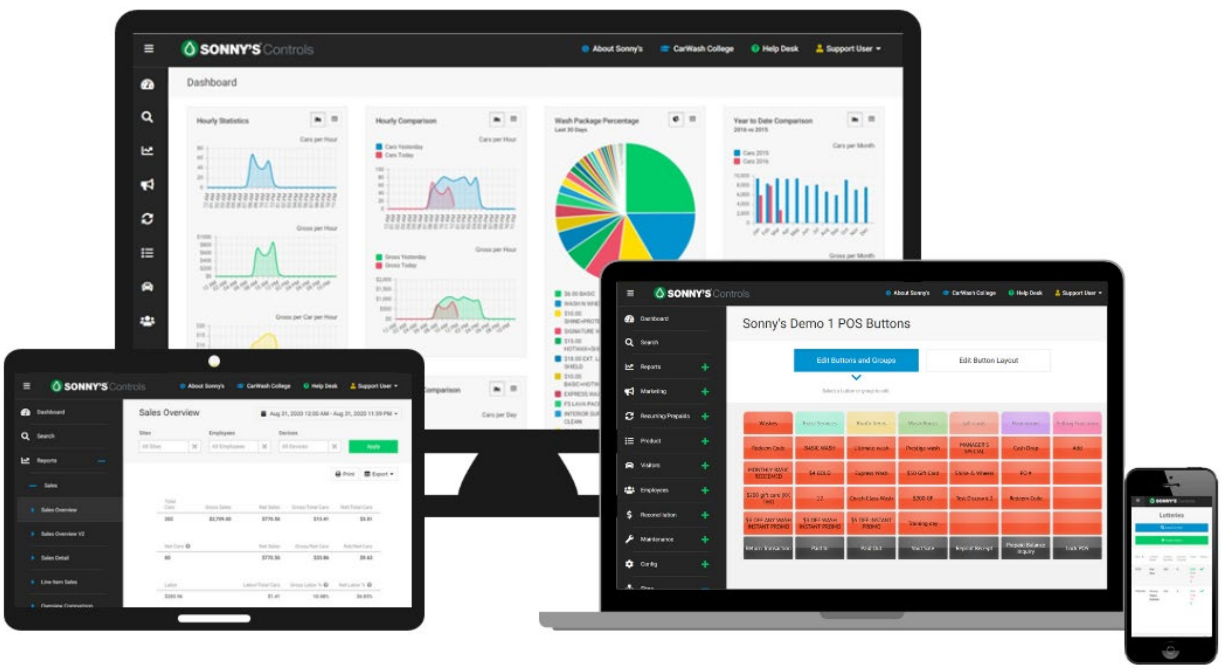
CarWash Controls
Back Office
User Manual



Sonny's Enterprises, Inc.
5605 Hiatus Road
Tamarac, Florida 33321

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INTRODUCTION

This Owner's Manual contains information that is vital to the successful operation and management of the Sonny's CarWash Controls Back Office system.

Please read and understand the full content of this manual to get a well-rounded understanding of setting up, managing and utilizing the Back Office system. Keep this manual in a location where it may be used for ongoing reference.

This manual is up to date as of Back Office version 22.3 – please note that newer system versions may present slight changes, as well as feature updates.

Should you have any questions on the setup and management of the Back Office system, please contact us directly at:

SONNY'S CARWASH CONTROL SYSTEMS
TECHNICAL SUPPORT
5605 HIATUS ROAD
TAMARAC, FL 33321
TOLL FREE (US) PHONE: 800.876.3900
LOCAL PHONE: 954.720.4102
REGULAR SUPPORT HOURS: MON-SUN 8AM – 8PM EST

ControlsHelpDesk@sonnysdirect.com

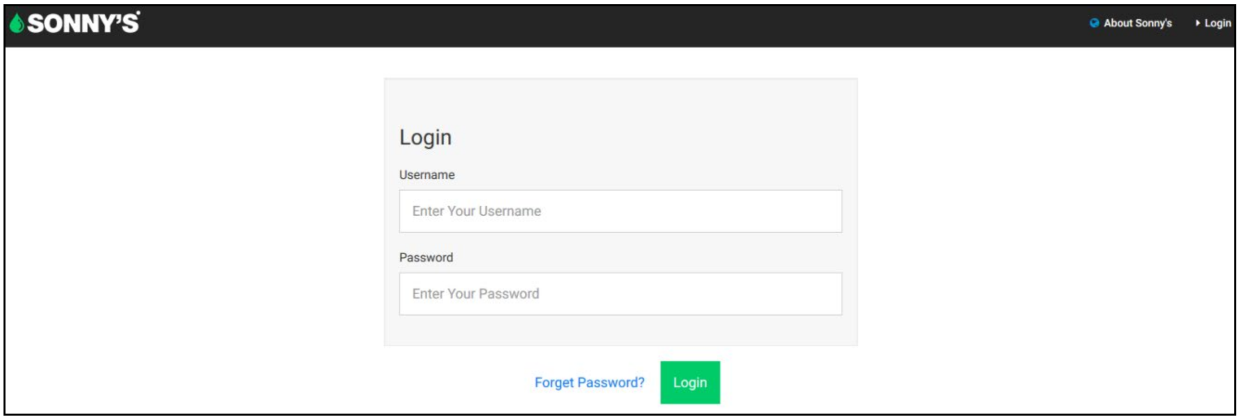
THANK YOU FOR YOUR CONFIDENCE IN
SONNY'S CARWASH CONTROLS!!!!

BACK OFFICE OVERVIEW

The Sonny's POS system is a combination of two main components: the POS (Point of Sale) hardware and software and the Back Office software. The POS is where transactions take place. The Back Office is the management component that enables the user to configure the POS, create and manage campaigns, run reports and many other features.

The Back Office is a comprehensive web-based management and reporting interface that allows you to securely and conveniently control every aspect of your carwash POS from any computer system connected to the Internet. You can monitor your car wash from ANYWHERE you can connect to the Internet!

This user manual is dedicated to the Back Office.

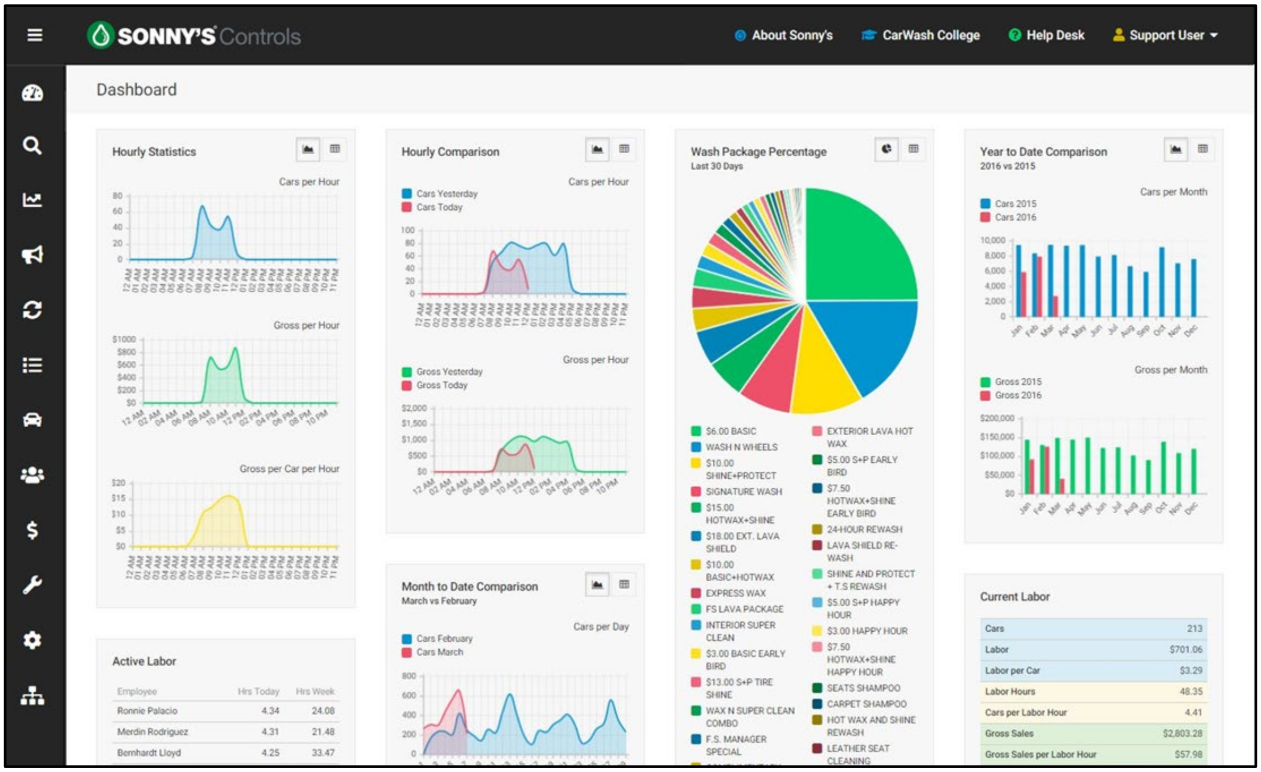


NOTE: We highly recommend that you use a browser other than Internet Explorer or Microsoft Edge for compatibility reasons. **Chrome** and **Firefox** are recommended.

USAGE AND MANAGEMENT

LOGGING IN

Before logging in to your Back Office you must obtain your URL and login information.
Simply open up a web browser and type in your carwash Sonny's URL. Enter your username and password in the corresponding fields and click the **Login** button.
If the login is successful, you will see the **<Dashboard>** menu screen with all your configured widgets.



LOGGING OUT

1. Click on the **User ▼** drop down at the top right corner of the page.
2. Click the **► Logout** option.

OVERVIEW OF THE MODULES

Your Back Office web page is driven by a left navigation menu consisting of all available modules that come with your subscription.
Some modules are divided into tiers that help divide the module into menus or categories.
For these types of modules you must click the *Expand* ✚ icon to access their options. Some of these modules are 2-tier modules, such as Visitors and Employees, and some are 3-tier modules, such as Reports and Marketing. Other modules can be clicked for direct access, such as Dashboard and Search.

THE MODULES

The following is a list and quick description of the Back Office Modules. Each module will be explained in detail in later sections of this manual.

- **Dashboard:** Welcome page when you log in to your back office account. It displays analytical widgets such as car count, gross sales, labor cost, etc., to give you a quick look of how your business is doing. These widgets are configurable.
- **Search:** Provides a search box to lookup cards and transactions by number.
- **Reports:** Provides access to all available reports.
- **Marketing:** Provides access to all of the marketing Campaigns, Promotions, Loyalty program and ECommerce.
- **Recurring/Prepaids:** Provides access to all of your Recurring Plans and Prepaids (Gift cards and Wash Books).
- **Product:** Allows you to create and manage your site's offering of washes, services and details as well as your merchandise items as well and inventory of those items.
- **Visitors:** Provides access to your Customers, Vehicles and House Accounts.
- **Employees:** Allows you to create and manage your Employees.
- **Reconciliation:** Provides access to managing the carwash reconciliation of open shifts.
- **Maintenance:** Allows you to manage and setup alerts for your carwash parts and equipment based on the recommended maintenance schedule using the Scheduled Maintenance module as well as to track incidents with the Incident Tracking module.
- **Config:** Provides setup and configuration options for your business.
- **Sites:** Provides you with a Map view of all your sites and allows you to configure site specific information and settings.

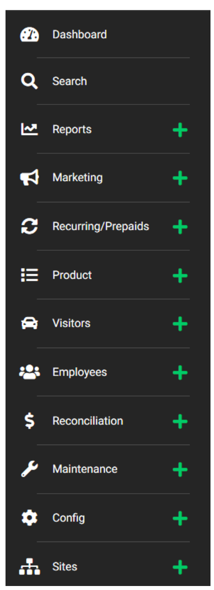
MODULES NAVIGATION MENU

The left navigation menu can be expands to show the name of each module, and contrasts to show each module's icon only.

The hamburger icon in the upper left corner of the menu locks the Navigation Menu into expanded mode. Clicking the hamburger icon again reverses the Navigation Menu into contracted view.

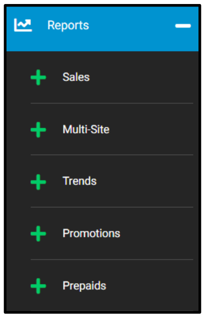
Contracted View

Expanded View

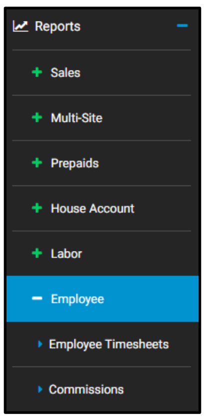


NAVIGATING THE MODULES

1. Click on any of the modules the *Expand* icons.
   - In this example we clicked the *Expand* icon for the **Reports** module on the sidebar.



2. Tier-2 options will now be displayed below.
   - Note that each of these options has an *Expand* ✚ icon as well, meaning that there are more options for each of these.
3. Click on the *Expand* ✚ icon for any of the options (which act as categories in this module).
   - In this case we clicked on the *Expand* ✚ icon for the ✚ Employee category.



4. Click on either of the two options (which in this module are the actual reports) to access their information.
5. You may also use the (collapse) — icon to hide the tier options.

OVERVIEW OF TABS

At the top right of the screen you will find tabs for extra functions.

ABOUT SONNY'S

A direct link to Sonny's – The Car Wash Factory – web page.

CARWASH COLLEGE

A direct link to Sonny's CarWash College web page.

HELP DESK

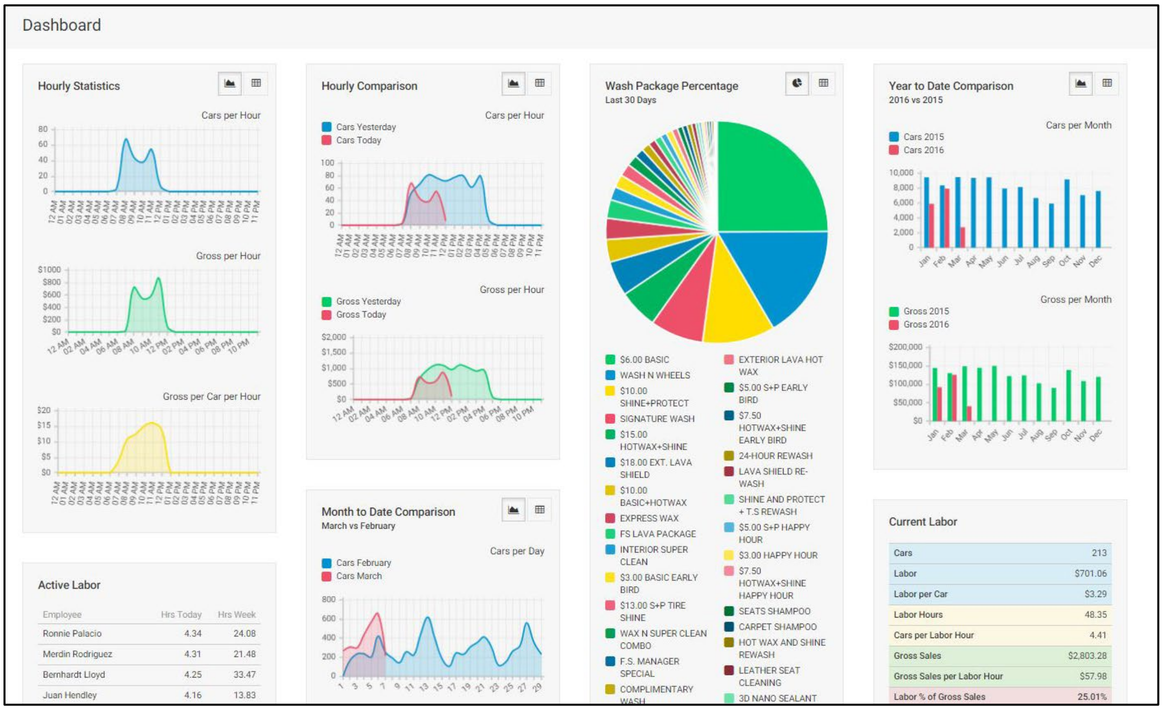
A direct link to Sonny's CarWash Controls Help Desk support page. Help Desk is a support portal where you can find knowledge base articles, videos and guides on our systems. You can also open and manage support tickets and track their status. Sign up to have complete access to the portal!

USER DROP DOWN

Currently under this drop down you find the logout option.

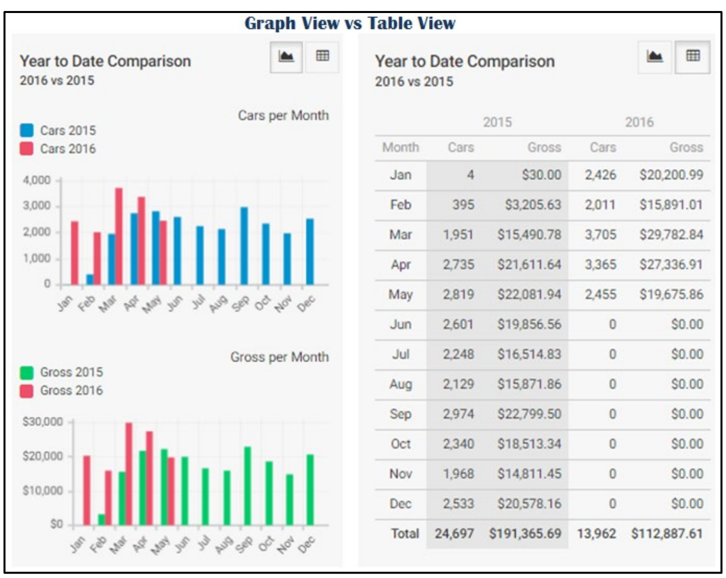
DASHBOARD MODULE

The Dashboard module presents widgets that give you an insight on your business. In this section we will explain how to add and manage widgets.



THE WIDGETS

Widgets are self-descriptive. Most widgets give you two view options: bar/pie view and table view. To change a widget between views simply click the corresponding icon at the top right of the widget.



Below a list and quick description of all widgets:

- **Single Site:** The following widgets display data for a single site:

- **Active Labor:** Shows daily and weekly clock-in hours for each employee with active hours for the current pay week for the selected site.
- **Cash Balance – Sonny's Pay Station:** Shows Sonny's Pay Stations live cash balances (from acceptor and dispensers) for the selected Pay Station and site.
- **Cash Overview:** Shows Sentinel Pay Stations live cash balances (from acceptor and dispensers totals) for the selected Pay Station and site.
- **Daily Labor Stats:** Shows data in regards of labor in conjunction with cars and sales totals for the site selected.
- **Day Over Day Sales:** Shows sales data per hour per day, for the current and previous day for the site selected.
- **Month Over Month Sales:** Shows sales data per day per month, for the current and previous month for the site selected.
- **Today's Wash Package Percentage:** Shows percentages and numbers of washes per type of wash sold on the current day for the site selected.
- **Wash Package Percentage:** Shows percentages and numbers of washes per type of wash sold on the last 30 days for the site selected.
- **Washes vs. Redemptions:** Shows a breakdown of washes (regular vs. redemptions washes) per hour for the current day, for the site selected.
- **Weather Daily:** Shows a daily weather for the current day and next 7 days for the site selected.
- **Weather Hourly:** Shows the daily weather for the current day by hour for the site selected.
- **Year Over Year Sales:** Shows sales per month for the current and previous year for the site selected.

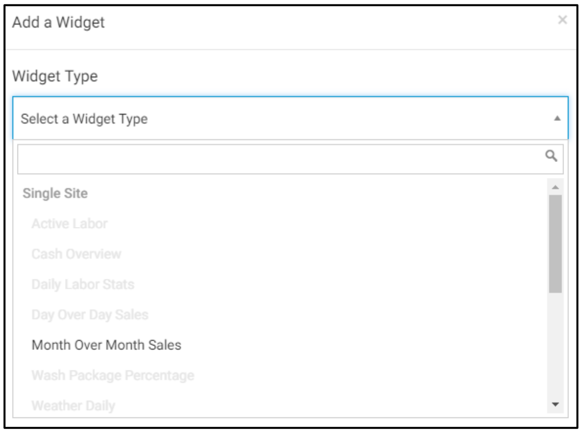
- **Multi Site:** The following widgets display data for multiple sites:
  - **Daily Sales:** Show sales for the current month, per day, for multiple sites selected.
  - **Hourly Sales:** Shows sales for current day, per hour, for multiple sites selected.
  - **Monthly Sales:** Shows sales for the current year, per month, for multiple sites selected.
  - **Year to date Incidents:** Shows the number of incidents per month for the current year for multiple sites selected.

- **Recurring Tracking (All Sites):** Shows the number of Recurring Plans that successfully charged or declined to charge and the scheduled number of plans to charge on for the next day.

ADD A WIDGET

When you first login to your Back Office you will not find any widgets on your Dashboard. To add widgets onto your Dashboard follow the steps below:

1. Click the **Dashboard** module on the sidebar.
2. Click the **Settings** button.
3. Click the **+ Add a Widget** button.
4. Use the Widget Type drop down menu to select the widget to add.



5. Select the Site the data on the widget is from using the Data From drop down menu (applicable for Multi-Site clients).
6. A preview of the selected widget will be displayed.
7. Click the **+ Add a Widget** button.
8. You may add more widgets if desired.
9. Click the **Apply** button to finish.

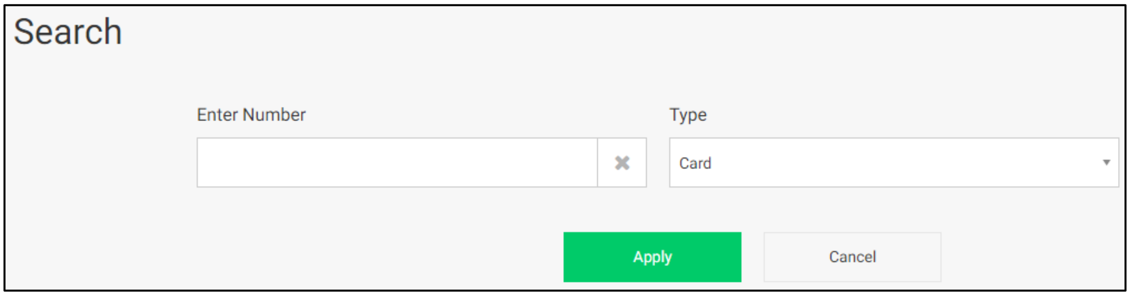
MOVE WIDGETS

The widgets are organized from left to right on the Dashboard screen, based on their position in the list from top to bottom. First widget on the top of the list will be the first widget on the top left of the Dashboard screen. If you would like to rearrange the widgets follow the steps below:

1. Click the **Dashboard** module on the sidebar.
2. Click the **Settings** button.
3. The widgets that have already been added to the Dashboard will be displayed in their respective order.
4. To reposition a widget click its 4-way arrow and drag it up or down accordingly.
5. Click the **Apply** button to finish.

SEARCH MODULE

This module allows you to quickly locate a prepaid account using the account's prepaid number, to quickly locate a transaction by entering the transaction number, and to quickly locate all transactions processed with a specific credit card by entering the credit card last 4 digits and credit card type (MasterCard, Visa, etc).



LOOKUP TRANSACTION

1. Click the Search module on the sidebar.
2. Enter the number of the transaction in the Enter Number field and then select *Transaction Number* from the Type drop down.
3. Click the **Apply** button to run the search.

LOOKUP PREPAID ACCOUNT

1. Click the Search module on the sidebar.
1. Enter the number of the prepaid card/RFID/Barcode Enter Number field and then select *Prepaid Card Number* from the Type drop down.
2. Click the **Apply** button to run the search.

LOOKUP CREDIT CARD TRANSACTIONS

1. Click the Search module on the sidebar.
2. Enter the last four number of the credit card in the Enter Number field and then select *Credit Card Number* from the Type drop down.
3. Select the credit card type from the Credit Card Type drop down.
4. For Credit Card transactions select the Credit Card Type from the drop down.
5. Click the Apply button to run the search.

REPORTS MODULE

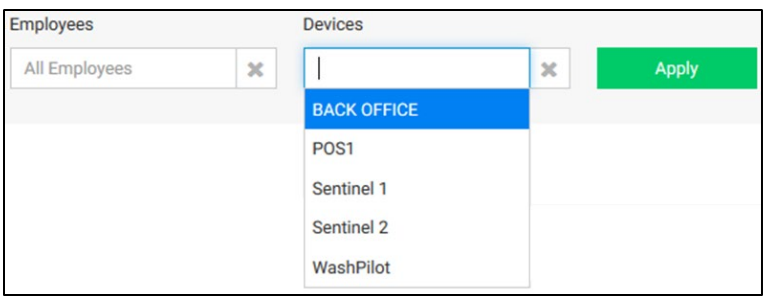
In this section we will describe how to view and navigate through the reports available in the system. Each report has a filtering and an options menu at the top right of the report.

REPORT OPTIONS MENU

The options vary on a per report basis. Each report has a heading with its corresponding options. Below is a sample view of these options.

- **Name of Report:** The name of each report is displayed at the top left of the report heading.
- **Filtering Options:** Reports can be run using certain filtering options. The filtering options for each report are displayed in the center of the report heading. In the example above the filtering options are Employees and Devices.

  - To use the filtering options click inside the box, a drop down of the available options will be displayed as shown below.

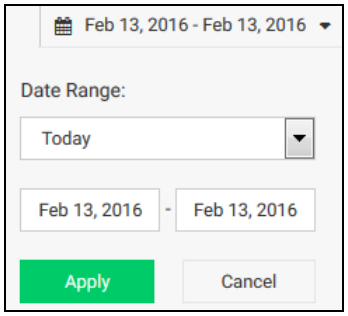


  - You may select multiple options.

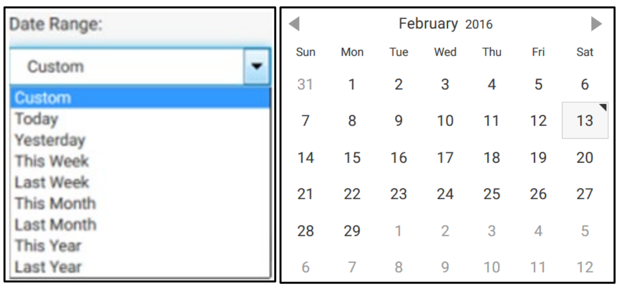
  - Once all options have been selected click the Apply button to run the report.

- **Site Selection:** For multi-site you use this drop down to select which site you want to run the report for.
- **Date Options:** Reports can be run for different date ranges. The Date Options are displayed at the top right of the report heading. To change the date-range click the date drop box.

  - Click the Date Range drop down menu.



- Select one of the predetermined options. Or customize the date range by selecting the start and end date boxes accordingly. When you click on one of these boxes a calendar box will be displayed for you to select the custom date.

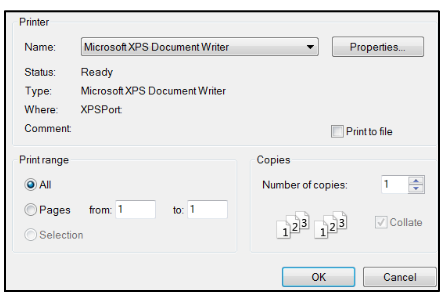


- Click the **Apply** button to run the run the report.

➢ **Print and Export Options:** Reports can be printed and exported. The print and export icons are displayed at the top right of the report heading below the date options.

- **To print a report:**

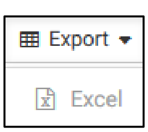
1. Click on the **Print** button.
2. Your computer printer options will be displayed.



3. Print as you would any other document.

- **To export a report:**

1. Click on the **Export** drop-down menu button.
2. The available formats for the export will be displayed.



3. Click the format you want to export the file and open or save file as desired.

THE REPORTS

Reports are grouped into categories. Below we will mention each category and the reports available within. A brief explanation of what the reports consists of is added below.

NOTE: Some reports are only available for clients that have extra hardware devices such as Pay Stations and the Sonny's Tunnel Controller.

SALES

- **Sales Overview:** This report gives you an overview of the site sales for a given time period. In this report Wash Book, Gift Card and Prepaid Wash redemptions are presented before Net Sales, indicating they are a liability against Gross Sales.
- **Sales Overview v2:** This report varies from the Sales Overview report in that it presents Wash Book, Gift Card and Prepaid wash redemptions after Net Sales, indicating they are a liability against Net Sales.
- **Sales Detail:** This report displays the sales of each department broken down by category.
- **Line Item Sales:** This report lists each individual transaction and its details for a specified day. Up to 1,000 transactions will be displayed when this report is run.
- **Overview Comparison:** This report allows you to compare general data such as total cars, gross sales, labor cost, amongst others, between two selected dates or date ranges.
- **Special Transactions:** This report lists all “discretionary” transactions such as Refunds, Comp Sales, Paid Outs, etc. so that you can quickly analyze how many of these transactions were processed and who processed them.
- **Inventory:** A complete list of your merchandise items with counts, costs and price. This reported can be printed and exported to excel.
- **Incomplete Transactions:** A list that shows transactions which have not been completed and are in a pre-sale or suspended status.
- **General Ledger:** This report allows you to assign a description and accounting/general ledger number to each line item of the Sales Overview report. This report can be exported into excel and imported into an accounting software.
- **General Ledger v2:** This report varies from the General Ledger in that it presents Washes Sold as negative amounts and does not include Gross Sales.
- **Loyalty Audit:** This report allows you to monitor loyalty balances that have been adjusted manually by displaying when and who made the adjustments.

MULTI-SITE

These reports are intended for multi-site clients.

- **Hourly Comparison:** This report compares each site’s daily key stats by hour, including total cars, gross sales, etc., so that you can see how well all of your car washes are doing in one report.
- **Daily Comparison:** This report compares each site’s daily key stats by day, including total cars, gross sales, etc., so that you can see how well all of your car washes are doing in one report.
- **Monthly Comparison:** This report compares each sites' daily key stats, including, total cars, Gross sales, etc, so that you can see how well all of your car washes are doing in one report.

TRENDS

- **Hourly Peak:** This report displays a daily count and graph of washes sold differentiating between cash purchases and prepaid redemptions.
- **Service Trends:** This report displays any services that were added to washes to identify which services are more popular and what wash package they are commonly added to.

