BerthVend
SMART SOLUTIONS

BACK-OFFICE MANAGEMENT

OPERATION MANUAL

ROLEC
Marina Services

BerthVend Marina Pedestal Back-Office
BVBOM-01-V01-R1 July 2022

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Safety

This manual is specifically applicable to Rolec Pedestal products incorporating the BerthVend system.

IMPORTANT: End Users should read and understand the content of this manual before use.

- The information provided in this manual is ONLY intended apply to the products/model(s) listed on page 1 of this manual.
- The information provided in this manual is NOT intended for use with any other product.
- The content of this manual may be updated by the manufacturer as required.
- The BerthVend system may be updated by the manufacturer as required.

Safety Advice within this Manual

Rolec manuals use a system of warnings, cautions and notes.

- **WARNINGS** concern the safety of installers/end user and will be given before the detail/instructions in the manual.
- **CAUTIONS** concern the potential for damage to the equipment and will be given before the detail/instructions in the manual.
- **NOTES** are given to provide additional information and/or highlight information of importance. They will be given either before or after the detail/instructions as appropriate and may use different wording (such as IMPORTANT) where emphasis is required.
- Warnings, Cautions and Notes may be repeated several times as appropriate and may be preceded by a hazard symbol.

Product Overview

BerthVend is a cloud-based berth management system, enabling marina operators to control their marina's electrical and water services anywhere, anytime on any device whilst providing berth holders with a seamless services provision.

Each BerthVend system is configured for the specific marina in which it will be used but in general terms, offers:

- Online management of:
  - Allocation of berths and pedestals and services
  - Electrical, Water services or Pump-out services provided from a pedestal.
  - Billing and control of the required services.
- Visual and interactive representation of the marina, its berths, and the pedestals.
- Visual representation of pedestal occupancy, and health.
- Recording and reporting of user (berth holder) details and their use of berths and pedestal services, and associated billing.

BerthVend hardware is required within each pedestal that will be controlled by the system. These pedestals are linked via a communications cable to a 'data pedestal' which is then linked by another communications cable to a gateway device that is part of the site IT/Communications system.

Under normal circumstances, up to 90 'pedestal services' can be linked to one data pedestal.

NOTE: The number of pedestals on a site is not necessarily the same as the number of services or utilities available. For example, a single pedestal with 1 water connection and 1 electrical connection = 2 utilities.

Typically, each pontoon within the marina could have a data pedestal for the service pedestals on that pontoon but more or fewer data pedestals may be installed depending on the size and complexity of the marina site.

Marina Operator – Back-Office Software

NOTE: The software used by marina operators is a 'live' interactive web page viewed in a web browser and is remotely updated, amended, etc. by the software provider. Depending on the frequency of these updates, screens and processes shown in this guide may differ slightly to the version of software in use at the time.

NOTE: The screens shown in this manual were captured from the Google Chrome web browser installed on a Windows PC. Other devices and web browsers may display the same screens slightly differently.

Operation of the buttons and other on-screen functions using a mouse click or finger tap should be performed as appropriate to the type of device being used.

Sign In Screen

1. Marina operators should have set up a **Username** and **Password** as part of the initial installation of the BerthVend system. If this was not done, contact your supplier to arrange for an 'invitation' to be sent to you by the BerthVend team.

2. Open your web browser and enter the web address: https://backoffice.berthvend.com/
   - The Sign in screen should be displayed.
3. Enter your Username and Password then click on the **Sign in** button.
   - If you have lost or forgotten the password, there is the option for it to be Reset shown below the Password field.

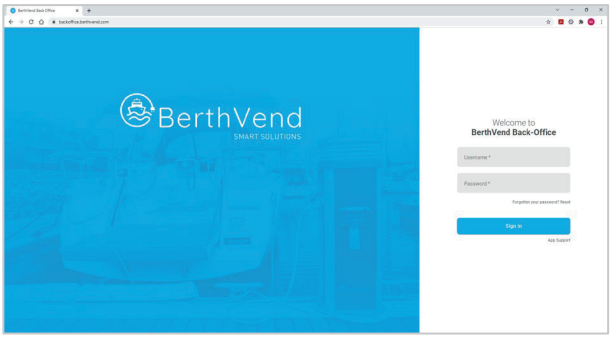


Figure 1 BerthVend Back-Office Login Screen

To request a password reset, the email address that is registered with the BerthVend system must be used.

