Swipe N Clean 2.0
Web Utilities Manual

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1. GETTING STARTED WITH SWIPE N CLEAN 2.0 INCOME MONITORING

Welcome to Jim Coleman Company Swipe N Clean Income Monitoring, an income monitoring and management tool. This system will provide an insight to the self-service car wash, utilizing the Swipe N Clean, cash, and credit income. It also has the tools needed to manage some of the day-to-day operations of the self-service car wash.

Its interface is user-friendly using either Microsoft Internet Explorer 4+ or Netscape 4+. This allows the user the familiar look (much like a web site) to navigate through the pages and use the data as required.
INFO CENTER
Displays the Reports, Utilities, and Diagnostics options relevant to the Swipe N Clean.

Reports contains report information about the Car Wash.
Utilities helps you setup your car wash and manage the various options.
Diagnostics allows you to troubleshoot problems before calling Technical Support.

MAIN SCREEN
This window gives you a large view of the options selected in the Info Center and instructions for each (located on the main screen).

1.1 Getting Connected

Your PC must meet the following requirements:

- Windows 95 or higher operating system
- Modem (installed with dial-up capability)
- One of the following Browsers installed:
  - Netscape Navigator, version 4x or above.
  - Microsoft Internet Explorer, version 4x or above.
- TCP/IP communications software installed (included with Windows 95 or higher).

NOTE: Before you begin, make sure you have your Windows 95 or 98 installation CD or floppy disk. You may be asked to use it. Also, make note of your computer number located on the backside of your computer case (inside the back door). For example, if this letter/number combination (JCCTXSRV299) is on your computer then your computer number is 299. You will need to know this number when you call Jim Coleman Co. Technical Support.
After connection has been established, open your browser (Microsoft Internet Explorer (ver.4.00 or higher) or Netscape Navigator, (ver 3.00 or higher). Located at the top of the browser you will notice the address window that looks similar to Figure 1.A.

Figure 1.A

Please read through the following explanation concerning the IP address and how you type it.

The address window is where you type your specific IP address. This will connect you to the Swipe N Clean through the network. Your web address is:

10.137.137.1/snc_web/main.htm
2. SWIPE N CLEAN INCOME MONITORING MENUS

The welcome screen will be the first screen viewed by the user. This screen will offer the user their elected path to receiving data. Once a menu function has been chosen the welcome screen will go away and not be seen again until the user logs in the next time.

Three sections control or manage all functions of the system. These sections are as follows:

- Reports
- Utilities
- Diagnostics

Each section will be discussed more thoroughly in the pages that follow. Read and re-read through each one. This will give you a better understanding of how to access the information and do specific searches.
The **REPORTS** option is just that…reports. Any data that is recoverable is displayed on the screens as that report is selected. This report is then viewable “as is” and/or may be printed using the default printer on your windows system.

The **UTILITIES** option is used to set-up the system, control functions, manage fleet information. Like the Reports, the Utilities options are viewable “as is” and/or may be printed using the default printer on your windows system.

The **DIAGNOSTICS** option is used to properly troubleshoot and diagnose problems related to the Swipe N Clean online.

Let’s take each of the three and explain how each one works and offer suggestions on how to properly use them.

### 2.1 REPORTS

The are six reports available to view. Starting with the first and working our way down we will discuss each one.

The following explanations apply to each of the reports when these are present:

- **Location**
  
  *Location* refers to the specific location of the referenced machine for which the report is generated.

- **Daily**
  
  *Daily* is a 24-hour period of time. The default time would begin at 12:00 AM and end at 11:59 PM. However, in location data the user has the option of setting their ending time for reconciliation purposes as they wish, which will be covered later under location data. All daily data is reset* at the default time or the user set time whichever is applicable. Any time that this report is viewed or printed the amount shown reflects the data gathered from the last reset time.
- **Monthly**
  Monthly is a 28, 29, 30, or 31-day period depending on which month it applies. At the end of the monthly period data is reset*.

- **Yearly**
  Yearly is from January 1 – December 31. At the end of the yearly period data is reset*.