PROMOTIONS

- **Internal Discounts:** A breakdown of discounts created in the Sonny's Back Office and used during a period of time.

- **External Discounts:** A breakdown of discounts externally created and used during a period of time.
- **Fundraiser:** Once a Fundraiser Code has been setup and starts being used the user can run this report to see the code usage.
- **Instant Promotions:** This is report that lists the usage and redemptions of Instant Promotion codes.

PREPAIDS

- **Wash Redemption Count:** This report will break down your wash sales to see which washes were purchased with a Prepaid (Recurring, Wash Book or Gift Card).
- **Prepaid Wash Stats:** This report focuses on what prepaid washes have been sold during a specified time frame.
- **Wash Book Stats:** This report displays prepaid wash book and recurring plan sales and redemptions. It focuses on what wash books and recurring plans have been sold during a specified time frame.
- **Gift Card Liability:** This report displays the value, used amounts and liability of all active gift cards.
- **Gift Card Audit:** This report allows you to monitor Gift Card balances that have been adjusted manually by displaying when and who made the adjustments.
- **Wash Book Audit:** This report allows you to monitor Wash Book balances that have been adjusted manually by displaying when and who made the adjustments.
- **Wash Book Pending:** This report displays a list of Wash Books purchased at the Pay Station and not yet assigned and activated.
- **Gift Card Pending:** This report displays a list of Gift Cards purchased at the Pay Station and not yet assigned and activated.

RECURRING

- **Recurring CC Exp:** This report displays a snapshot of recurring plans that have credit cards that are going to expire.
- **Recurring Churn:** This report shows growth and churn rates for recurring plans during a selected period – primarily monthly.
- **Recurring Profitability:** This report allows you to determine your profit from the recurring plans you have set up.
- **Recurring Purchases:** This report displays a list of the initial purchases of Recurring Accounts. It does not include recurring payments.
- **Recurring Tracking:** This report displays details on daily recurring charges (success and failures).
- **Recurring Usage:** This report breaks down the usage and revenue per recurring plan membership, by identifying the number of redemptions per the selected time range. It will also display revenue collected, averaged across each segment, and grouped by usage from top 33%, middle 34% and bottom 33%.
- **Recurring Conversion:** This report displays the conversion rate of vehicles washing and purchasing a recurring membership.
- **Recurring Cancellation:** This report provides a list of recurring plans that were cancelled and includes the recurring plan, the customer's name, the employee who cancelled the plan and the sales device where the plan was cancelled from as well as the date and time of the cancellation.
- **Current Membership Value:** This report provides a snapshot of the value of all your current recurring memberships determined by the sum of all active accounts billing amounts.
- **Recurring Pending:** This report displays a list of Gift Cards purchased at the Pay Station and not yet assigned and activated.
- **Recurring Billing vs Redemption Overview:** This report compares the number of accounts for each recurring plan vs the number of washes redeemed.
- **Recurring Billing vs Redemption Detail:** This report displays the washes redeemed from each recurring plan and the sites where the washes were redeemed at.

HOUSE ACCOUNT

- **House Account Overview:** This report lists your house accounts and provides basic information for each of them.
- **House Account Billing:** This report displays each house account billing information presented in an unofficial invoice form, so that you can print or export and send out to your house account customers.

LABOR

- **Net Daily Labor Costs:** This report displays labor costs based on employee labor net sales.
- **Net Daily Department Labor Costs:** This report displays labor costs per employee department and net sales.
- **Net Hourly Labor Costs:** This report displays labor costs on an hourly base based on net sales.
- **Gross Daily Labor Costs:** This report displays labor costs based on employee labor gross sales.
- **Gross Daily Department Labor Costs:** This report displays labor costs per employee department and gross sales.
- **Gross Hourly Labor Costs:** This report displays labor costs on an hourly base based on gross sales.

EMPLOYEE

- **Employee Timesheets:** This report displays employees' timesheets. For clients with an ADP license this report has an additional Export option that allows you export the timesheets into an APD format that you can upload into your ADP business software.

> **NOTE:** For ADP clients enter the ADP ID for each employee in the Employee Settings and the site code in the "ADP Report Company Code section" of the Site Settings.

- **Commissions:** This report displays commission sales for employees (greeters).

LICENSE PLATE RECOGNITION

- **New vs. Returning Vehicles:** This report displays new vs recurring vs returning license plates based off the LPR system reads. New represents vehicles that have only been at the wash once for the time period selected. Returning represents vehicles that have been at the wash more than once for the time period selected. Recurring represents vehicles that have been at the wash and are part of a recurring plan.
- **Recurring Retargeting:** This report displays the number of times the Retargeting message was displayed, the number of plans that were actually purchased when the message was displayed, and the conversion rate.
- **Redemption Manual entry:** This is report is applicable to LPR clients only. It displays vehicles that were processed through the Pay Station via an Employee Manual Override. It displays who the employee was that performed the override.

MAINTENANCE

- **Maintenance Report:** This report displays all the parts and equipment details such as installed, replaced dates and cars washed during the piece's lifetime. This reports works in conjunction with the *Scheduled Maintenance* module.
- **Incident Report:** This report displays all the car wash incidents at the site(s) during a specified time range. This report works in conjunction with the *Incident Tracking* module. Incidents are first document in *Incident Tracking* and then reports from those can be run using the Incident Report.

TUNNEL CONTROLLER

- **Unpaid Wash Report:** This report displays all washes processed through the tunnel controller that were not part of a sales transaction. These washes could be auto-generated washes, caused by triggering the photo eyes for a valid car length while no wash is in queue, or washes directly queued from the Push button Station.

MARKETING MODULE

This module offers the interface to configure different type of marketing campaigns. These include, but are not limited to, One-Time-Use codes, Event Promotions, Time Based Promotions, Instant Promotions, SMS Messaging and other type of Promotions and Discounts. Certain types of campaigns are only available for certain type of system setups. Please reference the table below to see what is available with your setup:

Feature / System Setup	SPS + LPR + POS + EComm	SPS + POS + EComm	SPS + POS	POS + EComm	POS Only
One-Time-Use Codes	✔	✔	✔	✔	✔
Event Promotions	✔	✔	✔	✔	✔
Timed Based Promotions	✔	✔	✔	✔	✔
Instant Promotions	✔	✔	✔	✔	✔
Recurring Retargeting	✔				
Lottery Wash	✔	✔	✔		
Discounts	✔	✔	✔	✔	✔
Fundraisers	✔	✔	✔	✔	✔
SPS Rewards Points	✔	✔	✔		
SPS Loyalty Sign Up Message	✔				
POS Rewards Points	✔	✔	✔	✔	✔
ECommerce Features	✔	✔		✔	
Automated SMS Messages	✔				
SMS Manual	✔	✔	✔	✔	✔

CAMPAIGNS

ONE-TIME-USE CODES

One-Time-Use codes are a set of randomly generated numbers that can only be used once. These codes will apply a discount to a wash as defined in the Back Office campaign settings when the promotion is created.

One One-Time-Use campaign can be configured with multiple types of discounts and each discount will create its own set of discount codes. For example, you may create a Summer Special One-Time-Use Campaign with different discounts that apply to different washes, or different sites.

Once you have added all the discounts to a campaign you will need to finalize the campaign so that the system can generate the codes.

After the system has generated the codes you will be able to export them. A csv file will be available for download containing each of the codes generated.

Once you have the list of codes you will be able to distribute them to your customers by different means. Most clients print out the codes and then stick each code onto their business cards or mailers.

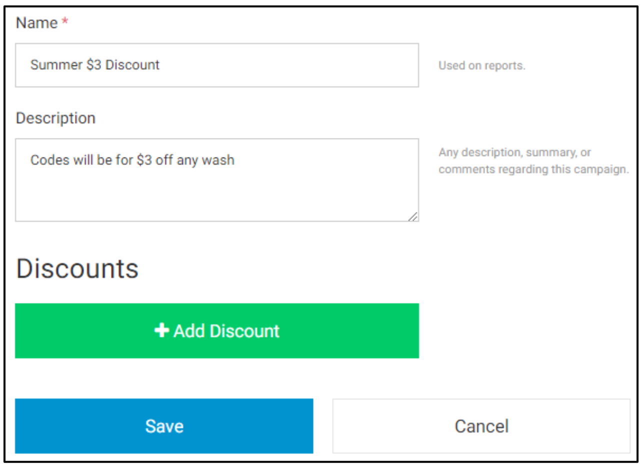
Other clients generate a barcode for each code and distribute the barcodes out to their customers. You could also utilize an email service to email out the codes. Or through Facebook, text offers!

CREATE A ONE-TIME-USE CODE CAMPAIGN

When you create a campaign you may also create the discount(s) that will be part of the campaign, or set them up at a later time. You may add one or more than one discount to a single campaign.

1. Click the *Expand* ✚icon for the **Marketing ✚** module on the sidebar.
2. Click the *Expand* ✚ icon for **Campaigns ✚** menu.
3. Click the **▶ One-Time-Use** option.
4. Click on the **✚ Create Campaign** button.
5. The *Create One-Time-Use Campaign* page is displayed. Fill in each field accordingly.

NOTE: The * (asterisk) denotes mandatory fields.



- **<u>Name *</u>:** Enter a name for the campaign.
- **<u>Description</u>:** Add any description, summary, or comments regarding this campaign.

6. Click the **Save** button to save the campaign and add the discount(s) at a later time. **<u>Or</u>** proceed to add the discount by clicking the **✚ Add Discount** button.

NOTE: The steps to adding the Discount to the Campaign section are described below.

CREATE ONE-TIME-USE CODES

Each campaign may contain one or more individual discounts. To create a discount for the campaign:

1. Click the *Expand* ✚icon for the **Marketing ✚** module on the sidebar.
2. Click the *Expand* ✚ icon for **Campaigns ✚** menu.
3. Click the **▶ One-Time-Use** option.
4. Click on the ✎ icon for the Campaign you are adding the discount to.
5. Click on the **✚ Add Discount** button.

- **<u>Name*</u>:** Enter the name for the discount.
- **<u>Category*</u>:** Select the category you would like the promotion to appear under for reports and filter. Choose between *Promotion/Coupon* and *Fundraiser Promotion*.
- **<u>Available For Sale</u>:** Select which site(s) the discount codes will be available for.
- **<u>Start Date</u>:** Select the date the codes will start to be available.
- **<u>Expiration Date</u>:** Select the date you want the codes to stop working – no longer valid. You may leave this field empty and simply disable the discount at a later date.

- **Number of Redemption Codes:** Enter the number of random codes to be generated.
- **Selling section:**
  - Discount Type: Select between *Discount amount in Dollars* and *Discount amount by a Percentage* for the type of discount the issued codes will be valid for.

> **NOTE:** Percentage discount are not redeemable at Pay Stations. They will only work at the POS.

  - Discount Amount: Enter the value of the discount to be given. This value will be in *dollars* or *percentage* based on the Discount Type selected.
  - Discount Applicable to: The discount code can be applied to any purchase (Subtotal) or to purchases with specific items in it (Single Item). Click on the radio button for the option you want to select.
    - *Apply Discount to Single Item*: When you select this option you will need to select if the discount will apply to all items in a Department(s) or specific single items. When you select this option a new Eligibility section is displayed. This is discussed in the Eligibility section below.
  - Can Combine with other Discounts: Use the *Yes/No* toggle switch to select whether or not the discount can be combined with other discounts.

> **NOTE:** Event codes and one-time codes cannot be used in the same transaction that is also using an instant code.

- **Eligibility section:** You need to select between *Eligible by Department* and *Eligible by Item*.
  - Eligible by Department: Use the *Department* drop-down list to select which department the discount code will apply to. Click the Apply button after selecting the applicable Department.

    You may add more Departments. Click on the + Add Rule **button** after item and repeat *Department* and *Item* selection plus the **apply** button.
  - Eligible by Item: Use the *Department* drop-down list to select which department (only Wash department is eligible) and then the *Item* dropdown list to select which item (wash item) the discount code will apply to. Click the Apply button to add the item.

    You may add more items. Click on the + Add Rule **button** after item and repeat *Department* and *Item* selection plus the **apply** button.

6. Click the Save button to finish setting up the promotion.
7. The campaign *Edit* page is now displayed.
8. You may click the Save button at this time discount you just created, and continuing adding discounts to the same campaign by clicking the + Add Discount button. Or you can come back to the campaign at a later time and add more discounts.
9. Click the Finish button to finalize the campaign and generate the redemption codes.
10. A "Warning!" pop-up is displayed for you to confirm the campaign is ready to be finalized. Click the ✓ Finish button.

> **NOTE:** You **will not** be able to add new discounts or change the number of redemption codes once you finalize the campaign.

11. After you finish the configuration of your One-Time-Codes campaign the system will start generating the codes. Based on the quantity of the codes it may take a couple of minutes for these to be generated. You will notice the Status of the Campaign showing a *Generating* icon. Once the codes are ready the status will display a ✔ *Ready* icon.

Export One-Time-Use Codes

After you finalize a campaign the system will generate the codes and you will be able to export them. To export the codes of a campaign:

1. Click the *Expand* ✚ icon for the **Marketing ✚** module on the sidebar.
2. Click the *Expand* ✚ icon for **Campaigns ✚** menu.
3. Click the **▶ One-Time-Use** option.
4. Click on the icon for the campaign you want to export the discounts for.
5. Follow the file download process based on your browser.

-3-Off-Any-Wash-1339-999_Redemption_Codes_2018-09-21_01-32-00_pm.csv

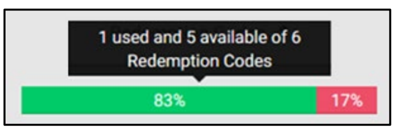
NOTE: The codes will be downloaded to a ZIP file. The codes are saved to a CSV file. If there were multiple discounts setup in the campaign there will be one CSV file per discount.

VIEW AND EDIT ONE-TIME-USE CAMPAIGNS

The **One-Time-Use Campaigns** page displays all the promotions that have been created. It also offers a quick view about the percentage of codes used for each campaign. You may use the *Search & Filter* options to filter the list of promotions and find a specific(s) promotion(s). You may also edit promotions that are not finalized. To view and edit the promotions:

1. Click the *Expand* ✚ icon for the **Marketing ✚** module on the sidebar.
2. Click the *Expand* ✚ icon for **Campaigns ✚** menu.
3. Click the **▶ One-Time-Use** option.
4. By default all promotions are listed. You may use the **Search & Filter** button to filter the search/view by: Name, Sites and/or Status.

➢ **Redemption Codes column:** This column displays a bar that indicates the percentage of codes that have been used. You may also hover over the bar to see an exact number of codes used and codes available.



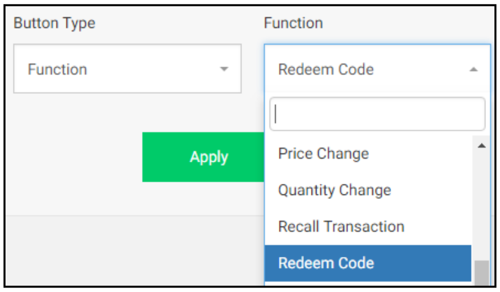
5. To edit a campaign click on the icon to the right of the corresponding promotion.

NOTE: For finalized campaigns you will only be able to edit the name of the campaign. For campaigns that are not finalized you want to use the icon to access the campaign and create the discount(s) and finalize the campaign.

CONFIGURE THE POS REDEMPTION BUTTON FOR ONE-TIME CODES

One-Time-Use codes can easily be scanner at both the POS and Sonny's Pay Station. However, if you don't have a scanner at the POS you can manually enter the code using the One-Time-Codes Redemption button. To configure this button at our POS:

1. Click the *Expand* ✚ icon for the **Sites** module on the sidebar.
2. Click the *Expand* ✚ icon for the specific site **▶ Car Wash #1**
3. Click the **▶ POS Buttons** option.
4. Click the **Edit Buttons and Groups** button. Proceed to click on any of the menu buttons.
5. After you click a button you will notice an icon on the button and below the buttons the settings to configure the button.
6. For the Button Type drop-down select: **Function**
7. For the Function drop-down select: **Redeem Code**



8. Click the **Apply** button and then the **Save** button. A confirmation notice will be displayed at the top left of the page.

9. After saving the POS will prompt you to Restart and the button will be available on the POS menu buttons.

EVENT PROMOTIONS

Event Promotions allow you to have the system automatically print out codes based on customer's purchased items. For example, you can setup a promotion that generates a $2 off discount when a customer purchases the top wash. This discount is printed out as an 8-digit code with a barcode. To redeem the discount the barcode can be scanned or the code manually typed in.

CREATE AN EVENT PROMOTION

1. Click the *Expand* **+** icon for the **Marketing** module on the sidebar.
2. Click the *Expand* **+** icon for **+ Campaigns** menu.
3. Click the **► Event Promotions** option.
4. Select the **+ Create Promotion** button.
5. The Create Event Promotion page will be displayed. Fill in each field accordingly.

NOTE: The * (asterisk) denotes mandatory fields.

- **Event Promotion*:** A name to identify the promotions on Reports, the POS and Customer Receipts.
- **Event Trigger*:** The Trigger Item is the item that when purchased triggers a generated discount code to be attached to the customer's receipt.
    - **Department:** Select the Wash Department.
    - **Item:** Select the specific wash the will trigger the promotion.
  - Select the **Apply** button to save the selection.
- **Available For Sale:** Select which sites (in multi-site) the discount will be available for by using the Yes/No toggle switch for each site displayed in the drop down menu.
- **Event Promotion Start Date:** Use this field to disallow the use of this promotion prior to the specified date.
- **Event Promotion Expiration Date:** Use this field to disallow use of this promotion after the specified date.
- **Available For Day:** This allows you to set the promotion applicable only for specific days of the week.
- **Promotion Code Issue Frequency Limit:** This allows you to set a maximum number of times the event will be triggered and generate a discount code on a daily base.
- **Promotion Code Issuing Limit:** This allows you to set a maximum number of times the event will be triggered and generate a discount code for the entire duration of the promotion.

- **Code Expiration Period (In Days)*:** The length, in days, that codes generated by this promotion will be valid for after being issued.
- **Item Discount Value:** The discount settings for the code generate by this promotion.
  - **Discount Type:** Select the corresponding radio button between Dollar Amount discount and Percentage discount.
  - **Discount Amount:** Enter the value of the discount code.
  - **Can Combine:** Select whether the discount can be combined with other discounts by using the Yes/No toggle switch.

NOTE: Event codes and one-time codes cannot be used in the same transaction.

- **Discount Item:** The item to which the discount code generated by the promotion will apply to.
  - **Department:** Select the Department the item belongs to.
  - **Item:** Select the specific item the discount will apply to.
  - Select the Apply button to save the selection.

6. Once all mandatory settings have been configured the Save button will become available.
7. Click the Save button to finish.

TIMED BASED PROMOTIONS

Time Based Promotions give you the ability to setup "Early Bird", "Happy Hour", "Lunch Break" specials where a discounted price is offered on selected wash items. These discounts can be configured in advance, where you can set up special pricing for holidays, seasonal specials, or anytime of the year.

For a How-To video on creating a Time Based Promotion click here or go to http://bit.ly/2K4iomF

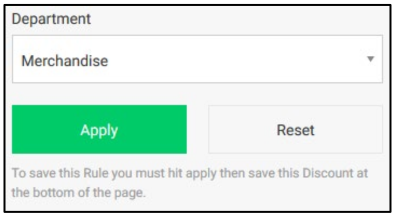
CREATE A TIME BASED PROMOTION

1. Click the *Expand* + icon for the Marketing module on the sidebar.
2. Click the *Expand* + icon for + Campaigns menu.
3. Click the ► Timed Based Promotions option.
4. Select the + Create Promotion button.
5. The Create Time Based Promotion page will be displayed. Fill in each field accordingly.

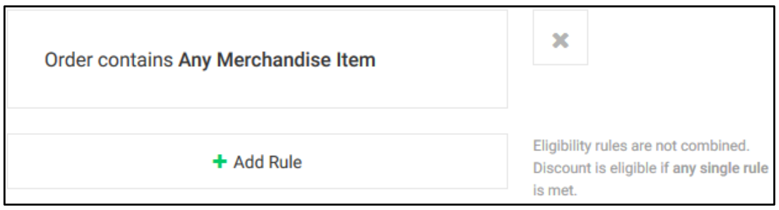
NOTE: The * (asterisk) denotes mandatory fields.

- **Name*:** A name to identify the promotions on Reports, the POS and Customer Receipts.
- **Category*:** Reporting category used for reporting and filtering.
- **Available For Sale:** Select which sites (in multi-site) the discount will be available for by using the Yes/No toggle switch for each site displayed in the drop down menu.
- **Start Date:** Set the date for the promotion begins on.
- **End Date:** Set the date for the promotion ends on.
- **Start Time:** The time the promotion begins on the days selected.
- **End Time:** The time the promotion ends on the days selected.
- **Available For Day:** This allows you to set the promotion applicable only for specific days of the week.
- **Selling section:**
  - **Discount Amount*:** The dollar amount the discount equals to.
  - **Can combine with other Discounts?:** Select if this promotion can be used with other discount on the same transaction by using the Yes/No toggle button.
- **Eligibility section:** You must select if the discount will be applied to *Departments* or *Items*, and specify accordingly.

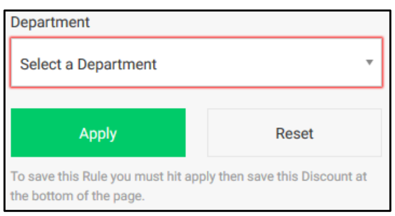
- **Eligible By:** Select the corresponding radio button between *Eligible by Department* or *Eligible by Item*.
  - If Eligible by Department:
    - Use the drop down for Department to select the department the discount will apply to and click the **Apply** button.



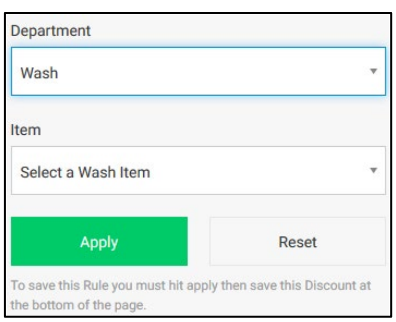
    - The Department selected will be displayed.



    - You may use the **Add Rule** button to add more eligible departments.
    - You may use the **Delete (X)** button next to each added department to clear it.
  - If Eligible by Item:
    - Use the Department drop down to select the department that the item for which the discount will apply belongs to.



    - After selecting a department you must select and item within the department and click the **Apply** button.



    - The Item selected will be displayed.

- You may use the **+ Add Rule** button to add more eligible departments. You may use the **Delete (X)** button next to each added department to clear it.

6. Click the **Save** button to finish setting up the promotion.

<u>When creating Time Based Promotions please keep in mind the following rules:</u>

- ✓ Only washes are currently eligible for Time Based Promotions.
- ✓ Only the Sonny's Pay Station will support Time Based Promotion pricing.
- ✓ The Sonny's Pay Station will automatically display the price change once the rules are met and then display the regular price once the promotion time has expired. In the SPS Items settings the "Request Manhattan Override" checkbox must be checked for the promotion to apply to each specific item.
- ✓ The POS will not change the price on the wash but will apply the discount at the time of the transaction.
- ✓ The system will adhere to the following rules concerning TBP as it relates to House Accounts discounts and applicable items, Wash Books, One-Time Use Codes, Event Driven Promotions, and regular discounts. When in a TBP window:
  - ❖ House Accounts that have a discount will not receive the TBP discount.
  - ❖ House Accounts with an assigned wash will be able to receive the TBP if the wash is part of the promotion.
  - ❖ TBP will be removed/ignored when customer redeems a wash with a wash book (regular or recurring).
  - ❖ Event Driven Promotion, One-Time Use and regular discount codes will not be accepted during the time of the Time Based Promotion. In other words, TBP is not combinable and will take precedent over any other promotion added to the transaction.

NOTE: The start and end dates do not validate nor control the "Available for Day" option. So if your start date is Monday, March 26th and your end date is Tuesday, March 27th, you must select Monday and Tuesday in the "Available for Day" section to turn TBP on for those days.

VIEW TIME AND EDIT TIME BASED PROMOTIONS

The Time Based Promotions menu will also display all the promotions that have been entered into the system. You may use the **Search & Filter** options to filter the list of promotions.

1. Click the *Expand* **+** icon for the **Marketing** module on the sidebar.
2. Click the *Expand* **+** icon for **+ Campaigns** menu.
3. Click the **▶ Timed Based Promotions** option.
4. All the available Time Based Promotions that have been created will be displayed.

- ➢ **<u>Site:</u>** Displays which site the Promotion was created for.
- ➢ **<u>Name:</u>** Displays the Name of the Promotion.
- ➢ **<u>Start Date:</u>** Displays when the Promotions start.
- ➢ **<u>End Date:</u>** Displays when the Promotion Ends.
- ➢ **<u>Time:</u>** Displays what time throughout the day the Promotion is available.
- ➢ **<u>Days:</u>** Displays the days the Promotion is available.
- ➢ **<u>Available:</u>** Displays whether or the Promotion is available for sale.

5. You may also use the **Search & Filter** option to filter by Time Based Name, Sites, Available For Use and/or Expiration Date.
6. Click the *Edit* icon to make changes to a time based promotion.

INSTANT PROMOTIONS

Instant promotions are preconfigured coupons codes generated at the POS that you can offer to your customers as a discount on future purchases.

Instant promotions are configured in the Back Office, assigned to a POS button, and are instantly printed from the POS printer with a click of a button.

CREATE AN INSTANT PROMOTION

1. Click the *Expand* **+** icon for the **Marketing** module on the sidebar.
2. Click the *Expand* **+** icon for **+ Campaigns** menu.
3. Click the **▶ Instant Promotions** option.
4. Click on the **+Create Promotion** button.
5. The *Create Instant Promotion* page is displayed. Fill in each field accordingly.

NOTE: The * (asterisk) denotes mandatory fields.

- **Name*:** Enter the name to identify the promotion on Reports, the POS and Customer Receipts.
- **Category*:** Select the category you would like the promotion to appear under for reports and filter. Choose between *Promotion/Coupon* and *Fundraiser Promotion*.
- **SKU*:** A unique number generated by the system to identify the promotion in the system. You may replace this with your own but it is best not to do so.
- **Available For Sale:** Use this field to select which site(s) the promotion will be available for.
- **Start Date:** Select the date you want this promotion to start issuing codes on.
- **Expiration Date:** Select the date you want this promotion to stop issuing codes on. You may leave this field empty and simply disable the promotion at a later date.
- **Code expiration period (in days)*:** Enter the number of days the code from this promotion will be valid for. Codes will expire at midnight on the expiring date.
- **Selling section:**
  - Discount Type: Select between *Discount amount in Dollars* and *Discount amount by a Percentage* for the type of discount the issued codes will be valid for.

NOTE: Percentage discount are not redeemable at Pay Stations. They will only work at the POS.

  - Discount Amount: Enter the value of the discount to be given. This value will be in *dollars* or *percentage* based on the Discount Type selected.
  - Discount Applicable to: The discount code can be applied to any purchase (Subtotal) or to purchases with specific items in it (Single Item). Click on the radio button for the option you want to select.
    - *Apply Discount to Single Item*: When you select this option you will need to select if the discount will apply to all items in a Department(s) or specific single items. When you select this option a new Eligibility section is displayed. This is discussed in the Eligibility section below.
  - Can Combine with other Discounts: Use the *Yes/No* toggle switch to select whether or not the discount can be combined with other discounts.

NOTE: Event codes and one-time codes cannot be used in the same transaction that is also using an instant code.

- **Eligibility section:** You need to select between *Eligible by Department* and *Eligible by Item*.

- Eligible by Department: Use the *Department* drop-down list to select which department the discount code will apply to (only the Wash department is eligible for this discount). Click the Apply button after selecting the Wash Department.
- Eligible by Item: Use the *Department* drop-down list to select which department (only Wash department is eligible) and then the *Item* dropdown list to select which item (wash item) the discount code will apply to. Click the Apply button to add the item. You may add more items. Click on the + Add Rule **button** after item and repeat *Department* and *Item* selection plus the **apply** button.

6. Click the Save button to finish setting up the promotion.

Configure a POS Button for Your Instant Promotion

After creating the Instant Promotion as described earlier, a POS button needs to be assigned to the promotion in order to print out a code. These codes can then be used at the POS or Sonny's Pay Station for redemption.

1. Click the *Expand* + icon for the Sites module on the sidebar.
2. Click the *Expand* + icon for the specific site ► Car Wash #1
3. Click the ► POS Buttons option.
4. Click the Edit Buttons and Groups button. Proceed to click on any of the menu buttons.
5. After you click a button you will notice an icon on the button and below the buttons the settings to configure for the button.
6. For the Button Type drop-down select: **Instant Promotions**
7. For the Instant Promotions drop-down select: *The Name of the Promotion You Created*.

8. Click the Apply button and then the Save button. A confirmation notice will be displayed at the top left of the page.

9. After saving the POS will prompt you to Restart and the button will be available on the POS menu buttons.

View and Edit Instant Promotions

The **Instant Promotions** module displays all the promotions that have been created. It also offers a quick view about the promotion's codes issuance and redemption. You may use the *Search & Filter* options to filter the list of promotions and find a specific(s) promotion(s). You may also edit an existing promotion at any time. To view and edit the promotions, follow the instructions below:

1. Click the *Expand* + icon for the Marketing module on the sidebar.
2. Click the *Expand* + icon for + Campaigns menu.
3. Click the ► Instant Promotions option.
4. By default all promotions are listed. You may use the Search & Filter button to filter the search/view by: Name, Sites and/or Available for Use.

➢ **Issued column:** This column is a quick count of the number of times an Instant Promo code has been printed out at the POS.

- **Redeemed column:** This column is a quick count of the number of times an Instant Promo code has been used in a transaction.

5. To edit a promotion click on the icon to the right of the corresponding promotion.

View The Instant Promotion Report

You can view your Instant promotions report in back office to keep track of code distribution and transactions.

1. Click *Expand* ✚ icon for the **Reports** module on the sidebar.
2. Click *Expand* ✚ icon for **✚ Promotions** menu.
3. Click the **▶ Instant Promotions** option.
4. Here you can view all the information about your instant promotions.