Save your Favourite Screen

When logging in for the first time, the BerthVend system will display an interactive site plan of the marina.

When you become accustomed to the application and the way you like to use it, you may wish to open the software on a different screen.

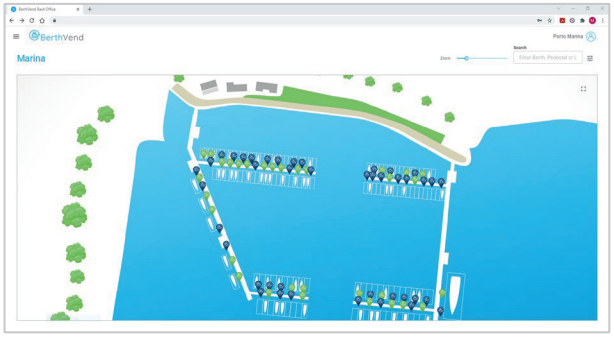


Figure 2 Marina Site Plan

If the application is saved to the web browser as a Favourite or a Bookmark; the next time you login using that bookmark, the first screen to be displayed after login will be the one that was active when it was saved.

NOTES:

- The method by which Favourites or Bookmarks are saved and accessed is dependent on the web browser being used.
- The dashboard is a slide-out panel. Slide-out panels cannot be saved as a Favourite or a Bookmark.

Application Navigation

Navigation within the software depends to some degree on the web browser used to access the application.

With the exception of History, all of the normal features and functions of your preferred web browser should operate as normal.

The web browser's History function can still be used to display a screen that has previously been viewed because the history function stores the web address of the screen.

However, because the screens always show the current 'live' view of the data at that moment in time, previous versions of the data cannot be shown.

Screen Navigation

The application uses a combination of Data Screens and Process Screens.

- **Data Screens** are presented as tables (or the marina Site Plan) and can be saved in the web as a Favourite or Bookmark.
  - **Pop-up Panels** are available on some data screens. Click on the Control icon to enable the data displayed on screen to be filtered to show or remove data from the current view.
  - Data screens can also be 'sorted' to display the data in ascending or descending order. Refer to **Data Sorting** for further details.
- **Process Screens** are slide-out panels that hover above a data screen and allow actions or 'processes' to be performed. For example, adding a new customer or making a utility available.

NOTES:

- Some slide-out panels are accessed from the Dashboard and are not necessarily related to the data screen currently being displayed below the panel.
- Other slide-out panels are displayed in response to clicking on the data screen and are related to the data that was clicked/selected.