- **Weekly Summary**
  Weekly Summary is the recorded and summed data for the past 7 days. This is referred to as a rolling 7-day sum. At the end of each day, the day total income for that day (cash and credit) is written into the cell of that day. Example: Today is Monday. When the user looks into the cell for Monday it has $431.50 in it. This amount reflects the amount of income from last Monday. At the end of today the amount of income that was recorded will be put into the cell for Monday. Also at this time the total will change showing the new amount for the previous 7 days.

*Reset Data
Although data is reset, it is never cleared or lost. It will continue to allow the user data access across any time period.

2.1.1 Summary

Summary Report
The Summary Report is the basis of all reports and by far will be used the most. It includes relevant data to the site such as the Location Name and Date/Time, income by Bay, Vacuum, Vending, Auto1 & 2. It also shows cash and credit. It will reflect Current,
Monthly, and Year to Date data. Weekly summary by day is included on this report as well as Today’s Income, Best Day and Best Week. Each of these will be discussed in detail.

2.1.2 Bays

- **Bays**
  This report is the breakdown of each bay by number reflecting the data in a daily, monthly, and yearly format. The total of the bays is the amount reflected on the summary report for the bays cell. This data can be used to evaluate bay usage by bay. It also provides and proves communications from the timers and push button controllers, which are the gathering tools of the system.

2.1.3 Vacuums
• Vacuum Report
This report is the breakdown of each vacuum by number reflecting the data in a daily, monthly, and yearly format. The total of the vacuums is the amount reflected on the summary report for the vacuum cell. This data can be used to evaluate vacuum usage by vacuum. It also provides and proves communications from the timers and push button controllers, which are the gathering tools of the system.

2.1.4 Vending

• Vending Report
This report is the breakdown of each vending machine by number reflecting the data in a daily, monthly, and yearly format. The total of the vending is the amount reflected on the summary report for the vending cell. This data can be used to evaluate vending usage by each vending machine. It also provides and proves communications from the timers and push button controllers, which are the gathering tools of the system.
2.1.5 Automatics

- Total Auto Cycles

There are five columns of information included in this report:

- **Address**: Location of the Entry Wizard
- **Cycle Number**: One of four cycles
- **Total Cycles**: Number each cycle is used
- **Cycle Amount**: Dollar amount of each cycle
- **Total**: Total amount of each cycle
- **Totals**: Total cycles and dollar amount of all machines

2.1.6 Past Earnings

- **By Date**
This screen shows three columns of information:

- **Device**: Includes Bays, Vacuums, Vending, Automatics, Sub-Total, and Total.
- **Cash**: Gives a total cash amount used for that particular machine along with the Sub-Total and Total of all machines.
- **Credit**: Gives the amount of purchases when a credit was used on each machine along with the Sub-Total.

### By Range Of Dates

Enter the start and end dates you want to search. The result of your entered information will appear on the screen.

### Application Tax Setup

#### Application Tax Information

<table>
<thead>
<tr>
<th>Application</th>
<th>Taxed</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wax</td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>Clear-Coat Protect</td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>Foaming Conditioner</td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>TireEngine Cleaner</td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>Pre-Stick</td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>Soap</td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>Foaming Brush</td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>Rinse</td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>Spot Free Rinse</td>
<td>☑</td>
<td></td>
</tr>
</tbody>
</table>

![Diagram](image)
There are nine applications that you can setup tax charges on. In the *Percentage* box you enter the amount of tax. For example, if you want to charge a 8.5% tax on *Wax* you would enter 8.5 in the wax percentage box and check the box under *Taxed* beside the wax application. Do this on all that apply. If you don’t check the *Taxed* box the customer will not be charged, even though you have a percentage entered.

- **Application Tax**

  Application Tax is used mainly in the state of Florida. It provides tax information on wax products that are taxed in a special way by the state of Florida. For most sites, this information is of little or no value.

  In this window you will notice the button on the bottom left. If you click it, a screen similar to the following will appear:
This screen is the result of the information entered in the previous screen. January is month 1, February is month 2, March is month 3, etc.

2.2 UTILITIES

This option allows you access to the following:

- **Location Data**
- **Fleet Links**
  - Manage Fleet
- **Credit Tools**
  - Credit Deposits
  - Receipt Search
  - By Name
  - By Date
- **Cash Tools**
  - Cash Income

2.2.1 Location Data

*Location Data* is the section of utilities that store all of the site data necessary to operate the site, reconcile the reports, and properly record the data. Each section will be covered describing the data required. The sections included are as follows:
NOTE: Each of the six sections listed are located under Utilities (Location Data). They are broken down for explanation purposes.

