devices). The amount of cash that was collected from customers is shown in the Cash Received entry. The Cash Added entry is the amount of cash that was added to restock change dispensers. The Cash Removed entry is the amount of cash that was removed from any of the cash devices (cash acceptors or change dispensers). If the Cash Added or Removed amounts are not zero, there should be a cash adjustment entry at the end of the report that provides a record of related events.

Cash Received - Provides a count and value of all cash received from customers, broken down by type and denomination.

Other Receipts - Provides a count of non-cash media (coupons, tokens) received from customers.

Change Dispensed - Provides a count and value of all change dispensed to customers, broken down by type and denomination.

Other Dispensed – Provides a count of tokens dispensed (if applicable).

4.4 Transaction Report

The transaction report provides a list of all transactions that were recorded over the reporting period. Reports can be generated for the current business day, previous day or for a user-specified date range.

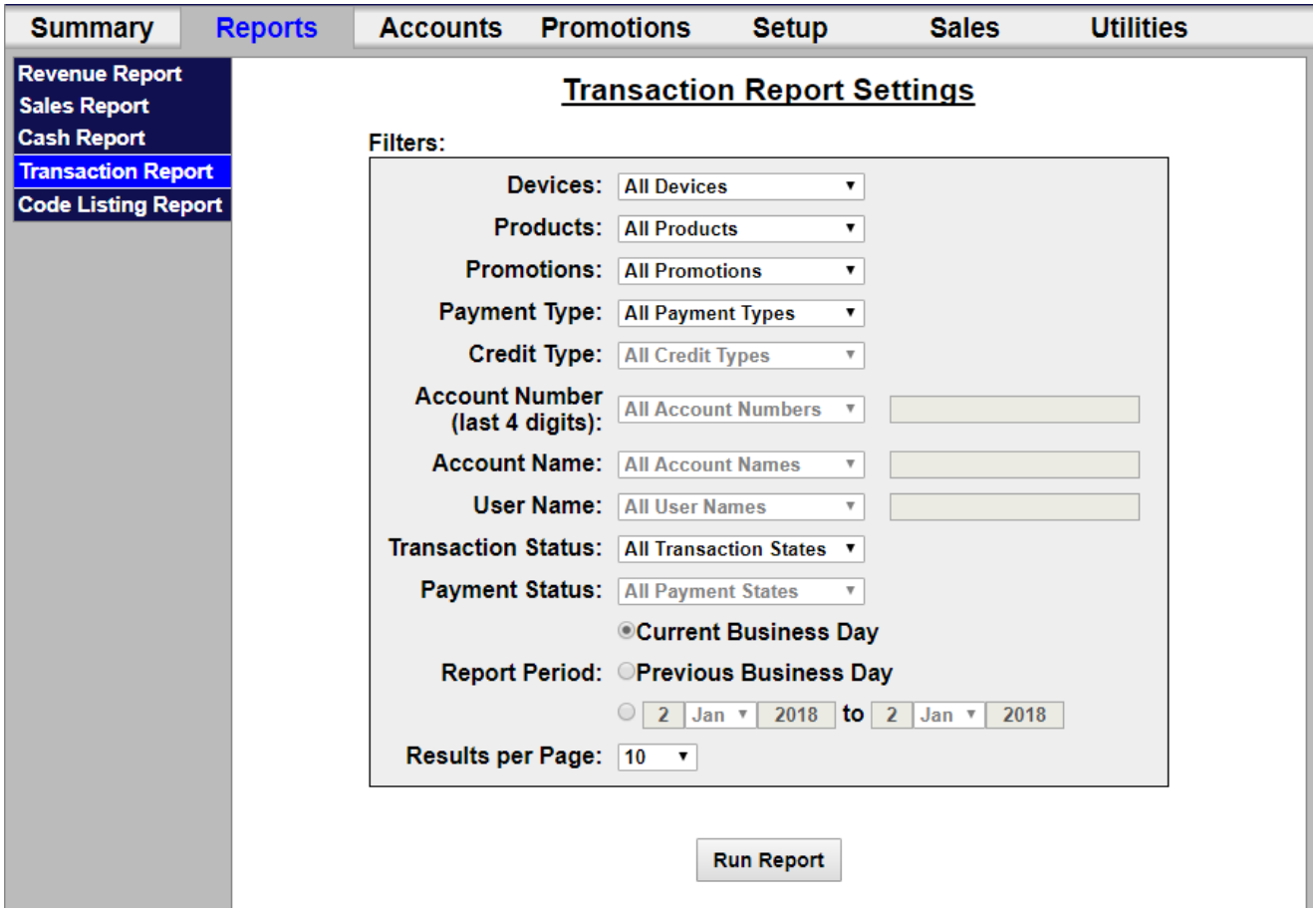


Figure 4.7. Transaction Report Settings

Additional filters are provided to refine reports include:

Devices – show transactions for a single payment device on the site.

Products – show transactions where a specific product (wash or added service) was purchased.

Payment Type – show transactions where a specific payment type (cash, credit, house account etc.) was used. Additional filters are provided for some payment types to further refine the report to a specific account or account type.

An example report is shown below. The date, time, amount, device, product and any discounts applied are listed for each purchase. The payment column displays the specific payment types used. This column will show 'Multiple' for a transaction that included multiple payment types (i.e., split tender). The Account Name column (if applicable) will list the account holder's name for transactions that were paid with a house account. The Account column will display either the last four numbers of the credit card used or the house account used. The Transaction status will be shown as processed (transaction was completed), cancelled (customer cancelled the transaction before it could be completed), or pending (transaction was started was not completed, still in process).

Transaction Report

Site: Your Carwash

Settings... Print Save

Run Date: 27 Jan 2012

Report Period: 27 Jan 2012 - 27 Jan 2012

Device(s): All Devices

Date/Time	Amount	Device	Product(s)	Payment(s)	Discount	Account	Status	Details
1/27/12 09:29	$11.00	SENTINAL 1	Deluxe Wash	MasterCard Credit	$0.00	3416	Complete	details
1/27/12 09:23	$11.00	SENTINAL 2	Deluxe Wash	MasterCard Credit	$0.00	8380	Complete	details
1/27/12 09:20	$11.00	SENTINAL 2	Deluxe Wash	Visa Credit	$0.00	5742	Complete	details
1/27/12 09:19	$7.00	SENTINAL 1	Express Wash	Cash	$0.00		Complete	details
1/27/12 09:14	$11.00	SENTINAL 1	Deluxe Wash	Visa Credit	$0.00	4396	Complete	details
1/27/12 09:02	$11.00	SENTINAL 1	Deluxe Wash	Remote POS Code	$0.00	POS 1	Complete	details
1/27/12 08:55	$11.00	SENTINAL 2	Deluxe Wash	Remote POS Code	$0.00	POS 1	Complete	details
1/27/12 08:37	$9.00	SENTINAL 1	Super Wash	Visa Credit	$0.00	8207	Complete	details
1/27/12 08:20	$11.00	SENTINAL 1	Deluxe Wash	Remote POS Code	$0.00	POS 1	Complete	details
1/27/12 08:09	$11.00	SENTINAL 1	Deluxe Wash	Remote POS Code	$0.00	POS 1	Complete	details

1 2 3

Figure 4.8. Sample Transaction Report

When the transaction report is viewed, a "details" link will be displayed for each record. By clicking on this link, the user can view and print a more detailed record of the transaction. An example of this detailed view is shown below.

Transaction Details

Print

Site:
Started: 1/27/2012 9:19:32 AM
Completed: 1/27/2012 9:19:38 AM
Total: $7.00
Status: Complete

Products

Name	Type	Rate	Quantity	Device
Spit Bath	Wash	$7.00	1.00	SENTINAL 1

Payments

Type	Amount	Media	Acct#	Expires	Ref#	CC	Status	Acct Name	User Name
Dollar Bill (dispensed)	$3.00	Bill					Complete		
Ten Dollar Bill (received)	$10.00	Bill					Complete		

Done

Figure 4.9. Sample Transaction Details

4.5 Code Listing Report

The code listing report is applicable to sites that use the optional POS interface or console for wash code sales. It can be used to check the status of a specific code by entering all or part of the code number.

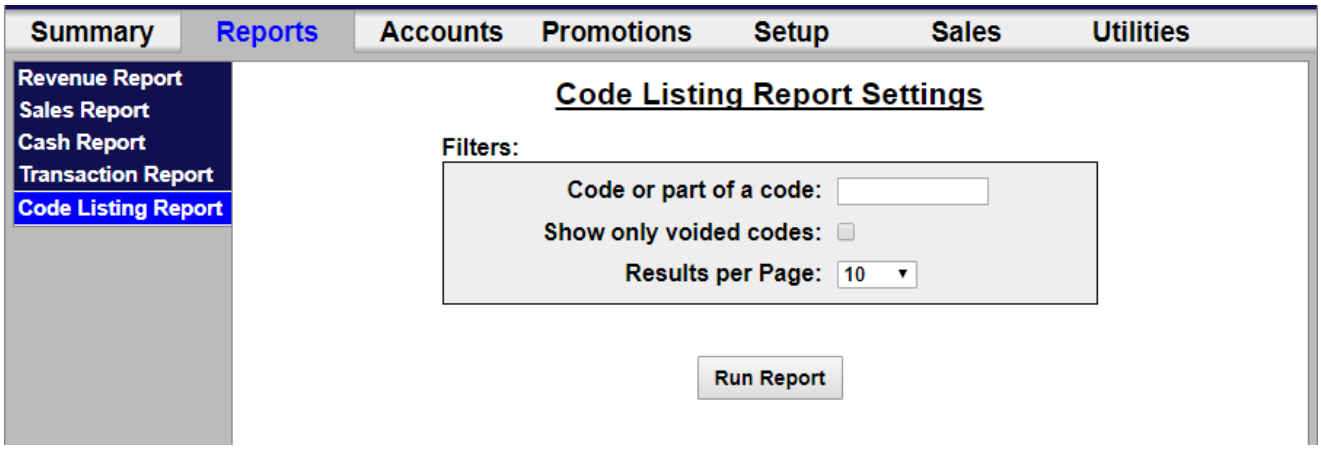


Figure 4.10. Code Listing Report Settings

Enter a code and select the results per page, then click Run Report. To generate a complete list of wash codes in memory, leave the code field blank and click the Run Report button.

Code	Status	Expires	Issue Date	Redemption Date	Product	Source	Issued By
66370	Used	3/30/10	3/23/10	3/23/10	Express Wash	POS	Register
11644	Used	3/30/10	3/23/10	3/23/10	Express Wash	POS	Register
76806	Used	3/30/10	3/23/10	3/23/10	Express Wash	POS	Register
65289	Used	3/30/10	3/23/10	3/23/10	Deluxe Wash	POS	Register
183026	Used	3/30/10	3/23/10	3/23/10	Express Wash	POS	Register

Figure 4.11. Sample Code Listing Report

The wash codes currently stored in memory are listed in chronological order. The code status will be shown as Active, Used or Expired. The Expires column displays the date the code expires. The Issue Date column displays the date the code was issued. The Redemption Date displays the date the code was used if any. The Product column displays the wash package sold. The Source column will indicate whether the code was sold from a console, C-store POS register or purchased at the pump. For codes sold at the console, the 'Issued by' column will show the user ID of the attendant that issued the code ticket. If more than 15 records are returned for the report query, use the page navigation at the lower right corner of the table.

5 Promotions Tab

The promotions feature is used to set up and manage various marketing programs. The types of programs that are available include discounts, complimentary washes, fundraisers, scheduled specials and prize promotions. Reports for tracking and managing these programs are accessed through the menu options on the left side of the promotions management pages (as shown below). The value of promotions used in a time period is shown in the 'discounts' field of the summary section at the top of the site revenue report.

NOTE: When using tokens with a Promotion, the Wash Select II is limited to using cash only when paying the remaining balance of the wash after the token has been accepted. Credit is not allowed when paying a balance remainder when tokens are used to purchase the wash.

NOTE: Coupons are not supported for Canadian sites.

Figure 5.1. Promotions - Main Screen

5.1 Discounts

Discounts can be configured so the value varies by wash package. The methods for redeeming a discount include code entry, card, coupon (inserted at the Bill Acceptor) or token. Other programmable features include:

- Usage Limit – total number of uses allowed and number of uses allowed in a single transaction
- Scheduling – Limit use of the discount to a specific date range, specific days of the week and/or, specific hours of the day

5.2 Complimentary Washes

The complimentary wash promotion provides a free wash when redeemed. Like the discount, this promotion can be configured for redemption by a code, paper coupon or token. The complimentary wash can also be set with a schedule to limit the days and/or hours when it can be used.

When a complimentary wash promotion is redeemed, the customer need not select a wash, as the associated wash will be automatically activated. If added services are enabled, customers will be allowed to purchase these services by adding payment.

5.3 Fundraisers

The fundraiser is a code-activated promotion intended to encourage supporters of an organization to use the car wash. No discount or other benefit is provided to the user at the wash but usage of the fundraiser 'code' is tracked and reported. The operator will typically donate a set amount to the organization for each wash purchase where the fundraiser code was entered. Fundraisers can be configured to apply to any of the available washes and usage can be controlled by a schedule and a limit for the total number of redemptions allowed.

When a fundraiser code is entered and validated, a thank you message will be displayed and washes that are not associated with the fundraiser will be removed from the product selection screen.

5.4 Scheduled Specials

Scheduled specials are discounts that are scheduled to automatically be applied at certain times and on specific days. The special can be configured to apply to any and all of the available washes and the amount of the discount can be set to vary for each wash package. When a scheduled special is active, the price posted for the associated wash will be reduced (on the wash section screen). The car wash operator can set up scheduled specials so an additional discount can, or cannot, be applied when the special is active.

NOTE: The Wash Select II is limited to 2 programmed scheduled specials at a time. Any specials that are setup with a discount price that is higher than wash package price will be ignored by the Wash Select II.

5.5 Prize Promos

The prize promotion is a slot machine style promotion that allows for customers to play a game and win either discounts or vouchers. The prize promo screen is presented to the user after payment is complete but before the wash is dispensed. A maximum of three prize promotions can be configured at one time. Customer participation is optional.

- Any active prize can be awarded when the prize promo is presented (in accordance with the configured prize limits)
- The award frequency can be configured independently for each prize promo.
- Any three of a kind wins one of the (up to) three prizes.
- The redemption method is always a code printed on a receipt.

5.6 Promotions Setup

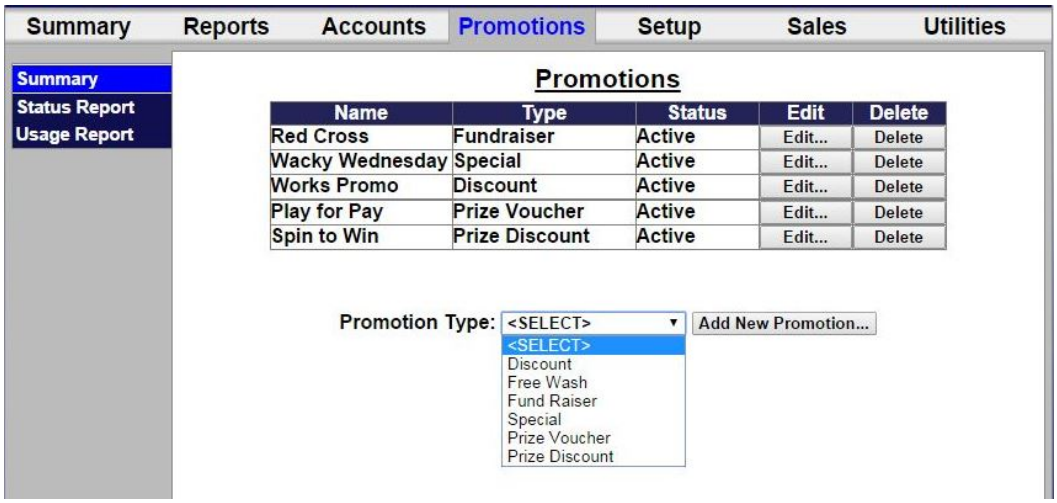


Figure 5.2. Promotions Main Screen

The Promotions Setup screen displays the current promotions. They are listed by name, type of promotions, and status. Note that the promotion statuses are 'active', 'inactive', 'expired', and 'exhausted'. 'Expired' means beyond the promotion schedule end date/time. 'Exhausted' only applies to promotions that have a maximum usage configured.