- The report is broken down per Promotion and for Sites.
- How many codes have been generated - ***Issued***.
- How many codes have been redeemed - ***Redeemed***.
- What percentage of the issued codes has been redeemed - **% Redeemed**.
- Told dollar amount of discounts - ***Total Discount***.

Discount	Issued	Redeemed	% Redeemed	Total Discount
$10 off clean n dry shine	9	2	22.22%	$20.00
Basic express free	4	1	25.00%	$8.00
$5 off clean n dry plus	3	2	66.67%	$10.00
Total:	16	5		$38.00

Sites

Discount	Site Code	Issued	Redeemed	Redeemed at Issued Site	% Redeemed at Issued Site
$10 off clean n dry shine	DEF	9	2	2	22.22%
	Discount Total:	9	2	2	22.22%
Basic express free	DEF	4	1	1	25.00%
	Discount Total:	4	1	1	25.00%
$5 off clean n dry plus	DEF	3	2	2	66.67%
	Discount Total:	3	2	2	66.67%

The **Sites** section of the report provides an all-sites view of issuance and redemptions of the codes. It helps multi-site customers see which sites are issuing and redeeming the most and least codes.

- What codes were redeemed and issued at the same site they were issued - ***Redeemed at Issued Site***.
- What percentage of codes was redeemed at the same site they were issued - % ***Redeemed at Issued Site***.

RECURRING RETARGETING

This is campaign that allows clients to create a custom Sonny's Pay Station message, offering customers to join their unlimited club plan. It will display once a customer has met the criteria of visits within a period of time. Follow the steps below to create a Recurring Marketing Page:

- ✓ This feature is only available for sites with Sonny's Pay Stations and License Plate recognition.
- ✓ Each site can only have one marketing page assigned.

1. Click the *Expand* ✚ icon for the **Marketing** module on the sidebar.
2. Click the *Expand* ✚ icon for **✚ Campaigns** menu.
3. Click the **▶ Recurring Retargeting** option.

4. Click on the **+ Create Marketing Page** button.
5. The Create Recurring Plan Retargeting page will be displayed. Enter the campaign parameters.

NOTE: The * (asterisk) denotes mandatory fields.

- **Greeting*:** Greeting to welcome the customer when they get to Pay Station. E.g. "Welcome Back to our CarWash!"
- **Marketing Message*:** Up-sale message to offer a recurring plan. E.g. "You could SAVE MONEY with our Monthly Recurring plans".
- **Default Visit Message*:** This message contains the 2 parameters (times (visits) and days) that will display once the customer meets the criteria. Therefore if you would like the message to appear when the customer has completed 2 visits in 1 month you would set the times (visits) to 2 and the days to 30 days.
  - **Times (visits)** are counted as completed transactions. So if visits are set to 3, three transactions must be completed before the message is displayed. For example: If visits = 3 and days = 30, on the 4th visit within 30 days, the message will display for that customer. So if the customer visits 5 times within 30 days the message would have displayed 2 times, on the 4th and 5th visit.
  - **Days** is a rolling period, which goes back 30 days from today and totals up the customer's visits within that time from. So the message will continue to display as long as the customer meets the criteria.
- **Oferring Message*:** The proposition message asking the customer to join the unlimited club. E.g. "Would you like to start SAVING today with our Recurring Plans?" This also displays a Yes and No button for the customer to select.
- **Status:** Indicates whether the Recurring Retargeting campaign is Active or Inactive.
- **Site*:** The site the Recurring Retargeting page is configured for. A marketing message must be configured for each site individually.

6. Once finished click the **Save** button.

LOTTERY WASH

This campaign allows clients to create setup a complimentary wash for customers after a set numbers of transactions. For example, every 100th wash there is a "lucky winner" of a free wash. Follow the steps below to configure the Lottery Wash:

- ✓ This feature is only available for sites with Sonny's Pay Stations and License Plate Recognition.
- ✓ Each site can only have one Lottery Wash promotion.
- ✓ Lottery Washes are not offered to Recurring or House Account customers.
- ✓ A Lottery Wash page must be configured at each Pay Station to enable this feature. (Please contact Sonny's Controls Tech Support for assistance with this).

1. Click the *Expand* **+** icon for the **Marketing** module on the sidebar.
2. Click the *Expand* **+** icon for **+ Campaigns** menu.
3. Click the **► Lottery Wash** option.
4. Click on the **+Create Lottery Wash** button.
5. The Create Lottery Wash page will be displayed. Enter the campaign parameters.

NOTE: The * (asterisk) denotes mandatory fields.

- **Lottery Wash*:** Select the wash that will be given for free to the lottery winner.
- **Lottery Number*:** Enter the number of washes that must accrue to award a free wash.
- **Available for Sale:** Select the site(s) that the Lottery Wash campaign will be available for by clicking the toggle to *Yes*. A Lottery Wash page must be configured for each site individually.
- **Available for Day:** Week days on which the campaign will run (both for car counting purposes and wash offering). For example, if the available days are set to Mondays and Wednesdays,

only wash sales completed on these days will count towards the accrued number of wash for the free wash, and the free Lottery wash will only be offered to customer on these two days as well.

6. Once finished click the **Save** button.

PROMOTIONS

In this section we will explain how to add and manage Discounts and Fundraisers promotions.

DISCOUNTS

Different type of discounts can be created; such as cash discounts, percentage discounts, specific wash discounts, or multiple use discounts.

Discounts — Search & Filter — Create Discount

Site	Sku	Name	Start Date	Expire Date	Available	Usage Count	
MAIN	123456	$1 OFF	02/01/14	Never	✓	0	
MAIN	235467	$2 OFF	02/01/14	Never	✓	0	
MAIN	4321	$3 OFF	02/01/14	02/29/16	✓	19	

Type Of Discounts

- **Cash Discounts:** The discount is a dollar amount.
- **Percentage Discounts:** The discount is a percentage amount.
- **Fixed Amount Discount:** A set dollar or percentage amount is setup for the discount.
- **Open Amount Discount:** The discount amount is entered at the moment of the sale. No predefined amount is setup for the discount.
- **Sale Subtotal Discount:** The discount is applied to the subtotal on the transaction, regardless of what items are in the transaction.
- **Single Item Discount:** The discount is applied to a single item in the transaction, or predefined items in the transaction. It will not apply to an item in a transaction where that item has not been deemed eligible for the discount.
- **Combinable Discount:** The discount can be used with other discounts in the same transaction.
- **Non-combinable Discount:** The discount cannot be used with other discounts in the same transaction.

Discounts Eligibility

When a discount is setup as a Single Item Discount type you must define which item(s) is eligible for the discount.
You may setup the eligibility by Department, where the discount will apply to all the items within the department. You may select multiple departments.
You may also setup the eligibility by Item, where you select a single item, or multiple items from one or multiple departments. The discount will apply to any of the selected options.

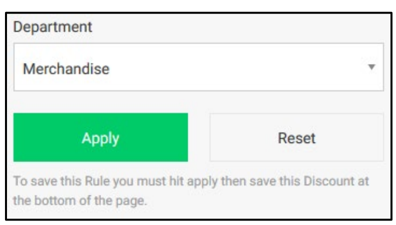
Create a Discount

1. Click the *Expand* ✚ icon for the **Marketing** module on the sidebar.
2. Click the *Expand* ✚ icon for **✚ Promotions** menu.
3. Click the **▶ Discounts** option.
4. Click the **✚ Create Discount** button.

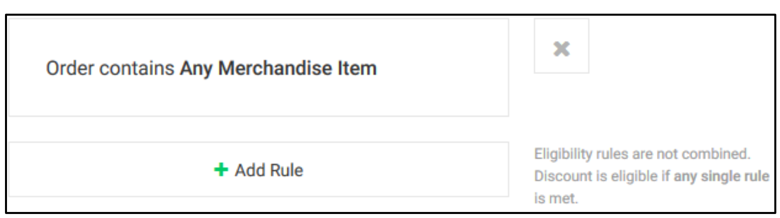
5. The *Create Discount* page will be displayed. Enter the discount parameters.

NOTE: The * (asterisk) denotes mandatory fields.

- **Name*:** Enter a name to identify the discount in the system.
- **Category*:** Used for reporting and filtering purposes only.
- **SKU*:** The system automatically generates a SKU number that you don't need to modify. However, you may modify it to use it as a code at a Pay Station or to print on a bar code.
- **Available for Sale:** Select which sites (in multi-site) the discount will be available for by using the Yes/No toggle switch for each site displayed in the drop down menu.
- **Available for Ecommerce:** For clients with an Ecommerce license determine if the discount can be applied through your Ecommerce (My Wash Account) site. Only single-item discounts area allowed from Ecommerce.
- **Start Date:** Enter the data the discount will be available on. The discount will be valid until the Expiration Date entered in the next field or until the discount is made unavailable at the site.
- **Expiration Date:** You may enter an expiration date for the discount so the system will automatically prevent the discount from being used after the expiration date has been met.
- **Selling section:**
    - **Discount Type:** Select the corresponding radio button between Dollar Amount discount or a Percentage discount.
    - **Discount Amount:** Enter the discount amount or check the Prompt for Discount checkbox.
    - **Apply Discount To:** Select the corresponding radio button between discount applicable to Subtotal or Single Item.
    - **Can Combine:** Select whether the discount can be combined with other discounts by using the Yes/No toggle switch.
- **Eligibility section:** You must select if the discount will be applied to *Departments* or *Items*, and specify accordingly.
    - **Eligible By:** Select the corresponding radio button between *Eligible by Department* or *Eligible by Item*.
        - *If Eligible by Department:*
            - Use the drop down for Department to select the department the discount will apply to and click the **Apply** button.

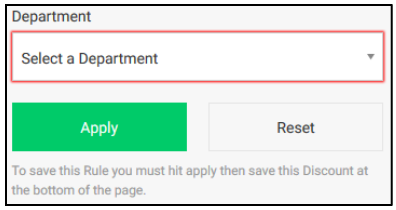


            - The Department selected will be displayed.

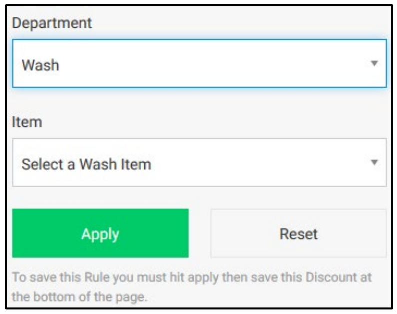


            - You may use the **Add Rule** button to add more eligible departments.
            - You may use the **Delete (X)** button next to each added department to clear it.
        - *If Eligible by Item:*

- Use the Department drop down to select the department that the item for which the discount will apply belongs to.



- After selecting a department you must select and item within the department and click the **Apply** button.



- The Item selected will be displayed.

- You may use the ✚ **Add Rule** button to add more eligible departments. You may use the **Delete (X)** button next to each added department to clear it.

6. Click the **Save** button to finish adding the discount.

View and Edit Discounts

By default in the Discounts page all discounts available for use are displayed. You may use the Search & Filter options to narrow down the view.

1. Click the *Expand* ✚ icon for the **Marketing** module on the sidebar.
2. Click the *Expand* ✚ icon for **✚ Promotions** menu.
3. Click the **▶ Discounts** options.
4. Click the **Search & Filter** button at the top right of the screen to filter the view. You can filter the view/search by Name, Sites, Available for Use and/or Start Date.
5. Click the *Edit* icon to make changes to any of the Discounts.

VISIT BASED PROMOTION

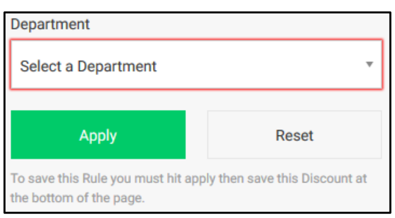
The Visit Based Promotion module allows you to set up a Discount promotion based on the number of visits a customer makes to the wash and display that message at the Sonny's Pay Station screen once the customer reaches the number of visits.

CREATE A VISIT BASED PROMOTION

1. Click the *Expand* ✚ icon for **Marketing** on the sidebar.
2. Click the *Expand* ✚ icon for **✚ Promotions** menu.
3. Click the **▶ Visit Based Promotions** option.
4. Click the **✚ Create Promotion** button.
5. Start with entering the parameters for the **Discount**.

NOTE: The * (asterisk) denotes mandatory fields.

- **Name*:** Enter a name to identify the discount in the system.
- **Category*:** Reporting category used for reporting.
- **SKU*:** The system automatically generates a SKU number that you don't need to modify. However, you may modify it to use it as a code at a Pay Station or to print on a bar code.
- **Available for Sale:** Select which sites (in multi-site) the discount will be available for by using the Yes/No toggle switch for each site displayed in the drop-down menu.
- **Available for Ecommerce:** For clients with an Ecommerce license determine if the discount can be applied through your Ecommerce (My Wash Account) site. Only single-item discounts area allowed from Ecommerce.
- **Start Date:** Enter the data the discount will be available on. The discount will be valid until the Expiration Date entered in the next field or until the discount is made unavailable at the site.
- **Expiration Date:** You may enter an expiration date for the discount so the system will automatically prevent the discount from being used after the expiration date has been met.
- **Selling section:**
  - **Discount Type:** Only Dollar Amount discounts can be setup here.
  - **Discount Amount:** Enter the discount amount.
  - **Apply Discount To:** The discount can only be applied to a Single Item.
  - **Can Combine:** Select whether the discount can be combined with other discounts by using the Yes/No toggle switch.
- **Eligibility section:** The discount can only be applied to an Item.
  - **Eligible By:** Select the corresponding radio button between *Eligible by Department* or *Eligible by Item*.
  - Use the Department drop down to select the department the item to be discounted belongs to.



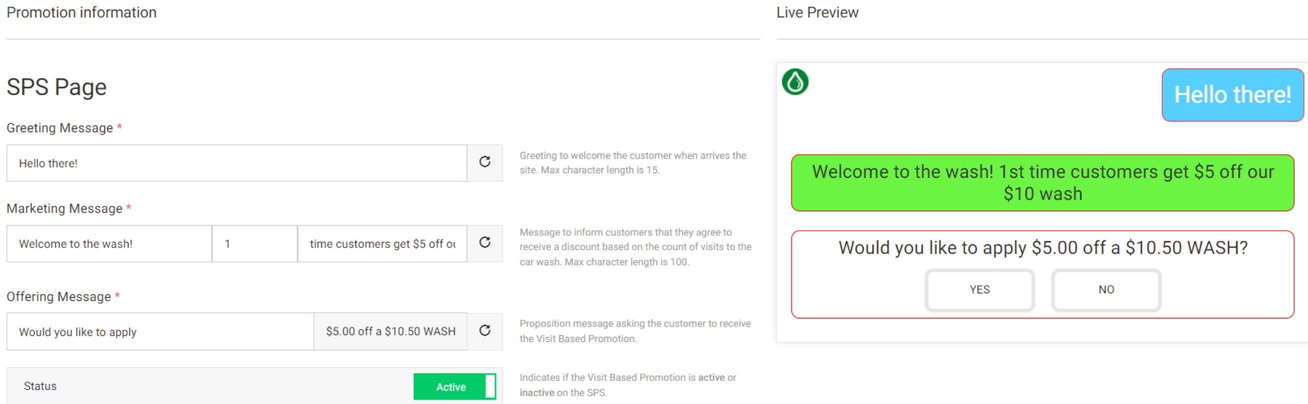
  - After selecting the department, select the item the discount will apply to and click the **Apply** button.

6. Scroll back to the top of the page to configure the Sonny's Page Station Visit Based Promotion Page. Enter the settings for the page.

NOTE: The * (asterisk) denotes mandatory fields.

- **Greeting Message*:** Enter the welcome message that will be displayed to the customer when they approach the Pay Station. This message will be displayed at the top right of the screen.
- **Marketing Message*:** This message tells the customer the number of visits required to get the discount. Compose your message in a way where you have "Message" "number of visits" "Message". E.g. "Welcome to the wash! 1st time customers receive $5 off the $10 Ultra Wash".

- **Offering Message*:** This message will be inserted in front of the dollar discount and dollar amount of the item the discount is being offered for asking the customer to accept (yes) or decline (no) the offer. E.g. "Would you like to apply the $5 off a $10 Ultra Wash?"



7. Scroll to the bottom of the page and click the **Save** button to finish creating the Promotion.

RETENTION DISCOUNT

The Retention Discount module allows you to set up a discount offered to customers when they try to cancel their recurring membership. This way the customer keeps their recurring plan with a special discount instead of cancelling their membership completely.

CREATE A RETENTION DISCOUNT

1. Click the *Expand* ✚ icon for the **Marketing** module on the sidebar.
2. Click the *Expand* ✚ icon for **✚ Promotions** menu.
3. Click the **▶ Retention Discount** option.
4. Click the **✚ Create Retention Discount** button.
5. The *Create Retention Discount* page will be displayed. Enter the discount settings.

NOTE: The * (asterisk) denotes mandatory fields.

- **Amount*:** Enter the amount you want the discount to be.
- **Recurring Plan*:** Select the specific plan you want the discount to apply to.
- **Sites:** Select the site you want the discount to apply to.
- **Available For Ecommerce:** Choose if you want the same discount to be available for customers on Ecommerce (MyWashAccount) page.
- **Retention Discount Message*:** You can set whether or not you want a custom message to display or leave the default message.
- **Period*:** Enter the number of months the customer will receive the discount for. E.g. If you create a $10 off discount and set the period to 3, the customer will receive $10 off the next 3 billing cycles on their recurring membership.
- **Blackout Period*:** Enter the number of months for which the same discount will not be available for the customer if previously used. E.g. You setup a retention discount for $10 off next 3 months and a customer that tried to cancel their membership applies the discount. The same customer comes back after those discounted 3 months and tries to cancel their plan again- if you have a blackout period of 6 months, the same retention discount won't be offered to this customer for the next 6 months after their last use of the Retention discount.

6. Click the **Save** button to finish.

FUNDRAISERS

The Fundraiser module allows you to setup a code and track wash sales linked to a specific group, company or entity. This code can be used at the POS or the Sonny's Pay Station. You can then run a report to see the code usage.

Create a Fundraiser Code

1. Click the *Expand* ✚ icon for the **Marketing** module on the sidebar.
2. Click the *Expand* ✚ icon for **✚ Promotions** menu.
3. Click the **▶ Fundraisers** option.
4. Click the **✚ Create Fundraiser** button.
5. The *Create Discount* page will be displayed. Enter the discount parameters.

NOTE: The * (asterisk) denotes mandatory fields.

- **Fundraiser Name*:** Enter a name to identify the discount in the system.
- **Category*:** Reporting category used for reporting and filtering.
- **Tracking Code*:** The unique numerical code to use at the POS or Sonny's Pay Station to track the sale of the wash assigned to the specific entity. The system auto-generates a code but it can be changed by the user.
- **Available For Use:** Select which sites (in multi-site) the discount will be available for by using the Yes/No toggle switch for each site displayed in the drop-down menu.
- **Start Date*:** Set the date when the code can start being used.
- **Expiration Date:** Set a date (if needed) when the code is no longer valid.
- **Donation section:**
    - **Donation Percentage*:** Enter the percentage used to calculate the donation amount based on pre-tax transaction total.
    - **Eligible Wash Items*:** Select the washes eligible for the Fundraiser by clicking and choosing from the drop down options.

6. Once finished click the **Save** button.

View and Edit Fundraisers

After creating Fundraisers you can view them, view the usage count and edit certain fields if necessary. You may use the **Search & Filter** options to view fundraisers at specific Sites or with a specific Start Date

1. Click the *Expand* ✚ icon for the **Marketing** module on the sidebar.
2. Click the *Expand* ✚ icon for **✚ Promotions** menu.
3. Click the **▶ Fundraisers** option.
4. Click the **Search & Filter** button at the top right of the screen to filter the view. You can filter the view/search by Name, Available at Site and/or Start Date.
5. Click the *Edit* icon to make changes to any of the Fundraisers.

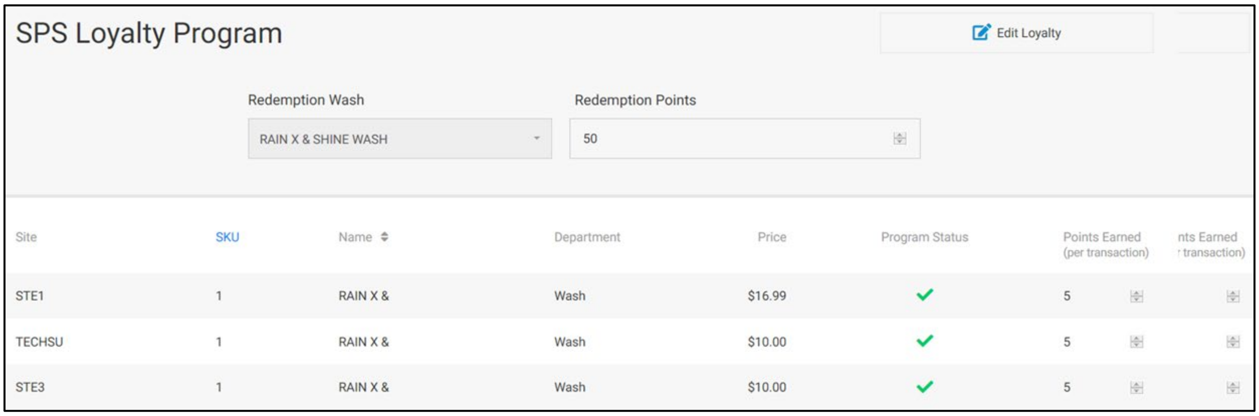
LOYALTY

SPS REWARDS POINTS

The user can setup a Loyalty program for customers using the Sonny's Pay Stations. Customers will get points as assigned in the Program and will receive a free wash, as assigned in the Program, when they collect the required number of points.

✓ This feature is only available for sites with Sonny's Pay Stations.

- ✓ There can only be a Redemption (free) Wash offered.
- ✓ For LPR customers a phone number needs to be associated with the license plate. The "SPS Sign Up Message" module allows you to configure the page that asks customers for the phone number at the Pay Station.
- ✓ Non-LPR customers will need an RFID sticker or Card to accumulate points. LPR customers will work with license plate.
- ✓ Recurring customers do not accrue loyalty points.
- ✓ A Loyalty Wash page must be configured for each site individually at each Pay Station. (Please contact Tech Support for assistance with this).



Configure the SPS Loyalty Program

1. Click the *Expand* ✚ icon for the **Marketing** module on the sidebar.
2. Click the *Expand* ✚ icon for **✚ Loyalty** menu.
3. Click the **▶ SPS Rewards Points** option.
4. Click the **Edit Loyalty** button.
5. Use the Redemption Wash drop down menu to select the wash customers will receive for free.
6. Use the Redemptions Points field to enter the number of points customers will need to have in order to receive the Redemption (free) Wash.
7. Use the Points Earned (per transaction) field to assign points to each of your washes. These will be the points the customers earn each time they purchase that particular wash.
8. Once finished click the **Save** button.

SPS SIGN UP MESSAGES

For Loyalty Points and SMS marketing the Pay Station can ask customers for their phone number. In order to do this you must configure the message to be displayed to customers asking for their phone number. The "SPS Sign Up Message" module allows you to configure the screen on the Pay Station that contains a phone number entry pad and a customized message (100-character limit) to market to customers. An additional feature for Loyalty Sign Up is the ability to send out SMS messages with promotions and/or discount codes. When a customer provides their phone number, an automated SMS message can be sent out welcoming the customer to the Loyalty program and/or any other marketing message. Additionally, a one-time-use discount code can be included in the message as well.

NOTE: In order to use the "SPS Sign Up Message" feature to send out promotional and rewards SMS messages you will **need** to have a paid service account with **Twilio**. Please contact Twilio at (855) 910-8712 or https://www.twilio.com and obtain the API token, Authentication ID and the phone number. Please contact Sonny's Controls Tech Support with this information for completion of set up.

- ✓ This feature is only available for sites with Sonny's Pay Stations.
- ✓ You can create different messaging for different sites, but each site can only have one active message.

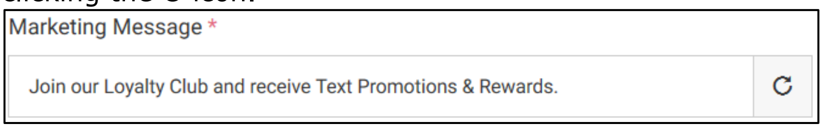
✓ Phone Number Collection for each site must be enabled under each site's "Site Config" page for "Loyalty Sign Up" Message to be displayed on the Pay Stations.

Create a SPS Loyalty Sign Up Message

1. Click the *Expand* ✚ icon for the **Marketing** module on the sidebar.
2. Click the *Expand* ✚ icon for **✚ Loyalty** menu.
3. Click the **▶ SPS Sign Up Message** option.
4. Click the **✚ Create Sign Up Message** button.
5. The *Create Loyalty Sign Up* page will be displayed. Enter the message parameters.

NOTE: The * (asterisk) denotes mandatory fields.

- **Marketing Message*:** The message that will be displayed on the Pay Station to encourage customers to enter their phone number for SMS and/or Loyalty Reward Points. E.g.: " Enter Your Phone Number To Join Our Loyalty Program!". You can also use a default message by clicking the ↻ icon.

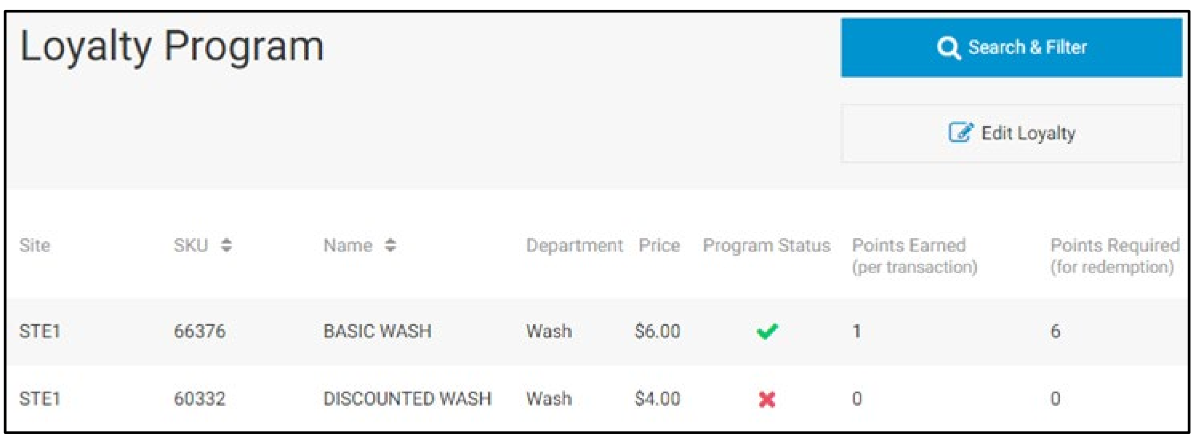


- **Status *:** Indicate if the "Loyalty Sign Up Page" is Active or Inactive on the Pay Station.

6. **Site*:** Select the sites where the "Loyalty Sign Up Page" will appear on the Pay Station.
7. Once finished click the **Save** button.

POS REWARD POINTS

The Sonny's Point of Sale (POS) system offers a loyalty points module that allows your customers to collect points and redeem services or products. The POS Loyalty Program page allows you to configure products and services for the loyalty program.



Loyalty Program

Search & Filter

Edit Loyalty

Site	SKU	Name	Department	Price	Program Status	Points Earned (per transaction)	Points Required (for redemption)
STE1	66376	BASIC WASH	Wash	$6.00	✔	1	6
STE1	60332	DISCOUNTED WASH	Wash	$4.00	✖	0	0

Configure The POS Loyalty Program

1. Click the *Expand* ✚ icon for the **Marketing** module on the sidebar.
2. Click the *Expand* ✚ icon for **✚ Loyalty** menu.
3. Click the **▶ POS Rewards** option.
4. Click the **Edit Loyalty** button.
   - The Points Earned and Points Required columns become editable for the listed products and services.
5. Enter the corresponding points for each product/service that will be part of the loyalty program.

6. Once finished click the Save button.

ECOMMERCE (MY WASH ACCOUNT)

The ECommerce module allows you to manage the Recurring and Prepaids plans to offer for sale as well as the theme and notifications in your customer facing Sonny's Controls hosted ECommerce (My Wash Account) website.

NOTE: The ECommerce module is a license based module. To add this module to your monthly subscription reach out to the Sonny's CarWash Controls Sales team.

PRODUCT LIST

The Product List is where you manage the plans you have available in your Ecommerce site (My Wash Account). This module is broken down into five sections: Monthly Recurring Plans, Annual Recurring Plans, Wash Books, Gift Cards and Prepaid Washes. The products displayed here will be the ones offered through the Ecommerce (My Wash Account) site. Plans are not created in this module but created in their specific modules and then added to the Ecommerce site from this module.
Use the Visit Site link on the Products page to quickly access your ECommerce site.

ADD PRODUCTS TO ECOMMERCE SITE

1. Click the *Expand* ✚ icon for the Marketing module on the sidebar.
2. Click the *Expand* ✚ icon for the ✚ Ecommerce menu.
3. Click the ► Product List option.
4. Click the ✚ Create Product button.
5. Select the corresponding type of product from the drop down options (Monthly Recurring Plan, Annual Recurring Plan, Wash Book, Gift Card or Prepaid Wash).
6. The *Create a Product for ECommerce* page is displayed. Enter the product parameters to display in ECommerce.

NOTE: The * (asterisk) denotes mandatory fields.

- **Select Product *:** Select the product to be sold online.
- **EComm Name *:** Enter the name to be displayed on the Ecommerce site. It may be different from the name currently assigned in the system.
- **Category:** Display-only field used for reporting and filtering.
- **Price *:** Enter the online sale price of the product. It can be different from the sale price at the car wash.
- **Available for Sale:** Select which sites the wash book plan will be available for sale by using the Yes/No toggle switch for each site displayed in the drop down menu.
- **Display Price:** (For applicable products) select Yes, for the price (trial price if applicable) to appear on the main page of ECommerce and the product details section of the main page. Select No for pricing information to not appear in these areas. Typically this is set to No if you have pricing on the custom image.
- **Allow Cancellation:** (For applicable products) select whether the plan can be cancelled online by using the Yes/No toggle switch.
- **Allow Upgrades:** (For applicable products) select whether customers are allowed to upgrade/downgrade the plan on the ECommerce site.
- **Email Payment Receipt:** (For applicable products) select whether customers receive an email with a receipt of recurring payments.
- **Trial Promotion:** (For applicable products) select whether trial promotions offered at the site will be available on the ECommerce site as well.
- **Product Image:** Upload a custom image to display in the Ecommerce site.
    - Click the **Upload a File** button and select the image to upload.