- **Address Information**

  ![Address Information Diagram]

  Enter your personal information in each of the Address Information boxes.

  **NOTE:** Car Wash Site Name is used to header each report and print on receipts.

- **Site Utilities**

  ![Site Utilities Diagram]

  The Site Utilities includes information about three areas:
✓ Printer Report PAN: This is the Personal Access Number you need to print a report. It can be any five-digit number.

✓ Wash Down PAN: This is the Personal Access Number you need for use of the bay to wash down the walls and bay floor. It can be any five-digit number.

✓ Wash Down Position: This position is the location of the key that starts the Wash Down after the code is entered. Default is 0 (High Pressure Rinse key).

• **Credit Card Settings**

Credit Card Settings includes the following:

✓ Authorization Amount: The amount you authorize for credit cards to be charged.

✓ Credit Limit Amount: The maximum dollar amount allowed for each credit card use.

✓ Settlement Time: The time each day all credit card transactions are completed. Allow 30 minutes between each machine. For example, the Entry Wizard may be set at 10:00 pm; the Swipe N Clean may be set at 10:30 pm; etc.

✓ Demo Mode: This option should be checked ONLY when you are testing the machine. **If it is checked during normal operational hours you will not get paid for any service accessed with a credit card.**

✓ Credit Cards Accepted: There are four types of credit cards that may be used (Visa, MasterCard, Discover, and American Express). Using the mouse or space bar, check all that you will allow to be used at your car wash.

• **Site Information**
Site information includes six options:

- **Number Of Automatics**: The number of automatic washes you have.
- **Number Of Bays**: The number of drive-through bays you have.
- **Number Of Vac/Shampoo**: The number of Vac/Shampoo machines you have.
- **Number Of Vac/Frangrance**: The number of Vac/Frangrance machines you have.
- **Number Of Vacuum Only**: The number of regular vacuums you have.
- **Number Of Vendors**: The number of vendor islands you have. The islands may have up to ten machines on them and still be one vendor island.

### Credit Price Setup

Credit Price Setup includes prices for:

- **Automatics**: You set the prices for each of the four cycles used in the automatic.

**NOTE**: For the next four items you will set a minimum start price that the customer has to insert before the machine starts. The stop price is the maximum amount the customer can insert before having to start over with a new session. The Bay price is the only one that will fluctuate. All others are one set price that has to be inserted for the service.

- **Bays**
- **Vacuums**
- **Shampoo**
- **Fragrance**
• Prepay Buttons

Prepay Buttons allows you to name and set each price on the prepay options. They include:

- **Active**: Checking this box beside each option activates that prepay option. When it is not checked it is not active.
- **Menu/Description**: The larger box is the main menu the customer will see. The smaller box is a descriptive sentence about the option.
- **Worth**: The amount the service is actually worth.
- **Price**: The price the customer has to be pay to get the service. (For example, if a customer chooses the last one in our illustration they will pay $95 and get $120 worth of service.)

• Submit and Done Buttons

When you have entered all information you want included, press the **Submit** button. When you have submitted the information you may press the **Done** button and return to the main screen.

2.2.2 Fleet Links

• Manage Fleet

This section includes the following:

- **Fleet Utilities**
  - Add Fleet User
  - Add Fleet Account
View/Edit Fleet Account
View/Edit Fleet PAN User
Fleet Reports
View PAN Totals
View Account Totals By Account
View Account Totals By Range
View Users With Transactions
Fleet Billing Report

✓ Code Generators
Fleet Random Generator
Random Promotion Generator
PrePay Random Generator

✓ Income Reports
Prepay Income
POS4000 Income

Each one of the categories will be explained in the following pages.

✓ Fleet Utilities

□ Add Fleet Account

This screen allows you to enter information for a fleet account. You must add an account before you can add a user.
Make certain to fill out all of the information about the new account and the new user. The first time you set up an account, you are filling out information about the account and the new user. You may add additional users to this account at a later date using the Add Fleet User utility under Fleet Utilities.