To setup a new promotion, select the type of promotion from the drop-down menu below the table and click Add New Promotion. The Edit Discount screen will be displayed.

5.6.1 Prize Promo Setup

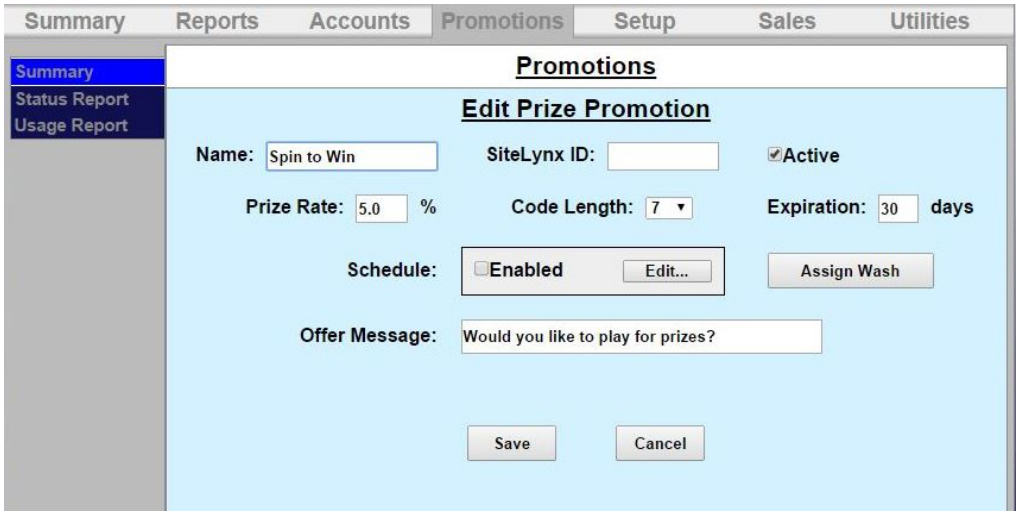


Figure 5.3. Prize Discount Setup Screen

1. To setup a Prize Discount, enter the name of the prize discount.
2. Enter the Prize Rate. The prize rate is the number of wins divided by the number of attempts (in percent).

3. Select a code length form 5-8. The default is 7.
4. Enter the prize expiration date. This can be set from 0-30 days. 0 days means the prize does not expire. The default is 30.
5. If you would like to enable a Schedule, click Enabled and Edit. Select the days and times the prize promo will be offered and click Save.
6. On the Assign Washes screen, a single wash can be assigned to this prize promotion along with the corresponding discount.
7. Enter the Offer Message. This field is limited to 40 characters.
8. Click Save.

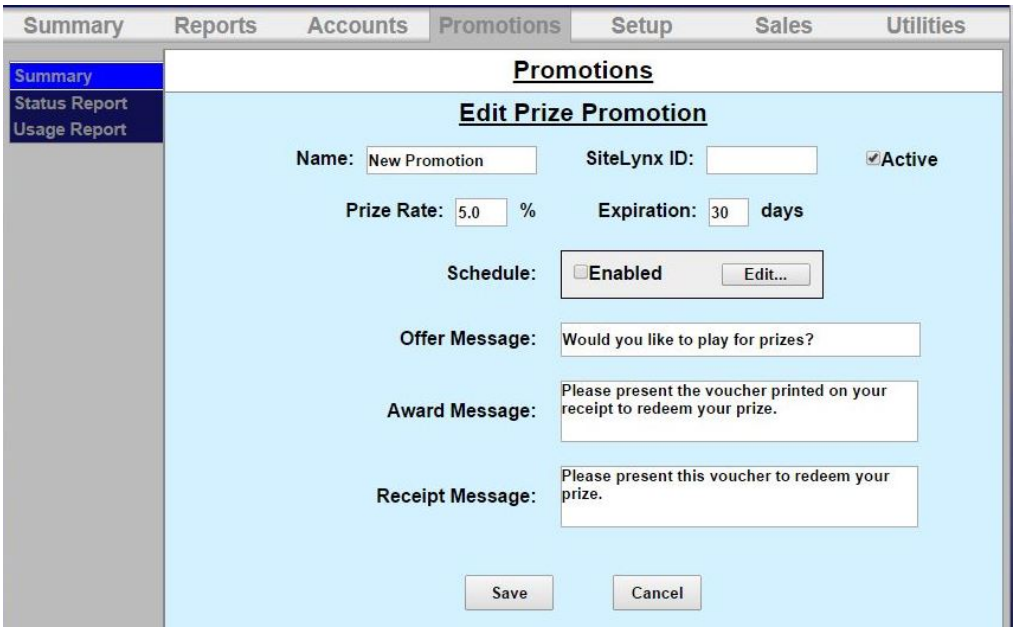


Figure 5.4. Prize Voucher Setup Screen

1. To setup a Prize Voucher, enter the name of the prize voucher.
2. Enter the Prize Rate. The prize rate is the number of wins divided by the number of attempts (in percent).
3. Select a code length form 5-8. The default is 7.
4. Enter the prize expiration date. This can be set from 0-30 days. 0 days means the prize does not expire. The default is 30.
5. If you would like to enable a Schedule, click Enabled and Edit. Select the days and times the prize promo will be offered and click Save.
6. Enter the Offer Message, Award Message and Receipt Message. These fields are limited to 40 characters.
7. Click Save.

5.6.2 Promotions Setup

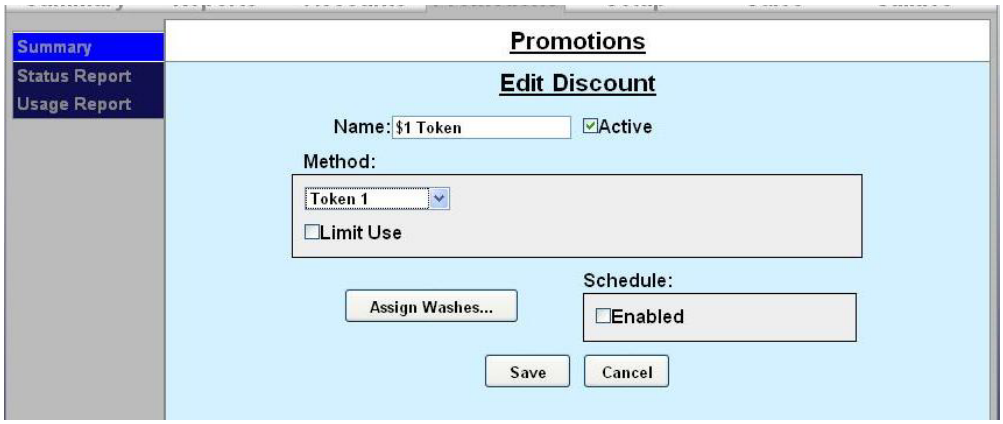


Figure 5.5. Edit Discount Screen

1. Enter the Name of the promotion. Select Active to enable the promotion.
2. Select the method of the promotion from the drop-down menu. For Discounts and Free Washes, the methods are: Codes, Tokens 1-4, Cards, Barcodes and VIP Coupons 1-3 and Mars Coupon. If Mars Coupon is selected, you will need to enter the 4-digit code from the coupon. For a Fundraiser, you may only choose Codes. For a Special, there is no method to choose from.
3. If you wish to limit the use of the promotion, select Limit Use then enter the maximum number of times the promotion can be used.
4. If you want the promotion to only run on certain days, under Schedule, click Enabled. Fill out the times and days on the subsequent screen. For Specials, you MUST fill out the schedule.
5. Click Assign Washes.

Figure 5.6. Promotions Washes

6. Select the wash you wish to assign from the drop-down menu then click Add to List.
7. Enter the amount the discount is worth. Repeat for any additional washes the discount will be applied to.
8. Click Save. If you wish to change or delete a wash, click Remove from List by that wash.
9. Click Save.

5.7 Promotions Reports

Status Report

The status report lists all promotions that have been configured and provides status information, as shown in the sample report below. The status will be active, inactive (disabled), exhausted (max uses limit reached) or expired (end date is reached). The uses and value fields show the total number of times the promotion was applied and the associated value of discounts applied.

Promotions Status

Site: *<Insert Site Name Here>* Run Date: 9/1/2008

Promotion Name	Status	Start Date	End Date	Type	Method	Code	Uses	Value
Wacky Wednesday	Active	3/15/2008	12/31/2008	Special			786	$1,272.00
Gazette Promo	Active	6/25/2008	12/31/2008	Discount	Code	94852	245	$245.00
Express Lube	Inactive	6/1/2008	12/31/2008	Free Wash	Coupon	12571	200	$1,400.00
Boy Scouts	Exhuasted	8/1/2008	11/1/2008	Fundraiser	Code	78321	100	$100.00
Valpak Mailer	Expired	1/1/2008	2/1/2008	Discount	Code	35937	30	$40.00

Figure 5.7. Sample Promotions Status Report

Usage Report

The Usage report provides a count and value of the promotions used over a user defined date range. The report will also show the percentage of washes to which the promotion was applied. The report will appear as shown below.

Promotion Usage Report

Site: *<Insert Site Name Here>* Run Date: 9/1/2008

Report Period: mm/dd/yyyy to mm/dd/yy

Promotion Name	Type	Wash	Count	Value	% of Sales
Wacky Wednesday	Special	Works	12	$15.00	12.0%
Gazette Promo	Discount	Supreme	6	$6.00	4.0%
Express Lube	Free Wash	Supreme	15	$105.00	2.0%
Boy Scouts	Fundraiser	Works	8	$8.00	4.0%
		Deluxe	3	$3.00	1.0%
Valpak Mailer	Discount	Deluxe	11	$11.00	1.0%

Figure 5.8. Sample Promotions Usage Report

6 Accounts Tab

The accounts module is a product option that allows house accounts to be set up and managed in the Sierra server application. Four account types are available: prepaid, subscription, loyalty, and fleet accounts. Accounts can be configured for redemption by a magnetic stripe card, numeric code or RFID tag. The Accounts module also includes reports for tracking account status and usage. Management functions will appear on the left side of the Accounts management page.

6.1 Prepaid Accounts

Prepaid accounts function as a gift card and can be configured with either a monetary value or a number of prepaid washes (e.g. 5 wash pass). Revenue received from the sales and recharges of prepaid accounts is shown in the *Other Revenue* section of the Site Revenue Report. Account uses (or redemptions) are reported under the *Prepaid* column in the *Net Sales* section of the Revenue Report. Once a prepaid account is set up for a customer, cards, codes, barcodes, or RFID tags may be activated and assigned to the customer.

The recommended method for issuing a prepaid account is to first create an Account Program through the *Programs* option in the Accounts menu. Example programs would be a $50 gift card or 5 Express Wash pass. Once a program is established, individual accounts can be issued through the *Accounts* option in the Accounts menu. Configuration options for prepaid accounts include:

- Schedule – restricts the account for usage on certain days or during certain hours
- Expiration – set an expiration date for the account
- Frequency limit – set a frequency limit for account usage (e.g., once per day, 3 times per week, etc…)

You may reload the account without reentering all information, and the customer may also reload his account at the entry unit. If the balance of the account is insufficient for the purchase, the customer will be asked if they'd like to recharge the account. If they choose to do so, they'll be prompted to add payment and the account will be recharged for the amount that's defined in the account program. For instance, if the account program is configured to provide (5) $10 washes for $40, the customer will be charged $40 for the reload and 5 washes will be added to their account. One of those will be applied to the current sale so the remaining balance will be 4 washes. Please note that this feature will also apply to 'multi-wash' codes.

6.2 Subscription Accounts

Subscription accounts are designed to support an 'unlimited' wash application. These accounts are product-based accounts and are valid for a specific wash package. It should be noted, however, that customers using a subscription account are able to add money to upgrade to a better wash if *Upgrades* are enabled. As Sierra does not include a recurring billing application for subscription account payment, the sale of a subscription account is not reported as revenue. Likewise, redemptions against these accounts are not reported as revenue. Redemptions are included in the *Transaction Count* in the summary section of the revenue report but are excluded from the *Paid Transactions* count.

As with prepaid accounts, subscription accounts should be set up by first creating a subscription account program (e.g. Gold, Silver, Bronze pass) than issuing individual accounts from the desired program. Subscription accounts can also be configured to operate on a schedule and have expiration dates and frequency limits.

6.3 Loyalty Accounts

Loyalty accounts provide incentives to 'members' in order to encourage repeat visits. This feature offers two different programs: member discounts and frequent shopper rewards. The discount application entitles club members to discounts on one or more wash products. The frequency application functions as an 'electronic punch card' that provides rewards for repeat customers (e.g. buy 4, get the 5th for free).

A program must be setup for both options. When configuring the options, you must configure the following information:

- Program name
- Assign washes and discount values
- Allow other discounts – indicates whether other discounts can be combined with member discounts (should be enabled by default).
- Schedule – days/hours when the member discount can be used (default is 24/7)

The configuration options for the frequency program include:

- Program Name
- Assign washes – select washes that, when purchased, qualify towards a reward
- Frequency Reward – select wash that will be awarded
- Expiration – Days in which rewards must be claimed (default will be no expiration)

Accounts will be activated from the management pages by selecting the associated loyalty program and entering the customer-specific data, including:

- User name and contact details (address, e-mail etc.)
- Account Number
- Redemption method – Code, Card or RF Tag

6.4 Fleet Accounts

Fleet accounts are intended as a 'house credit' application where a business will be billed for usage. Typical customers for fleet accounts include local law enforcement agencies and private businesses with a number of vehicles in their fleet. Fleet accounts are set up directly from the *Accounts* menu option and not from the *Programs* menu. Once a fleet account is set up for a business, cards, codes, barcodes, or RFID tags may be activated and assigned to individual users (or vehicles).

Fleet accounts can be set up to restrict a user to a single product or to allow them to select any available product. The feature also allows the car wash Operator to assign a discount (as a dollar value or percentage) to the account. This discount will be applied in the Account Transaction report, which serves as the fleet customer's statement (for billing).

The fleet account set-up page also has a check box, which is used to identify the account as a 'maintenance' account. Maintenance accounts are intended to be used for car wash site employees, service providers and others that may need to use the wash but are not paying customers. The use of maintenance accounts is not accounted for in revenue calculations but these uses are counted in the accounting and house account reports for tracking.

6.5 Account Programs

The account programs option is used to set-up standard products for pre-paid, Site Lynx pre-paid, and subscription accounts (e.g. $50 gift card, 5 wash pass etc). Once the program is set-up the 'Accounts' option can be used to issue or edit an individual account.

Figure 6.1. Account Program Screen

To setup a new account program, select from either Pre-paid, Subscription or Loyalty from the drop-down menu below the table and click Add New Account Program. The Edit Account screen will be displayed. To edit an existing account program, click Edit next to that program.