Dashboard Screen

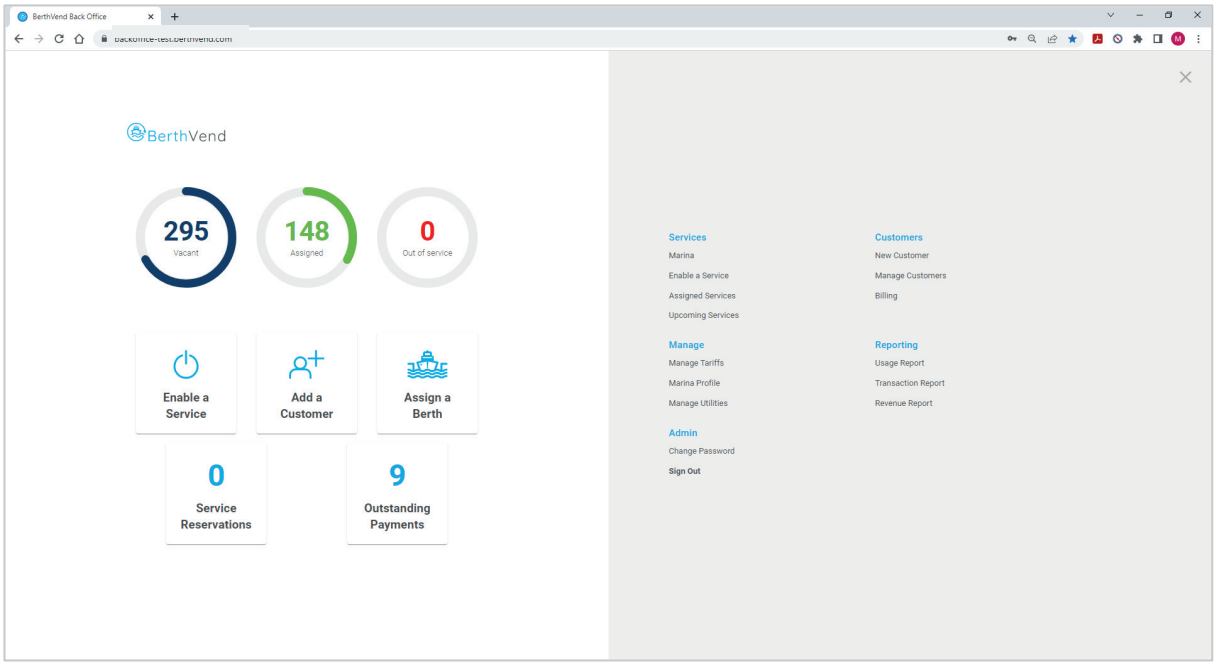


Figure 3 Dashboard Screen

The Dashboard screen is a slide-out panel that fills all the screen. It is accessed by clicking on the three lines icon ≡ shown next to the BerthVend logo on any other screen within the application.

Figure 4 Access the Dashboard Screen

All screens within the application can be accessed from the dashboard.

The Dashboard is divided into two distinct halves.

The left-hand panel of the Dashboard screen provides:

- an easy to view summary of the current state of your utilities.
- the ability to enable (or disable) services at each berth.
- the ability to add a new customer
- the ability to assign a berth to a customer.
- the ability to view service reservations.
- the ability to view any outstanding payments.

1. Click on the appropriate button to access the required screen.

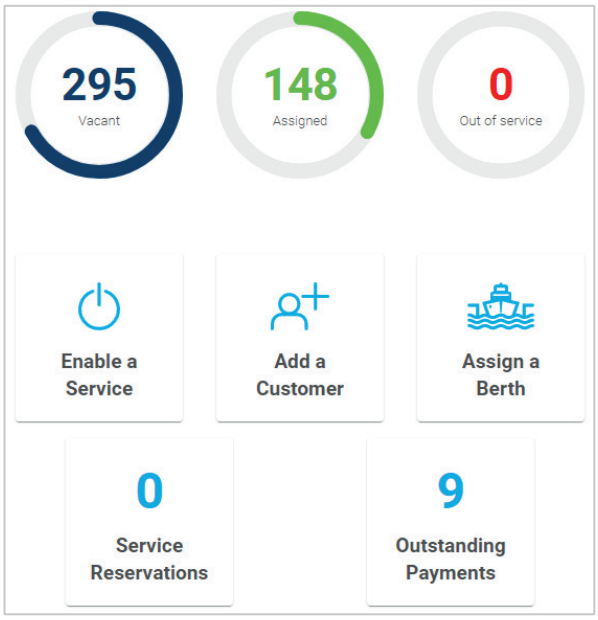


Figure 5 Dashboard Marina Summary and Easy Access Buttons

NOTE: The summary indicators at the top of the left-hand panel show the total number of utilities that are Vacant, Assigned or Out of Service. Adding the numbers together should = the total number of utilities available at the marina.

Out of Service utilities are based on automated feedback from the pedestals. Information about the fault can be seen when viewing information about the pedestal by clicking on an icon on the Marina site plan.