- Add Fleet User

This screen allows you to enter information for a fleet user. You may add a name and select all options that apply to that user. It includes the following:

- **NOTE**: When adding a Fleet User, it is important to remember that all fields must be filled out. If you fail to fill out one of the fields the server will send an error back when you attempt to save the page and the data will not be saved.

- When adding a Fleet User you must first decide whether you will add a Fleet User to an existing account, or create a new one. A Fleet Account can contain many users, each having their own profile. If you choose to add a Fleet User to an existing account, follow the steps below.
• Click the arrow beside the Select Acct. window to bring up a list of all fleet accounts already setup.

A brief explanation of each of the boxes in the User Information follows:

**USER INFORMATION**

✔ **Fleet PAN Number:** This number may be any six-digit number to identify this user. You may click the PAN's In Use button to see any numbers already used.
NOTE: The first number in the PAN should not begin with a zero. Although the system will work if it begins with a zero, it will be confusing when viewing information about the user. For instance, a PAN like 012345 would show up as 12345 because of the way the data is stored and extracted from the database. The leading zeros are not saved and will be omitted when the data is retrieved on the user.

Remember, you may edit a user at anytime by selecting the “View/Edit Fleet PAN User” from the "Fleet Utilities" list (located under UTILITIES: Manage Fleet), updating the information about them, and clicking the “Submit” button.

✓ Last Name: The user’s last name.
✓ First Name: The user’s first name.
✓ Fleet Session Amount: The maximum amount the user is allowed to use each session.
✓ Fleet Maximum Daily: The maximum amount the user is allowed to use each day.
✓ Fleet Maximum Weekly: The maximum amount the user is allowed to use each week.
✓ Fleet Maximum Monthly: The maximum amount the user is allowed to use each month.
✓ Fleet Administrative: Check this box and the user will have administrative rights. This means that all amounts entered will be overridden and the user will have unlimited use.

NOTE: When adding a Fleet User, even if you give them administrative rights, it is important to remember that all fields must be filled out. If you fail to fill out one of the fields the server will send an error back when you attempt to save the page and the data will not be saved.
**USER DEVICE SELECTION**

- **Bays:** Check this box if the user will have access to the drive-through bays with his code.
- **Vacuum:** Check this box if the user will have access to the vacuums on the property with his code.
- **Vending:** Check this box if the user will have access to the vending islands/machines with his code.
- **Automatic:** Check this box if the user will have access to the automatic wash with his code.

**USER SCHEDULE**

⚠️ **NOTE:** All of the user information required is straightforward, with the exception of the "On Time" and "Off Time". These settings are based on MILITARY time (1-24). If you leave these times set at 00 values, the user can use the system anytime, day or night. To change these times, select the time of day the user is allowed to use the system. This function is typically used when setting up a Fleet User that works for a car dealer, for instance. You may only want their code to be valid during normal business hours, not on weekends or after hours. Once all of the information is filled out about the user, click on the "Update User Information" command button. The data is now saved, and the user will appear in the "Select User" drop down list.

- **Days of the week:** Check each box beside the day the user will be able to use his code with the boxes selected in the **User Device Selection**.
- **On Time:** Designate a time by hour and minute the user’s account will be activated for use.
- **Off Time:** Designate a time by hour and minute the user’s account will be de-activated for use.
### View/Edit Fleet Account

#### Existing Fleet Accounts

<table>
<thead>
<tr>
<th>Account Number</th>
<th>Account Name</th>
<th>Address</th>
<th>City</th>
<th>State</th>
<th>Zip</th>
<th>Country</th>
<th>Permission/Authorizations</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This screen gives you a look at all accounts setup in the Fleet section of the Utilities. You can view the following:

### View/Edit Fleet PAN User

#### Existing PAN Codes

<table>
<thead>
<tr>
<th>Account Number</th>
<th>Account Name</th>
<th>Address</th>
<th>City</th>
<th>State</th>
<th>Zip</th>
<th>Country</th>
<th>Permission/Authorizations</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This screen allows you to see all PAN users with their PAN numbers. You may edit them by double-clicking the number.
Fleet Reports

- View PAN Totals

This screen allows you to view the PAN totals. In the drop down menu you select the number to show the totals by that individual PAN user (including name, account number, user code, transaction date, type, and amount.

- View Account Totals By Account

This option allows the same as viewing PAN totals with the exception of showing account totals instead of individual totals.
- **View Account Totals By Range**

  This screen allows you to view an account by using a date range. When you enter a start date and ending date you will see all transactions by users on that account for the time period entered.