Pre-Paid Account Program Setup

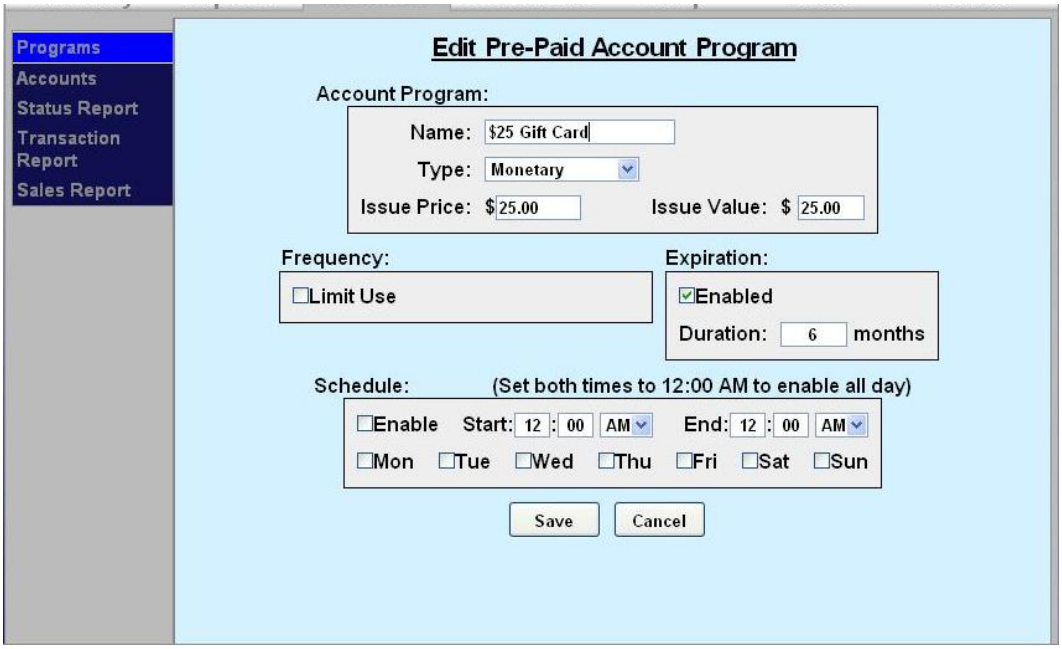


Figure 6.2. Pre-paid Account Program Edit Screen

1. Enter the name of the account program.
2. Select the type of account from the drop-down menu. A product-based account is useable for only (1) wash product (which is selected from a drop down list). Monetary accounts can be used for any wash. **NOTE**: Prepaid accounts can be monetary or product based; subscription accounts are product based.
3. Enter the Issue Price (or selling price) that will be reported when a new account is issued (or sold) and then enter the Value for which the account can be redeemed. This field is not present on Subscription accounts.
4. You may limit the use and only allow a certain amount of washes per day, week, month or year. To do this, click Limit Use and enter the amount of washes and the time increment from the drop-down menu.
5. If you wish for the account to have an expiration date, click Enable, then enter the duration of the account program. **NOTE:** This schedule runs in calendar months. The account will expire on the last day of the month, not 30 days from the issue date.
6. If you wish to limit usage of the account to certain days and hours, click Enable under the schedule block and enter the valid times and days of the week.
7. Click Save.

Subscription Account Program Setup

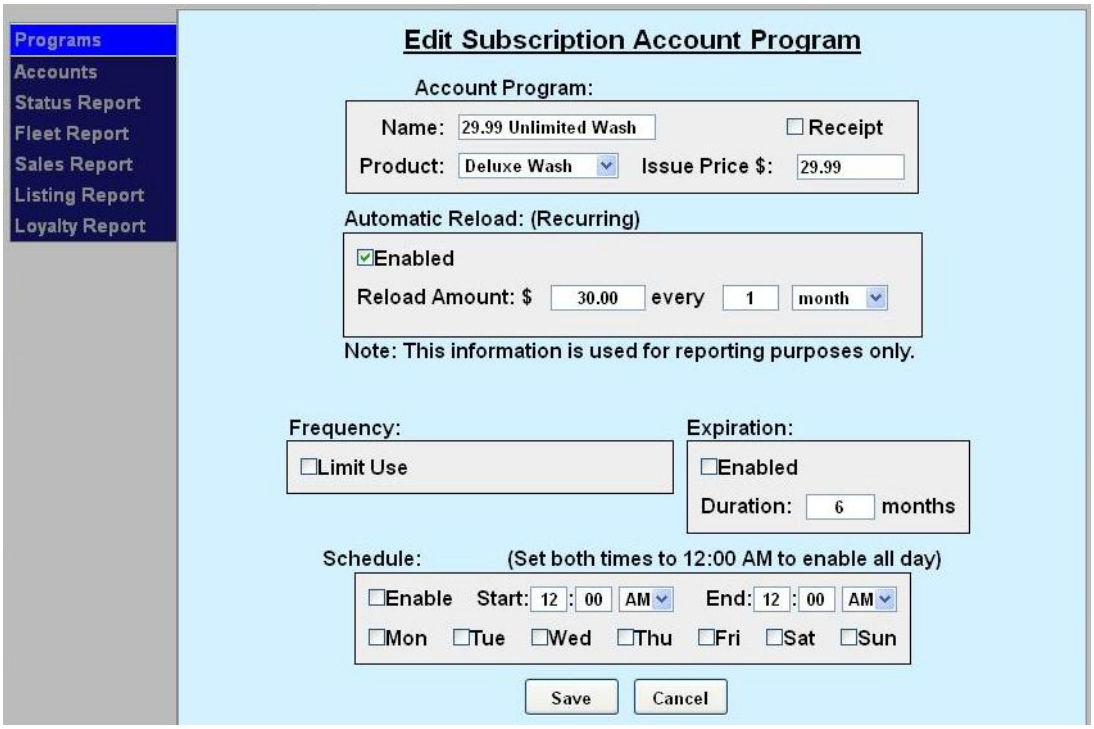


Figure 6.3. Subscription Account Program Edit Screen

1. Enter the name of the account program. Chose whether or not to force a receipt with each transaction.
2. Select the product from the drop-down menu.
3. Enter the Issue Price (or selling price) that will be reported when a new account is issued (or sold) and then enter the Value for which the account can be redeemed. This field is not present on Subscription accounts.
4. If desired, enable and enter the recurring bill amount. This amount will show up on reports ONLY. The entry unit WILL NOT automatically bill the customer, your credit processor wil.
5. You may limit the use and only allow a certain amount of washes per day, week, month or year. To do this, click Limit Use and enter the amount of washes and the time increment from the drop-down menu.
6. If you wish for the account to have an expiration date, click Enable, then enter the duration of the account program. **NOTE:** This schedule runs in calendar months. The account will expire on the last day of the month, not 30 days from the issue date.
7. If you wish to limit usage of the account to certain days and hours, click Enable under the schedule block and enter the valid times and days of the week.
8. Click Save.

6.6 Accounts

When the accounts option is selected, a list of current accountholders will be displayed along with search functions to find a specific account. To view details of an account, click Edit next to the account. To setup a new account, select the account type from Fleet, Pre-paid or Subscription from the drop-down menu below the table. For new Pre-paid or Subscription accounts, you may select a Program from the additional drop-down menu.

Prepaid and Subscription Accounts

For prepaid and subscription accounts, it's recommended that you first set up an account program, then select the program from the drop down list. Select add new account.

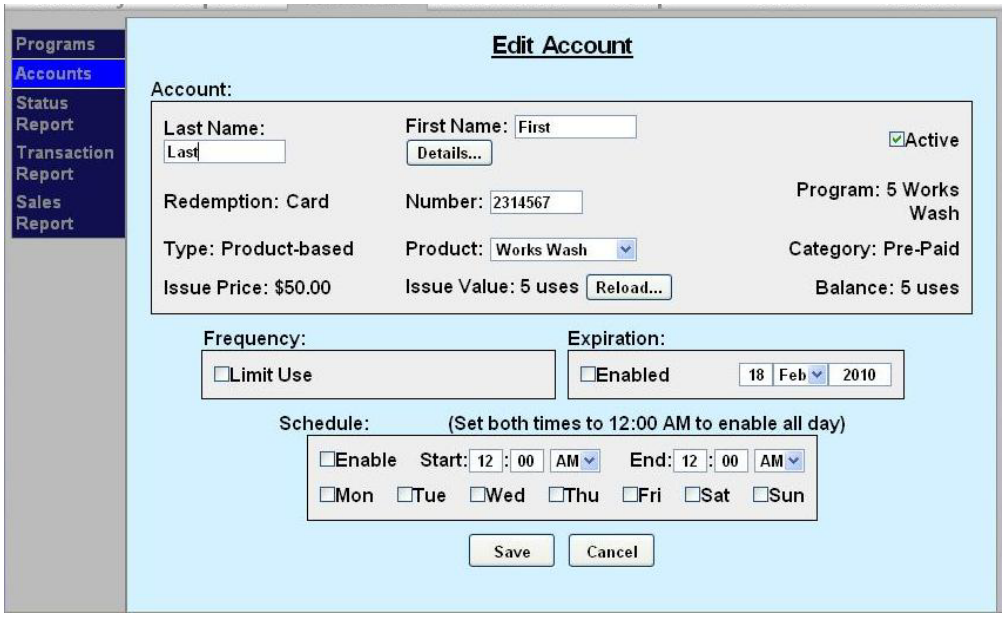


Figure 6.4. Prepaid Account Edit Screen

The account set-up page will show values that were set-up for the account program but additional data will need to be entered for the account holder as follows:

- Last and First name of the Account holder. A mailing address can be entered if desired by selecting the 'details' tab.
- Redemption method – select code, card, barcode or RFID (Subscription accounts only) from the drop down menu.
- Number – Enter code, card number or RFID tag number.

Loyalty Accounts

Accounts will be activated from the management pages by selecting the associated loyalty program and entering the customer-specific data, including:

- User name and contact details (address, e-mail etc.)
- Account Number
- Redemption method – Code, Card or RF Tag

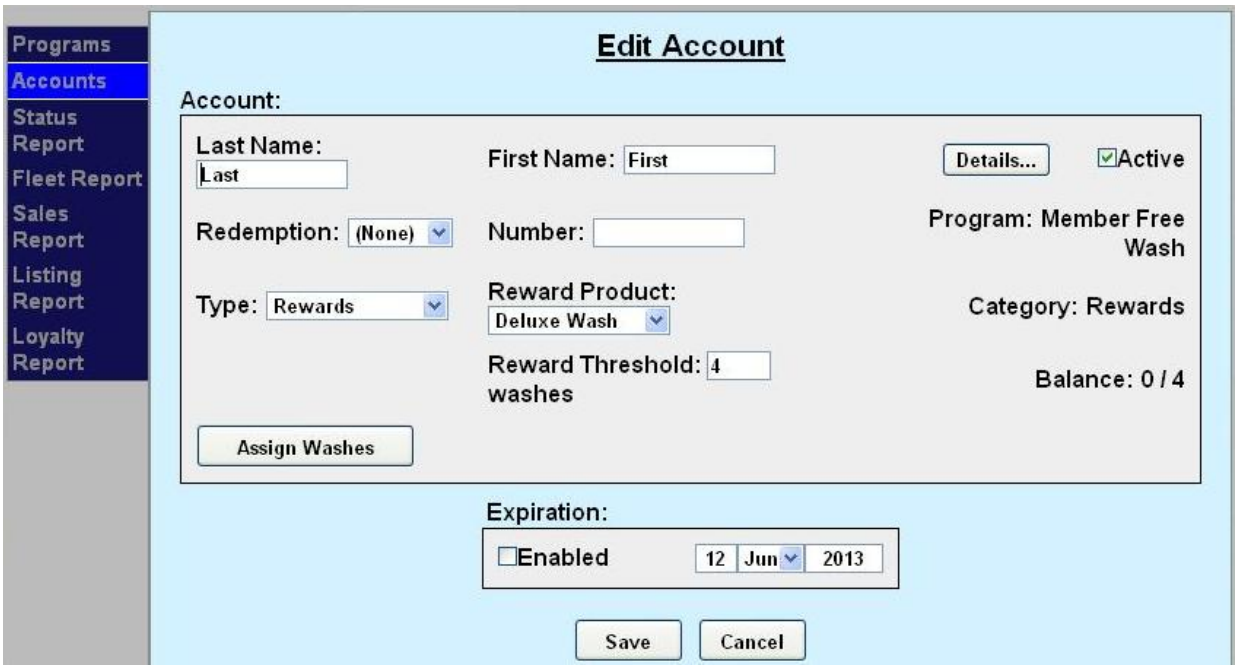


Figure 6.5. Loyalty Account Setup Screen

Fleet Accounts

Fleet Accounts are set-up and managed directly through the 'Accounts' option (not the 'Programs' option). Account set-up is a 2-step process. The first step will be to set up and save the fleet business account. The 2nd step will be to add users (drivers) under the account. From the main Accounts page select Fleet as the account type and click the Add New Account button.

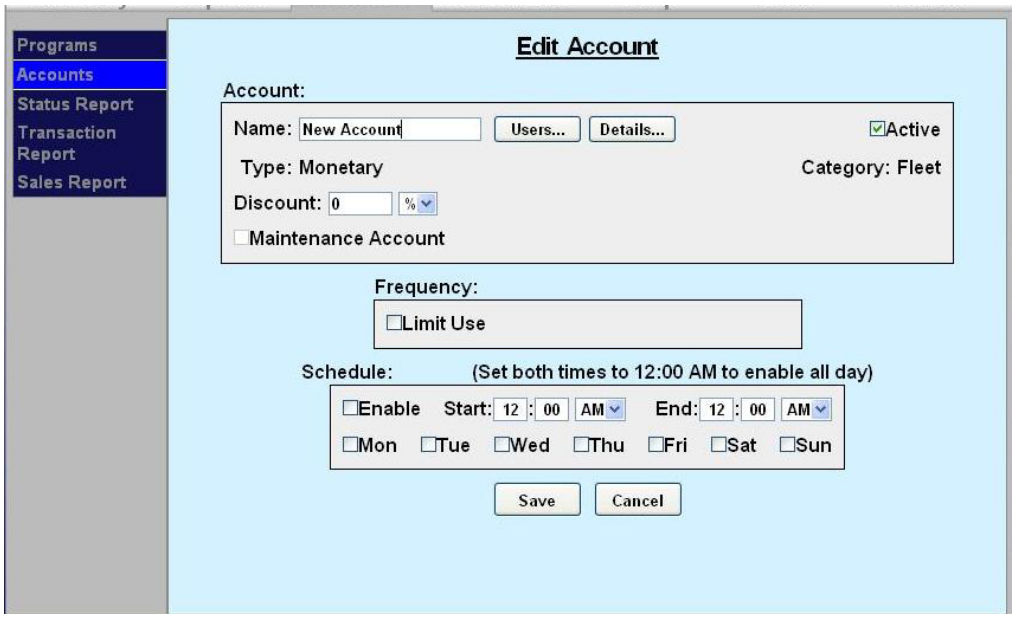


Figure 6.6. Edit Fleet Account

To set-up the fleet account:

1. Enter the business name for the account in the Name field.

2. Select the account type as monetary or product based. For product accounts, the associated wash product will need to be selected from the drop down list of available products.
3. Enter the value of discount that should be applied to the fleet customer's billing statement. Discounts can be set for a dollar value or a percentage.
4. Select 'maintenance' account if usage is not to be reported as revenue. **NOTE:** This account feature would typically be used for service providers and employees.
5. Select and enter usage limits, if desired.
6. If the account is only to be used during certain days or hours, enable and configure the account schedule.
7. Select the Details button and enter the billing address for the account, if desired.
8. Click save to save the account and return to the account listing.

To add or edit Users under a fleet account, find the account name in the account list and select edit. At the Account Edit page select the Users button. A list of current users will be displayed. Select the Add User function to get to the Edit Account User screen.

Figure 6.7. Edit Account User

To add a new user,

1. Enter the first and last name of the account user
2. Select the redemption method (code, card, barcode or RFID Tag)
3. Enter the code, card number or RFID tag number for the user
4. Click Save.