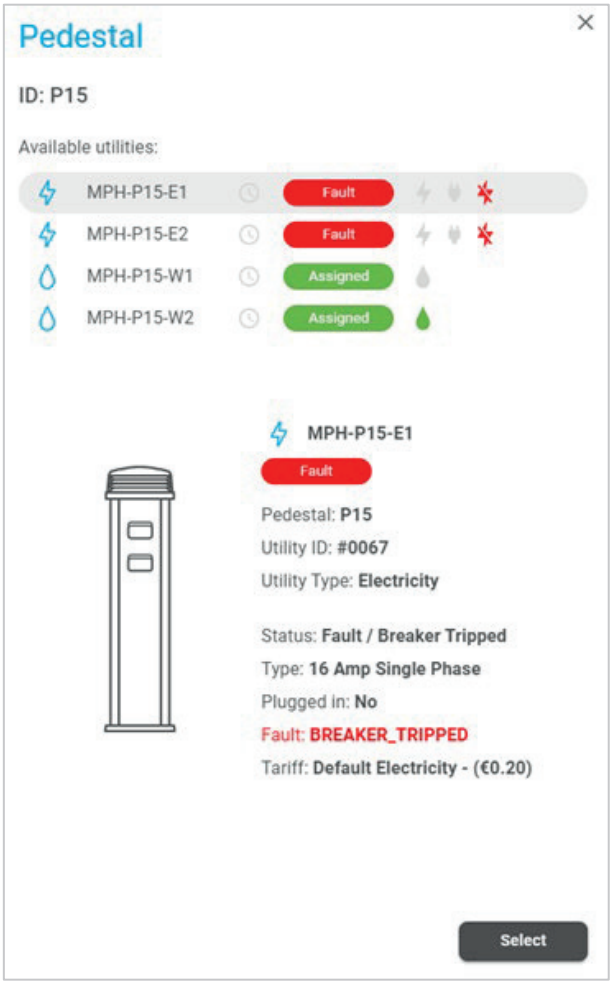


Figure 6 Out of Service Utilities

The right-hand panel of the Dashboard screen provides access to the same screens (as previously listed) as well as all other screens within the application.

Click on the appropriate text button to access the required screen.

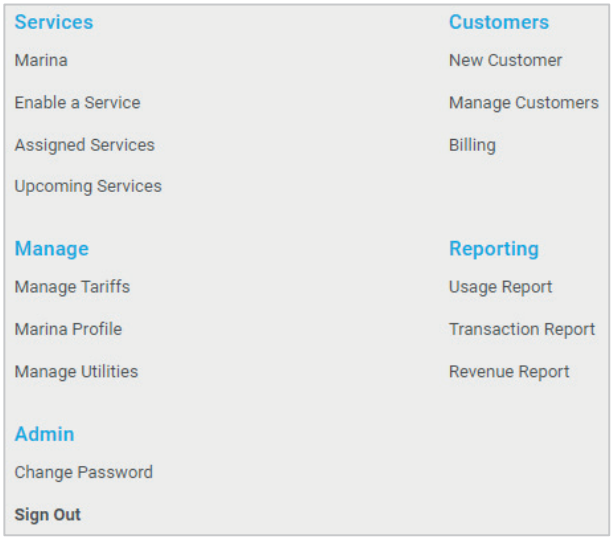


Figure 7 Screens Within the Application

Data Sorting

Data within the application is displayed in tables.

By default, the rows in the table will be sorted in descending order based on the left-hand column.

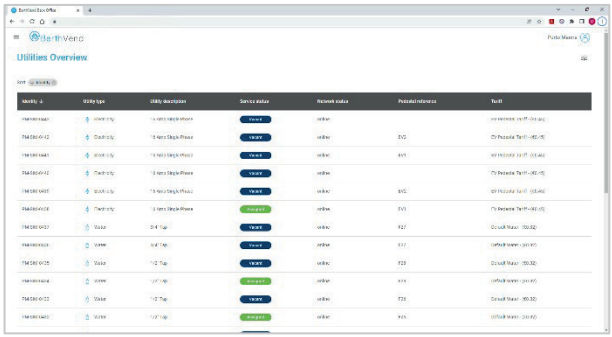


Figure 8 Data Screen Example

Each heading in the table can be clicked to select it as the sorting column.