- **View Users With Transactions**

  This option allows you to view users by using a date range. When you enter a start date and ending date you will see all transactions by that individual user for the time period entered.
Fleet Billing Report

By inserting a date range and selecting a specific account you may view the billing report/s for the time period entered and the account selected.

✓ Code Generators

Fleet Random Generator

This utility may be used to generate fleet codes that last for one month. At the beginning of the next month the promotion amount resets.
### Random Promotion Generator

By entering a new fleet account number, name, promotion name, amount, and selecting all options available you may generate a certain amount of codes to issue for promotions. These codes are used for one year. At the end of the year they automatically reset to the promotion amount.

### PrePay Random Generator

This option allows you to do the same as the previous option with the exception of this one applies to a pre-pay amount. Once the promotion amount is used up it is gone. It does not reset automatically. It is a “one-time” use utility.
✓ Income Reports

▪ Prepay Income

By utilizing this option you may generate a report of the income from prepay users including last and first names, user code, paid amount, date paid, and amount remaining.

▪ POS 4000 Income
You may generate an income report by date range for all POS4000 usage.
2.2.3 Credit Tools

Credit Tools consists of four sections:

- Credit Deposits
- Receipt Search
- By Name
- By Date

- Credit Deposits Report

This option allows you to search the Credit Deposits within a begin date and end date. When you enter begin and end dates you will generate a report showing the following:

- Customer Name
- Account Type
- Account Number
- Transaction Date
- Authorization Code
- Amount
• Receipt Search

Receipt Search is used to look up previous use by a customer. In the event a customer does not receive a receipt, and wants to know how much they spent on any given day at the wash, you can enter the last four digits of their credit card and find all transactions they have made at your car wash.

• By Name
*By Name* is used to find transactions on a customer using their last name. The utility is useful if a customer does not have the last four digits of their credit card, or is reluctant to give it out. By inputting the last few letters of the customers name, the utility will look up all transactions associated with the information provided. If you enter *A*, it will look up all *A*'s in the database. Entering *Al* will lookup all last names beginning with *Al*. Sometimes it is better to provide less information than more when looking up a customer’s last name. Entering just three or four letters of the last name often returns better search results.

- **By Date**

*By Date* will list all users and their transactions that used the Swipe N Clean system on any given date. This is a helpful utility when finding information about a particular customer on a given day when the credit card does not contain a name on the card. This happens occasionally with some credit card companies.
2.2.4 Cash Tools

- Cash Income

This utility provides cash deposited information by device, on a given day, or range of days. It gives a breakdown of each device on the car wash site, and totals the income for the time period requested. This utility is useful to determine the performance of one bay or vacuum over another for income.

Enter a start date and an end date for a *Cash Income* report. If you leave the end date empty you will generate a report on the start date only. For example, *03/14/05* was entered and submitted. The following screen appeared:
2.3 DIAGNOSTICS

Diagnostics is the last of three sections (Reports and Utilities have already been discussed). There are five different tools at your disposal:

- Device Table
- OOS Devices
- Text File Viewer
- Settlement
- DB Download

2.3.1 Device Table

The Device Table contains diagnostic information about the "Health" of the Swipe-N-Clean system. At midnight each night, and at application startup, the POS communicates with each device to verify proper operation of the system. The information that is sent back from each device is stored in this table. Each time a device powers up on the system, that transaction is written to this table.
2.3.2 OOS Devices

This table is used to keep track of any device(s) that failed to report to the POS in the last 24 hours. This tool will help troubleshoot devices that are not working properly. If a device is not reporting properly you should consult the troubleshooting section.
2.3.3 Text File Viewer

This utility is used exclusively by maintenance personnel. Swipe N Clean logs all transactions to and from the database in a text file. These files are kept for diagnostic purposes, error tracking, and system performance. You will not hurt anything by viewing the files in this page, however, they will be of little use to you.

2.3.4 Settlement
2.3.5 DB Download

This utility is used for backing up your database to a remote location. It is recommended that you backup your database to your home or office on a regular basis. In the event of a corrupted database that can not be repaired, you will have a backup copy of the database to get your Swipe N Clean system up and running quickly.