6.6.1 Account Reports

Status Report

A sample status report is shown below. This report will list all accounts that are set up in the account database with the following information:

- Account name and number
- Status – Shown as Active, Inactive (the account has been disabled by the car wash operator), Expired, or Exhausted (prepaid account with no remaining balance).
- Date the account was originally opened
- Expiration date (if account is configured to expire)
- Remaining Balance – shown as $ value or number of uses, depending on the account type)
- Total uses since account was opened (as $ value or number of uses, depending on the account type)

Account Name	Acct#	Status	Open Date	Expiration	Bal ($)	Bal (uses)	Total ($)	Total (uses)
County Police	---	Active	4/14/2010	---	---	---	---	0
Jones, Phil	59632185	Active	4/14/2010	---	$50.00	---	$0.00	---
Smith, Ed	89563214	Active	4/14/2010	---	$50.00	---	$0.00	---
Smith, Will	65987423	Active	4/14/2010	---	---	---	---	0

Figure 6.8. Sample House Account Status Report

Listing Report

This report allows you to export a list of account holders in .csv format. The exported file includes the account holder name and contact information, account number, and enrollment date.

Report Name	Site	Run Date							
Account Listing Rep	Unitec Demo Link	1/2/2018							
Account Name	Open Date	Status	Account Number	Address	Phone Number	Email Address	Account Category	Account Program	
Police Dept	11/20/2014	Active	75977722				Fleet		
Police Dept	11/20/2014	Active	53941127				Fleet		
Police Dept	11/20/2014	Active	87388234				Fleet		
Rogers, Steve	11/20/2014	Active	68998479				Subscription		
Grey, Jean	11/20/2014	Active	56328625				Pre-paid		
Summers, Scott	12/4/2014	Active	1456				Pre-paid	Works 5	
Jones, Ed	3/2/2016	Active	78905672				Pre-paid	Works 5	

Figure 6.9. Sample Account Listing Report

Loyalty Report

The Loyalty Report provides a list of all members, their account numbers, uses, uses per month, and rewards information, plus any discount.

Account Name	Account #	Uses	Uses/Month	Issued Rewards	Claimed Rewards	Expired Rewards	Average Discount
Andrews, Ed	59632159	26	6.2	5	4	1	$1.08
Bruschi, Ted	84965327	14	3.7	2	2	0	$1.00
Carlson,Jim	65843215	9	4	1	1	0	$0.78
Francis, Lois	33256984	6	2.8				$1.50
Harris, Jane	54213985	4	2.2				$2.00
Jackson, Lou	44869532	22	5.6	4	2	1	$0.64
Ortiz, David	95487623	18	7.2	3	2	0	$0.78
Smith, John	25644459	12	4.5	2	1	1	$0.58
Wilson, Terry	15789652	7	5.6	1	1	0	$1.00

Figure 6.10. Sample Account Loyalty Report

Fleet Report

The fleet report provides a list of all uses from one or more accounts over a user defined date range. This report is used to generate a statement for fleet account billing. A sample fleet report is below. The report shows a fleet application where the Police Department with multiple users is provided with a $2 discount off of the ($11) Deluxe wash.

Fleet Account Statement

Settings... Send Print Save

olice Department

Billing Date: 11/30/2013
Payment Due: 12/15/2013
Amount Due: $288.00

Remit payment to: Your Carwash
1234 Main St
City, ST 12345

User Name	Account No.	Date	Site	Product	Net Due
Admin 1	1234	12/20/2011	01	Deluxe	$9.00
Admin 1	1234	1/7/2012	01	Deluxe	$9.00
Admin 1	1234	1/7/2012	01	Deluxe	$9.00
Admin 1	1234	1/21/2012	01	Deluxe	$9.00
Admin 2	2345	12/18/2011	01	Deluxe	$9.00
Admin 2	2345	12/31/2011	01	Deluxe	$9.00
Admin 2	2345	1/21/2012	01	Deluxe	$9.00
CID	3333	12/22/2011	01	Deluxe	$9.00
CID	3333	1/23/2012	01	Deluxe	$9.00
Patrol 1	0001	12/9/2011	01	Deluxe	$9.00
Patrol 1	0001	12/9/2011	01	Deluxe	$9.00
Patrol 1	0001	12/10/2011	01	Deluxe	$9.00
Patrol 1	0001	12/10/2011	01	Deluxe	$9.00
Patrol 1	0001	12/10/2011	01	Deluxe	$9.00
Patrol 1	0001	12/10/2011	01	Deluxe	$9.00
Patrol 1	0001	12/14/2011	01	Deluxe	$9.00
Patrol 1	0001	12/17/2011	01	Deluxe	$9.00
Patrol 1	0001	12/21/2011	01	Deluxe	$9.00
Patrol 1	0001	12/21/2011	01	Deluxe	$9.00
Patrol 1	0001	12/22/2011	01	Deluxe	$9.00
Patrol 1	0001	1/11/2012	01	Deluxe	$9.00
Patrol 1	0001	1/11/2012	01	Deluxe	$9.00
Patrol 1	0001	1/11/2012	01	Deluxe	$9.00
Patrol 1	0001	1/18/2012	01	Deluxe	$9.00
Patrol 2	0002	12/9/2011	01	Deluxe	$9.00
Patrol 2	0002	12/17/2011	01	Deluxe	$9.00
Patrol 2	0002	12/28/2011	01	Deluxe	$9.00
Patrol 2	0002	1/7/2012	01	Deluxe	$9.00
Patrol 2	0002	1/7/2012	01	Deluxe	$9.00
Patrol 3	0003	12/30/2011	01	Deluxe	$9.00
Patrol 3	0003	1/18/2012	01	Deluxe	$9.00
Patrol 3	0003	1/20/2012	01	Deluxe	$9.00

Figure 6.11. Sample House Account Fleet Report

The Fleet Report contains the following information for the specified time period:

- Name of the fleet account
- Dates of billing, when the payment is due, and the amount due
- The payment address
- User Name and Account Number (either card, code or RFID tag)

- Day the car wash was used
- The wash package that was purchased. Usually, a wash package is assigned to the account in setup.
- Price of the wash package used. The price is totaled at the bottom of the column.
- Amount of discount that is applied to the account (if any). The discount if totaled at the bottom of the column.
- Net amount due for each wash package used. The net amount is totaled at the bottom of the column to show the total amount due for that billing period. This is the same amount listed at the top of the report.

Sales Report

Account Sales Report

Site: Your Carwash

Settings... Print Save

Run Date: 1/26/2012

Report Period: 1 Jan 2012 - 26 Jan 2012

Account Name	Acct#	Program	Date	Sales Type	Value ($)	Value (uses)	Price	Employee ID
Adams, John	38256083		1/14/2012	Issue	$30.00	---	$24.00	00
Washington, George	66913541		1/18/2012	Issue	$100.00	---	$70.00	00
Smith, John	52733161		1/14/2012	Issue	$31.25	---	$25.00	00
Smith, Jane	30622355		1/16/2012	Issue	$52.00	---	$40.00	00
Example, Ima	27274189		1/21/2012	Issue	$35.00	---	$28.00	01
$100 Gift Card	29423077	$100 Gift	1/18/2012	Reload	$100.00	---	$90.00	00
$100 Gift Card	30761204	$100 Gift	1/18/2012	Issue	$100.00	---	$90.00	00
$100 Gift Card	56624211	$100 Gift	1/18/2012	Issue	$100.00	---	$90.00	00
$100 Gift Card	83847475	$100 Gift	1/18/2012	Issue	$100.00	---	$90.00	00
$100 Gift Card	82185278	$100 Gift	1/18/2012	Issue	$100.00	---	$90.00	01
$50 Gift Card	86037969	$50 Gift	1/18/2012	Issue	$50.00	---	$0.00	00
$50 Gift Card	72326034	$50 Gift	1/18/2012	Issue	$50.00	---	$0.00	00
$25 Gift Card	74354076	$25 Gift	1/16/2012	Issue	$25.00	---	$20.00	00
$25 Gift Card	50014935	$25 Gift	1/16/2012	Issue	$25.00	---	$20.00	00
Parker, Peter	11657709		1/7/2012	Issue	$20.00	---	$16.00	00
Arthur, Chester	65738185		1/5/2012	Reload	$50.00	---	$40.00	00
West, Adam	49158965		1/15/2012	Issue	$60.00	---	$48.00	00

Figure 6.12. Account Sales Report

The account sales report provides a list of prepaid account sales and account reloads during a user defined date range. A sample report is shown above.

- Account Name and Number
- Program – indicates whether an account program was used for this account.
- Date – day account was purchased.
- Sales type -- indicates whether the entry is for a new account that was sold (issued) or a reload.
- Value – indicates the dollar amount or number of uses that were added to the account and the
- Price -- indicates the amount due from the account holder.
- Employee ID – indicates the system user who issued or reloaded the account.

Account Transaction Report

Account Transaction Report

Site: Your Carwash

Settings... Print Save

Run Date: 1/2/2014

Report Period: 1 Sep 2013 - 31 Oct 2013

Account Name	User Name	Acct#	Date	Location	Product	Discount	Net Amount
City Bus	Bus 5	11111111	9/17/2013	Your Carwash	Self Service Bay	$0.00	$20.00
	Bus 6	22222222	12/18/2013	Your Carwash	Self Service Bay	$0.00	$7.97
Total						**$0.00**	**$27.97**
Police Dept	Squad 1	12345678	9/6/2013	Your Carwash	Works	$0.00	$11.00
	Squad 2	23456789	9/9/2013	Your Carwash	Works	$0.00	$11.00
	Squad 1	12345678	9/16/2013	Your Carwash	Deluxe	$0.00	$8.00
	Squad 1	12345678	10/21/2013	Your Carwash	Works	$0.00	$11.00
	Squad 2	23456789	11/12/2013	Your Carwash	Works	$8.00	$3.00
Total						**$8.00**	**$44.00**

Figure 6.13. Account Transaction Report

The Account Transaction Report displays all transactions over a user defined date range. The report can be filtered to show transactions for all accounts, all accounts of a certain type (e.g. subscription, fleet …) or a single account. Records shown can be sorted by account name or transaction date.

7 Sales Tab

The Sales tab displays and functions as a Point of Sale console interface. You must first set up the Sales screen in the POS Interface in order for this screen to be populated. For further instruction, please see Section 3.7.

To allow an employee to access the Sales screen ONLY, you must setup a User account with access privileges to Accounts and Promotions and Code and Account Sales. For more information, please see Section 3.5.

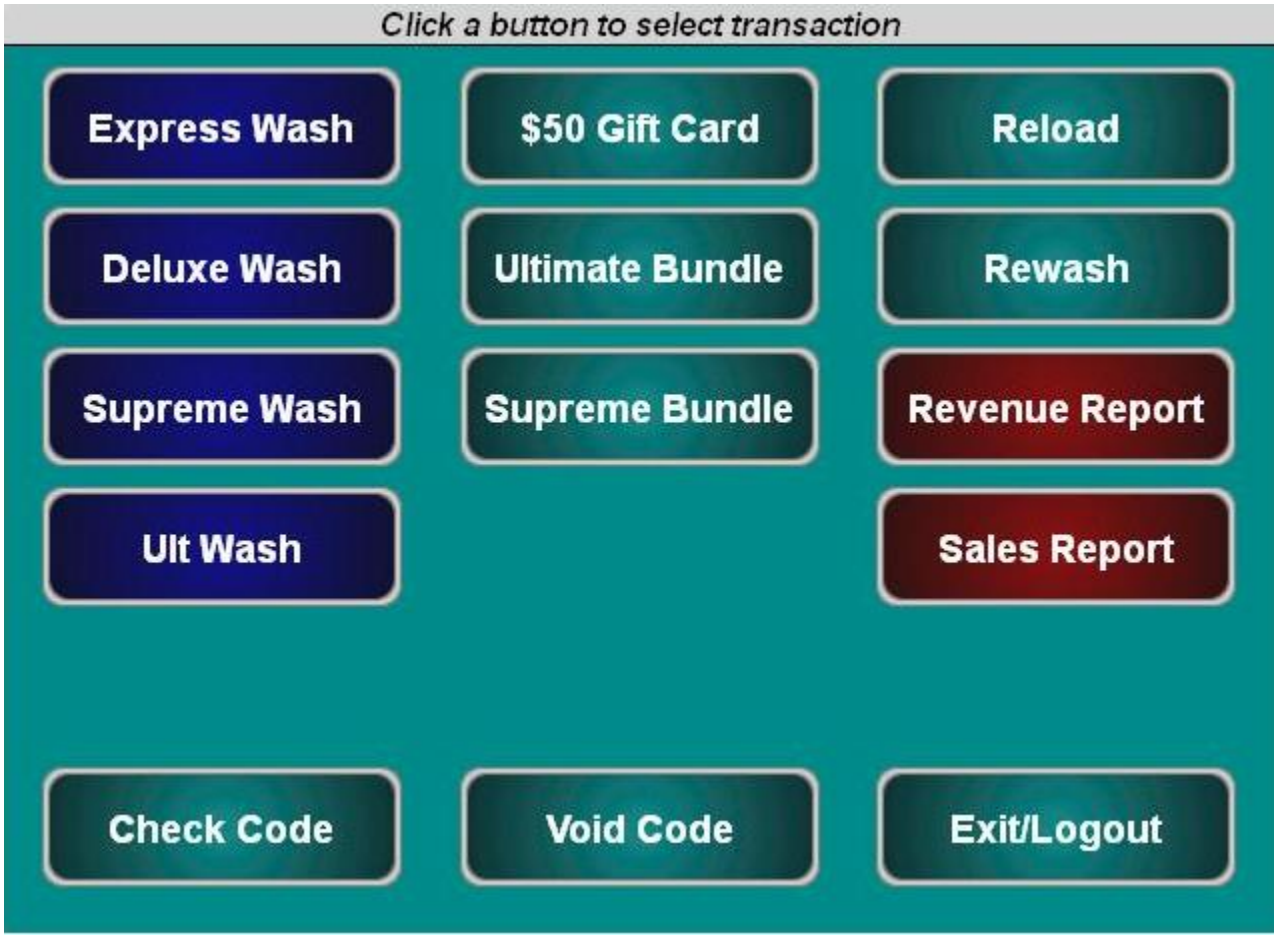


Figure 7.1. Sales Screen

The Sales screen function keys are color-coded. Washes are blue and reports are red. Account, reloads, rewashes and the check and void code functions are teal.

To purchase a wash package, select one of the washes then click Purchase.

Figure 7.2. Purchase Wash Package Screen

A code will be generated and displayed on the screen. You may then print the code from the POS printer or from the print function of your PC.

Figure 7.3. Wash Purchased Screen

To purchase a new account, click on the account:

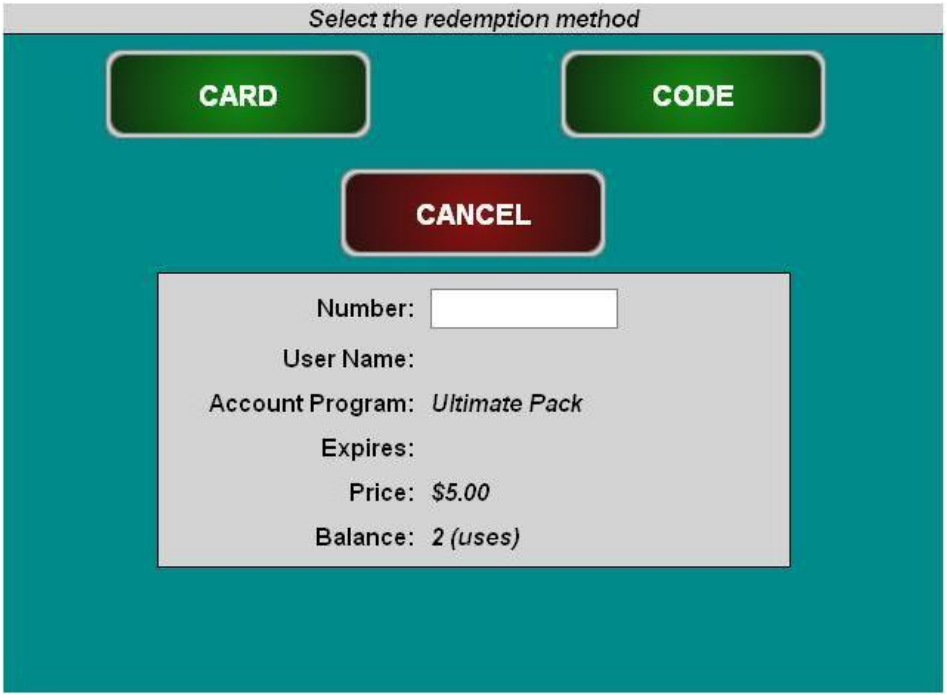


Figure 7.4. Account Purchase

1. Select code or card.
2. Enter the account number.
3. Enter the account holder's name.
4. Click Purchase to finalize the account purchase.