7. Once finished click the **Save** button.

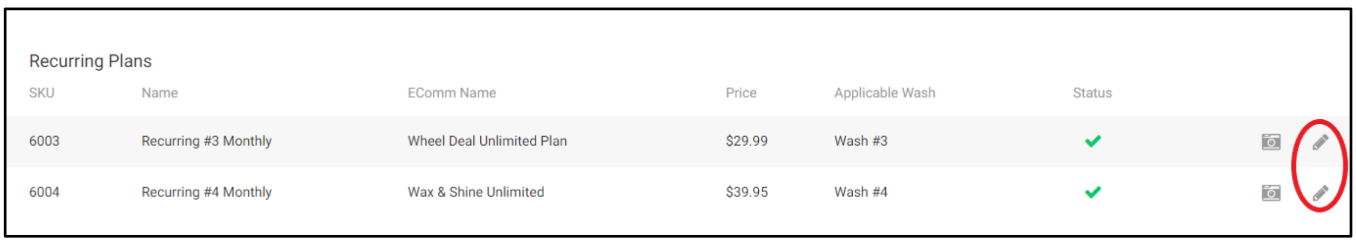
Arrange Products for Your Ecommerce Site

Products on the ECommerce (My Wash Account) site are displayed in their respective groups in this order: Monthly Recurring Plan, Annual Recurring Plan, Wash Book, Gift Card or Prepaid Washes. Products within each group can be arranged by the user. To arrange the order products are displayed on the ECommerce site:

1. Click the *Expand* + icon for the **Marketing** module on the sidebar.
2. Click the *Expand* + icon for **+ Ecommerce** menu.
3. Click the **► Product List** option.
4. Click the **Edit Arrangement** button.
   - A *4-way arrow* ✥ icon will appear next to each ECommerce product to the right hand side of the screen.
   - Click on the product *4-way arrow* ✥ icon that you want to reorder and move it up or down accordingly.
   - The ordering of products within each group goes from top to bottom, where top is the first product to display within each group.
5. Click the **Save** button.
6. Refresh the ECommerce page to see the changes!

Edit ECommerce Products

To edit the products being offered on ECommerce follow these steps:


Recurring Plans

SKU	Name	EComm Name	Price	Applicable Wash	Status
6003	Recurring #3 Monthly	Wheel Deal Unlimited Plan	$29.99	Wash #3	✓
6004	Recurring #4 Monthly	Wax & Shine Unlimited	$39.95	Wash #4	✓

1. After creating the product, click on *Edit* icon on the right hand side of the screen for the product.
2. Make the necessary changes and click the **Save** button.

API Documentation

The Sonny's Back Office provides an API for clients who wish to setup and host their own ECommerce site. This is a license based add-on to your subscription. All the API documentation is provided within this module.

Send Notifications

You can push notifications out to your ECommerce customers by creating a notification in Back Office. Customers who have visited your ECommerce (My Wash Account) site and have opted in to receive notifications will receive these.

Create Notification

To create an ECommerce notification:

1. Click the *Expand* + icon for the **Marketing** module on the sidebar.

2. Click the *Expand* ✚ icon for ✚ Ecommerce menu.
3. Click the ▶ Send Notifications option.
4. Click the ✚ Create Notification button.
5. The *Customer Notification – Create* page is displayed. Enter the notification parameters.

NOTE: The * (asterisk) denotes mandatory fields.

- **Date *:** Select the date you want the notification to be sent out.
- **Time *:** Select the time you want the notification to be sent out. The time must always be at least 30 minutes from the time the notification is created.
- **Active:** Select *Yes* for the notification to be sent out, or No to hold it or not send it out.
- **Title *:** Enter a name for the notification.
- **Message *:** Enter the message to push out to customers.

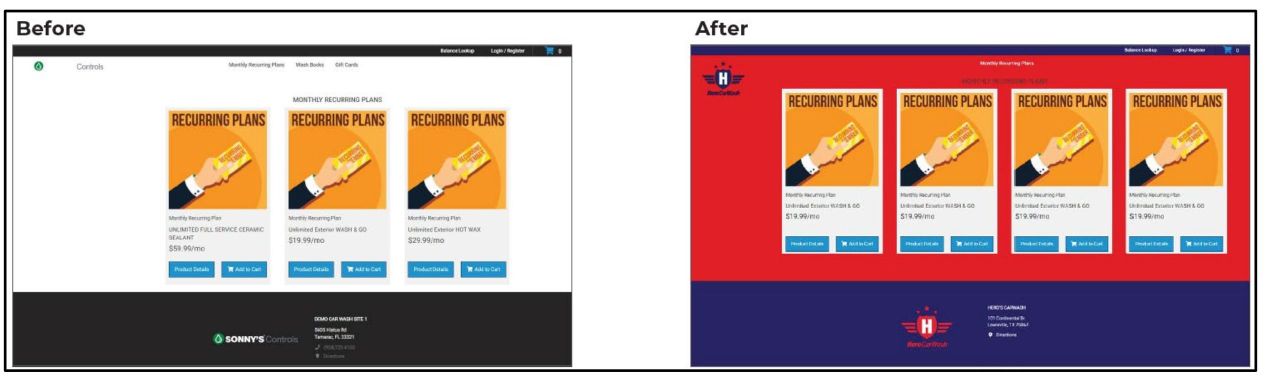
View Created and Sent Notifications

After a Notification is created you'll have a list displaying all of your notifications and their sent status. To view your notifications:

1. Click the *Expand* ✚ icon for the Marketing module on the sidebar.
2. Click the *Expand* ✚ icon for ✚ Ecommerce menu.
3. Click the ▶ Send Notifications option.
4. Click the 🔍 Search & Filter button to filter the Notification list by Active and Sent notifications.
5. The Sent column will show an **X** for Notifications not sent or a ✓ for notifications sent.

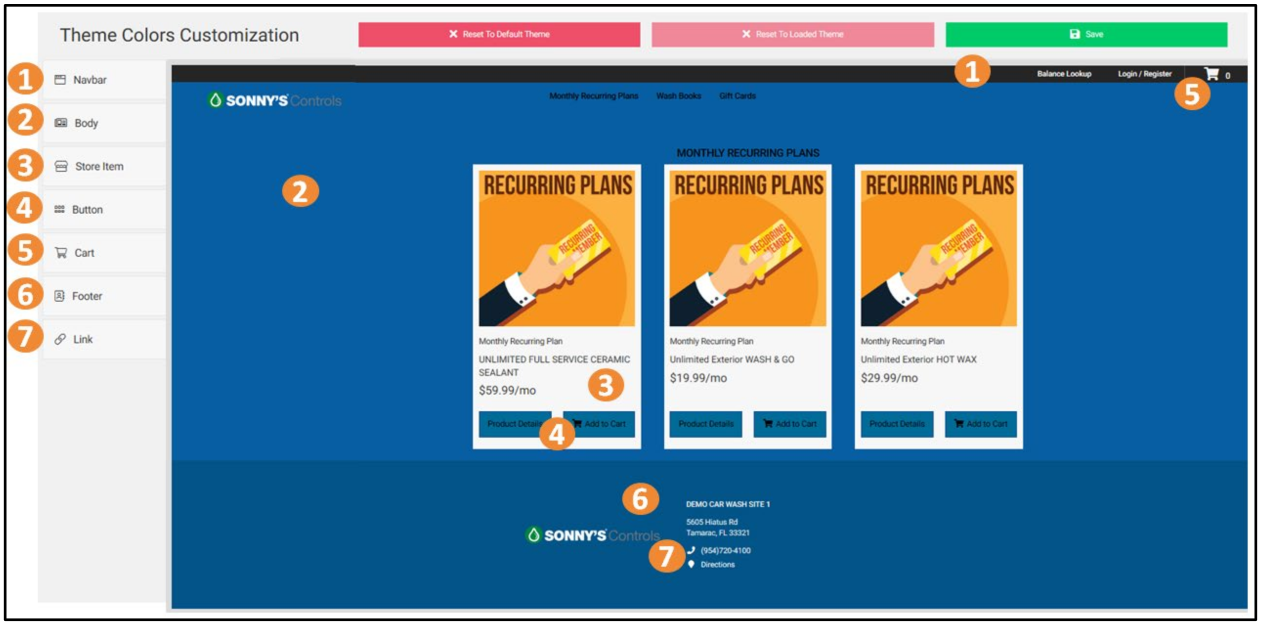
THEME

This is an ECommerce feature that allows you to customize the theme of your ECommerce site to match your site branding. You can customize color of navigation bar, body, store items, buttons, cart, footer, and links to match your brand color scheme. Once the changes are made, they are saved on the database and automatically applied to your ECommerce (My Wash Account) site.



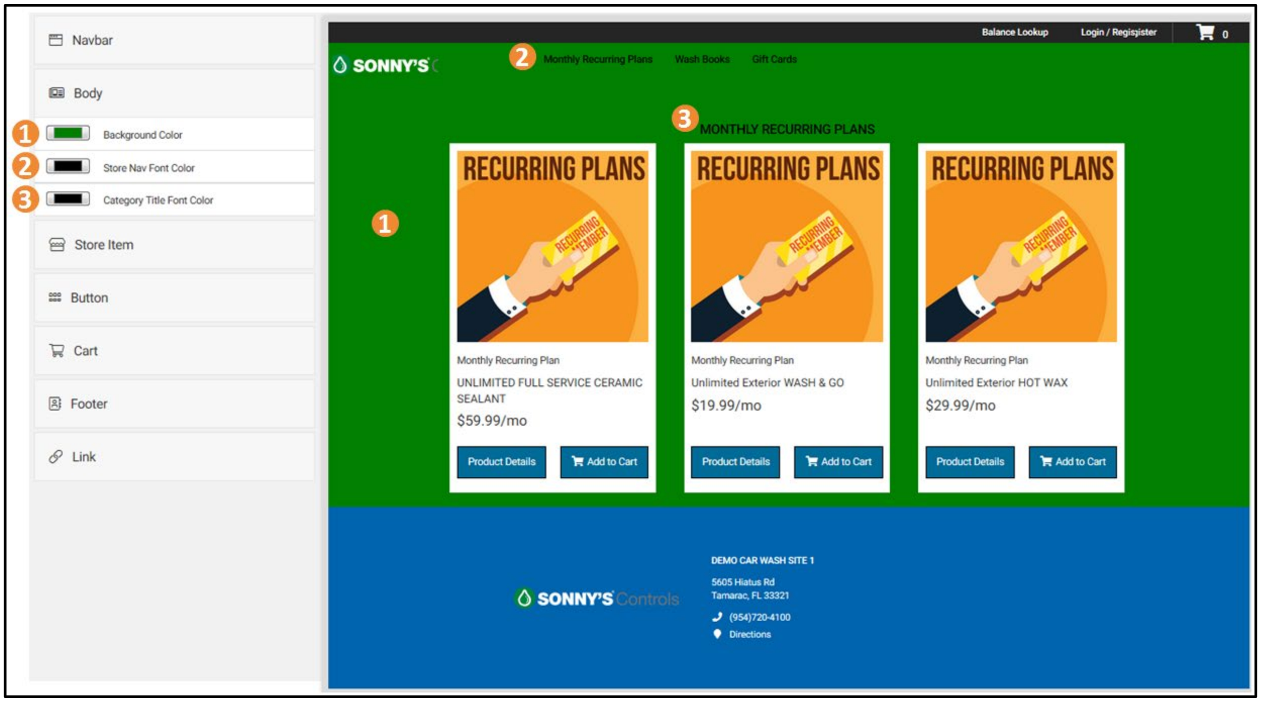
Customize Theme

1. Click the *Expand* ✚ icon for the Marketing module on the sidebar.
2. Click the *Expand* ✚ icon for ✚ Ecommerce menu.
3. Click the ▶ Theme option.
4. On the left menu of the Theme Customization Window click the section you would like to apply changes to. These are sections: **Navbar**, **Body**, **Store Item**, **Button**, **Cart**, **Foorter** and **Link**.



5. Select the color box for the item you wish to apply changes to.

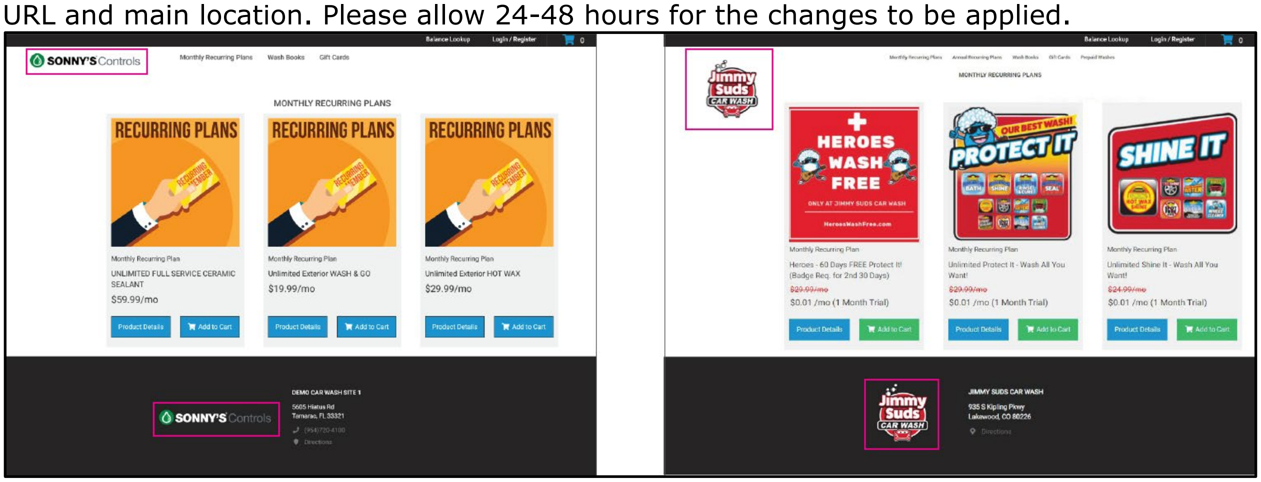
6. E.g. for the Body section you can change the Background color, the Store Navigation Font color and the Category Title Font Color as indicated below.



7. To undo your changes and revert back prior to saving select the **X Reset to Loaded Theme** button.
8. To apply changes select click the **Save** button.
9. To revert to the default theme click the **X Reset to Default Theme** button. (Please note that any custom changes to your theme will be reset).

Logo for Header and Footer Customization

To update the logo on the header and footer of the My Wash Account contact Sonny's Controls at controlsmedia@sonnysdirect.com and provide your properly sized logo, car wash name, website URL and main location. Please allow 24-48 hours for the changes to be applied.



Logo for Header and Footer Requirements:

- ✓ Image should not exceed 540px width. There is no fixed height.
- ✓ We recommend 3:1 (horizontal) or 1:1 (square) image ratios.
- ✓ Keep file sizes under 300KB for faster load times and a better shopping experience.
- ✓ .jpeg and .png file formats supported.
- ✓ For either format, run image through https://tinypng.com/ and use the resulting optimized image.

Recommended Logo Format Examples:

3:1 Horizontal logo

1:1 Square logo

SMS

The SMS (Short Message Service AKA Text Messaging) module allows you to set up text marketing campaigns to send text messages to customers on specific transactions automatically or manually.

NOTE: To enable SMS messaging you will **need** to have a paid service account with **Twilio**. Please contact Twilio at (855) 910-8712 or https://www.twilio.com and obtain the API token, Authentication ID and the phone number. Please contact Sonny's Controls Tech Support with this information for completion of set up.

AUTOMATED SMS MESSAGES

The system can send out an Automated SMS Message after the purchase of a Recurring Plan or a customer sign up for Loyalty at the Sonny's Pay Station. You can create and customize these messages. For example, you can setup a campaign to send an SMS message for customers purchasing a recurring plan at the Sonny's Pay Station. The Pay Station will prompt the customer to enter in their phone number to opt-in receiving text marketing messages. Once the transaction is complete the customer's phone number will be added to the system and a message will be sent out automatically.

- ✓ This feature is only available for sites with Sonny's Pay Stations and License Plate Recognition.
- ✓ The system allows only one message per site.
- ✓ The message can be of any length and there is a counter that displays how many SMS messages (140 characters) will be sent.
- ✓ If ECommerce is enabled, the system will append the URL to the message which is already included in the message counter.

CREATE AN AUTOMATED SMS MESSAGE

1. Click the *Expand* ✚ icon for the **Marketing** module on the sidebar.
2. Click the *Expand* ✚ icon for **✚ SMS** menu.
3. Click the **▶ Automated** option.
4. Click the **✚ Create Message** button.
5. The *Create Automated SMS Message* page is displayed. Enter the message parameters.

NOTE: The * (asterisk) denotes mandatory fields.

- ➢ **Name*:** Enter a title name for the message.
- ➢ **Processing Type*:** You can choose between a Recurring Sign Up and a Loyalty Sign Up.
    - ▪ **Recurring sign Up:** The one-time message that will be sent out to customers after they purchase a Recurring plan. E.g. "Welcome to our Membership Club! To manage your membership, visit mywashaccountURL"

- **Loyalty Sign Up:** The one-time message that will be sent out to customers after they enter their phone number at the Pay Station to join the Loyalty program. E.g. "Welcome to our Loyalty Rewards club! Here is a code for a free wash! We will keep you up to date on latest promotions (1-4 msgs per month)"

- **Message *:** The message that will be sent out to customers.
- **Message Counter:** Displays-only field that lets you know in how many text messages the customers will receive for the message. This is due to SMS messaging restrictions of 140 characters.
- **Available For Site:** Select the sites for which these messages are available for.
- **Include a Discount?:** You can include a discount code when you create a "Loyalty Sign Up Automated SMS". Follow the same instructions found in the Create a Discount section to include a discount code.

6. Click the Save button to finish.

MANUAL SMS MESSAGES

The system provides you with the ability to market products and services, as well as offer discounts and promotions to several groups of customers via SMS messaging.

- ✓ Once the group has been created, it cannot be changed, modified, or removed.
- ✓ Some groups will allow for a 1-month (up to 3 months from the scheduled date) filter to be applied to target more recent customers.

SMS CUSTOMER GROUPS

Below are the names of the groups and their criteria:

- **Active Recurring Members:** Customer with an active recurring plan.
- **New Recurring Members:** Customers who purchased a recurring plan within the configured number of months (up to 3 months prior).
- **Cancelled Recurring Members:** Customers who cancelled their recurring plan with the configure number of months (up to 3 months prior).
- **Non-Recurring Members:** Customers who do not have a recurring plan but may have enrolled in the SPS Loyalty Program or provided their phone number in other way.
- **All Customers:** All customers that have a phone number in the system.
- **ECommerce Customers:** Customers who registered for Ecommerce or purchased a product on ECommerce (currently customers can only register after purchasing a product).

CREATE A MANUAL SMS MESSAGE

1. Click the *Expand* ✚ icon for the Marketing module on the sidebar.
2. Click the *Expand* ✚ icon for ✚ SMS menu.
3. Click the ▶ Manual option.
4. Click the ✚ Create Message button.
5. The *Create Manual SMS Messages* page is displayed. Enter the message parameters.

NOTE: The * (asterisk) denotes mandatory fields.

- **Title *:** Enter a name for the message.
- **Recipient Group *:** Select the group that will receive the SMS message.
- **Available From Site:** Select the site(s) the message will apply to.
- **Number of Recipients:** (For applicable groups) Display-only field that shows the number of recipients in the group at the time of the SMS message creation.
- **Message *:** The message that will be sent out to customers.

- **Message Counter:** Displays-only field that lets you know in how many text messages the customers will receive for the message. This is due to SMS messaging restrictions of 140 characters.
- **Scheduled Date/Time*:** Enter the date/time you want to send the SMS message.
- **Include a Discount?:** You can include a discount code when you create a "Loyalty Sign Up Automated SMS". Follow the same instructions found in the Create a Discount section to include a discount code.

6. Click the Save button to finish.

DISCOUNT REPLY SERVICE

Customers setup to do SMS Marketing will be able to configure discounts where users text the wash a keyword in order to receive the discount. Eg. Wash advertisers "Text LAUNCH to 30400". When customers text this number with the word LAUNCH they receive a text with a discount code as configured in the **Discount Reply Service** module in the Back Office.

- ✓ Must have a Twilio account and have Text Marketing enabled.
- ✓ Must be able to provide a Short Code (phone number customers will text) from Twilio.
- ✓ Create a Discount Reply Message that determines the keyword the customer must text in order to receive the discount and the discount that is given to the customer when they text the correct keyword.

CREATE A DISCOUNT REPLY MESSAGE

1. Click the *Expand* ✚ icon for the Marketing module on the sidebar.
2. Click the *Expand* ✚ icon for ✚ SMS menu.
3. Click the ► Discount Reply Service option.
4. Click the ✚ Create Message button.
5. The *Create Discount Reply Service* page is displayed. Enter the message parameters.

NOTE: The * (asterisk) denotes mandatory fields.

- **Name *:** Enter a name to identify the promotion by.
- **Message *:** Enter the message the customers will receive after they text the short code with the keyword.
- **Message Counter:** Displays-only field that lets you know in how many text messages the customers will receive for the message. This is due to SMS messaging restrictions of 140 characters.
- **Keyword *:** The keyword customers will text to receive the discount. **Keyword must be all capital letters no spaces**.
- **Available For Site:** Select the sites for which these messages are available for.
- **Discount Section:** Select the settings for the discount that customers will receive.

6. Click the Save button to finish.

SINGLE CODE SERVICE

Customers that are set up with SMS Marketing will be able to send out a One-Time-Use Campaign to one specific customer via text within the Backoffice through the Single Code Service module.

- ✓ Must have a Twilio account and have Text Marketing enabled.
- ✓ Create a One-Time-Use Campaign with Single Code Service enabled.

SEND A SINGLE CODE

1. Click the *Expand* ✚ icon for the Marketing module on the sidebar.

2. Click the *Expand* ✚ icon for ✚ SMS menu.
3. Click the ► Single Code Service option. The *Single Code Service* page is displayed.
4. Click the *Campaign* drop-down and select the Campaign created with Single Codes enabled.
5. Click the *Discount* drop-down and select the Discount from the selected Campaign.
6. In the *Phone Number* field enter the customer's cell phone number you are sending the code to.
7. Click the Send button to send the code to the customer.

RECURRING/PREPAIDS MODULE

In this section we will explain what is available in the Recurring/Prepaids module.

RECURRING

This section contains all of the Recurring Monthly and Annual plans and accounts as well as the Declines list.

MONTHLY PLANS

In order to sell Recurring Plans at the POS or Pay Stations you must setup these plans in the Back Office and specify the plans options such as number of washes (if limited) per month and the price the plan will sell for.

> **NOTE:** In order to sell recurring plans you must have credit card processing integrated with the Sonny's POS system and an a gateway account with **WorldPay** configured to process card not present transactions.

MONTHLY RECURRING TYPES

There are 2 types of Monthly Recurring plans.

- **Single Tag:** This the most common type of recurring plan where there is only 1 tag sold per transaction and only 1 active tag per account.
  - **Additional Tag(s):** Single Tag type of plans can have an option to add additional tags into the same account after the original sale. When this option is enabled a Single Card type of plan can then have more than one tag active under the account. There will be a price increase on the account charge based on the cost of each additional tag. E.g. Single Tag plan price is $19.99 with the option to add additional tags at $9.99 each. If a customer purchases this plan and then add another tag the monthly billing is increased to $29.98 and charged at the Next Scheduled bill date.
- **Family Pack:** This recurring plan type allows for an account to be sold and setup with multiple tags. All tags share the account balance and there is a single charge on the account.

CREATE A MONTHLY RECURRING PLAN

1. Click the *Expand* ✚ icon for the **Recurring/Prepaids ✚** module on the sidebar.
2. Click the *Expand* ✚ icon for **✚ Recurring** menu.
3. Click the **► Monthly Plans** option.
4. Click the **✚ Create Monthly Plan** button.
5. The *Create a Monthly Recurring Plan Item* page is displayed. Enter the recurring plan parameters.

> ***NOTE:*** The * (asterisk) denotes mandatory fields.

- **Name*:** Enter a descriptive name to identify the plan in the system.
- **Category*:** Use the drop down to select the category that the plan will use for reporting.
- **SKU*:** The system automatically generates a SKU number that doesn't need to be modified.
- **Tag Type:** Select the type of plan between Single Card and Family Packs.
- **Included Tag*:** When Family Pack Card Type is selected you must specify the maximum numbers of cards/barcodes/RFIDs that can be active within an account at any time.
- **Allow Additional Card/RFID:** When set to Yes, the price entered will be used to increase the Monthly price of the customer's account at the Next Scheduled bill date each time a Card/RFID is added to the account.

- **Available For Sale:** Use the drop down and switch the sites to Yes/No to make the plan available for sale at each of the different sites.
- **Selling section:**
  - **Price*:** Enter the price that the plan will sell for. You may check the *Prompt for Price* option to enter a price manually with each sale at the POS (Prompt for Price is not available when selling plans from the Pay Station). You may also set a price for All Sites, or set individual prices for reach site by using the *All Sites/Per Site* toggle button.
  - **Tax Rate:** Use the drop down to select the tax rate to use for the sale of the plan at each site.
- **Redemption section:**
  - **Recurring Plan Item*:** The redemption wash assigned to the plan.
  - **Redemption Wash Upgradable:** Use the Yes/No toggle to determine if the POS and Sonny's Pay Station will prompt the customer to upgrade to a more expensive wash and pay the difference between the redemption wash and the selected wash.

NOTE: This only applies to the POS and Sonny's Pay Station. Redemption Wash Upgradable and Sonny's Pay Station Offer Service CANNOT both be set to Yes at the same time.

  - **Sonny's Pay Station Offer Service:** Use the Yes/No toggle to determine if the Sonny's Pay Station will direct the customer to the Services page of the redemption wash.

NOTE: This only applies to the Sonny's Pay Station. Redemption Wash Upgradable and Sonny's Pay Station Offer Service CANNOT both be set to Yes at the same time.

  - **Redemption Limit:** Use the Unlimited/Limited toggle switch to determine if the plan will limit the number of times a wash can be redeemed within a month.
  - **Frequency Limit:** Use the Unlimited/Limited toggle switch to determine if the plan will limit the number of times a wash can be redeemed within a day or a week.
  - **Card Must Be Present:** Use the Yes/No toggle switch to determine if the customer must swipe a magnetic strip card at the POS to redeem a wash.

NOTE: This only applies to the Sonny's POS. Set to No when Pay Stations are integrated.

  - **Customer Must Be Attached:** Use the Yes/No toggle switch to determine if the POS must prompt the cashier to enter the customer's information during the sale of a recurring plan - at the POS only.
- **Trial Promotion section:** The settings in this section allow you to define a special price for a set number of months (billing cycles). This will allow new customers to try a recurring plan for a specified amount of time at a reduced price and then automatically switch to the actual price of the plan.
  - **Trial Period:** Use the Yes/No toggle switch to determine if the plan will offer a Trial Period. The *Trial Price* will be the introductory price the customer will pay until the *Trial Period* ends. Ex: Trial Price=$15 for a Trial Period of 3 months after which the Regular price=$30 will be charged. The *Trial Period* is the times that the *Trial Price* will be charged. Ex: Trial Period=3(months) at a Trial Price=$15. After the 3rd charge of $15, the 4th charge will be at the regular price of $30.

6. Click the **Save** button to finish.

VIEW AND EDIT RECURRING PLANS

When you select the Recurring menu, under Monthly Plans all Available for Sale Plans are displayed by default. You may filter this view by using the Search & Filter option.

1. Click the *Expand* + icon for the **Recurring/Prepaids +** module on the sidebar.
2. Click the *Expand* + icon for **+ Recurring** menu.

3. Click the ▶ Monthly Plans option.
4. The *Monthly Plans* page displays the Available Recurring Plans.
5. Click the Search & Filter at the top right of the screen to filter the view. You can filter the view/search by Name, Sites and/or Available for Sale.
6. Enter or select the options to filter by and click the Apply button.
7. To edit any of the plans click on the *Edit* icon for the corresponding plan.
8. The plan's details will be displayed. Make editions and click the Save button commit the changes.

NOTE: Most changes done to a recurring plan will only take effect on plans sold after the changes are made. They will not affect existing, previously sold, accounts under the plan. Ex. You have a plan set to $30. You sale 10 memberships (accounts) of this plan. You then edit the price of the plan and set it to $35. The 10 customers that purchased the plan at $30, will continue to be charged $30 on their monthly charge. Any new customers that purchase the plan while it's priced at $35 will be charged $35 on their monthly charge.

View and Edit Recurring Accounts

When a recurring plan is purchased the system creates an account for it. This account can be a single card type of account or a family type of account. To view the details on a recurring plan follow the steps below:

1. Click the *Expand* ✚ icon for the Recurring/Prepaids ✚ module on the sidebar.
2. Click the *Expand* ✚ icon for ✚ Recurring menu.
3. Click the ▶ Monthly Plans option.
4. The *Monthly Plans* page displays the Available Recurring Plans.
5. Click the *Accounts* icon to see the accounts under the corresponding plan.
6. The *Plan's* page displays all of the Accounts under the plan.
7. Click the *Account Details* icon to view and edit an account.
8. The details on the account, Account History and Recurring Billing History will be displayed.

NOTE: You can also get to the account's detail page by looking up the account using the card/barcode/RFID number through the **Search** Module or by looking up the customer through the **Customers** module.

Find Recurring Account through the Search Module

If you have account's card/barcode/RFID number you can quickly find the account details page by using this number to search for it.

1. Click the Search module on the sidebar.
2. In the Enter Number text field enter the Prepaid Card Number (card/barcode/RFID) number or the License Plate Number.
3. In the Type drop down field select the *Prepaid Card Number* or the License Plate Number option accordingly.
4. Click the Apply button.
5. If there's a matching account found it will be displayed.
6. Click the *Account Details* icon to view the account's details page.