If the heading is clicked again the arrow displayed will point in the opposite direction, indicating whether the column is being sorted in ascending or descending order.

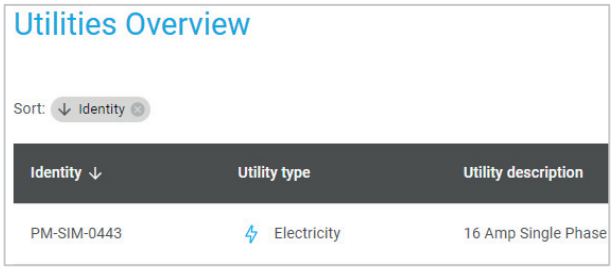


Figure 9 Data Sort Descending Order

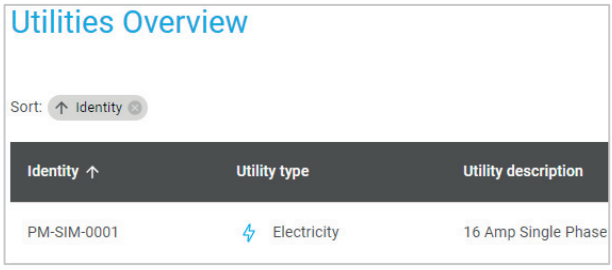


Figure 10 Data Sort Ascending Order

Additional columns can be added to the sort process by clicking on the heading.

- Columns that are added are listed in a row above the table.
- As previously described, the columns can be sorted in ascending or descending order.
- To remove a column from the sort process, click on the '**X**' icon shown next to the heading name in the row above the table.
- Alternatively, click the **Clear** text to remove all columns from the sort process.

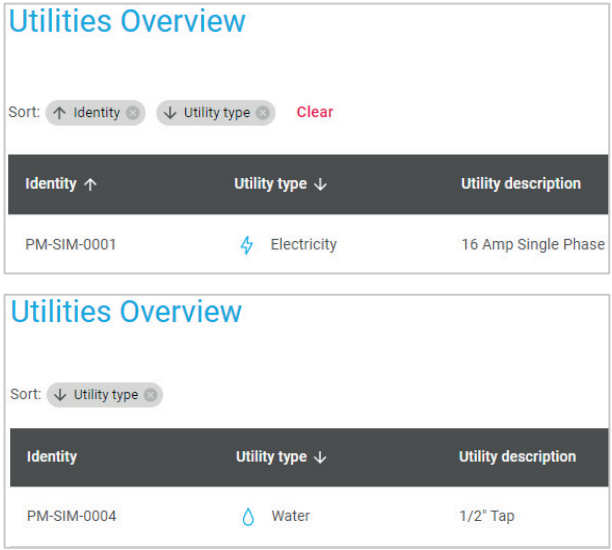


Figure 11 Data Sorting Examples

The table will default to the view shown when it is first displayed where it is sorted in descending order based on the left-hand column.

Setting Dates and Time

There are various places within the application where a date and time may be set.

Both dates and time can be set by editing the digits currently displayed, directly in the cell. Alternatively, the setting can be edited using a pop-up calendar or clock.

Date Setting Calendar

1. Click on the calendar icon 📅.
2. A calendar will be displayed in a pop-up.
3. Use the calendar to select the **Start** date for the report.
4. Click **OK** on the calendar to enter the selected date into the system.