To reload an account, click Reload and enter the account number.

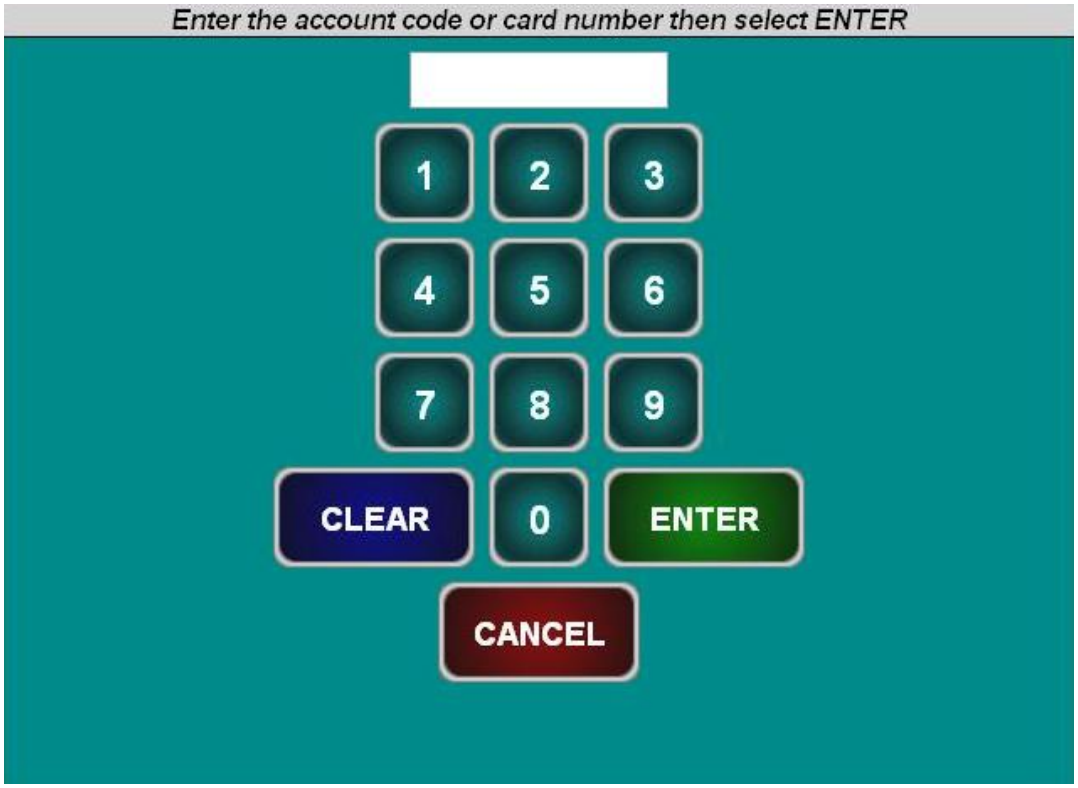


Figure 7.5. Reload Account Screen

Ensure the account holder's information is correct, then click Reload.

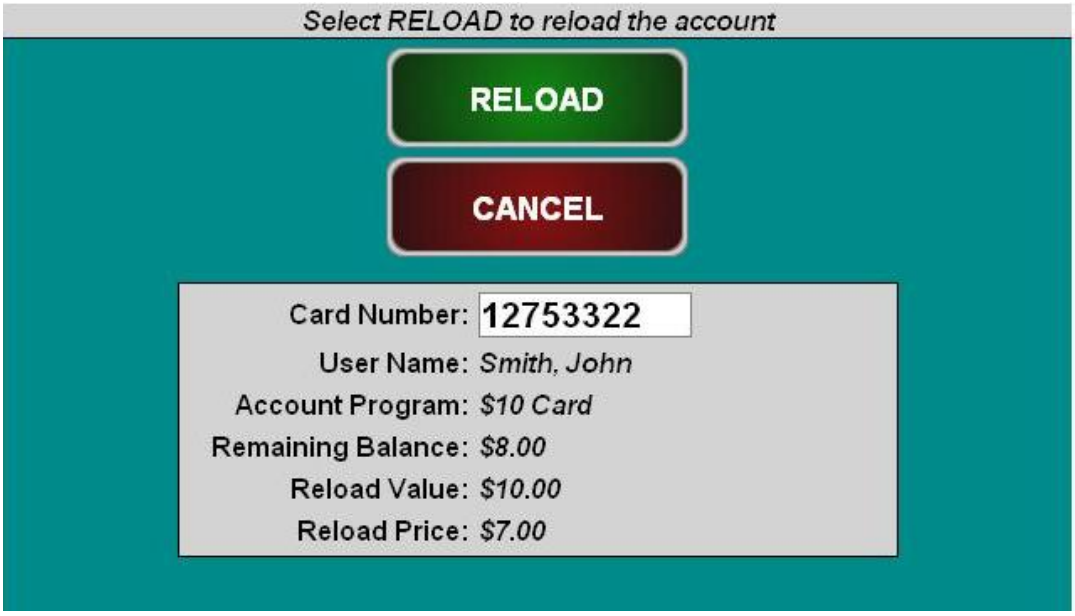


Figure 7.6. Reloaded Account Screen

To issue a rewash code, click Rewash then select the wash to issue the code:

Figure 7.7. Rewash Selection Screen

Figure 7.8. Rewash Code Issued Screen

To print a report, select the report type. If you would like to select a date other than the current day, select Change Dates. You may select the current day, select the previous day, or select a date range, then click Done, then Print Report. **NOTE:** The Report functions on the Sales page are for console users **ONLY.**

Figure 7.9. Report Date Selection Screen

8 Utilities Tab

8.1 General System Utilities

The Utilities tab allows you to view the current server version, view the current C drive version, view any hot fixes applied, view the IP address, set the system date and time, backup and restore the databases, view the event log, and upload software updates.

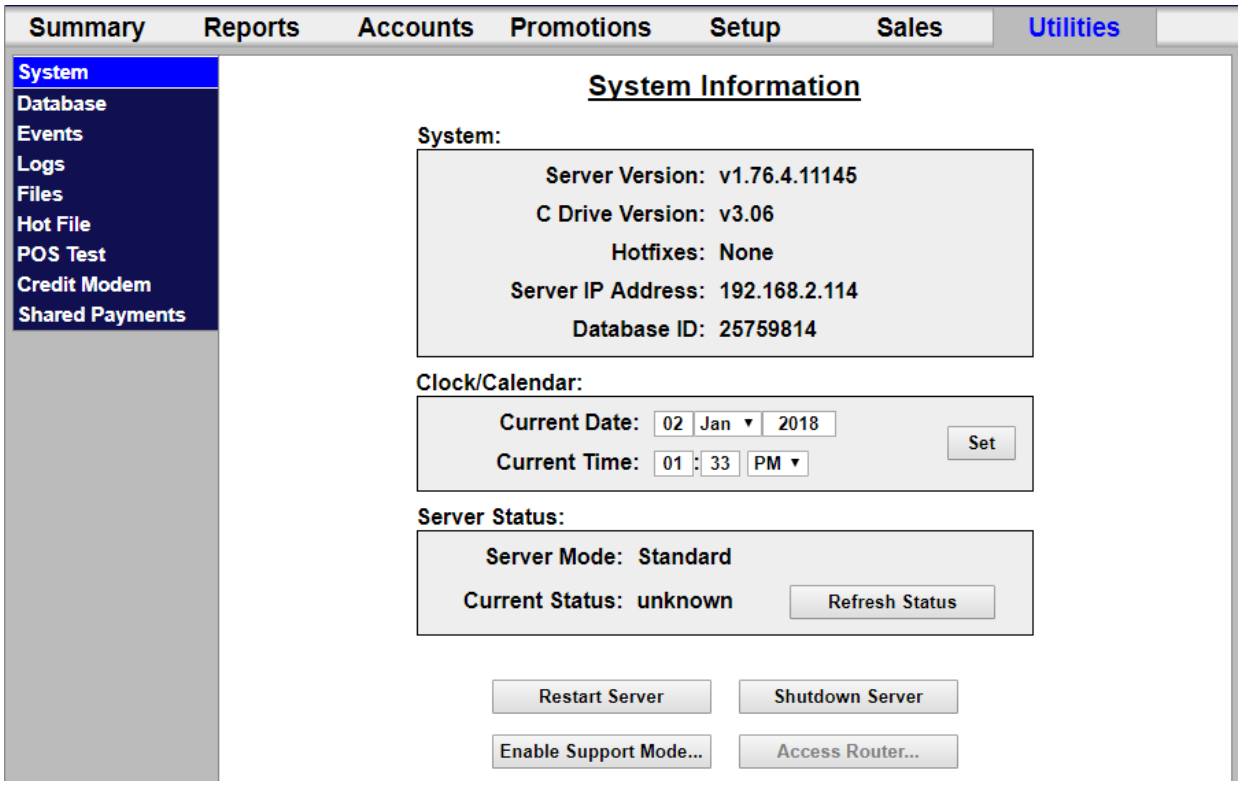


Figure 8.1. System Utilities Screen

The System Utilities screen displays the current installed server software version, installed hot fixes (if any), the server IP address as allocated by the router, and the database ID. It also displays the time and date and allows you to restart or shutdown the server from that screen without requiring a login to Maintenance Mode.

1. To set the calendar: enter the day, select the month from the drop-down menu, and enter the current year.
2. To set the current time: enter the hours and minutes then select AM or PM from the drop-down menu. Once the time is changed, you will be logged out and the time will be downloaded to any secondary devices.
3. To restart or shutdown the server, click the button. The system will confirm the restart or shut down, then restart or shut down the server. All devices will go into Cash-Only mode.

   IMPORTANT NOTE: For Portals and Sentinels, if the server is shut down, the primary unit running the server will shut down and all other units will go into Cash-Only mode. Be sure someone is on site to restart the primary unit.

IMPORTANT NOTE: For WashPay systems, ensure that there are no pending transactions before restarting or shutting down the server, or those transactions will be lost.

8.1.1 Enable Support Mode

Enable Support Mode is a feature that allows Unitec Customer Service to access and troubleshoot the server via remote access. If your devices are having problems, call Unitec Customer Support at 18004UNITEC. Click the button to access the next screen.

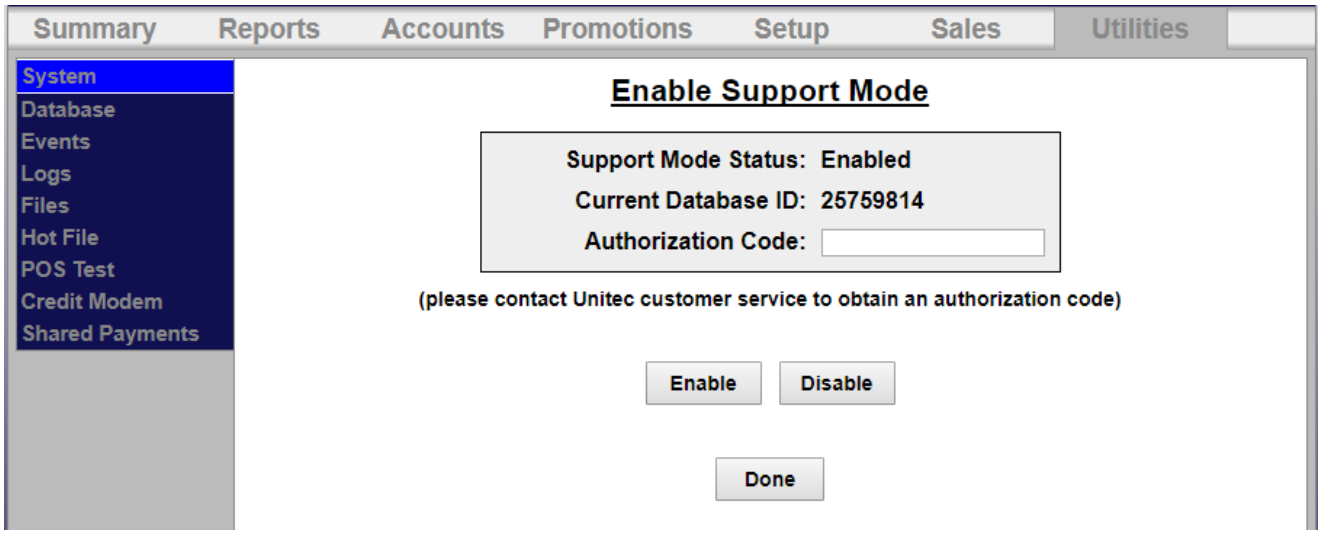


Figure 8.2. Enable Support Mode Screen

The Unitec Customer Support representative will provide a 6-digit authorization code to gain access to the server. Once that is entered correctly. Click Enable. Support Mode will automatically disable in 24 hours.

8.2 Database Management

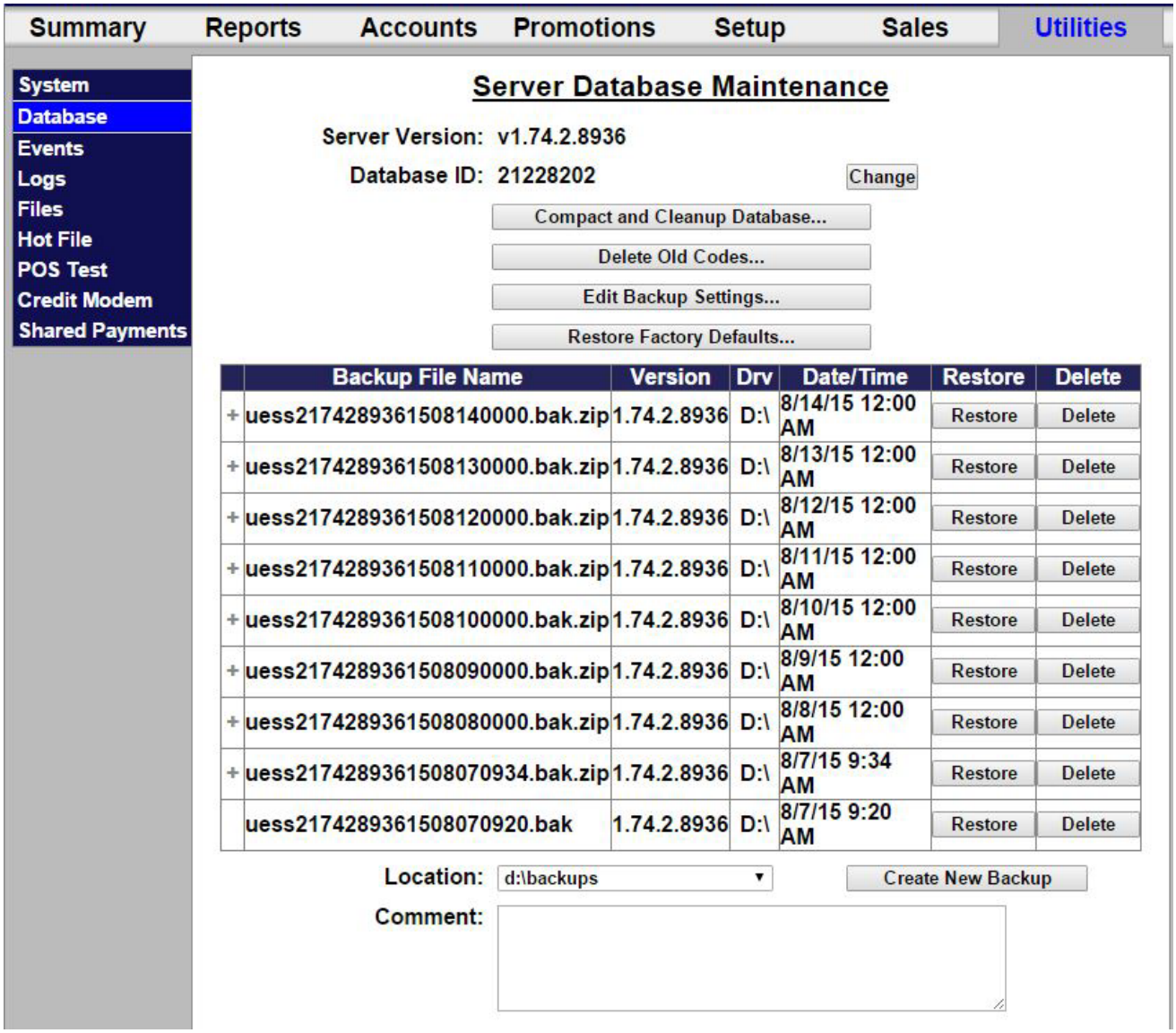


Figure 8.3. Database Utility Screen

The Database Utility screen is used to backup and restore the Sierra Server databases. Database back up files can be used to restore operation of the system in the event of a catastrophic event. To minimize the potential for lost sales data, regular back-ups should be performed. The software version, date and time of previously created back-ups are displayed on the screen.