Find Recurring Account through the Customers Module

You may locate a recurring account by searching through the customer's record in the system.

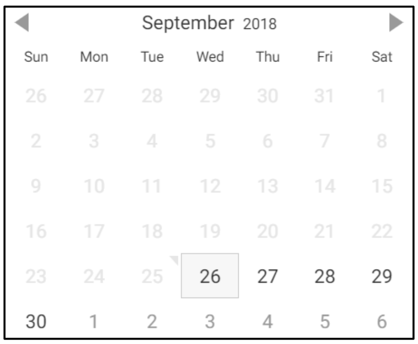
1. Click the *Expand* ✚ icon for the Visitors ✚ module on the sidebar.
2. Click the ▶ Customers option.

3. Click the **Search & Filter** option to look up a customer and click the **Apply** button. You can filter the view/search by First Name, Last Name, Phone, License Plate, Recurring Plan, Created From and/or Loyalty Number Name.
4. Click the *Active Recurring Account* ✓ icon which directs you to the *Prepaid Accounts* section of the customer's details page.
5. Click the *Account Details* icon to view the account's details page.

Change Recurring Account Billing Date

If a customer requests that their Billing Date is on a specific day, or if you decide to change a customer's next scheduled Billing Date, you may accomplish so by following the steps below:

1. Locate the customer's account by any of the methods described in the Find Recurring Account through the Search Module or Find Recurring Account through the Customers Module section.
2. Scroll down to the **Recurring** section.
3. Click on the Calendar icon next to the Next Bill Date.
4. A Next Bill Date field box is shown, displaying the current date, click inside this field.
5. A calendar will display.



6. Use this calendar to select the next billing date.
7. Once a date is selected the calendar will close out and the picked date will be displayed on the Next Bill Date field box.
8. Click the **Save** button to confirm the change.

> ***NOTE:*** Please note that by following these steps you are manually changing the customer's next billing date. The account will be billed on the date you select and 30 days after that going forward. If you change the next billing date to tomorrow, the customer will be charged tomorrow regardless of when their last billing occurred.

Cancel Recurring Billing on Account

To cancel a customer's Recurring account, follow the steps below:

1. Locate the customer's account by any of the methods described in the Find Recurring Account through the Search Module or Find Recurring Account through the Customers Module section.
2. Scroll down to the **Recurring** section.
3. Click on the toggle switch for Recurring Status and set it to Cancelled.
4. Click the **Save** button to confirm the cancelation.

> **NOTE:** The recurring status will be set to **Cancelled**. The customer can redeem with their account within the plan's limits and only until the prepaid period expires, unless you also cancel the card/barcode/RFID on the account. To reactivate the account you must do so through the POS. This is because reactivating an account may require a credit card transaction to be processed.

Activate and/or Cancel Tag/Card/Barcode/RFID on Account

1. Locate the customer's account by any of the methods described in the Find Recurring Account through the Search Module or Find Recurring Account through the Customers Module section.
2. Scroll down to the **Tags** section.
3. Click the Manage button.
4. The *Account Tag Management* page is displayed.
5. Use the **Active/Canceled** toggle button to change the status of the tag.
6. Click the Save button to confirm the changes.

NOTE: When a Card/RFID status is set to **Cancelled** the customer will not be able to redeem with it. When a Card/RFID is set to **Active** the customer will be able to redeem with it as long as the account is within a prepaid period. If an account is outside of a prepaid period in a **Cancelled** state, even if the Card/RFID status is **Active** the customer will not be able to redeem with it.

ANNUAL PLANS

Annual Plans are similar to Monthly Plans but they are active for a year and automatically charge the customer on a yearly schedule. Creating, viewing and editing yearly plans follow the same structure as monthly plans.
The process for selling an Annual Plan at the PO is the same as selling a Monthly Plan; the only difference will be that the customer's account will be set to bill in a year from purchase instead of a month from purchase.

Create an Annual Recurring Plan

1. Click the *Expand* ✚ icon for the Recurring/Prepaids ✚ module on the sidebar.
2. Click the *Expand* ✚ icon for ✚ Recurring menu.
3. Click the ► Annual Plans option.
4. Click the ✚ Create Annual Plan button at the top right of the screen.
5. The Create an *Annual Recurring Plan Item* form page is displayed. Enter the recurring plan parameters.

NOTE: You may reference step 5 under the Create a Monthly Recurring Plan section for details on the plan's settings. Do note that Annual plans do not offer the *Trial Promotion* option.

6. Click the Save button to finish.

DECLINES

The Declines menu provides a list of recurring accounts that are in a declined state. A Declined state means that the credit card charge was not approved by the bank or other entity. Reasons for declined transactions are unknown to Sonny's CarWash Controls.

View Declined Recurring Accounts

1. Click the *Expand* ✚ icon for the Recurring/Prepaids ✚ module on the sidebar.
2. Click the *Expand* ✚ icon for ✚ Recurring menu.
3. Click the ► Declines option.
4. All the Declined accounts will be displayed. Click the Search & Filter button at the top right of the screen to search for a specific customer's account by using either their First Name or Last Name.
5. Click the *Account Details* icon next to each account to see the account details page.
6. You may also use the Export button to download a cvs version of the list.

PREPAIDS

In this section we will explain how to setup and manage gift cards, wash books and prepaid washes.

GIFT CARDS

In order to sell Gift Cards through the POS and the Pay Stations you must setup Gift Card plans that specify the dollar amount the gift cards will be loaded with.

Gift Card Types

There are 3 gift card types.

- **Single Card:** This the most common type of gift card where there is only 1 active card per account.
- **Family Pack:** For this type there can be multiple active cards per account. All cards share the account balance.
- **Fund Raiser:** For this type multiple cards can be sold in one transaction, but each card is a separate account.

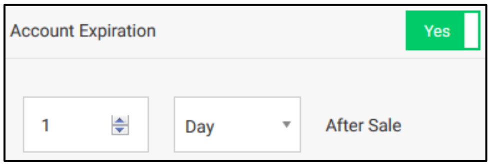
Create a Gift Card Plan

1. Click the *Expand* ✚ icon for the **Recurring/Prepaids ✚** module on the sidebar.
2. Click the *Expand* ✚ icon for **✚ Prepaids** menu.
3. Click the **► Gift Cards** option.
4. Click the **✚ Create Gift Card** button at the top right of the screen.
5. The *Create a Gift Card Item* page will be displayed. Enter the gift card plan parameters.

NOTE: The * (asterisk) denotes mandatory fields.

- **Name *:** Enter a name for the gift card plan to identify it in the system.
- **Category*:** Category used for reporting and filtering.
- **SKU*:** The system automatically generates a SKU number that doesn't need to be modified.
- **Card Type:** Select the gift card plan between Single Card, Family Pack and Fund Raiser.
    - **Max Active Cards field:** This field is only editable for Family Pack and Fund Raiser card types. Single Card type is limited to 1 active card per account.
- **Available for Sale:** Select which sites the gift card plan will be available for sale by using the Yes/No toggle switch for each site displayed in the drop down menu.
- **Selling section:**
    - **Price*:** Enter the price the gift card is going to be sold for or check the Prompt for Price box if this will be entered at the time of sale.
    - **Bonus Dollars*:** You may add an extra amount to the value of the gift card that is not charged to the customer when the gift card is purchased. It is an extra amount added to the price of the gift card. This is most commonly used for Fixed Price gift cards and not for Prompt for Price gift cards.
    - **Max Dollars*:** Enter the maximum dollar amount that can be loaded to the card (must be greater than or equal to Price + Bonus Dollars).
- **Redemption section:**
    - **Sonny's Pay Station Dispense Card:** This setting applies to customer with Sonny's Pay Stations. If the toggle is set to Yes, the Pay Station will dispense a card when a gift card is purchased. If the toggle is set to No, the Pay Station will print a redeemable code/barcode on the receipt.
    - **Card Must Be Present:** Select whether a magnetic stripe card must be swiped on the POS during redemption by using the Yes/No toggle switch.

- **Account Expiration:** Select whether you wish the gift card to expire after a certain period of time after it is purchased by using the Yes/No toggle switch. If you select Yes, select when the gift card will expire using the time boxes for After Sale.



6. Click the **Save** button to finish.

VIEW AND EDIT GIFT CARD PLANS

When you select the **Gift Cards** menu all Available for Sale Gift Cards Plans are displayed by default. You may filter this view by using the Search & Filter option.

1. Click the *Expand* ✚ icon for the **Recurring/Prepaids ✚** module on the sidebar.
2. Click the *Expand* ✚ icon for **✚ Prepaids** menu.
3. Click the **▶ Gift Cards** option.
4. Click the **Search & Filter** icon at the top right of the screen to filter the view. You can filter the view/search by Name, Sites and/or Available for Sale.
5. To edit any of the plans select the *Edit* icon for the corresponding plan.
6. The plan's details will be displayed. Make changes and click the **Save** button to finish.

NOTE: Most changes done to a gift card plan will only take effect for gift cards sold or reloaded after the changes are made. They will not affect existing, previously sold, gift card accounts.

VIEW AND EDIT GIFT CARD ACCOUNTS

When a gift card is sold on the POS the system creates an account for it. This account can be a Single Card type of account or a Family type of account. To view a gift card account details follow the steps below:

1. Click the *Expand* ✚ icon for the **Recurring/Prepaids ✚** module on the sidebar.
2. Click the *Expand* ✚ icon for **✚ Prepaids** menu.
3. Click the **▶ Gift Cards** option.
4. All off the Available for Sale Gift Card Plans are displayed.
5. Click the *Accounts* icon to see the accounts under the corresponding plan.
6. The *Gift Card Plan's* page displays all of the Gift Card Accounts under the plan.
7. Click the *Account Details* icon to view and edit an account.
8. The Gift Card Account details will be displayed and may be edited if needed.

WASH BOOKS

In order to sell Wash Book cards (or barcodes) through the POS and the Sonny's Pay Stations you must set up Wash Book plans that specify the wash, the number of redemptions that will be loaded onto the card, and the price of the Wash Book.

WASH BOOK TYPES

There are 3 wash book types.

- **Single Card:** This the most common type of wash book where there is only 1 card sold per transaction and only 1 active card per account.
- **Family Pack:** In this wash book type there can be multiple active cards per account. All cards share the account balance.

➢ **Fund Raiser:** In this wash book type multiple cards can be sold in one transaction, but each card is a separate account.

Create a Wash Book Plan

1. Click the *Expand* ✚ icon for the **Recurring/Prepaids ✚** module on the sidebar.
2. Click the *Expand* ✚ icon for **✚ Prepaids** menu.
3. Click the **► Wash Books** option.
4. Click the **✚ Create Wash Book** button at the top right of the screen.
5. The *Create a Wash Book Item* page is displayed. Enter the wash book plan parameters.

NOTE: The * (asterisk) denotes mandatory fields.

➢ **Name*:** Enter a name to identify the wash book plan in the system.
➢ **Category*:** Category used for reporting and filtering.
➢ **SKU *:** The system automatically generates a SKU number that doesn't need to be modified.
➢ **Card Type:** Select the wash book plan between Single Card, Family Pack and Fund Raiser.

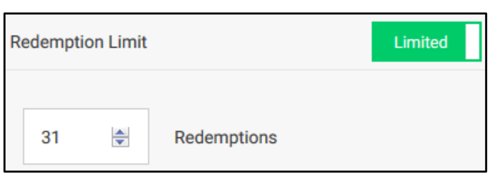
- **Max Active Cards field:** This field is only editable for Family Pack and Fund Raiser card types. Single Card type is limited to 1 active card per account.

➢ **Available for Sale:** Select which sites the wash book plan will be available for sale by using the Yes/No toggle switch for each site displayed in the drop down menu.
➢ **Selling section:**

- **Price*:** Enter the price the wash book is going to be sold for or check the Prompt for Price box if this will be entered at the time of sale.
- **Tax Rate*:** Select the tax rate, if any, that will be charged with the sale of the wash book.

➢ **Redemption section:**

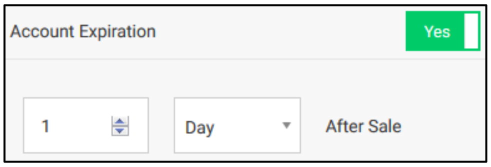
- **Wash Book Item*:** Select the wash that the wash book will be loaded with.
- **Redemption Wash Upgradable:** Select if the wash book will be eligible for wash upgrades. This allows customers to use the wash book as credit to a more expensive wash. If you offer the wash to be upgradable you cannot offer to add a service to the wash.
- **Sonny's Pay Station Offer Service:** If the toggle is set to *Yes*, the Sonny's Pay Station will direct the customer to the *services page* of the redemption wash. If you give the option for services to be added to the wash you cannot offer the wash to be upgradable.
- **Redemption Limit:** Use the Unlimited/Limited toggle switch to determine the amount of washes that will be loaded onto the card. If you set it to Limited select the number of redemptions.



- **Frequency Limit:** Use the Unlimited/Limited toggle switch to determine the number of times the wash book can be used in a day, week, month, or year. If you set it to Limited select the times the card can be used and the specific period of time.

- **Card Must Be Present:** This setting applies to the POS only. Use this to require the Wash Book card to be swiped at the POS during Wash Book wash redemptions.

- **Customer Must Be Attached:** This setting applies to the POS only. Use this to require a customer to be attached to the transaction during Wash Book wash redemptions.
- **Account Expiration**: Select whether you wish the wash book card to expire after a certain period of time after it is purchased by using the Yes/No toggle switch. If you select Yes, select when the wash book will expire using the time boxes for After Sale.



6. Click the Save button to finish.

VIEW AND EDIT WASH BOOK PLANS

When you select the **Wash Books** menu module all Available for Sale Wash Book Plans are displayed by default. You may filter this view by using the Search & Filter option.

1. Click the *Expand* ✚ icon for the Recurring/Prepaids ✚ module on the sidebar.
2. Click the *Expand* ✚ icon for ✚ Prepaids menu.
3. Click the ▶ Wash Books option.
4. Click the Search & Filter button at the top right of the screen to filter the view. You can filter the view/search by Name, Sites and/or Available for Sale.
5. Enter or select the options to filter by and click the Apply button.
6. To edit any of the plans click on the *Edit* icon for the corresponding plan.
7. The plan's details will be displayed. Make changes and click the Save button.

NOTE: Most changes done to a wash book plan will only take effect for wash books sold/recharged after the changes are made. They will not affect existing, previously sold, wash book accounts.

VIEW AND EDIT WASH BOOK ACCOUNTS

When a wash book is sold on the POS the system creates an account for it. This account can be a single card type of account or a family type of account. To view a wash book account details follow the steps below:

1. Click the *Expand* ✚ icon for the Recurring/Prepaids ✚ module on the sidebar.
2. Click the *Expand* ✚ icon for ✚ Prepaids menu.
3. Click the ▶ Wash Books option.
4. All the Available for Sale Wash Book Plans are displayed.
5. Click the *Accounts* icon for the particular plan you want to see the wash book accounts for.
6. All Wash Book Accounts under the plan are displayed.
7. Click the Search & Filter button at the top right of the screen to filter the view. You can filter the view/search by First Name, Last Name, Account Status, Prepaid Card Number, and/or License Plate.
8. Click the *Accounts* icon to view and edit the account details.
9. The Wash Book Account details and history will be displayed and may be edited if needed.

(PREPAID) WASHES

You can setup prepaid washes to see from the POS or from your Sonny's Controls ECommerce (My Wash Account) site. When a customer purchases a prepaid wash they get a barcode to use at a later time to get their wash. In order to sell prepaid washes you must configure these in the Back Office.

Create a Prepaid Wash

1. Click the *Expand* ✚ icon for the **Recurring/Prepaids ✚** module on the sidebar.
2. Click the *Expand* ✚ icon for **✚ Prepaids** menu.
3. Click the **► Washes** option.
4. Click the **✚ Create Prepaid Wash** button at the top right of the screen.
5. The *Create a Wash Book Item* page is displayed. Enter the wash book plan parameters.

NOTE: The * (asterisk) denotes mandatory fields.

- **Name*:** Enter a name to identify the wash book plan in the system.
- **Category*:** Category used for reporting and filtering.
- **SKU *:** The system automatically generates a SKU number that doesn't need to be modified.
- **Available for Sale:** Select which sites the wash book plan will be available for sale by using the Yes/No toggle switch for each site displayed in the drop down menu.
- **Selling section:**
  - **Price*:** Enter the price that the plan will sell for. You may check the *Prompt for Price* option to enter a price manually with each sale at the POS (Prompt for Price is not available when selling plans from the Pay Station).
  - **Tax Rate:** Use the drop down to select the tax rate to use for the sale of the plan at each site.
- **Redemption section:**
  - **Wash Item*:** Select the wash that the prepaid code will be applicable to.

View and Edit Prepaid Washes

1. Click the *Expand* ✚ icon for the **Recurring/Prepaids ✚** module on the sidebar.
2. Click the *Expand* ✚ icon for **✚ Prepaids** menu.
3. Click the **► Washes** option.
4. The *Prepaid Washes* page displays all of the Available for Sale Prepaid Washes. Click the **Search & Filter** button at the top right of the screen to filter the view. You can filter the view/search by Name, Sites and/or Available for Sale.
5. Click the *Edit* icon for the respective Prepaid Wash. The wash details will be displayed.
6. Make changes and click the **Save** button.

PRODUCT MODULE

This module allows you to create, view and manage washes, wash services, detailing services and merchandise sold through the system.

WASH MANAGEMENT

WASHES

This section allows you to you create and manage your washes.

CREATE A WASH

1. Click the *Expand* + icon for the **Product +** module on the sidebar.
2. Click the *Expand* + icon for the **+ Item Management** menu.
3. Click the **▶ Washes** option.
4. Click the **+ Create Item** button at the top right of the screen.
5. The corresponding *Create Item* page is displayed. Enter the item's parameters.

NOTE: The * (asterisk) denotes mandatory fields.

- **Name*:** Enter the name of the wash.
- **Category*:** Select the category the item is part of.
- **SKU*:** The system automatically generates a SKU number that doesn't need to be modified. However, it may be modified if needed for integration and identification purposes with other systems such as the tunnel controller or automated pay stations.
- **Available for Sale:** Select which sites the item will be available for sale by using the Yes/No toggle switch for each site.
- **Selling section:**
  - **Pricing*:** Enter the price the item is going to be sold for or check the Prompt for Price box if the price will be entered at the time of sale. You may set different prices for the same wash at different sites. If you are going to have different pricing at different locations for the same wash toggle the "All Sites" to "Per Site" and enter the price for the wash at each site. Otherwise, leave the toggle at "All Sites" and enter the price.
  - **Tax Rate drop down*:** Select the tax rate, if any, that will apply to the item.
- **Cost Per Wash:** You may use this field to enter the estimated cost of an item. This cost is used in reports to calculate your actual profit/loss on unlimited and wash book plans. As with wash pricing you can set different cost for the same wash at each site. Use the "All Sites/Per Site" toggle to enter cost information accordingly.

6. Click the **Save** button to finish.

VIEW AND EDIT WASHES

When you select the **Washes** menu all Available for sales washes are displayed by default. You may filter this view by using the Search & Filter option.

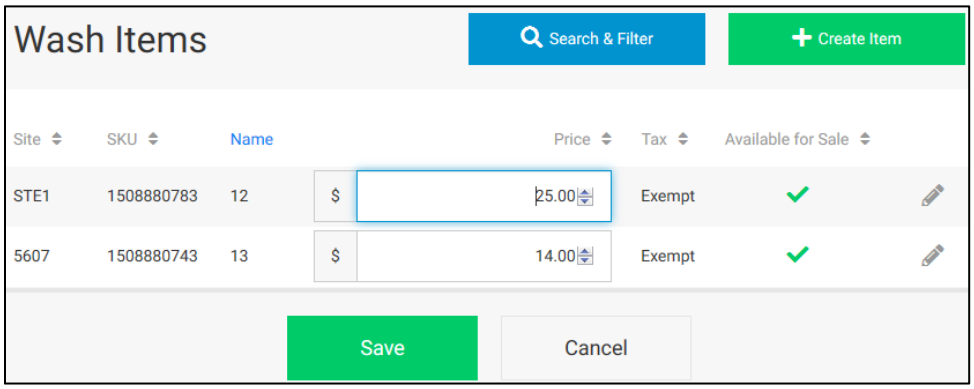
1. Click the *Expand* + icon for the **Product +** module on the sidebar.
2. Click the *Expand* + icon for **+ Wash Management** menu.
3. Click the **▶ Washes** option.
4. Click the **Search & Filter** button at the top right of the screen to filter the view. You can filter the view/search by SKU, Name, Available for Sale, Sites and/or Categories.
5. Enter or select the options to filter by and click the **Apply** button.

6. To edit any of the items click on the item's the *Edit* icon.
7. The item's details will be displayed. Make changes and click the Save button.

Edit Multiple Wash Prices

A quick way to update your washes price is to using the Edit Price button on the Wash Items page.

1. Click the *Expand* ✚ icon for the Product ✚ module on the sidebar.
2. Click the *Expand* ✚ icon for ✚ Wash Management menu.
3. Click the ▶ Washes option.
4. Click the Edit Price button at the top left of the screen.
5. The Price column on the screen becomes available for edit.



6. Enter the new prices for the applicable washes and click the Save button to finish.

SERVICES

This section allows you to you create and manage your wash services, also known as wash add-ons. One or more services can be added to a wash. Some common services offered with washes are Tire Shine, Lava and Buff and Dry. Creating and editing services follow the same steps as with washes. To create and edit services reference the Washes section and apply the same steps to the Service module.

DETAILS

This section allows you to you create and manage your detailing services. These services are most commonly offered by full service car washes and applied by hand. Some common details are Hand Wax, Carpet Shampoo and Leather Treatment. Creating and editing services follow the same steps as with washes. To create and edit services reference the Washes section and apply the same steps to the Service module.

ITEM MANAGEMENT

MERCHANDISE

This section allows you to create and manage your merchandise.

Create Merchandise Items

To add merchandise items in the system follow the steps below:

1. Click the *Expand* ✚ icon for the Product ✚ module on the sidebar.
2. Click the *Expand* ✚ icon for ✚ Item Management menu.

3. Click the ▶ Merchandise option.
4. Click the ✚ Create Item button at the top right of the screen.
5. The *Create Item* page is displayed. Enter the item's parameters.

NOTE: The * (asterisk) denotes mandatory fields.

- **Name*:** Enter the name of the item.
- **Category*:** Select the category the item is part of.
- **SKU*:** The system automatically generates a SKU number that doesn't need to be modified.
- **Available for Sale:** Select which sites the item will be available for sale by using the Yes/No toggle switch for each site.
- **Selling section:**
  - **Pricing*:** Enter the price the item is going to be sold for or check the *Prompt for Price* box if the price will be entered at the time of sale. You may set different prices for the same wash at different sites. If you are going to have different pricing at different locations for the same wash toggle the "All Sites" to "Per Site" and enter the price for the wash at each site. Otherwise, leave the toggle at "All Sites" and enter the price.
  - **Tax Rate*:** Select the tax rate, if any, that will apply to the item.
- **Inventory section:**
  - **Cost of Goods:** Enter the cost of the item. This cost is used in reports to calculate your actual profit/loss on merchandise items. As with wash pricing you can set different cost for the same item at each site. Use the "All Sites/Per Site" toggle to enter cost information accordingly.
  - **Count:** Enter the Count in hand of the item and a Threshold to determine when the counts are low.

6. Click the Save button to finish.

View Merchandise Items

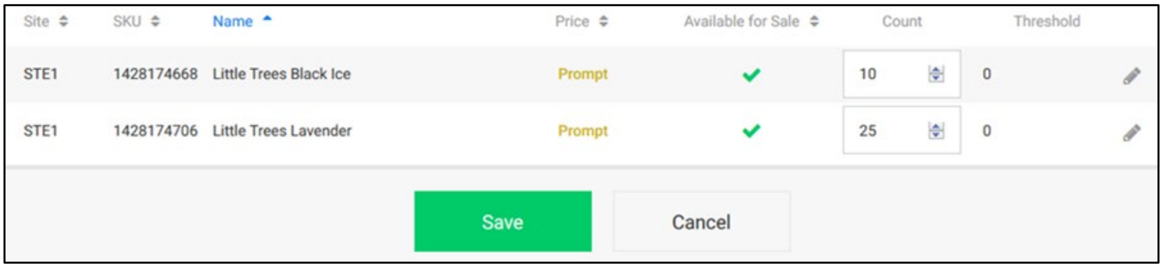
When you select the **Merchandise** menu all Available for sales items are displayed by default. You may filter this view by using the Search & Filter option.

1. Click the *Expand* ✚ icon for the Product ✚ module on the sidebar.
2. Click the *Expand* ✚ icon for ✚ Item Management menu.
3. Click the ▶ Merchandise option.
4. Click the 🔍 Search & Filter button at the top right of the screen to filter the view. You can filter the view/search by SKU, Name, Available for Sale, Sites, Categories and/or Count.
5. Enter or select the options to filter by and click the Apply button.
6. To edit any of the items click on the *Edit* icon.
7. The item's details will be displayed. Make changes and click the Save button.

Edit Merchandise Price and Count

You may quickly edit merchandise price and counts.

1. Click the *Expand* ✚ icon for the Product ✚ module on the sidebar.
2. Click the *Expand* ✚ icon for ✚ Item Management menu.
3. Click the ▶ Merchandise option.
4. Click the Edit Price & Count button at the top left of the screen.
5. The *Price*, *Count* and *Threshold* columns become editable and you may enter the new values for each item.



6. Click the **Save** button to finish.

NOTE: All column values must be greater than 0 for the changes to successfully be saved.

VISITORS MODULE

This module allows you to create, view and manage customers, vehicles and house accounts.

CUSTOMERS

This section allows you to create, view, manage and export customers' records.

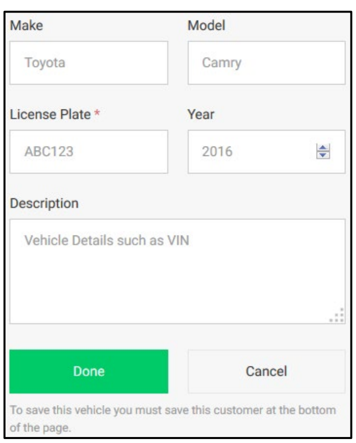
CREATE CUSTOMER

To add a new customer in the Back Office, follow the following steps:

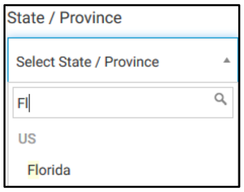
1. Click the *Expand* + icon for the **Visitors +** on the sidebar.
2. Click the **▶ Customers** option.
3. Click the **+ Create Customer** button at the top right of the screen.
4. The *Create Customer* page is displayed. Enter the customer's information.

NOTE: The * (asterisk) denotes mandatory fields.

- **First Name*:** Enter the customer's first name.
- **Last Name*:** Enter the customer's last name.
- **Phone:** Enter the customer's phone number.
- **Email Address:** Enter the customer's e-mail address.
- **Loyalty Section:**
  - Loyalty Number: Enter the customer's loyalty number. If the loyalty numbered entered is available the check mark will turn green, otherwise you will notice a red x.
  - Loyalty Points: Enter any initial loyalty points to give the customer on creation.
- **Vehicles Section:**
  - Add Vehicle button: Click to expand the vehicle fields and fill them out accordingly. Click the Done button when finished.



- **Address Section:**
  - Country: Select country.
  - Address: Enter customer's address.
  - City: Enter city.
  - State/Province: Select the State or Province accordingly. You may click the field and then start typing in the search field for a quick search.



- Zip/Postal Code: Enter zip code or postal code.

- **Marketing Section:**
  - Allow SMS?: Determine whether the customer is opt-in or opt-out from SMS marketing.

5. Click the **Save** button to finish.

VIEW CUSTOMERS

When you select the **Customers** menu all existing customers are displayed by default. You may filter this view by using the Search & Filter option.

1. Click the *Expand* **+** icon for the **Visitors +** on the sidebar.
2. Click the **▶ Customers** option.
3. Click the **Search & Filter** button at the top right of the screen to filter the view. You can filter the view/search by First Name, Last Name, Phone, License Plate, Recurring Plan, Created From and/or Loyalty Number.
4. Enter or select the options to filter by and click the **Apply** button.

> **NOTE:** To view customers that registered via ECommerce use the *Created From* filter and select ECommerce.

EDIT CUSTOMER DETAILS

1. Click the *Expand* **+** icon for the **Visitors +** module on the sidebar.
2. Click the **▶ Customers** option.
3. Click the *Edit* icon for the corresponding customer.
4. The customer's details will be displayed. Make changes and click the **Save** button.

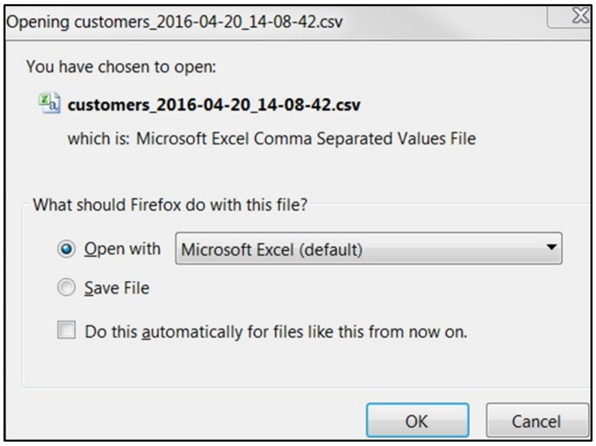
VIEW CUSTOMER'S TRANSACTION HISTORY

1. Click the *Expand* **+** icon for the **Visitors +** module on the sidebar.
2. Click the **▶ Customers** option.
3. Click the Transaction History icon for the corresponding customer.
4. The *Transaction History* page is displayed listing all customer's transactions. You may use the **Search & Filter** button at the top right of the screen to filter the view. You can filter the view/search by Number, Date and/or Type.
5. You may also see a transaction's details by selecting the *Transaction Details* icon for any transaction.

EXPORT CUSTOMER LIST

To export your customer list follow the steps below:

1. Click the *Expand* **+** icon for the **Visitors +** module on the sidebar.
2. Click the **▶ Customers** option.
3. Click the **Export** button at the top right of the screen.
4. A system *Open with/Save File* dialogue box will be displayed.



NOTE: The look of this dialogue box depends on your PC configuration. You must also make sure you are not blocking pop-ups on your browser. The export file is a csv file.

5. Select *Open* or *Save* the file accordingly.

VEHICLES

This section allows you to create, view, manage and export vehicles records.

CREATE VEHICLE

To add a new vehicle in the Back Office, follow the following steps:

1. Click the *Expand* + icon for the **Visitors +** module on the sidebar.
2. Click the **▶ Vehicles** option.
3. Click the **+ Create Vehicle** button at the top right of the screen.
4. The *Create Vehicle* page is displayed. Enter the vehicle's information.

NOTE: The * (asterisk) denotes mandatory fields.

- **License Plate*:** Enter the license plate of the vehicle.
- **Vehicle Make:** Enter the make of the vehicle.
- **Vehicle Model:** Enter the model of the vehicle.
- **Year:** Enter year the vehicle was made.
- **Description:** Enter any other details about the vehicle.
- **Attach Customer:** Select whether to assign the vehicle to a customer or not. If you select *Yes*, you must select the customer from the list of existing customers.
- **Attach House Account:** Select whether to assign the vehicle to a house account or not. If you select *Yes*, you must select the house account from the list of existing house accounts.

5. Click the **Save** button to finish.

VIEW VEHICLES

When you select the **Vehicles** menu all existing vehicles are displayed by default. You may filter this view by using the Search & Filter option.

1. Click the *Expand* + icon for the **Visitors +** module on the sidebar.
2. Click the **▶ Vehicles** option.
3. Click the **Search & Filter** button at the top right of the screen to filter the view. You can filter the view/search by License, Make and/or Model.
4. Enter or select the options to filter by and click the **Apply** button.

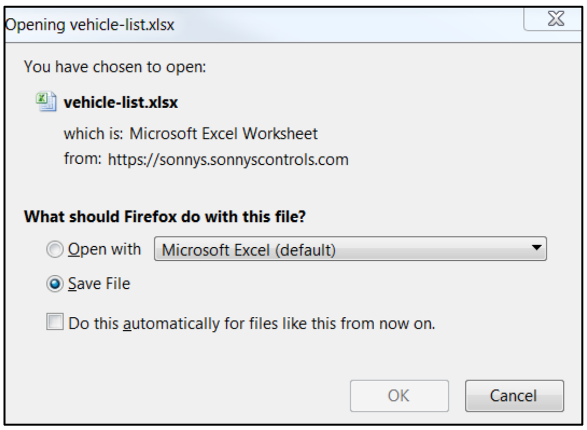
EDIT VEHICLE DETAILS

1. Click the *Expand* + icon for the **Visitors +** module on the sidebar.
2. Click the **► Vehicles** option.
3. Click the *Edit* icon for the corresponding vehicle.
4. The vehicle's details will be displayed. Make changes and click the **Save** button.

EXPORT VEHICLES LIST

To export your vehicles list follow the steps below:

1. Click the *Expand* + icon for the **Visitors +** module on the sidebar.
2. Click the **► Vehicles** option.
3. Click the **Excel Export** button at the top right of the screen.
4. A system *Open with/Save File* dialogue box will be displayed.



NOTE: The look of this dialogue box depends on your PC configuration. You must also make sure you are not blocking pop-ups on your browser. The export file is a *.xlsx* file.

5. Select ***Open with*** or ***Save File*** accordingly.

LPR ALIAS

This section allows you to search existing Alias (look-like identification) tied to a Customers License plate, and allow you to create an Alias and associate it with a License plate. Aliases are created for license plates with challenging characters. E.g., RICH1E plate is scanned as RICHIE (with an I) causing a recurring member to not be identified. A crew member can manually confirm that the scanned RICHIE plate is associated with the RICH1E account. When the vehicle returns to any of your sites it will be linked to the given alias.

CREATE AN LPR ALIAS

To add a new alias in the Back Office, follow the following steps:

1. Click the *Expand* + icon for the **Visitors +** module on the sidebar.
2. Click the **► LPR Alias** option.
3. Click the **+ Create LPR Alias** button at the top right of the screen.
4. The *Create LPR Alias* page is displayed.
5. Use the *Vehicle License* drop-down menu to enter and search for an existing license plate.
6. Enter the alias to use for the designated license plate in the *Alias* field.
7. Click the **Save** button to finish.

SEARCH ALIASES

When you select the **LPR Alias** menu all existing License Plates are displayed with their created aliases. You may search for a specific license plate or alias by using the Search & Filter option.

1. Click the *Expand* ✚ icon for the Visitors ✚ module on the sidebar.
2. Click the ▶ LPR Alias option.
3. Click the Search & Filter button at the top right of the screen.
4. Enter the License Plate or Alias you want to search for and click the Apply button.

EDIT ALIASES

1. Click the Expand ✚ icon for the Visitors ✚ module on the sidebar.
2. Click the ▶ LPR Alias option.
3. Search for the corresponding License Plate or alias and click the Edit icon next to the alias you want to edit.
4. The Edit LPR Alias page is displayed. Make changes and click the Save button.

DELETE AN ALIAS

1. Click the *Expand* ✚ icon for the Visitors ✚ module on the sidebar.
2. Click the ▶ LPR Alias option.
3. Search for the corresponding License Plate or alias and click the *Delete* icon next to the alias you want to delete.
4. A confirmation dialogue box will be displayed. Click the delete Delete button.

HOUSE ACCOUNTS

This section allows you to create, view and manage House Accounts.

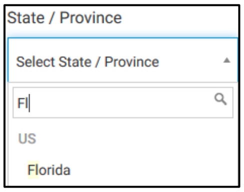
CREATE HOUSE ACCOUNT

To add a new vehicle in the Back Office, follow the following steps:

1. Click the *Expand* ✚ icon for the Visitors ✚ module on the sidebar.
2. Click the ▶ House Accounts option.
3. Click the ✚ Create Account button at the top right of the screen.
4. The *Create House Account* page is displayed. Enter the account's information.

NOTE: The * (asterisk) denotes mandatory fields.

- **Company*:** Enter the company/business name.
- **First Name*:** Enter the house account contact's first name.
- **Last Name*:** Enter the house account contact's last name.
- **Phone*:** Enter the house account contact's phone number.
- **Email Address:** Enter the house account e-mail address.
- **Address Section:**
  - Country: Select country.
  - Address: Enter company address.
  - City: Enter city.
  - State/Province: Select the State or Province accordingly. You may click the field and then start typing in the search field for a quick search.



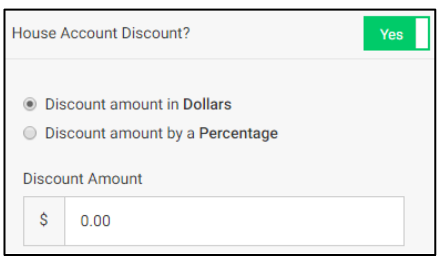
- ❖ Zip/Postal Code: Enter zip code or postal code.

➢ **Vehicles Section:**

- ❖ Click the **Add Vehicle** button.
  - ▪ Enter the vehicles details and click the **Done** button.
  - ▪ Repeat to add more vehicles.
  - ▪ You may edit the details or delete a vehicle using the icons next to each vehicle.

➢ **Selling Section:**

- ❖ Tax Exempt: Select whether purchases under the account will be tax exempt by using the Yes/No toggle switch.
- ❖ House Account Discount: Select whether purchases under the account will receive an automated discount by using the Yes/No toggle switch. If set to Yes configure the discount settings:
  - ▪ Choose between a dollar discount and a percent discount and enter the amount accordingly.



- ❖ Credit Limit: Select whether the account will have a spending limit or will be unlimited by using the *Limited/Unlimited* toggle switch. If set to *Limited* enter the limit amount.
  - ▪ Credit Limit Comments: Enter comments in regards to the credit limit.
- ❖ House Account Comments: Enter any comments/notes in regards to the account.

5. Click the **Save** button to finish.

VIEW HOUSE ACCOUNTS

When you select the **House Accounts** module a list of all the active house accounts is displayed. You may filter this view by using the Search & Filter option.

1. Click the *Expand* ✚ icon for the **Visitors ✚** module on the sidebar.
2. Click the **▶ House Accounts** option.
3. Click the **Search & Filter** button at the top right of the screen to filter the view. You can filter the view/search by Company, Phone, Status, First Name and/or Last Name.
4. Enter or select the options to filter by and click the **Apply** button.

EDIT HOUSE ACCOUNT DETAILS

1. Click the *Expand* ✚ icon for the **Visitors ✚** module on the sidebar.
2. Click the **▶ House Accounts** option.

3. Click the *Edit* icon for the corresponding house account.
4. The details of the House Account will be displayed. Make changes and click the **Save** button.

VIEW HOUSE ACCOUNT'S TRANSACTION HISTORY

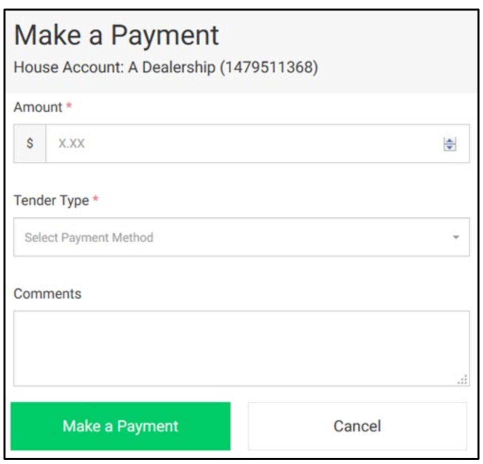
1. Click the *Expand* + icon for the **Visitors +** module on the sidebar.
2. Click the **► House Accounts** option.
3. Click the *Transactions History* icon for the corresponding account.
4. The *Transactions* page is displayed listing all of the transaction in the account.
5. You may also see a transaction's details by selecting the *Transaction Details* icon for any of the transactions.

MAKE A PAYMENT TO A HOUSE ACCOUNT

1. Click the *Expand* + icon for the **Visitors +** module on the sidebar.
2. Click the **► House Accounts** option.
3. Click the *Payment* icon for the corresponding house account.
4. The *Make a Payment* page is displayed. Enter the payment details.

NOTE: The * (asterisk) denotes mandatory fields.

- **Amount***: Enter the payment amount.
- **Tender Type***: Choose the method between cash and check used for payment. Credit Card payments must be processed through the POS.
- **Comments**: Enter comments.



5. Click the **Make a Payment** button to submit the payment.

EMPLOYEES MODULE

This module allows you to setup and manage employees and employees' related information. It provides you with access to their timesheets, compensation, and POS permissions. Additionally, you are able to create and manage Back Office users (employees that have configurable access to the Back Office portal).

LIST

This section allows you to create and manage your employee's information in the system.

CREATE EMPLOYEE

To add a new employee in the Back Office, follow the following steps:

1. Click *Expand* ✚ icon for the Employees ✚ module on the sidebar.
2. Click the ► List option.
3. Click the ✚ Create Employee button.
4. The *Create Employee* page is displayed. Enter the employee's information accordingly.

NOTE: The * (asterisk) denotes mandatory fields.

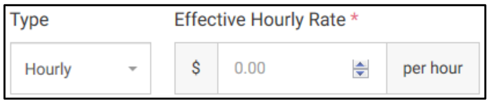
- **First Name*:** Enter the employee's first name.
- **Last Name *:** Enter the employee's last name.
- **Phone:** Enter the employee's phone number.
- **Email:** Enter the employee's email.
- **Departments *:** Select at least one department the employee is part of.

NOTE: For an employee to be part of the commissions module the Greeter department must be assigned to the employee.

- **Start Date*:** Select the employee's start date.
- **Available to Work:** Select the sites the employee will be available to clock in/out.

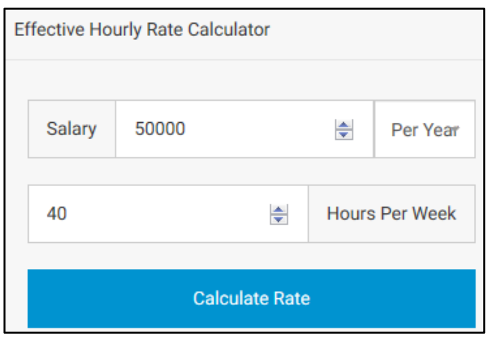
NOTE: Employees, active and inactive, **must be** assigned to at least one site to remain visible on the employee list page.

- **POS Login section:**
  - POS User ID*: Enter an ID number for the employee to be able to login into the POS. This number cannot be changed after it is saved.
  - POS User Pin*: Enter a Pin number for the employee to be able to login into the POS.
- **Emergency Contact section:**
  - Name: Enter employee's emergency contact name.
  - Phone Number: Enter employee's emergency contact phone number.
- **ADP Report section:**
  - Employee ID: Enter the employee's ID from the Employment Profile page on your ADP site. (For users with an ADP payroll system).
- **Compensation section:**
  - Type: Select between Hourly and Salary.
    - **Hourly:** Employees setup as hourly will clock in/out for their hours/compensation to be calculated within the system.
      - *Effective Hourly Rate**: Enter the employee's hourly rate.

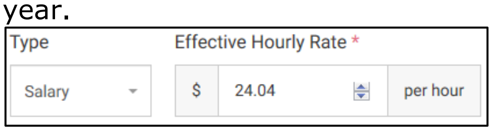


- *Overtime*: Select whether the employee is eligible for overtime by using the *Ineligible/Eligible* toggle switch. If set to Eligible enter the hourly overtime rate.

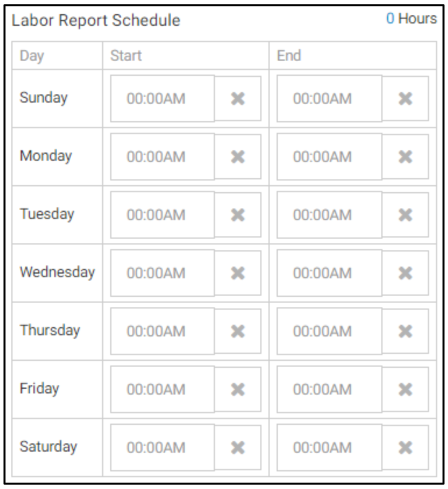
- **Salary:** For employees setup as salary the system will calculate hours/compensation based on the values entered and include it in your labor cost calculation without having the employee clock in and out on the system each time.
  - *Effective Hourly Rate**: **<u>Do not enter any values in this field</u>**. This field will be auto-populated after you enter the information in the *Effective Hourly Rate Calculator* below.
  - *Effective Hourly Rate Calculator*:
    - <u>Salary / Per Year or Per Week</u>: Enter the employee's salary by year or by week – make sure to select the corresponding option.
    - <u>Hours Per Week</u>: Enter the number of hours the employee works each week.



    - Click the Calculate Rate button. The system will converts the salary wage into an hourly rate for Labor Cost reporting by using the standard 52 working weeks in a year.



  - *Labor Scheduled Cost*: Select how you would like the system to calculate the employee's labor cost by selecting between *Labor Scheduled Cost* or *Employee Clock-ins*.
    - <u>Labor Schedule Cost</u>: When this option is selected you will need to define the days and times the system will use to calculate labor.
      - *<u>Employee Labor Site</u>:* Select the site the employee's labor cost will apply to.
      - *<u>Labor Report Schedule</u>:* Select the Start and End hours during which the system will use the employee's effective hourly rate to calculate labor cost.



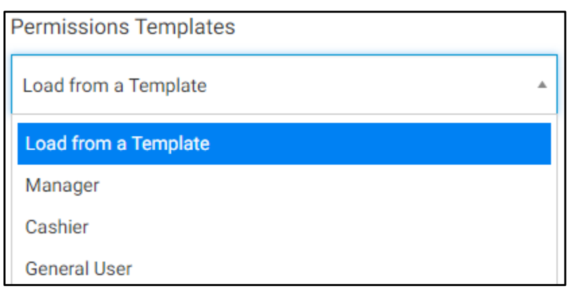
- Employee Clock-Ins: Labor will be generated using the employee's clock-ins/outs.

5. Click the **Set POS Access** button to finish this part of the employee creation and move onto the **Employee Access** section.

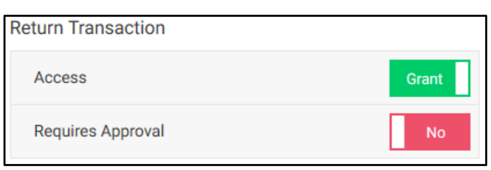
> **NOTE:** After creating an employee the system will automatically take you to the **Employee Access page** to give permissions to the recently created employee. You may complete this at this time, which is recommended, or do it at a later time. If you do not complete this section right after creating the employee, or click Cancel instead of Save, the employee record will still be created but the employee will not have any permissions to use the POS.

6. The *Employee Access* page is displayed. In this page you will determine what the employee will, or will not, have access to while logged into the POS. You may setup access by using a pre-configured template or by customizing each permission individually.

   - **Permissions Templates:** Select a template from the Permission Template drop-down to use a pre-configured set of permissions based on the role of the employee. It is not required to choose any template and, even if you choose one, the permission set for each employee is completely customizable.



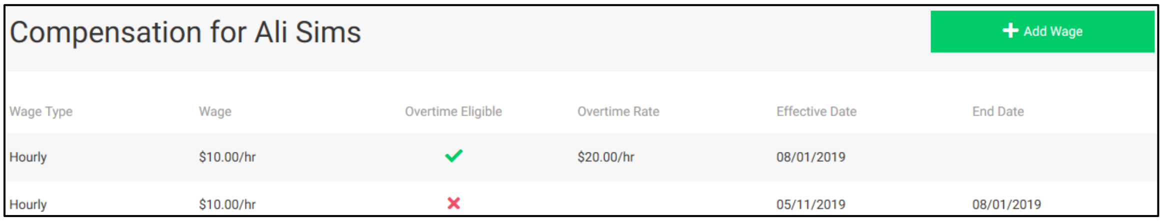
   - **Action Approval Authority:** You may choose to grant full access to an employee. Set the *Give Authority* toggle to *Yes*. The employee will have access to all POS features and can approve any action for users requiring approval.
   - **Permissions section:** This section lists each of the available permission and allows you to change each individually. When a permission is set to *Grant*, you will also have the option to determine whether the user has access but requires approval to perform the action.



7. Click the **Save** button to finish.

VIEW AND EDIT EMPLOYEE'S COMPENSATION

1. Click the *Expand* + icon for the **Employees +** module on the sidebar.
2. Click the **► List** option.
3. The list of all active employees is displayed. Click the *Compensation* $ icon for the corresponding employee.
4. The employee's current and previous compensation information is displayed.


Compensation for Ali Sims

+ Add Wage

Wage Type	Wage	Overtime Eligible	Overtime Rate	Effective Date	End Date
Hourly	$10.00/hr	✓	$20.00/hr	08/01/2019	
Hourly	$10.00/hr	✗		05/11/2019	08/01/2019

5. To change the wage information for the employee you'll need to create a new wage that will replace the previous wage. Click the **+ Add Wage** button.
6. The *Compensation* parameters are displayed. Enter the employee's wage information accordingly.

- **Effective Date*:** The effective date for a new wage must be at least a day after the effective date of the latest wage.
- **Wage Type:** Select the wage type and enter all the corresponding wage information.

7. Click the **Save** button to finish.

VIEW AND EDIT EMPLOYEE'S PERMISSIONS

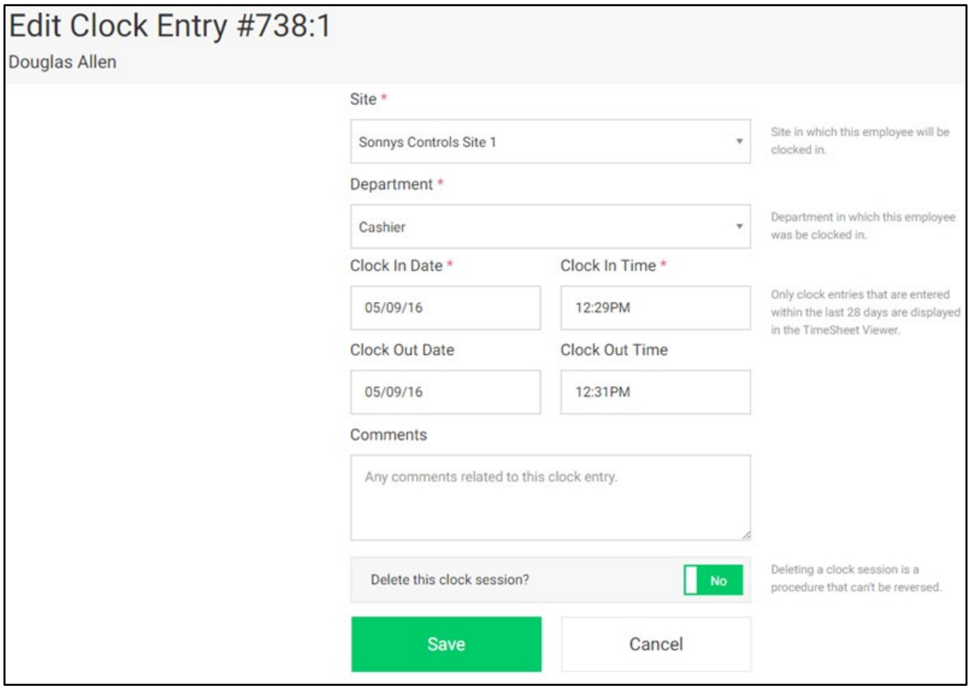
1. Click the *Expand* + icon for the **Employees +** module on the sidebar.
2. Click the **► List** option.
3. The list of all active employees is displayed. Click *Permissions* icon for the corresponding employee.
4. Edit any of the POS permissions and click **Save** button to finish.

VIEW AND EDIT EMPLOYEE'S CLOCK ENTRIES

1. Click the *Expand* + icon for the **Employees +** module on the sidebar.
2. Click the **► List** option.
3. The list of all active employees is displayed. Click the *Timesheet* icon for the corresponding employee.
4. The employee's *Timesheet* page is displayed. You may edit or create clock entries for the employer.

EDIT AND DELETE EMPLOYEE'S CLOCK ENTRY

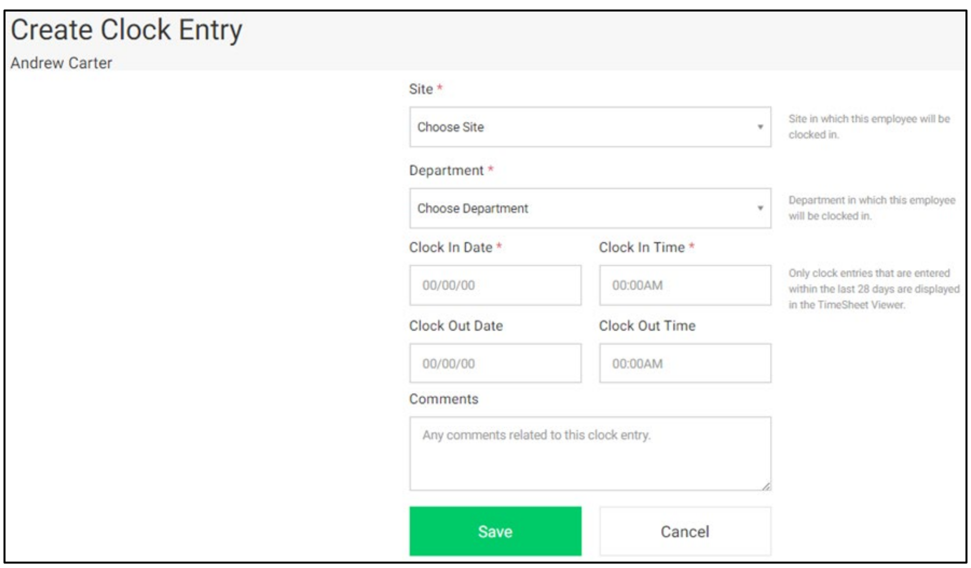
1. Follow steps 1 through 5 from the View and Edit Employee's Clock Entries section.
2. Click the *Edit* icon for the corresponding entry.
3. The employee's *Edit Clock Entry* page is displayed.



4. Make changes to the clock entry or use the Yes/No toggle switch to delete the clock entry.
5. Click the **Save** button to finish.

Create Employee's Clock Entry

1. Follow steps 1 through 5 from the View and Edit Employee's Clock Entries section.
2. Click the **+ Create Clock Entry** button.
3. The *Create Clock Entry* page will be displayed.

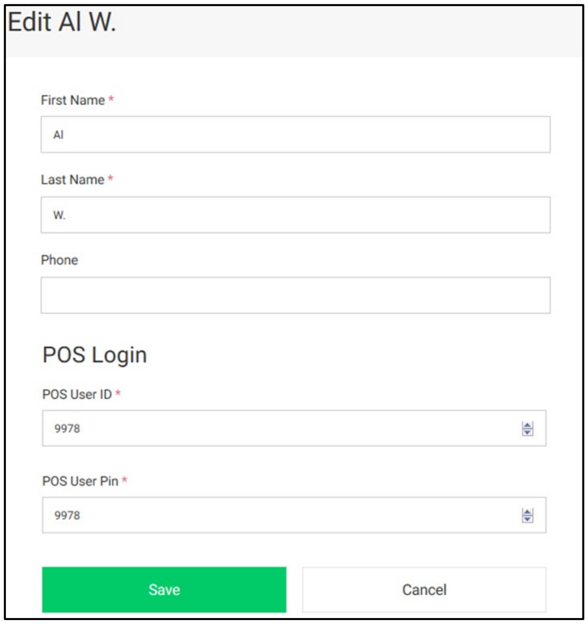


4. Enter the details for the clock entry and click the **Save** button to finish.

EDIT EMPLOYEE'S INFORMATION

1. Click the *Expand* + icon for the **Employees +** module on the sidebar.
2. Click the **► List** option.

3. The list of all active employees is displayed. Click the *Edit* icon to the right hand side of the screen for the corresponding employee.
4. The employee's *Edit* page will be displayed.



5. Make changes or use the Active/Inactive toggle switch in the *Status* field to make the employee inactive.

NOTE: Employees are not deleted from the system but set to an inactive state. Employees that are set to inactive can later be set back to active.

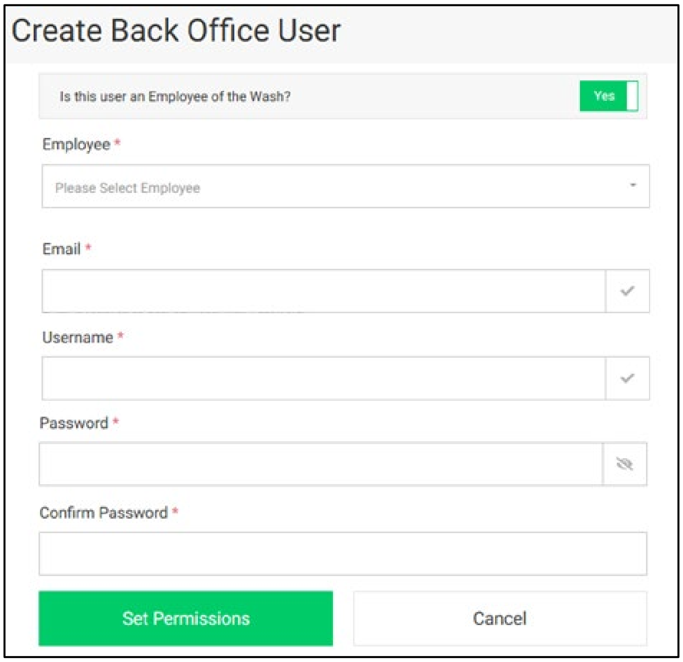
6. Click the **Save** button to finish.

BACK OFFICE USERS

This section allows you to create and manage your Back Office users.

CREATE A BACK OFFICE USER

1. Click the *Expand* + icon for the **Employees +** module on the sidebar.
2. Click the **▶ Back Office Users** option.
3. Click the **+ Create User** button.
4. The *Create Back Office User* page is displayed. Enter the user's parameters.



- **Is this user an Employee of the Wash?:**
  - Select ***Yes*** if the Back Office user is an employee who also needs access to the POS. In this case you want to create the employee following the steps in the Create Employee section and then come back to create their Back Office User and link it to their employee record.
    - *Employee**: Use the drop down menu to select the employee this back office user will be linked to.
  - Select ***No*** if the back office user is an External User and will never require access to a POS. External Users will only have access to the Back Office system. Only created Employees can have access to a POS
    - *First Name**: Enter the user's first name.
    - *Last Name**: Enter the user's last name.
- **Email*:** Enter the user's email address.
- **Username*:** Enter a username that starts with a letter and contains 3 to 64 alpha-numeric characters.
- **Password*:** Enter a password that is at least 8 alpha-numeric characters long.
- **Confirm Password*:** Type password again. It must match with what was entered in the Password field.

5. Click the **Set Permissions** button to finish this part of the Back Office user creation and move onto the **Back Office Access Control** section.

> **NOTE:** After creating a Back Office user the system will automatically take you to the **Back Office Access Control page** to give permissions to the recently created user. You may complete this at this time, which is recommended, or do it at a later time. If you do not complete this section right after creating the user, or click Cancel instead of Save on this page, the Back Office user will still be created but will not have any permissions to in the Back Office.

6. The *Back Office Access Control* page is displayed.

- **Accessible Sites*:** Pick the sites the user will have access to. If you have grouped your sites in regions, you can click a region and all applicable sites will be added to the user. You can still exclude specific sites by clicking on the [x] in each of them.

- **Permission Templates:** You may select a template from the available templates which will load a set of pre-configured permissions chosen to help out during setup. It is not required to choose any template and, even if you choose one, the permission set for each user is completely custom.
- **Permissions section:** This section lists each of the available permission and allows you to change each individually. Selecting between *Granting* or *Denying* access to each specific permission.

7. Click the Save button to finish.

VIEW AND EDIT A BACK OFFICE USERS

You may edit the permissions for a user or change their login information or inactivate the user in the **Back Office** section.