1. Click the Create New Backup button below the table. Once the back up is saved, the devices will reload and the new back up will have been added to the screen. To delete an old database backup, click the Delete button next to that file name. To add a comment to the backup file (for example, Standard Setup), enter a comment in the box when creating a new backup. To view the comment, click the "+" sign next to the backup file.

   Note: The thumbdrive MUST have a root folder named "backups" to backup data to it and restore from it.

2. To restore the Sierra Server to a backed-up version of the database: Make sure all devices are idle. Click the Restore button next to the version you wish to restore. Once the database is restored, all devices will reboot.

   Note: Any activity that occurred since the last back up will be written over by performing the Restore and that activity will be lost, including sales transactions and configuration changes.

8.2.1 Compact and Cleanup Database

The Compact and Cleanup Database function allows you to delete old transactions from the database. This will delete old information from reports and free up memory. To compact and cleanup the database:

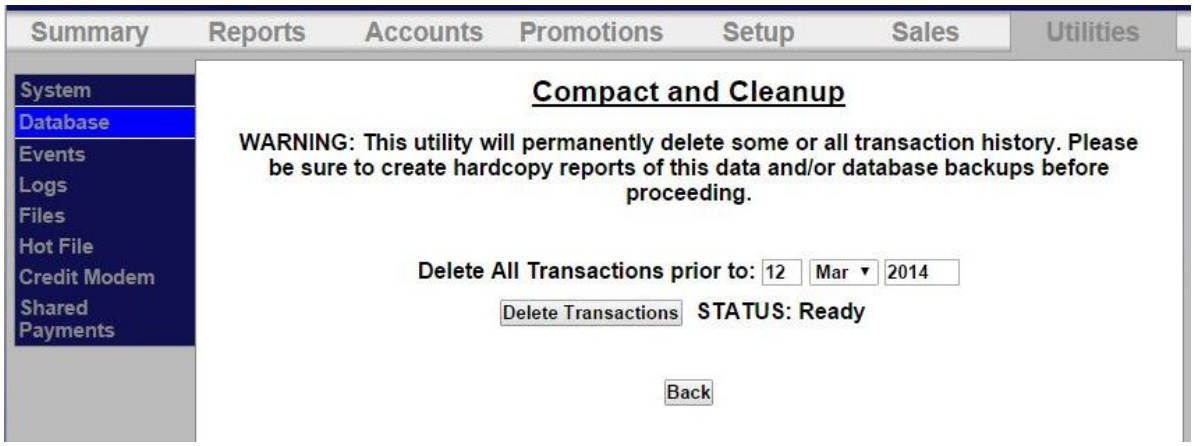


Figure 8.4. Database Compact and Clean Screen

Enter a start date. Click Delete Transactions.

NOTE: All transactions prior to that date will be deleted, so make sure to create a database backup and hardcopy backups before performing this function.

8.2.2 Delete Old Codes

The Deleting Old Codes function allows you to erase old POS codes from the database to remove old unused codes from reports and free up memory. To delete old codes:

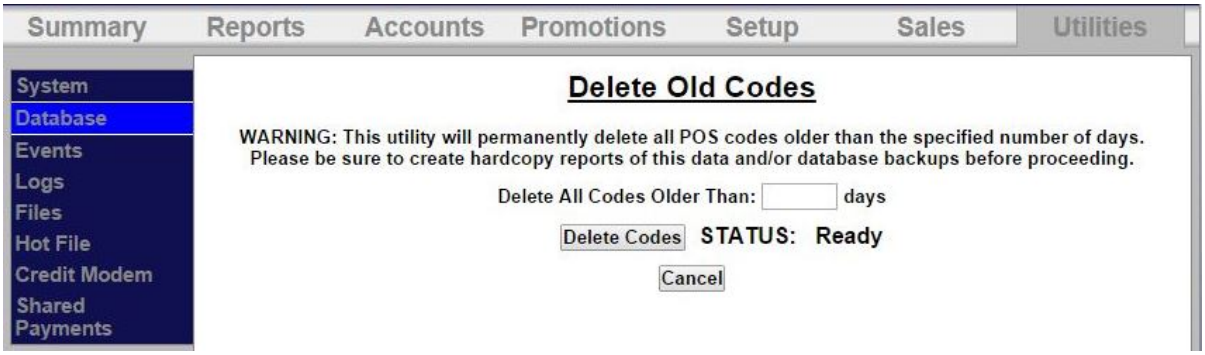


Figure 8.5. Delete Old Codes Screen

Enter the number of days. Click Delete Codes.

NOTE: All codes prior to that number of days will be deleted, so make sure to create a database backup and hardcopy backups before performing this function.

8.2.3 Automatic Backups Schedule for Server

To schedule Automatic backups, click on Edit Automatic Backup Settings.

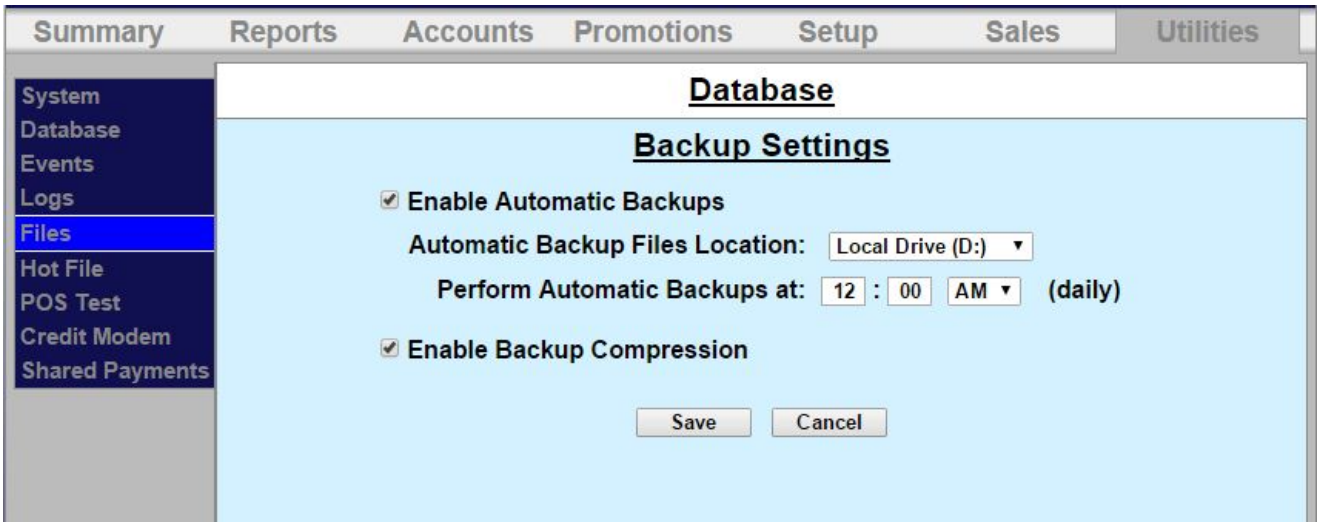


Figure 8.6. Automatic Backup Settings Screen

1. Click Enable Automatic Backups, then select the location, either the D drive or a thumbdrive, from the drop-down folder. Enter a time to perform the automatic backup. Click Save.
2. To create a backup: Make sure all devices are idle. You may choose where to save the backed-up data. To save backups on a separate device, a thumb drive should be connected to one of the USB ports on the primary carrier board.

Note: The thumbdrive MUST have a root folder named "backups" to backup data to it and restore from it.

3. Click Enable Backup Compression to compress the backup files, to save memory.

8.2.4 Restore Factory Defaults

This function should only be used when advised to by Unitec Customer Support.

8.3 Event Log

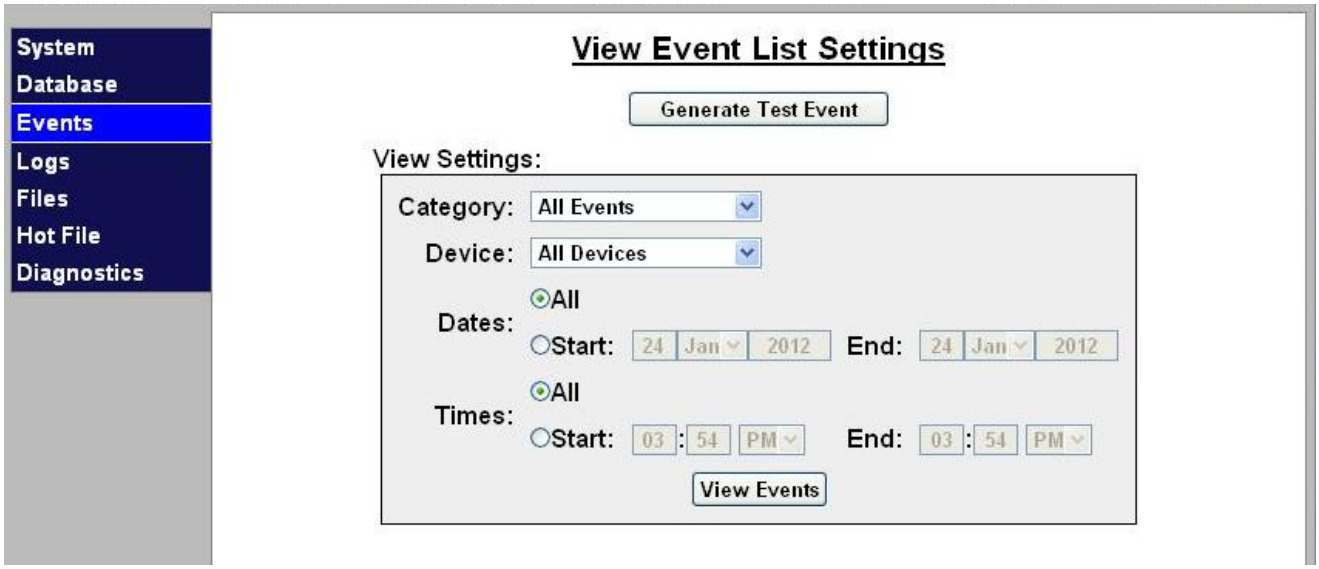


Figure 8.7. Event Log Screen

The Events screen allows you to view all or select system events in a log. To view the event log, select any or all of the following filters: category, device, date and time. You may also generate a test event to ensure the log is updating properly.

8.4 Logs

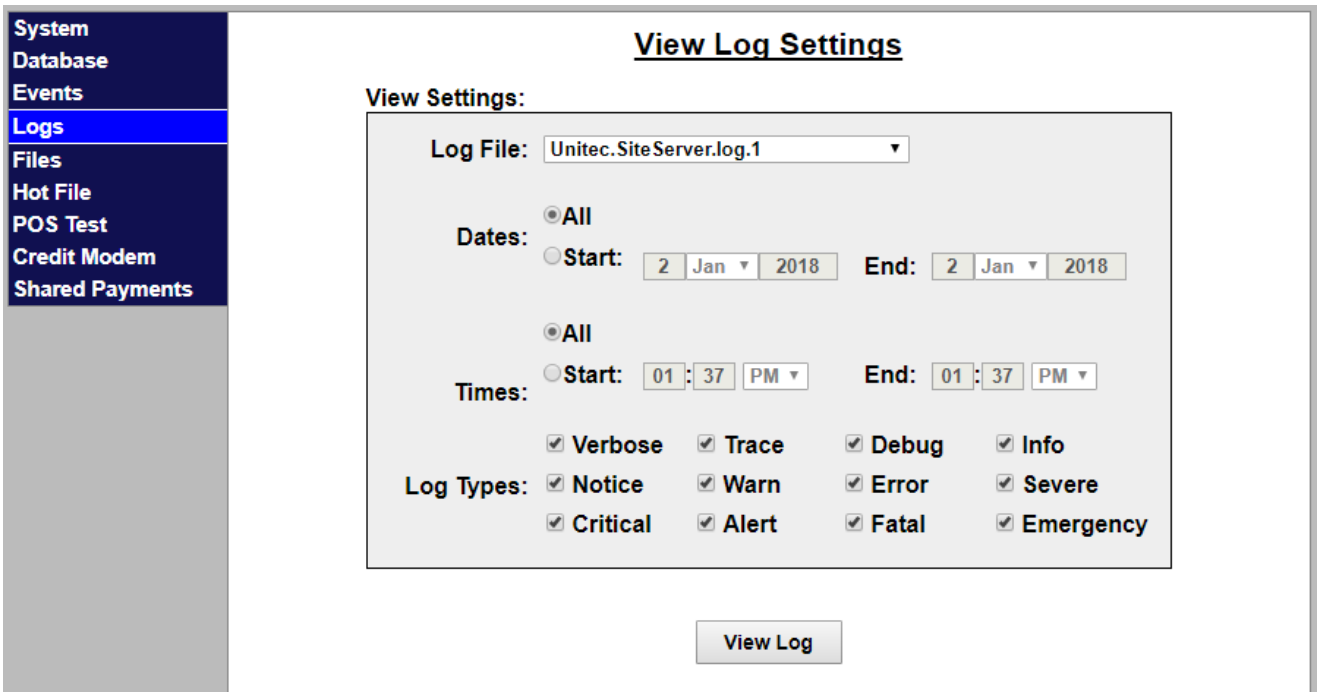


Figure 8.8. Logs Screen

The Logs screen allows Unitec Customer Service to view system logs for troubleshooting purposes. To view system logs, select any or all of the following filters: log file type, category, date, and time. Click View Log.

8.5 Files

Figure 8.9. Files Screen

The Files screen allows you to load software update files and post sale video files to the unit. Updates are provided on a thumbdrive that is to be connected to the USB port on the primary carrier board. With the thumbdrive installed, click the Load Files button. The thumbdrive should be listed as a source location. Select it and click Upload.

Note: Video files must be in .wmv format and uploaded to the unit from a thumbdrive with the following file structure:

For Portal: UEP_Droot >bin>Portal>Video>English>PostSaleVideo.wmv

For Sentinel: UES_Droot >bin>Portal>Video>English>PostSaleVideo.wmv

8.6 Hot File (WashPay Only)

Figure 8.10. Hot File Screen

Hot files are a record of the credit cards used that were declined or listed as stolen. To view the hot files. Select the card type, enter the account number, then list a date range. Click View Records.

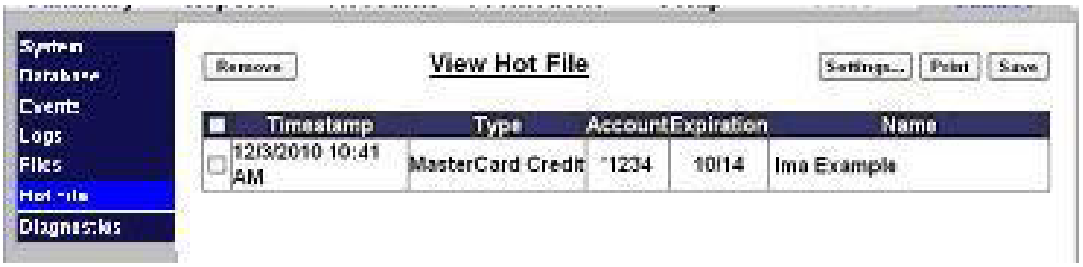


Figure 8.11. Hot File Removal

To remove a credit card listed in the hot file (for example, a debit card that had a zero balance a week ago that has had funds added since), view the hot file records. Once the card has been located, click Remove in the top left corner of the frame.

8.7 POS Test

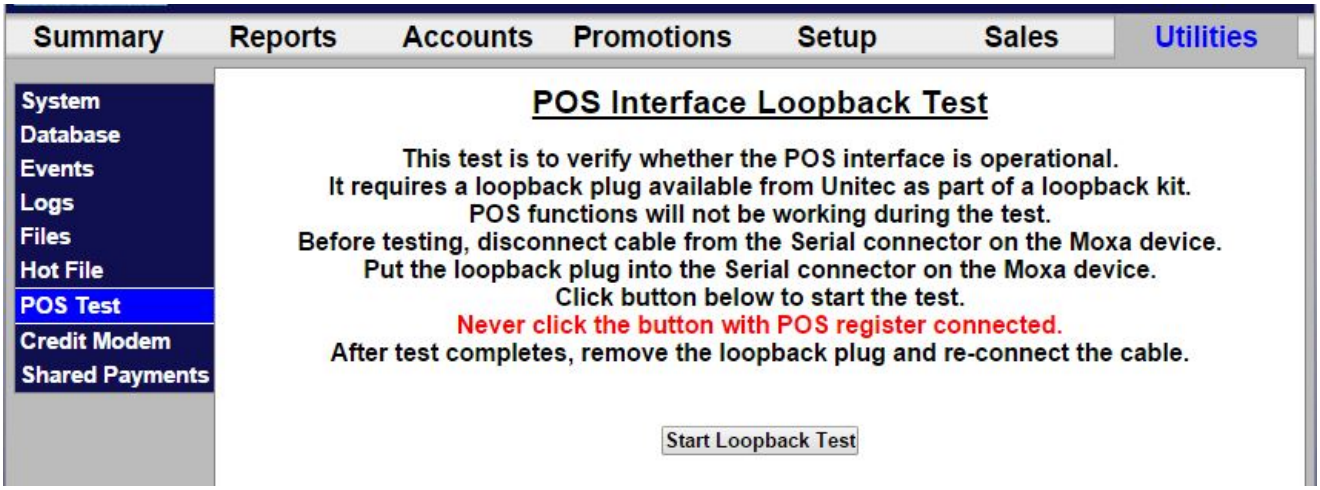


Figure 8.12. POS Test Screen

POSTest is a PC-based software application for your laptop or desktop computer running Windows 95 or above. This program is intended for use as an aid to service personnel testing the communications link from a Unitec POS device to an External Point of Sale Device (Ext POS, Site Controller or Register). The POSTest is a hardware-only test that will allow the technician to validate the functionality of the Unitec Hardware.

Note: This test requires a Loopback cable:
DB9 male to female null modem adaptor (Radio Shack Giga-Ware # 26-1411) and
DB9F to DB9F lap link cable (Radio Shack Giga-Ware #26-1405).

8.8 Credit Modem

The Credit Modem function allows you to manually batch credit transaction and allows credit modem diagnostics testing.

8.8.1 Credit Batching

The Credit Batching function allows you to view the current batch information, close a current batch, clear the current batch, open a new batch, or change a batch number.

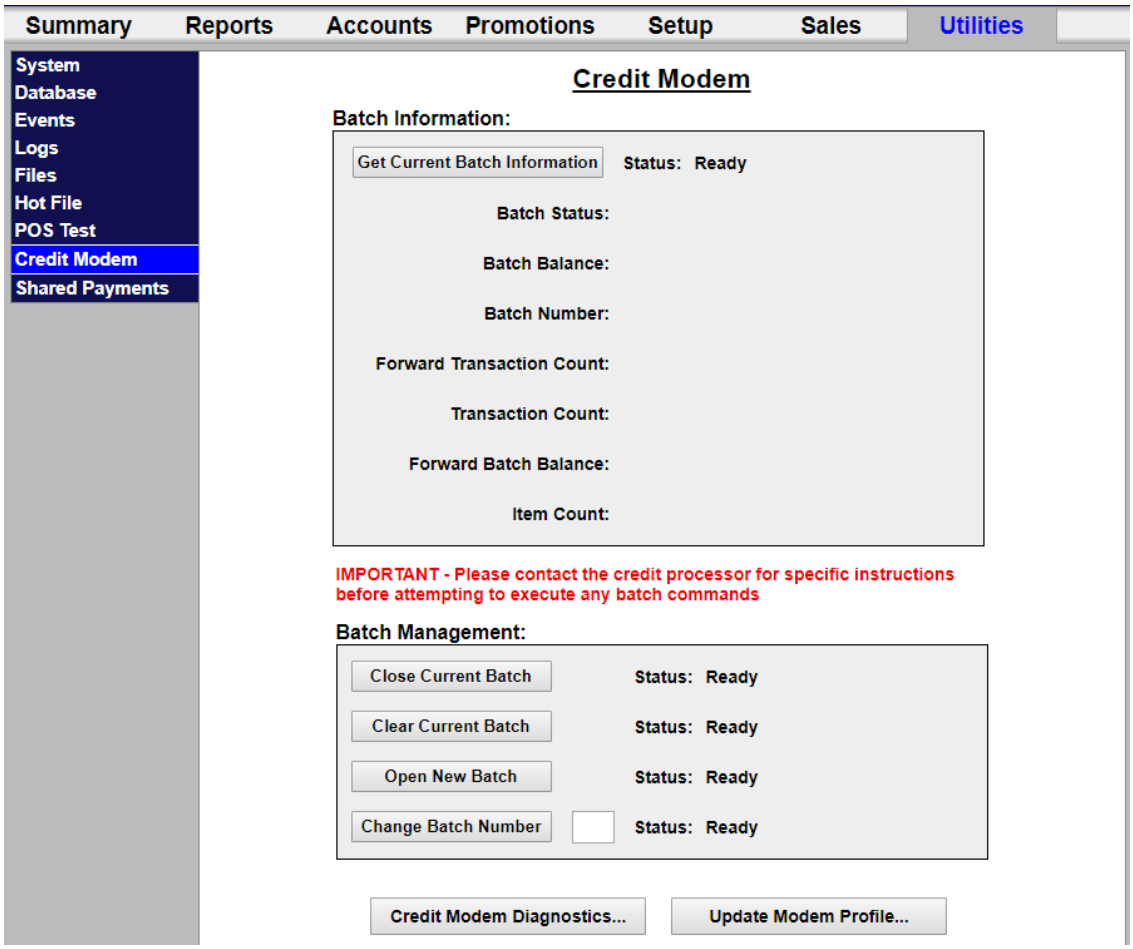


Figure 8.13. Credit Modem Batching

The Credit Batching function allows you to view the current batch information, close a current batch, clear the current batch, open a new batch, or change a batch number.

8.8.2 Diagnostics

The Sierra server allows you to run diagnostics on the DataTran Credit Modem (for customers with credit modems).

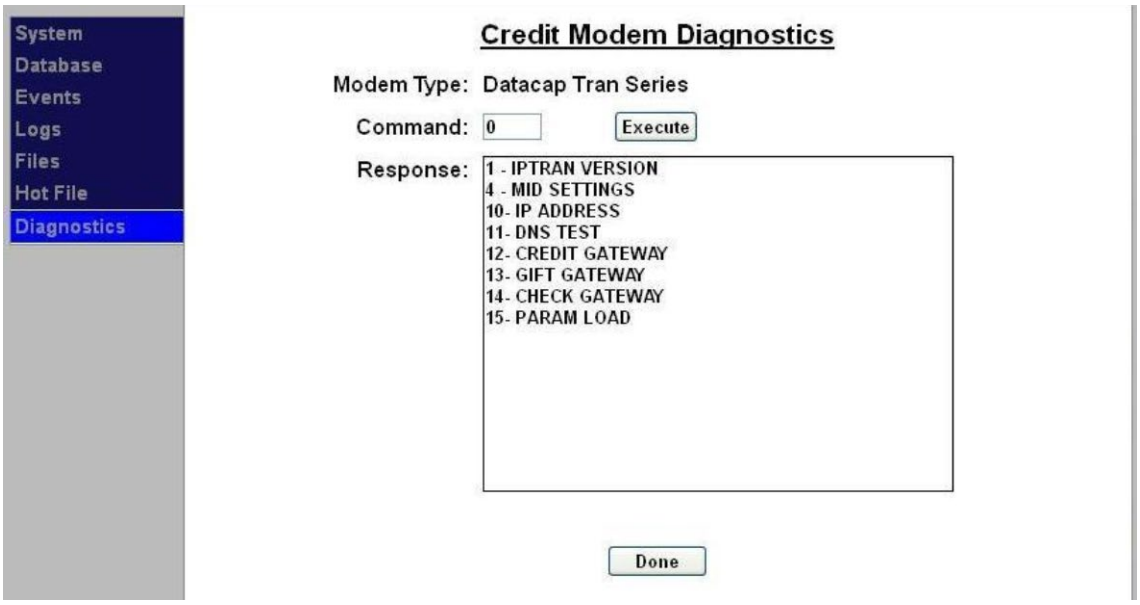


Figure 8.14. Credit Modem Diagnostics

Enter "0" in the command line for a list of commands to run the diagnostics. The DataTran and IPTran modems will have different lists of diagnostics because the devices are different. Most commands will respond within a few seconds. The list of diagnostics is as follows:

1-DTran/IPTran Versions (Both Devices)

2-Dial Tone Test (DataTran Only)

3-Card Settings (DataTran Only)

4-Credit Mid Settings

10-IP Address (IPTran Only)

11-DNS Test (IPTran Only)

12-Credit Gateway (IPTran Only)

13-Gift Gateway

14-Check Gateway

15-Param Load

Appendix A: Themes

Standard (Default) Theme

Autumn Theme

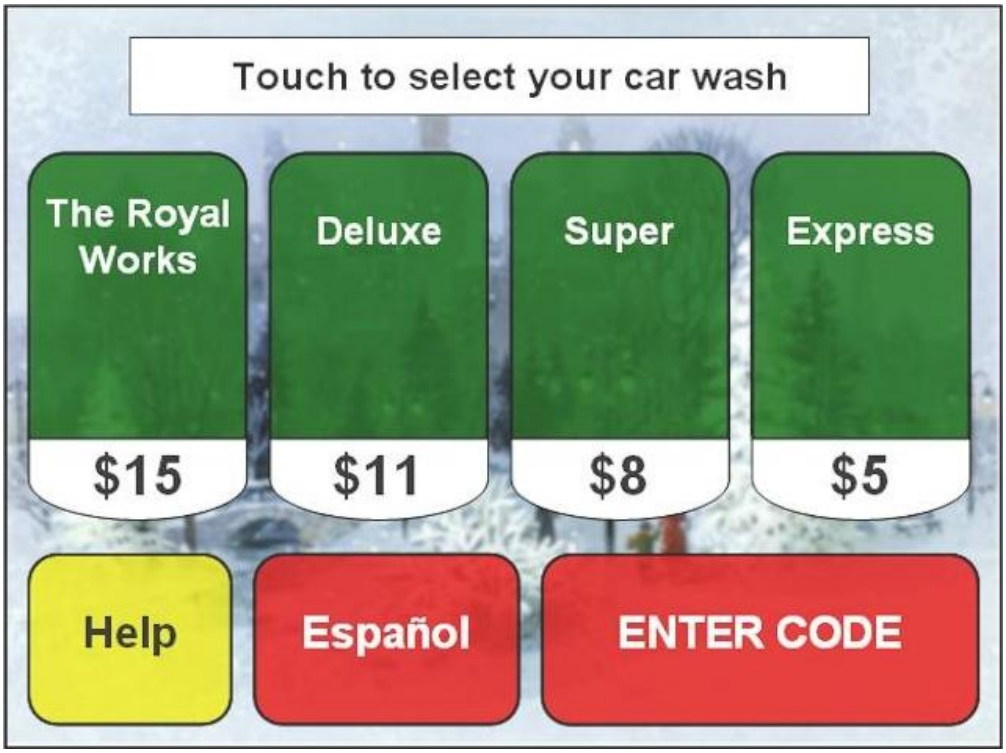
Flag Theme

Sky Theme

Spring Theme

Summer Theme

Water Theme



Winter Theme

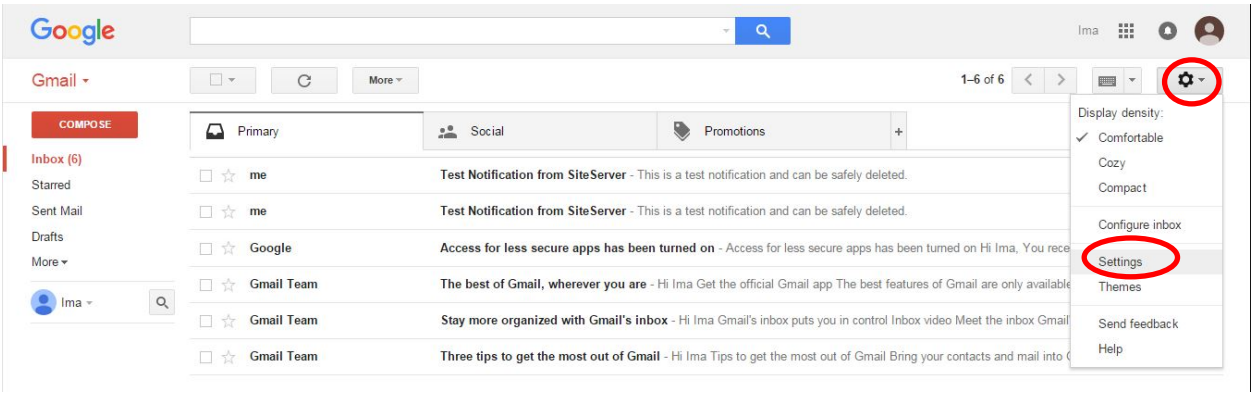
Appendix B: Alternate SMTP Email Setup

For existing customers whose email notifications are getting blocked:

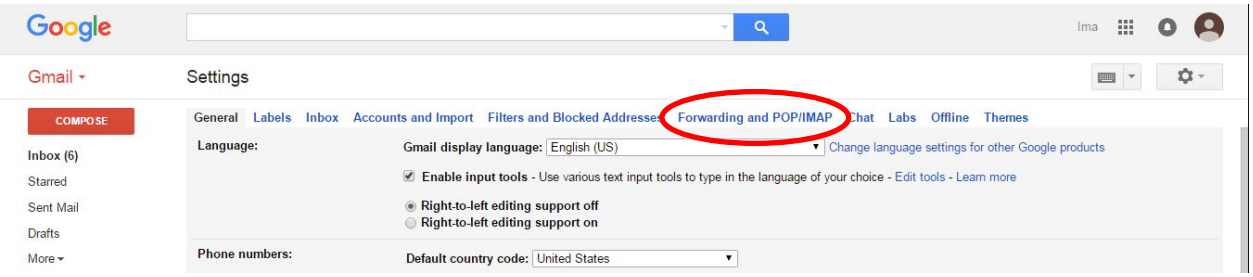
You will be using a Gmail account to receive notifications. If you do not have a Gmail account, go to www.gmail.com and setup a new account. Once you are logged into your Gmail account, you must enable IMAP and change a security setting in order to be able to receive email notifications from the Sierra server.