1. Click the *Expand* ✚ icon for the Employees ✚ module on the sidebar.
1. Click the ▶ Back Office option.
2. The list of all Back Office Users is displayed.
3. You may use the Search & Filter button to view employees filtering by: First Name, Last Name, User Name, Email and/or Status.
4. Click the *Permissions* icon to edit a user's permissions or the *Edit* icon to edit the login information.
5. Make the corresponding changes and click the Save button to finish.

CALL CENTER USERS

This section allows you to create and manage your Call Center users. Each person logging in to the Call Center site will need to have their own login credentials. These are created in the Employees Module in Back Office.

> **NOTE:** This feature is only available for sites with The Call Center license. To add this module to your monthly subscription, reach out to the Sonny's CarWash Controls Sales team.

CREATE A BACK OFFICE USER

1. In Back Office click the Expand ✚ icon for the Employees ✚ module.
2. Click the ▶ Call Center Users option.
3. Click the ✚ Create User button.
4. The *Create Call Center User* page is displayed.
5. Enter the username the user will use to login to the Call Center module in the *Username* field.
6. Enter the user's first name in the *First Name* field.
7. Enter the user's last name in the Last Name field.
8. Enter the user's email address in the *Email* field.
9. Enter the password they user will use to login to the Call Center module in the *Password* field. (The password must be no less than 8 characters long).
10. Re-enter the password in the *Confirm Password* field.
11. Click the Save button to finish.

EMPLOYEE BARCODES

The system creates a barcode for the employees. They may use these barcodes to clock in/out from the POS. To find these barcodes follow the steps below:

1. Click the *Expand* ✚ icon for the Employees ✚ module on the sidebar.
2. Click the ▶ Employee Barcodes option.
3. Click the Print button at the top right of the screen to print out the barcodes.

COMMISSION BARCODES

The system creates a barcode for employees to track commission sales at the Sonny's Pay Station. To find these barcodes follow the steps below:

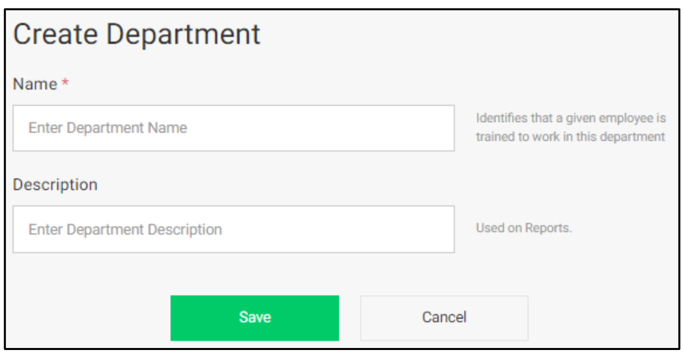
- ✓ An employee must part of the Greeter Department in order to earn commissions.
- ✓ Commissions at the Pay Station are tracked when the employee scans their commission barcode before a transaction is complete, usually at the checkout page. If the employee is not assigned to the Greeter Department, the system will allow them to scan their commission barcode, but they will not earn commission for the transaction.
- ✓ Use the *Commissions* report to see commission earnings for these employees. Greeter employee's information will also be displayed, per transaction, on the Line Item Sales report.

1. Click the *Expand* ✚ icon for the **Employees ✚** module on the sidebar.
2. Click the **▶ Commission Barcodes** option.
3. Click the **Print** button at the top right of the screen to print out the barcodes.

DEPARTMENT LIST

You may create Employee Department for classification purposes of your employees.

1. Click the *Expand* ✚ icon for the **Employees ✚** module on the sidebar.
2. Click the **▶ Department List** option.
3. Click the **✚ Create Department** button.
4. The *Create Department* parameters are displayed. Enter accordingly.

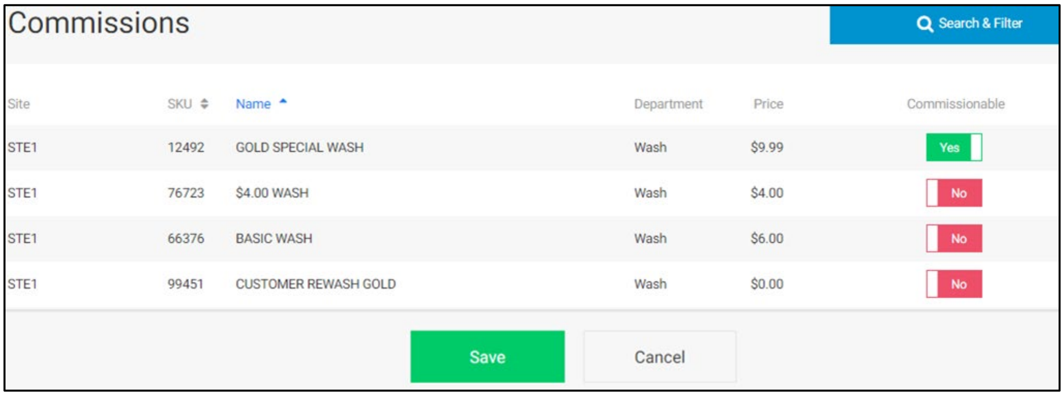


5. Click the click **Save** button to finish.

COMMISSIONS

This module allows you to setup items for commission.

1. Click the *Expand* ✚ icon for the **Employees ✚** module on the sidebar.
2. Click the **▶ Commissions** option.
3. By default all items will be displayed. You may also use the **Search & Filter** button to view incidents filtering by: SKU, Name, Sites, Departments and/or Commissionable (status).
4. Click the **Edit Commission** button at the top right of the screen.
5. Notice that the **Commissionable** column now displays a Yes/No toggle switch for each item.



6. Set the items as commissionable or not commissionable and click the **Save** button to finish.

RECONCILIATION MODULE

This module is used to reconcile sales form the Sonny's POS and the Sonny's Pay Stations. In this section we will describe how to navigate and reconcile your Daily sales and Shifts. The idea behind reconciliation is to verify that the money at the Point of Sale devices and Pay Stations match the money calculated by the system for a Day or a Shift.

A shift at the POS is started when a cashier first logs into the POS and it is closed when a cashier closes the shift. Multiple cashiers can login during one shift. Shifts from Pay Stations are automatically started with the first transaction after having closed the last opened shift. Pay Stations cashier shifts must be manually closed from the back office after withdrawing all money from the Pay Stations.

DAILY

Daily Reconciliation is intended for sites that manage reconciliation for all sale devices on a daily base. Daily will sum up sales from all point of sales devices and Pay Stations in one place, creating a daily entry.

RECONCILE A DAY

1. Click the *Expand* + icon for the **Reconciliation +** module on the sidebar.
2. Click the *Expand* + icon **► Daily** menu.
3. Click the **► Unreconciled** option.
4. Click the *Reconcile* $ icon for the day to reconcile.
5. Review the amounts posted by the system and enter your counts in the *Deposits* section.

Deposits		
POS Cash	$	83
Checks	$	0
PayStation Cash	$	1160.25
Cash Drop	$	0

6. The *Deposit Totals* section will indicate any overages or shortages.

Deposit Totals	
Accumulated Total	$2,651.25
Actual Deposit Amount	$2,650.25
Over/Short	($1.00)

7. Enter any comments and click the **Reconcile** button to finish.

REVIEW A RECONCILED DAY

After a day is reconciled it moves over to the Reconciled sub-menu. This section allows a manager/owner to have a quick overview of reconciled days.

1. Click the *Expand* + icon for the **Reconciliation +** module on the sidebar.
2. Click the *Expand* + icon **▶ Daily** menu.
3. Click the **▶ Unreconciled** option.
4. Click the *Edit* icon to make further changes or view details.
5. Click the *Audit* icon if you are auditing the reconciled day. This is intended for sites that have a third party and/or accountant revising reconciliation. When a reconciled day is audited it moves to the Audited section and the auditor's name and date added to it.

SHIFT

A Shift is any period of time where a cashier logs in at POS and the same or different cashier closes the shift. Therefore a shift can include sales from one or multiple cashiers. When a cashier is logged in and a different cashier wants to log in to process sales, the POS can be locked and the second cashier login or the cashier can log off through the Log Off Cashier button in the System tab at the POS. A shift will only close when the Close Shift button at the POS is selected. Closing a Shift will also log the current cashier off.

RECONCILE A POS SHIFT

1. Click the *Expand* + icon for the **Reconciliation +** module on the sidebar.
2. Click the *Expand* + icon for the **▶ Shift** menu.
3. Click the **▶ Unreconciled** option.
4. Click the *Reconcile* $ icon for the shift to reconcile.
5. The first section will refer to your cash and will report an overage/shortage based on the amount the system calculates and the actual cash collected.

Over/Short

Expected Cash on Hand	$164.00
Cash Drawer Total	$166.00
Cash Drawer Over/Short	$2.00

6. You may enter any comments in regards of this amount in the Over/Short Comment text box.
7. Review the Checks, Credit Cards, Discount, House Accounts sections and toggle to **Yes** to confirm the amounts.
8. The Deposit section is intended for you to document the actual money that will be deposited to the bank or put away in the safe.
9. Click the **Reconcile** button to finish.

RECONCILE A PAY STATION SHIFT

Unlike a POS where cashier needs to login and make sales, Pay Stations automatically create a shift with the first sale after a previous shift has been closed. When ready to reconcile a Pay Station shift ensure that no sales will take place during reconciliation and that you have removed all money from the Pay Station (via Cash Removal action at the Pay Station).

1. Click the *Expand* + icon for the **Reconciliation +** module on the sidebar.

2. Click the *Expand* ✚ icon for the ▶ Shift menu.
3. Click the ▶ Unreconciled option.
4. Click the *Close Shift* icon to close the shift in the Back Office. This indicates that you have taken all the money out of Pay Station (through Cash Removal) and have closed the lanes so no sales take place during reconciliation.
5. A confirmation dialogue box is displayed to confirm the action. Click **Yes** to confirm.
6. Click the *Reconcile* $ icon for the shift to reconcile.
7. Proceed in the same manner as with a POS shift reconciliation.
8. Click the Reconcile button to finish.

REVIEW A RECONCILED SHIFT

After a shift is reconciled it moves over to the Reconciled sub-menu. This section allows a manager/owner to have a quick overview of reconciled shifts.

1. Click the *Expand* ✚ icon for the Reconciliation ✚ module on the sidebar.
2. Click the *Expand* ✚ icon for the ▶ Shift menu.
3. Click the ▶ Reconciled menu.
4. Click the *Edit* icon to make further changes or view details on a specific shift.

MAINTENANCE MODULE

This module offers the ability to track wear levels and maintenance thresholds of parts and equipment based on numbers of cars washed and to document incidents at the wash caused by equipment in the tunnel.

SCHEDULED MAINTENANCE

In this section we will explain how to setup email alerts (schedule maintenance) for parts and equipment.

ADD PART

1. Click the *Expand* + icon for the Maintenance + module on the sidebar.
2. Click the ► Scheduled Maintenance option.
3. Click the + Add button.
4. The *Create Part* page is displayed. Enter the part parameters as follows:

NOTE: The * (asterisk) denotes mandatory fields.

- **Part Name*:** Enter the name for the part.
- **Description*:** Enter a description for the part.
- **SKU*:** Enter a SKU number for the part.
- **Site *:** In multisite select which site the part is installed at.
- **Part Type*:** Select which type of part it is between part and equipment.
- **Part Install Date*:** Select the date the part was or will be installed. This will be used to calculate the remaining lifetime of this part.
- **Lifetime (In Cars Washed)*:** Enter the manufacturer's recommended part lifetime in number of cars washed.
- **Alert Threshold (In cars Washed) *:** Enter the amount of cars that should be counted before this alert triggers, based on the install date.
- **Alert Message Text field*:** The message you want to receive when this alert triggers.

5. Click the Save button to finish.

EDIT PART

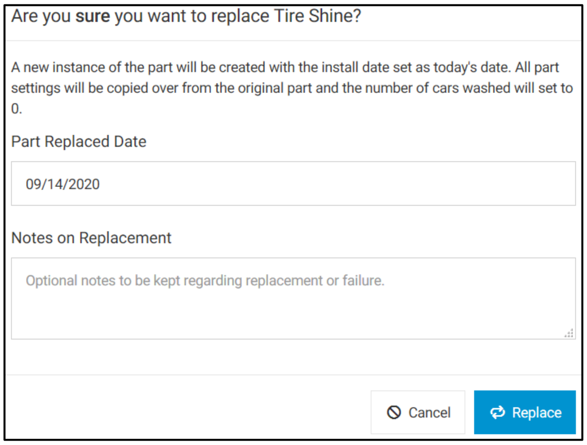
After you add a part you may edit its parameters as follows:

1. Click the *Expand* + icon for the Maintenance + module on the sidebar.
2. Click the ► Scheduled Maintenance option.
3. Search for the part in the list and click its corresponding icon.
4. Make the desired changes and click the Save button to commit the changes.

MARK PART AS REPLACED

Once a part has reached its life expectancy and you have replaced it mark it as replaced so the system can calculate the wear level for the new part.

1. Click the + for the Maintenance + module on the sidebar.
2. Click the ► Scheduled Maintenance option.
3. Search for the part in the list and click its corresponding icon.
4. Confirm the part replacement, select the date the part was replaced and add any replacement notes.


Are you **sure** you want to replace Tire Shine?

A new instance of the part will be created with the install date set as today's date. All part settings will be copied over from the original part and the number of cars washed will set to 0.

Part Replaced Date

09/14/2020

Notes on Replacement

Optional notes to be kept regarding replacement or failure.

Cancel Replace

5. Click the **Replace** button to complete the replacement.

CREATE ALERT RECIPIENT

This will allow you to setup alerts to be sent out automatically when parts need to be replaced.

1. Click the *Expand* + icon for the **Maintenance +** module on the sidebar.
2. Click the **▶ Scheduled Maintenance** option.
3. Click the **Manage Alerts** button.
4. The *Preventative Maintenance* Alerts page is displayed.
5. Click the **+ Create Alert** button.
6. The *Create Preventative Maintenance Alert* is displayed.
7. Enter the email address of the alerts recipient and click the **Save** button to finish.

INCIDENT TRACKING

The Incident Tracking section allows you to record and track incidents that happen at the car wash. This can help you identify troublesome equipment and assist you in incident claims tracking.

DOCUMENT AN INCIDENT

1. Click the *Expand* + icon for the **Maintenance +** module on the sidebar.
2. Click the **▶ Incident Tracking** option.
3. Click the **+ Create Incident Report** button.
4. The *Create Incident* page is displayed. Fill in each field accordingly.

NOTE: The * (asterisk) denotes mandatory fields.

- **Customer Vehicle Information*:**
  - **VIN Available:** Enter VIN number of the vehicle.
  - **VIN Not Available:** When the VIN is not available, use the toggle switch to set this to *No* and enter the vehicle information below:
    - Vehicle Make: Enter the make of the vehicle.
    - Vehicle Model: Enter the model of the vehicle.
    - Vehicle Year: Enter the year the vehicle was made.
- **Customer's Name:** Enter the customer's name.
- **Customer's Phone Number:** Enter the customer's phone number.
- **Customer's Email Address:** Enter the customer's email address.
- **Customer's Car License Plate Number:** Enter the customer's license plate number.

- **Site:** If multisite select the site the incident occurred at.
- **Car Damage Tags*:** Use the drop list and select the part of the customer's car that was damaged. Notice you may select multiple options.
- **Wash Part Tags:** Use the drop list and select the car wash part/equipment that caused the damage. Notice you may select multiple options.
- **Damage In Dollars:** Enter the estimated or actual cost of the damage.
- **Insurance Claim Status:** Use the toggle to determine if Yes/No an insurance claim was completed.
- **Incident Date:** Select the date when the incident occurred.
- **Incident Time:** Select the time when the incident occurred.
- **Resolved Date:** Select the date when the incident was resolved, if any.
- **Upload Photos:** Drop images into the box or click to select images to upload.

5. After entering all the details of the incident click the Save button to finish.

VIEW INCIDENT LIST

The Incident Tracking menu will also display all the incidents that have been entered into the system. You may use the **Search & Filter** options to filter the list of incidents.

1. Click the *Expand* ✚ icon for the Maintenance ✚ module on the sidebar.
2. Click the ► Incident Tracking option.
3. By default all incidents are listed. You may use any of the columns heading to organize the incidents on a specific field.
4. You may also use the Search & Filter button to view incidents filtering by: Phone, License Plate, Site and/or Insurance Claim Status.

VIEW SINGLE INCIDENT DETAILS

You can see all the details on a single incident. You can also Print the incident details, provide you with a link to see all the images and add comments to the incident.

1. Click the ✚ for the Maintenance ✚ module on the sidebar.
2. Click the ► Incident Tracking option.
3. Select the *Account* icon for the incident.
4. The *View Incident* page is displayed.
5. Use the Copy Image Urls button to get a link that you can use to see the pictures uploaded with the incident.
6. Use the Print Report button to print the report.
7. Add any comments or notes to the incident and click the Save Comment button.

VIEW INCIDENT REPORT

Incident Reporting report allows you to generate, export and print a report on the incidents placed in the system. By default when the Incident report is selected it will display any incidents added to the system on the current day and for all sites. You may use the Sites filter and Date Range options to expand the results of the report.

1. Click the *Expand* ✚ icon for the Reports ✚ module on the sidebar.
2. Click the *Expand* ✚ icon for the ► Maintenance menu.
3. Click the ► Incident Report option.
4. Select the Site(s), Vehicle Parts Damaged and Car Wash Parts Damaged to include in the report.
5. Use Date Range selector at the top of the page and select the corresponding dates to run the report for.
6. You may print the report by selecting the Print icon.

7. You may export the report to excel by select the Export ▾ icon.

CONFIGURATION MODULE

This module allows you to set up global settings for your site(s).

TUNNEL ADMINISTRATION

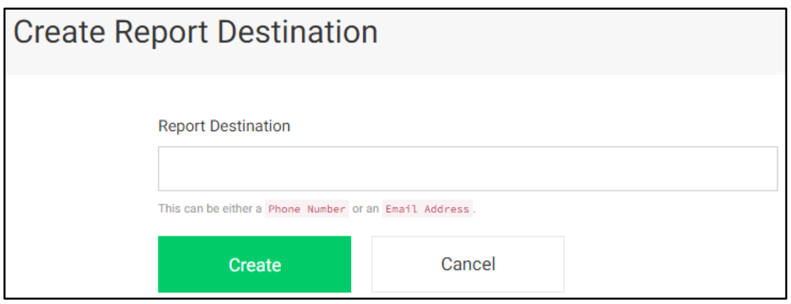
This configuration page is only available for customers with a Sonny's Tunnel Controller. How to use this configuration page is described in the Sonny's Tunnel Controller User Manual.

EMAIL AND TEXT REPORTS

The system allows you to setup automated email and text messages for specific data reports.

ADD PHONE OR EMAIL DESTINATION

1. Click the *Expand* + icon for the **Config +** module on the sidebar.
2. Click the **► Email/Text Reports** option.
3. Click the **+ Create Destination** button.
4. The Create Report Destination page is displayed.

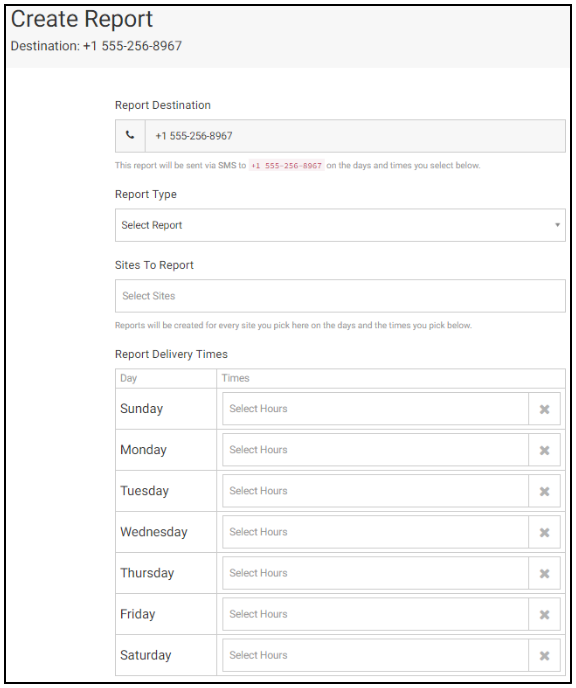


5. Enter a Phone Number to receive reports via text message or Email Address to receive the reports via email.
6. Click the **Create** button to finish.

SCHEDULE REPORTS

After adding a destination you may proceed to configure the reports to send and set the schedule for when to send them on.

1. Click the *Expand* + icon for the **Config +** module on the sidebar.
2. Click the **► Email/Text Reports** option.
3. The created destinations are displayed.
4. Click the *View Reports* ➜ icon to the right of the destination you wish to configure a schedule report for.
5. The *Manage Reports* page is displayed.
6. Click the **+ Create Report** button.
7. The *Create Report* page is displayed.
   - **Report Type:** Use the scroll down menu to select from the available reports – Labor and Sales report.
   - **Sites to Report:** Select the site(s) the report will apply to.
   - **Report Delivery Times:** Select the hours you would like the report to be sent each day.



5. Click the **Create** button to finish.

EDIT PHONE OR EMAIL DESTINATION

1. Click the *Expand* **+** icon for the **Config +** module on the sidebar.
2. Click the **▶ Email/Text Reports** option.
3. The created destinations are displayed.
4. Click the *Edit* icon to the right of the destination you wish to edit.
5. Make changes as desired and click the **Save** button.

DELETE PHONE OR EMAIL DESTINATION

1. Click the *Expand* **+** icon for the **Config +** module on the sidebar.
2. Click the **▶ Email/Text Reports** option.
3. The created destinations are displayed.
4. Click the *Delete* icon to the right of the destination you wish to delete.
5. A confirmation dialogue box will be displayed. Click **Delete** button.

SMCC ALERT SUBSCRIBER

This module allows you to setup text message users to receive alerts from their Sonny's Motor Control Center. Owners, GM's, and Managers may have this setup to receive an alert.

There are a variety of SMCC Alerts to choose from when configuring each Alert Subscriber.

CREATE AN SMCC ALERT SUBSCRIBER

1. Click the *Expand* **+** icon for the **Config +** module on the sidebar.
2. Click the **▶ SMCC Alert Subscriber** option.
3. Click the **+ Create Subscriber** button.
4. The *Create SMCC Alert Subscribers* page is displayed.

5. Select the alerts form the SMCC that you wish to trigger a text message to be sent to the subscriber from the *Alerts* multi-selection field.
6. Enter the phone number of the subscriber in the *Phone Number* field.
7. Enter a description to identify the subscriber receiving the alerts in the *Description* field.
8. Click the **Create** button to finish.

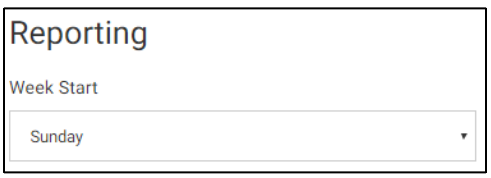
GLOBAL SETTINGS

This module allows you to configure settings related to: Payroll settings, House Account Billing settings, Recurring Purchases Trial Plan Repurchase, Text Marketing and Tax from Sonny's Pay Station.

PAYROLL DAY WEEK STARTS FOR REPORTING

Employee Timesheets are presented in a weekly base. To determine which day is the "start of week day":

1. Click the *Expand* + icon for the **Config +** module on the sidebar.
2. Click the **▶ Global Settings** option.
3. The *Global Settings* page is displayed. Scroll down to the **Reporting** section.

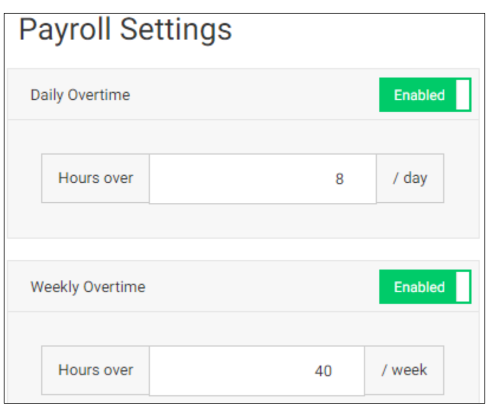


4. Use the scroll down menu to select the day you want to start your week for payroll purposes.
5. Scroll down to the bottom of the page and click the **Save** button.

PAYROLL SETTINGS FOR OVERTIME CALCULATIONS

When you configure employees to accrue overtime, the system will use the settings configured on this section.

1. Click the *Expand* + icon for the **Config +** module on the sidebar.
2. Click the **▶ Global Settings** option.
3. The *Global Settings* page is displayed. Scroll down to the **Payroll Settings** section.



NOTE: Consult your state and local overtime laws before completing this section.

➢ **Daily Overtime toggle:** Use the Enabled/Disabled toggle button to determine if daily overtime is applicable to employees. If Enabled:

❖ Hours over /day: Enter the number of hours in a day after which overtime will apply.

- **Weekly Overtime toggle:** Use the Enabled/Disabled toggle button to determine if weekly overtime is applicable to employees. If Enabled:
  - Hours over /week: Enter the number of hours in a week after which overtime will apply.

4. Scroll down to the bottom of the page and click the **Save** button.

HOUSE ACCOUNT BILLING INFORMATION

The information entered here will be used as the Company contact information in the House Account Billing report.

1. Click the *Expand* + icon for the **Config +** module on the sidebar.
2. Click the **► Global Settings** option.
3. The *Global Settings* page is displayed. Scroll down to the **House Account Billing** section.
4. Use the *Disabled/Enabled* toggle for the *Display Header Information*. When *Enabled* enter all the applicable information.
5. Scroll down to the bottom of the page and click the **Save** button.

RECURRING PURCHASES SETTINGS

When offering Trial Plans for Recurring Sales you can determine whether customers can repurchase these plans or not.

1. Click the *Expand* + icon for the **Config +** module on the sidebar.
2. Click the **► Global Settings** option.
3. The *Global Settings* page is displayed. Scroll down to the **Recurring Purchases** section.
4. Use the *Disabled/Enabled* toggle to prevent or allow the repurchase of Trial plans. When *Enabled* enter the number of months that must elapse before a customer can re-purchase a trial plan.
5. Scroll down to the bottom of the page and click the **Save** button.

TEXT MARKETING SETTINGS

Enable this feature to prompt customers to enter their phone number and opt-in for Text Marketing when a recurring plan is selected for purchase.

> **NOTE:** *Text Marketing* requires you to have a paid service account with **Twilio**. Please contact Twilio at (855) 910-8712 or https://www.twilio.com and obtain the API token, Authentication ID and the phone number. Please contact Sonny's Controls Tech Support with this information for completion of set up.

1. Click the *Expand* + icon for the **Config +** module on the sidebar.
2. Click the **► Global Settings** option.
3. The *Global Settings* page is displayed. Scroll down to the **Text Marketing** section.
4. Use the *Disabled/Enabled* toggle to prevent or allow the Sonny's Pay Stations to prompt customers to enter a phone number for Text Marketing.
5. Scroll down to the bottom of the page and click the **Save** button.

TAX FROM SONNY'S PAY STATION SETTINGS

This configuration will enable two (2) distinct behaviors from the Sonny's Pay Station when a Wash or Service is being purchased. These are the two options:

- ✓ **No Tax:** If the Wash/Service has tax configured, the pay station will automatically remove tax from the transaction.
- ✓ **Standard Tax:** Tax will be charged on the regular Wash/Service price. This is typically enabled for a site that doesn't accept cash. Ex: Wash price is $20.00 and tax is 5%, at check out the final price

will be $21.00. The tax rate used here is the one configured in your **Tax Rates** settings in the **<Site Config>** module.

1. Click the *Expand* ✚ icon the **Config ✚** module on the sidebar.
2. Click the **▶ Global Settings** option.
3. The *Global Settings* page is displayed. Scroll down to the **Tax from Sonny's Pay Station** section.
4. Select the type of tax option the Sonny's Pay Stations will use between *No Tax* and *Standard Tax*.
5. Scroll down to the bottom of the page and click the **Save** button.

SPS DOOR SENSOR EVENT SUBSCRIBERS

The purpose for Door Sensor Event Subscriber is for whenever a door on a SPS Opens or Closes it will shoot over a message to the phone number tied to the subscriber. Owners, GM's, and Managers may have this setup to receive an alert.

Door Sensor Event Subscriber doesn't specify which SPS Door was open, but it will notify that a door has opened and would need to contact the wash to find out which one specifically was open and find out as to why it was opened.

This is to help owners and managers find out as to why it is was opened without them being on site or near the SPS.

CREATE SUBSCRIBER

1. Click the *Expand* ✚ icon for the **Config ✚** module on the sidebar.
2. Click the **▶ SPS Door Sensor Event** option.
3. Click the **✚ Create Subscriber** button.
4. The *Create SPS Door Sensor Even Subscriber* page is displayed.
5. Select the type of even you want to create an alert for (Open Door, Close Door) from the <u>*SPS Door Event Type*</u> drop-down.
6. Enter the cellphone number of the person who will be receiving these alerts in the <u>*Phone Number*</u> field.
7. Click the **Create** button to finish.

ITEM CATEGORIES

The system utilizes departments to classify all of your products/services. You may add your own categories under these departments.

CREATE CATEGORY

8. Click the *Expand* ✚ icon for the **Config ✚** module on the sidebar.
9. Click the **▶ Item Categories** option.
10. Click the **✚ Create Report** button.
11. The *Category* parameters are displayed. Enter parameters accordingly.

> **NOTE:** The * (asterisk) denotes mandatory fields. Categories created cannot be deleted or moved to a different department.

- **<u>Department*</u>:** Use the drop down menu to select the Department this new category will be a part of.
- **<u>Name*</u>:** Enter a descriptive name for your new category.
- **<u>Description</u>:** Optionally enter a description for your new category.

12. Click the **Save** button.

GL ASSIGNMENT

In order to use the General Ledger report you want to customize your items. You may enter a description best suited for your General Ledger report and an account number for each item to match your books. To manage these:

CONFIGURE GENERAL LEDGER ITEMS

1. Click the *Expand* + icon for the **Config +** module on the sidebar.
2. Click the **▶ GL Assignment** option.
3. Click the *Edit* icon to the right of the corresponding category you wish to configure.
4. All of the items under the corresponding category are displayed.
5. Click the **Edit Fields** button at the top right of the screen.
6. The GL Description and the Account Number columns for each item become editable.
7. Enter the corresponding information for each item and click the **Save** button to finish.