NOTE: The SMTP email address that is used in the SITE tab will now act as the email server and all notifications from the server will be SENT from this address. The email addresses that are entered under the USER area are the addresses where the email will be received.

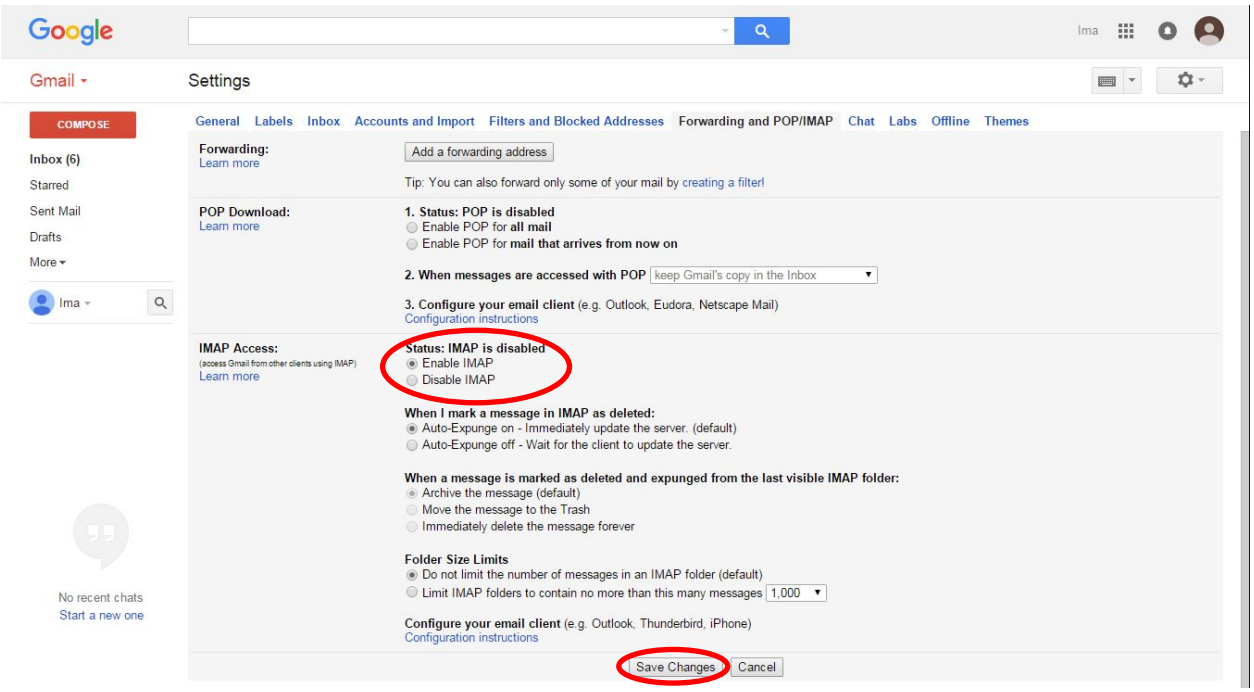
To enable IMAP, log into your Gmail account and click the gear in the upper right corner, then select Settings.



To enable IMAP, log into your Gmail account and click the gear in the upper right corner, then select Settings.

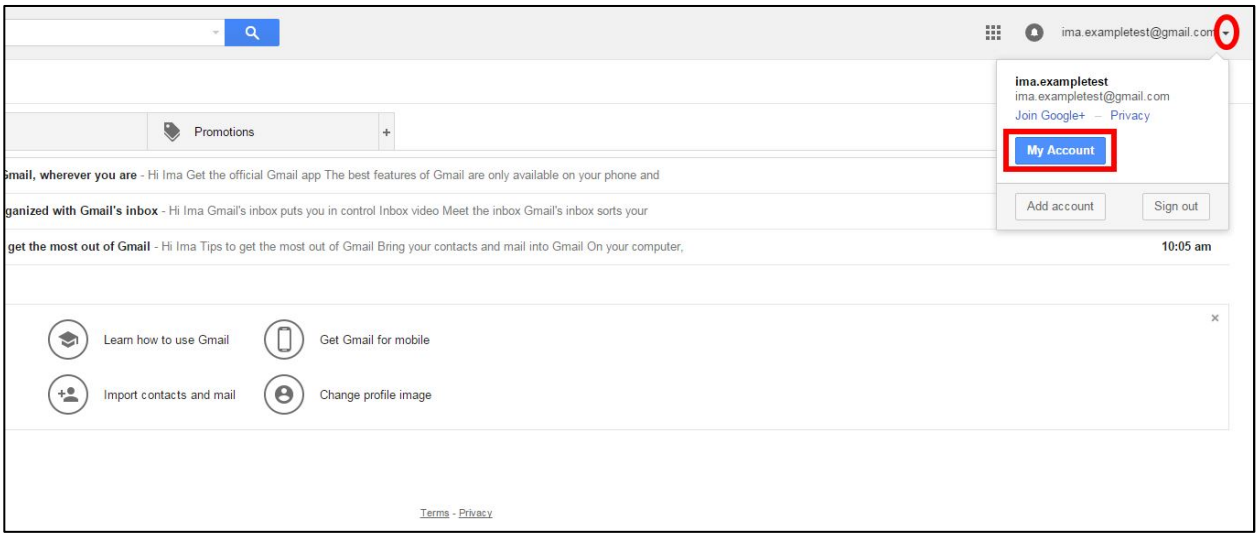


Select the Forwarding and POP/IMAP tab.

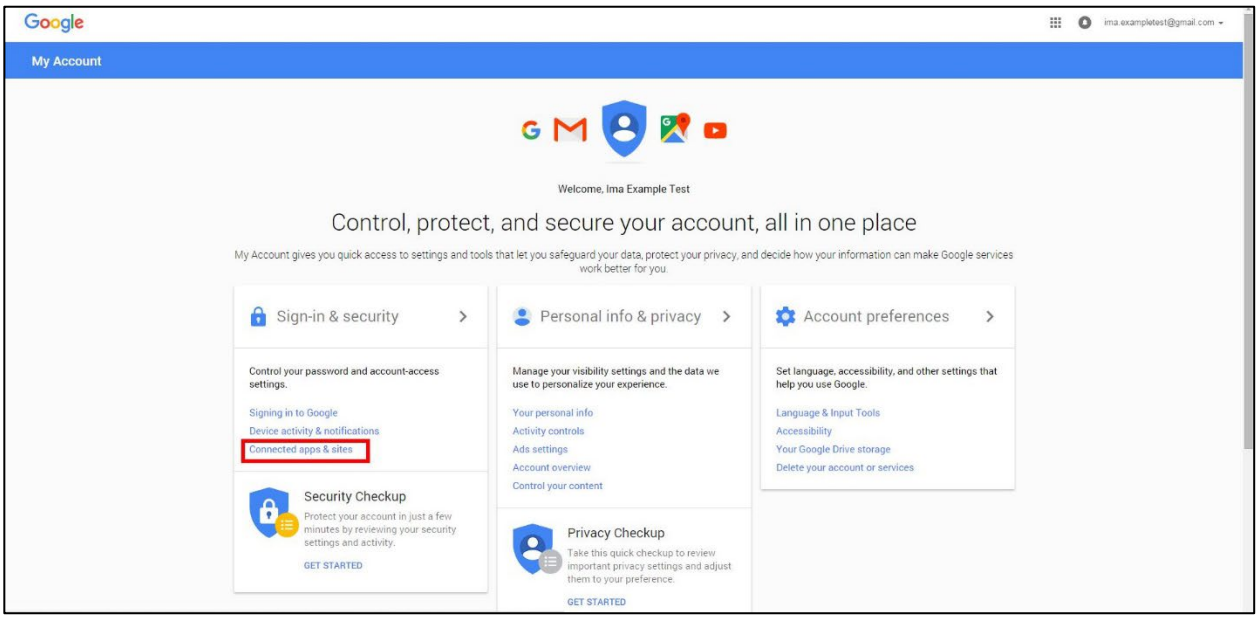


Enable IMAP and click Save Changes.

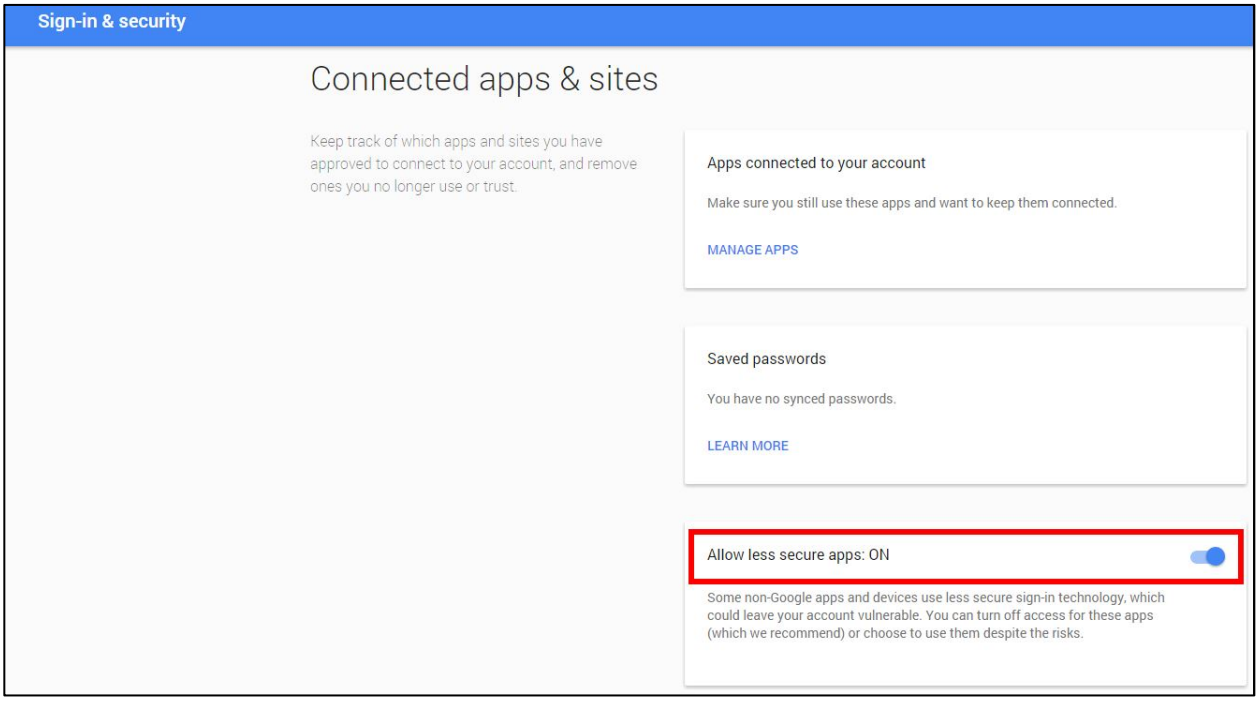
To change the security setting:



Go to the upper right corner and click the down arrow, then click the blue *My Account* box.

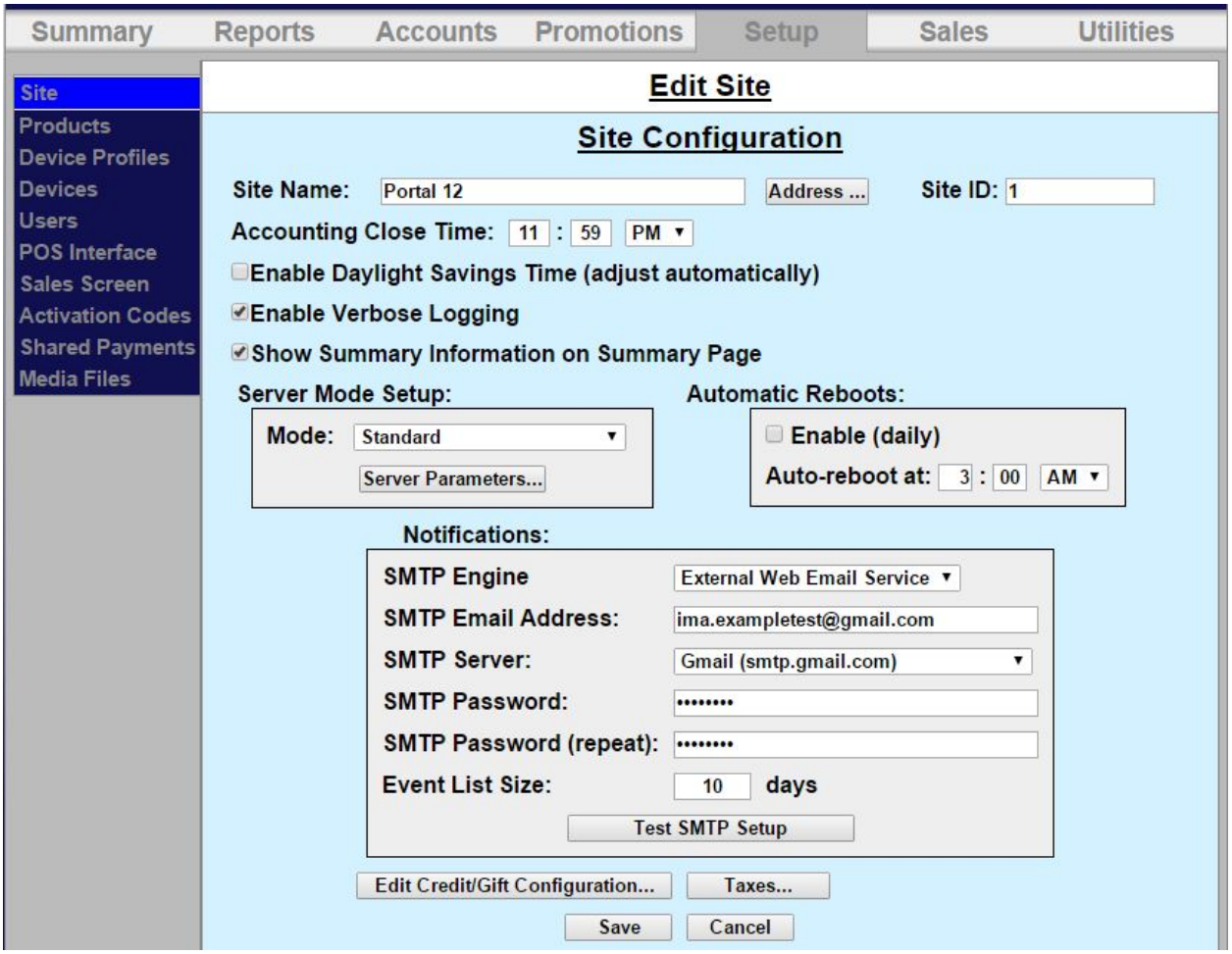


Then click *Connected apps and sites* under *Sign in and Security*.



Scroll to the bottom and change *Allow less secure apps* to ON.

Login to the Sierra management system using an administrative login. Go to the Settings tab, then click Edit by the name of the Site.



1. Under Notifications, select External Web Email Service from the drop down menu for SMTP Engine.
2. Enter your Gmail address in the SMTP Email Address field.
3. Select Gmail (smtp.gmail.com) from the drop down menu for SMTP Server.
4. Enter the email password from you Gmail account into the SMTP Password and SMTP Password (repeat) fields.
5. Click Test SMTP Setup to ensure the server and your Gmail account are communicating. You will receive a test message in your Gmail account.
6. Click Save.