REGIONAL SETTINGS

The system allows you to create regions so you can group your sites accordingly.

✓ *Regions* is a license based feature. Please Sonny's Controls Tech Support for assistance enabling this feature.

CREATE A REGION

1. Click the *Expand* + icon for the **Config +** module on the sidebar.
2. Click the **▶ Regional Settings** option.
3. Click the **+ Create Region** button.
4. The *Create Region* page is displayed. Enter the parameters for the region you're creating.

NOTE: The * (asterisk) denotes mandatory fields.

- **Region Name*:** Enter a name for the region.
- **Region Code*:** Enter a code for the region. The code should be unique and contain at least 3 characters.
- **Associated Sites*:** Select the sites that will be associated with the region. Note that a site can only be associated with one region.

VIEW AND EDIT REGIONS

After you create a region you may edit its name, code or belonging sites. To view your existing regions or edit them:

1. Click the *Expand* + icon for the **Config +** module on the sidebar.
2. Click the **▶ Regional Settings** option.
3. All the existing regions are displayed.
4. You can quickly see the site(s) that are part of a region by clicking the icon to the left of the region.
5. To edit a region click the icon to the right of the corresponding region.

NOTE: To move a site to a different region edit the region you want the site to be part of and *Add* it to it.

6. Make your changes and click the **Save** button to finish.

DATA API DOCUMENTATION

Clients who wish to extract data from the Back Office and use it for extra functionality or external integrations can use our Back Office API. Some examples of this functionality are generating a list of one-time use codes and integrating it with a voucher system, or gathering transaction information for specialized reports.

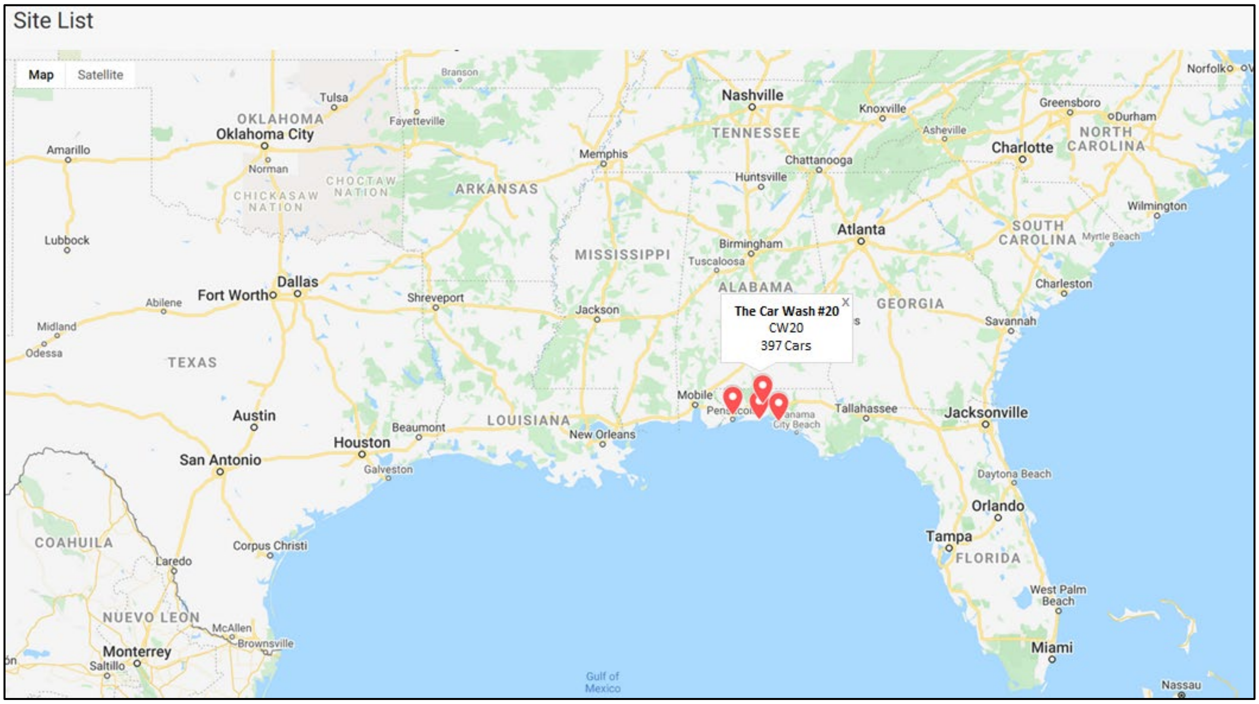
This feature is license based. Please Sonny's Controls Tech Support for assistance enabling this feature.

SITES MODULE

This module allows you to set up site(s) related settings such as tax rates, receipt printer settings, e-mail/text reports, and POS buttons.

MAP

This page presents you with a Google Map that pin points each of your sites or regions. If your sites are grouped in regions the information will be presented per region. You can zoom in to show the sites in the region. For each site or region you can see the day's car count when you hover over each.



SITES

For each of your sites you will find an expandable menu under the Sites main module. Within each site you will be available to configure your site specific settings such as site hours, receipt settings and POS Buttons.

SITE CONFIG

This section contains the site information.

Site Info and Address

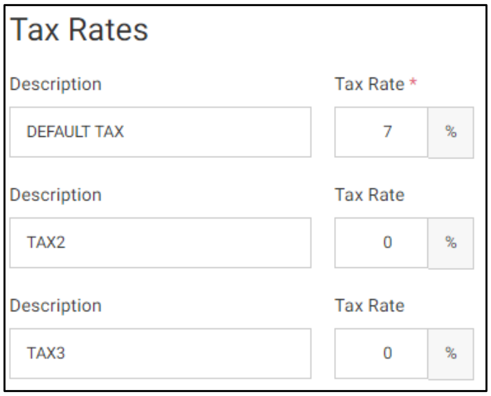
This information is entered by support when your site is created in Back Office. This information can only be changed by support as well and it's displayed as view-only information to you.

Tax Rates

The system allows you to setup up to 3 different tax rates. To configure these:

1. Click the *Expand* + icon the **Sites +** module on the sidebar.
2. Click the *Expand* + icon the specific site **► Car Wash #1**
3. Click the **► Site Config** option.

4. The *Site* settings page is displayed. Scroll down to the *Tax Rates* section.



5. Enter your tax rates accordingly.
6. Scroll down to the bottom of the page and click the **Save** button to finish.

Hours of Operation

1. Click the *Expand* + icon the **Sites +** module on the sidebar.
2. Click the *Expand* + icon the specific site **► Car Wash #1**
3. Click the site **► Site Config** option.
4. The *Site* settings page is displayed. Scroll down to the *Hours of Operation* section.
5. Use the *Apply to All/Per Day* toggle switch to enter daily hours of operation.
   - Apply to All: The same open and close hours will be used for every day.
   - Per Day: Open and close hours are different and therefore will be entered individually for each day.
6. Scroll down to the bottom of the page and click the **Save** button to finish.

Disable POS Car Count

By default the POS shows the Car Count (washes sold) at the POS Status bar, however, this can be hidden if you choose to do so. To hide the Car Count at the POS:

1. Click the *Expand* + icon the **Sites +** module on the sidebar.
2. Click the *Expand* + icon the specific site **► Car Wash #1**
3. Click the site **► Site Config** option.
4. The *Site* settings page is displayed. Scroll down to the *POS Configuration* section.
5. Toggle the *Display Car count on Status Bar?* to *No*.
6. Scroll down to the bottom of the page and click the **Save** button to finish.

NOTE: The POS Application will prompt a Restart for this change to take effect.

Enable Employee Clock In/Out with PIN

You may configure the POS to require the employee to enter his/her pin when clocking in and out.

1. Click the *Expand* + icon the **Sites +** module on the sidebar.
2. Click the *Expand* + icon the specific site **► Car Wash #1**
3. Click the site **► Site Config** option.
4. The *Site* settings page is displayed. Scroll down to the *POS Configuration* section.
5. Toggle the *Employee Clock In/Out requires PIN?* to *Yes* to require employees to enter their PIN number when clocking in and out of the POS.
6. Scroll down to the bottom of the page and click the **Save** button to finish.

NOTE: The POS Application will prompt a Restart for this change to take effect.

Enable Z-Day Report at Close Shift

A POS Z-Day report summarizes the sales made through the POS. This settings determines if the POS should automatically print out this report when a shift is closed or if the POS should prompt the end-user to print or not print it.

1. Click the *Expand* ✚ icon the **Sites ✚** module on the sidebar.
2. Click the *Expand* ✚ icon the specific site **► Car Wash #1**
3. Click the site **► Site Config** option.
4. The *Site* settings page is displayed. Scroll down to the *POS Configuration* section.
5. Toggle the *Print Z-Day Report at Close Shift* to *Yes* for the POS to always print a Z-Day report when a shift is closed. Toggle it to *No* to have the prompt the user to choose to print or not print it.
6. Scroll down to the bottom of the page and click the **Save** button to finish.

NOTE: The POS Application will prompt a Restart for this change to take effect.

Enable Shift Denominations

Choosing to close a shift with *Denominations* will display an input form for the cashier to enter the cash (denominations quantity) in the drawer at the end of their shift. Choosing to close a shift with *Summary* will display a single entry field for the cashier to enter the total cash amount. By default a shift is closed with *Summary*, to enable *Denominations*:

1. Click the *Expand* ✚ icon the **Sites ✚** module on the sidebar.
2. Click the *Expand* ✚ icon the specific site **► Car Wash #1**
3. Click the site **► Site Config** option.
4. The *Site* settings page is displayed. Scroll down to the *POS Configuration* section.
5. Toggle the *Close shift with* to *Denominations.*
6. Scroll down to the bottom of the page and click the **Save** button to finish.

NOTE: The POS Application will prompt a Restart for this change to take effect.

Allow Recurring Numbers to Be Entered Manually at Unitec Sentinel

For clients with Unitec Sentinel Pay Station you can allow Recurring Card/RFID numbers to be manually entered at the Pay Stations. To allow this:

1. Click the *Expand* ✚ icon the **Sites ✚** module on the sidebar.
2. Click the *Expand* ✚ icon the specific site **► Car Wash #1**
3. Click the site **► Site Config** option.
4. The *Site* settings page is displayed. Scroll down to the *Unitec Sentinel Configuration* section.
5. Toggle the *Allow Recurring Numbers to be manually entered* to *Yes.*
6. Scroll down to the bottom of the page and click the **Save** button to finish.

Allow Recurring Numbers to Be Entered Manually at Sonny's Pay Station

For clients with Sonny's Pay Stations you can allow Recurring Card/RFID numbers to be manually entered at the Pay Stations. To allow this:

1. Click the *Expand* ✚ icon the **Sites ✚** module on the sidebar.
2. Click the *Expand* ✚ icon the specific site **► Car Wash #1**
3. Click the site **► Site Config** option.

4. The *Site* settings page is displayed. Scroll down to the *Sonny's Pay Station Configuration* section.
5. Toggle the *Allow Recurring Numbers to be manually entered* to *Yes.*
6. Scroll down to the bottom of the page and click the **Save** button to finish.

Allow Phone Number Collection at Sonny's Pay Station

For clients with Sonny's Pay Stations you can have the Pay Station prompt customers that do not already have a phone number associated with their license plate to enter their Phone Number to opt in to receive text messages. To allow this:

1. Click the *Expand* ✚ icon the **Sites ✚** module on the sidebar.
2. Click the *Expand* ✚ icon the specific site **► Car Wash #1**
3. Click the site **► Site Config** option.
4. The *Site* settings page is displayed. Scroll down to the *Sonny's Pay Station Configuration* section.
5. Toggle the *Wash Purchase Phone Number Collection* to *Yes.*
6. Scroll down to the bottom of the page and click the **Save** button to finish.

Set Up ADP Report Company Code

For clients using ADP you can enter the company code from your ADP System into the Back Office so that the ADP Timesheet export includes this code.

1. Click the *Expand* ✚ icon for the **Sites ✚** module on the sidebar.
2. Click the *Expand* ✚ icon for the specific site **► Car Wash #1**
3. Click the site **► Site Config** option.
4. The *Site* settings page is displayed. Scroll down to the *ADP Report* section.
5. Enter the ADP Company Code in the Company Code field.
6. Scroll down to the bottom of the page and click the **Save** button to finish.

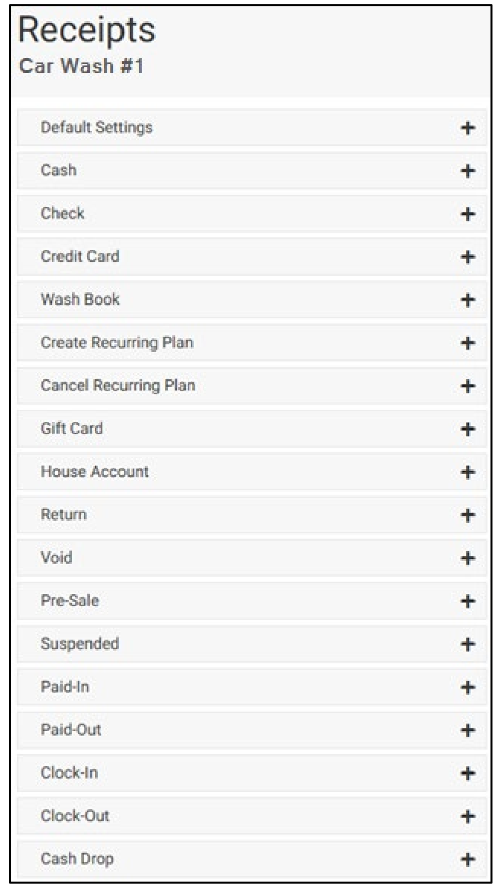
NOTE: Refer to the **Reports** module -> **Employees** menu -> ***Employee Timesheets*** report to export the ADP version of this report.

POS RECEIPT

The system allows you to manage receipt printing for different types of transactions performed at the POS. You can choose whether you want to enable or disable receipt printing for different type of transactions such as cash, check, credit card, etc. For credit cards transactions you may choose to print a signature line on transactions over a certain amount only. Because this section is extensive we won't go into detail of each of the printing settings.

CONFIGURE POS PRINT OPTIONS

1. Click the *Expand* + icon the **Sites +** module on the sidebar.
2. Click the *Expand* + icon the specific site **► Car Wash #1**
3. Click the **► POS Receipt** option.
4. Click the *Expand* + icon for each printing category and configure accordingly.



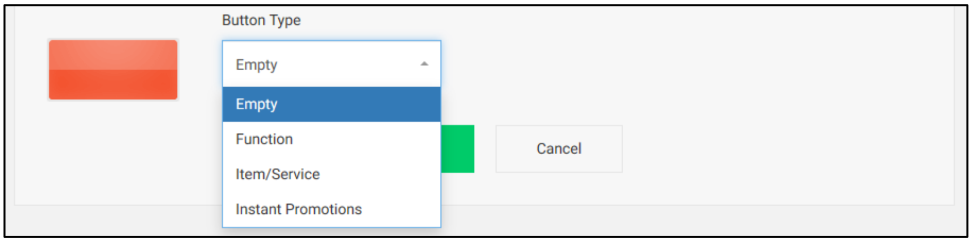
NOTE: Changes done on Receipt Settings require the POS application to be restarted before taking effect.

POS BUTTONS

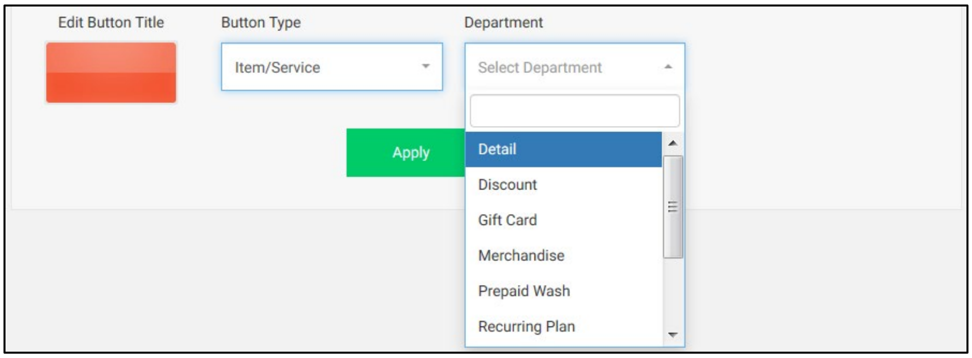
A POS button is a link to a promotion/product/service and or function in the system. Before you can add a button for any of these you must first create the actual promotion/product and/or service. System functions are pre-configured and can be added at any time.

CREATE BUTTONS

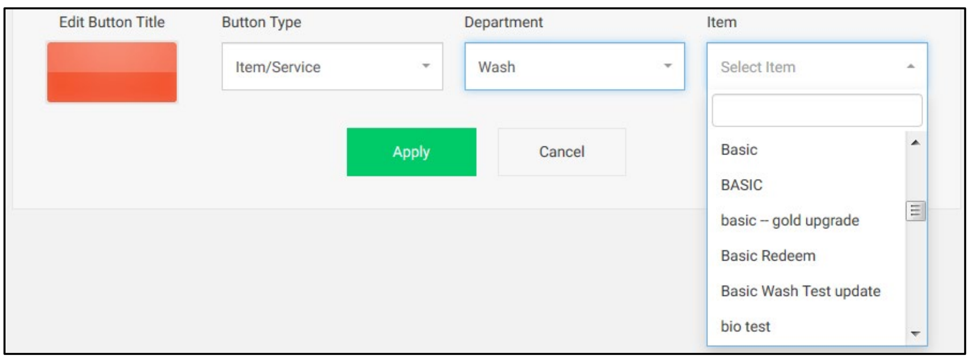
1. Click the *Expand* + icon for the **Sites +** module on the sidebar.
2. Click the *Expand* + icon for the specific site **► Car Wash #1**
3. Click the **► POS Buttons** option.
4. Click the **Edit Buttons and Groups** button. Proceed to click on any of the menu buttons.
5. Click on any of the menu buttons. After you click a button you will notice an icon on the button and below the buttons the settings to configure for the button.
6. Choose the Button Type between *Function*, *Item/Service* and *Instant Promotions*. You may also choose *Empty* to clear a previously configured button.



7. Select the next option from the new Drop Down menu. In this case the second Drop Down menu is the Department categories.

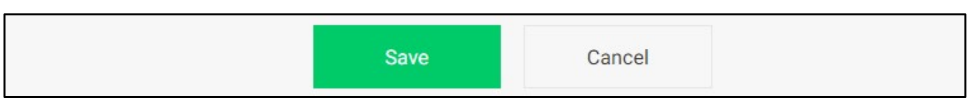


8. Select the corresponding promotion/service and/or product accordingly. In this case we will be selecting a Wash.



NOTE: The Button Title will be auto-populated with the name of the Item selected; however, you may edit the name as it will display on the button itself. For clarity it is best to leave the name of the button the same as the name of the item, or edit the name of the item itself and not the button.

9. Click the **Apply** button to save the button configuration.
10. After clicking the **Apply** button a **Save** and a **Cancel** button will be displayed at the bottom of the page.



11. You may continue creating buttons and hold off on clicking the **Save** button or click the **Save** button to commit all the buttons created up to this point. A confirmation notice will be displayed at the top left of the page.

12. After saving the POS will prompt you to Restart.

NOTE: If you click **Cancel** or exit the page without clicking the **Save** button first all buttons created during the session will reverse back to what they were after the last save.

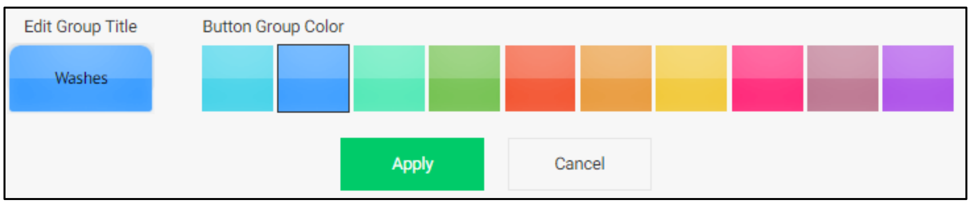
If you are creating multiple buttons click **Apply** after each button but it is best that you click **Save** once you are done adding all the buttons and not after each button, or at least after so many buttons as with each **Save** the POS will prompt you to restart the application.

If you are creating buttons in multiple *Menu Tabs* click **Save** before moving onto a new *Menu Tab*. The *Menu Tabs* are the top row of the Buttons Menu.

RENAME MENU TABS AND CHANGE THEIR COLORS

The names of the Menu Tabs can be customized as well as the color of each tab and its buttons. To changes these:

1. Click the *Expand* ✚ icon for the **Sites ✚** module on the sidebar.
2. Click the *Expand* ✚ icon for the specific site **► Car Wash #1**
3. Click the **► POS Buttons** option.
4. Click the **Edit Buttons and Groups** button.
5. Click on the **Menu Tab** you want to change the name or the color on.
6. At the bottom of the page you will now see the tab settings.



7. Type in a new name in the "Edit Group Title" button and/or choose a new color and click the **Apply** button.
8. After clicking the **Apply** button a **Save** and a **Cancel** button will be displayed at the bottom of the page.
9. Click the **Save** button to finish if you are finished making changes or creating buttons for the menu buttons you are working on. A confirmation notice will be displayed at the top left of the page.
10. After saving the POS will prompt you to Restart.

MOVE BUTTONS AND MENUS

1. Click the *Expand* ✚ icon for the **Sites ✚** module on the sidebar.
2. Click the *Expand* ✚ icon for the specific site **► Car Wash #1**
3. Click the **► POS Buttons** option.
4. Click the **Edit Button Layout** button.
5. Click on a Button or Menu Tab.

- You will notice a four-way arrow ✥ when you click on a Button and a two-way arrow ⟷ when you click on a Menu Tab.

6. Drag the Button or Menu Tab to its new location.

- Notice that when moving a Button to a location with an existing button the buttons switches places. Same for Menu Tabs.

7. Click the **Save** button to finish.

MOBILE POS RECEIPT

For clients with a Sonny's Mobile POS receipt settings are managed in this section of the Back Office.

CONFIGURE MOBILE POS PRINT OPTIONS

1. Click the *Expand* ✚ icon the **Sites ✚** module on the sidebar.
2. Click the *Expand* ✚ icon for the specific site **▶ Car Wash #1**
3. Click the **▶ Mobile POS Receipt** option.
4. Click the **+** icon for each printing category and configure accordingly.

NOTE: Changes done on Receipt Settings require the POS application to be restarted before taking effect.

MOBILE POS BUTTONS

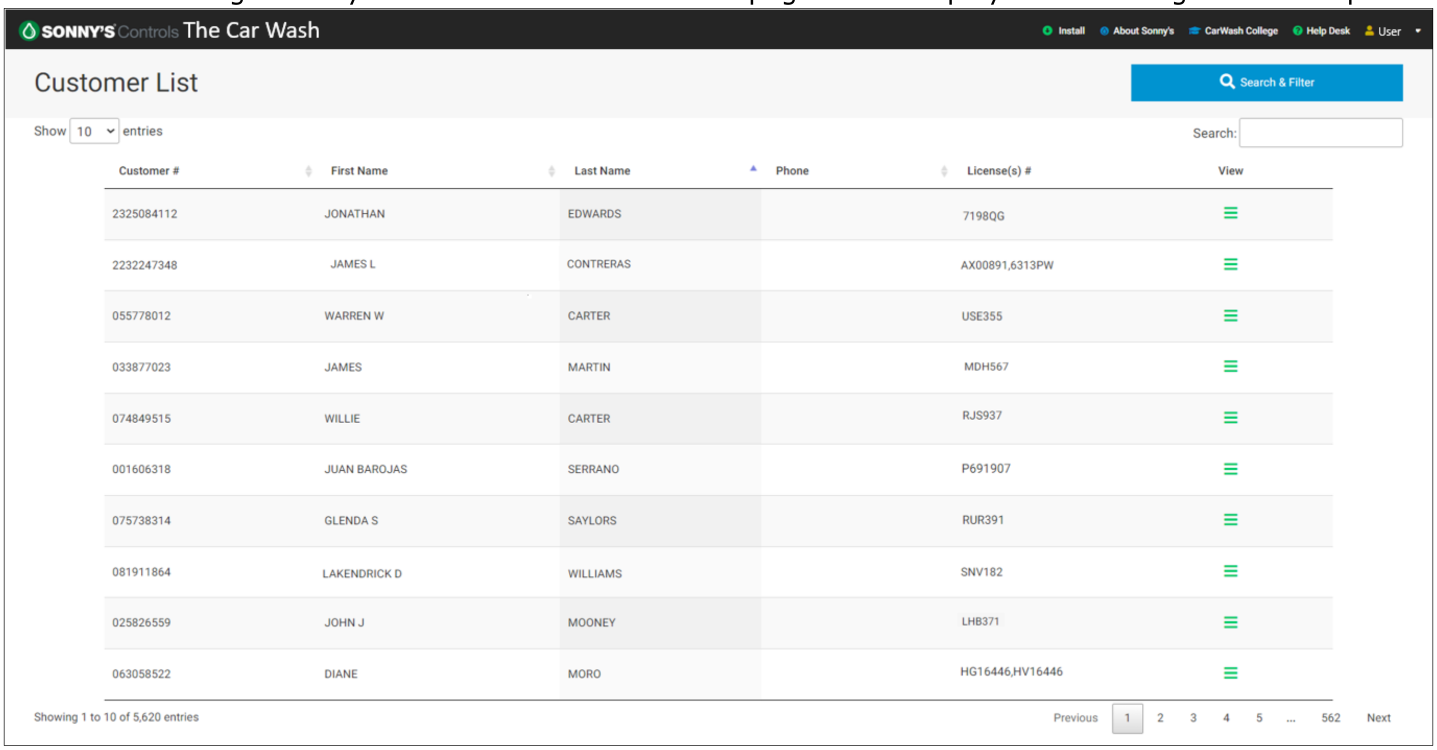
For clients with a Sonny's Mobile POS Buttons are configured in the same manner as POS Buttons are. To familiarize with buttons setup please reference the POS Buttons section.

CALL CENTER

The Call Center is an extension to the Back Office for clients to be able to have internal users manage Recurring Memberships alone. This feature is only available for clients with the Call Center license added to their monthly subscription. For more details on getting access to the Call Center, reach out to the Sonny's CarWash Controls Sales team.

Once Call Center is enabled for a client, they can go to their Call Center site *carwasdomain*.controlscustomercare.com and enter their credentials.

When the user logs in they will see the **Customer List** page which displays all recurring memberships.



SONNY'S Controls The Car Wash — Install · About Sonny's · CarWash College · Help Desk · User

Customer List — Search & Filter

Show 10 entries — Search:

Customer #	First Name	Last Name	Phone	License(s) #	View
2325084112	JONATHAN	EDWARDS		7198QG	≡
2232247348	JAMES L	CONTRERAS		AX00891,6313PW	≡
055778012	WARREN W	CARTER		USE355	≡
033877023	JAMES	MARTIN		MDH567	≡
074849515	WILLIE	CARTER		RJS937	≡
001606318	JUAN BAROJAS	SERRANO		P691907	≡
075738314	GLENDA S	SAYLORS		RUR391	≡
081911864	LAKENDRICK D	WILLIAMS		SNV182	≡
025826559	JOHN J	MOONEY		LHB371	≡
063058522	DIANE	MORO		HG16446,HV16446	≡

Showing 1 to 10 of 5,620 entries — Previous 1 2 3 4 5 ... 562 Next

VIEW AND EDIT CUSTOMER'S ACCOUNT

1. Click the **Search & Filter** button at the top right of the screen. You can search by First Name, Last Name, Phone Number, Tag, License Plate and/or Customer Number.
2. Enter the options to search by and click the **Apply** button.
3. The matching accounts will be displayed below.
4. To edit an account, click on the *View* ≡ icon for the corresponding account.
5. The account's details will be displayed right below the account information. Make the changes necessary for each of the options available. Each of these options are discussed next.

CANCEL ACCOUNT

1. Click on the *View* ≡ icon for the corresponding account.
2. Under the **Status** column, if the account is Active, it will display an **X**, click it.
3. The "Confirm Plan Cancellation" dialogue box will be displayed.
4. Click the **OK** button to cancel the plan.

> **NOTE:** Please note that cancellations are not reversible. In order to reactivate an account, the customer must do so through ECommerce, the Pay Station or the POS.

5. The Status for the account will be changed to Cancelled.

CHANGE PRICE

You may change the recurring price for a specific customer's account. The price change will take effect on the next billing date and only affect the account the price change is made on.

1. Click on the *View* icon for the corresponding account.
2. Under the **Price** column and to the right of the current price click the *Edit* icon.
3. The price becomes an editable field for you to enter the new price.
4. A confirmation dialogue box will be displayed confirming that the price change will take effect on the next billing date and thereafter.
5. Click the OK button to confirm the price change.

CHANGE LICENSE PLATE

You may change the license plate linked to a customer's recurring account.

1. Click on the *View* icon for the corresponding account.
2. Under the **License #** column and to the right of the license click the *Edit* icon.
3. The "Edit License Plates" dialogue box is displayed. Use the dropdown to select the license plate to edit.
4. Enter the new license plate in the *New License Plate* field.
5. Enter the make of the vehicle in the *Make* field.
6. Enter the Model of the vehicle in the *Model* field.
7. Enter the year of the vehicle in the *Year* field.
8. Click the Update License Plate button to update the license plate.

REPLACE CREDIT CARD

You may change the credit card information on a specific customer's recurring account.

1. Click on the *View* icon for the corresponding account.
2. Under the **Card #** column and to the right of the card's last four numbers click the *Edit* icon.
3. The "Update Credit Card Information" dialogue box is displayed.
4. Enter the new credit card information in the corresponding fields
5. Enter the new credit card billing address in the corresponding fields.
6. Click the Update Credit Card button to update the credit card information.

VIEW ACCOUNT HISTORY

You may change the credit card information on a specific customer's recurring account.

1. Click on the *View* icon for the corresponding account.
2. To the right of the account information click the *View History* link.
3. The "Account History" dialogue box is displayed showing the account's history. Click the **X** icon to close this window.