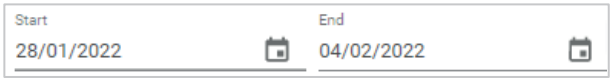


Figure 12 Date Setting Fields

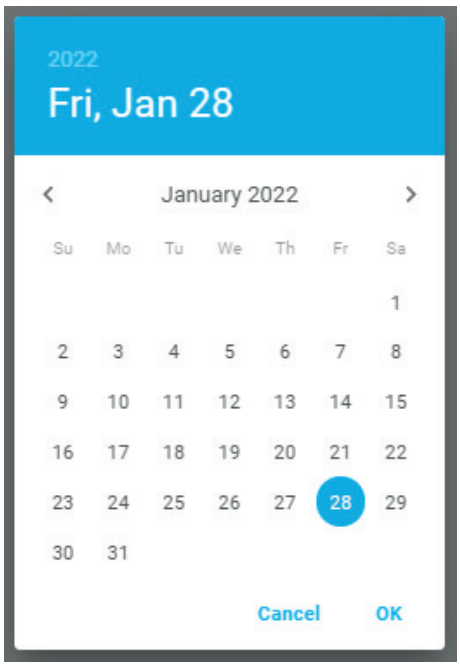
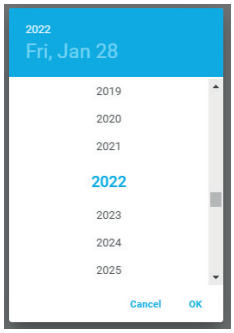


Figure 13 Calendar Date Selector

NOTE:

- Months are selected using the **< >** arrows.
- Individual days are selected by clicking on the numbers (1-31).
- The year can be selected by clicking on the year shown at the top of the calendar.



Time Setting Clock

1. Click on the icon .
2. A simple clock face showing just the hours will be displayed in a pop-up.

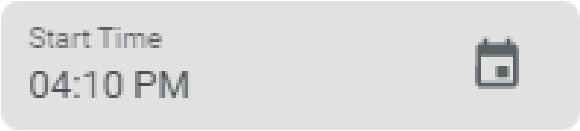


Figure 14 Set the Time

3. Click on the number on the clock face to select the hour.
4. The pop-up will change to show the minutes clock face.

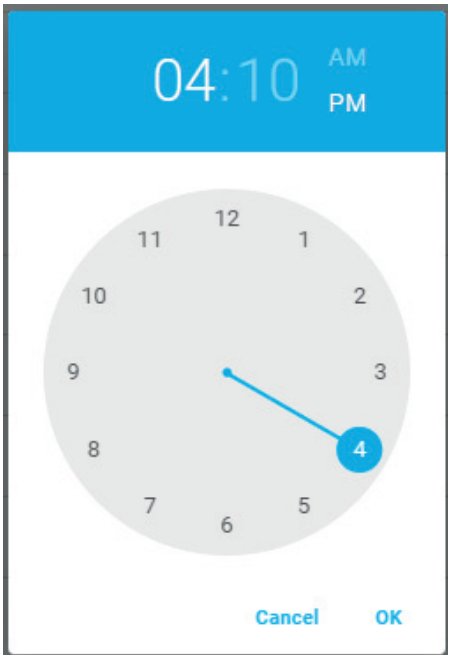


Figure 15 Set the Hours

5. Click on the number on the clock face to select the minutes.
6. Click on the **OK** text to set the time in the system.

NOTE: If required, click and hold the pointer to drag it around the clock face to set the precise minutes.

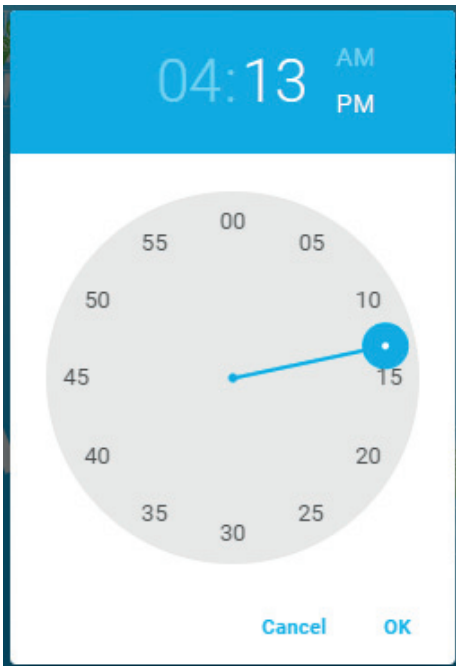


Figure 16 Set the Minutes

Services

Marina

1. Click on the **Marina** text in the left-hand panel of the Dashboard to display the marina site plan.

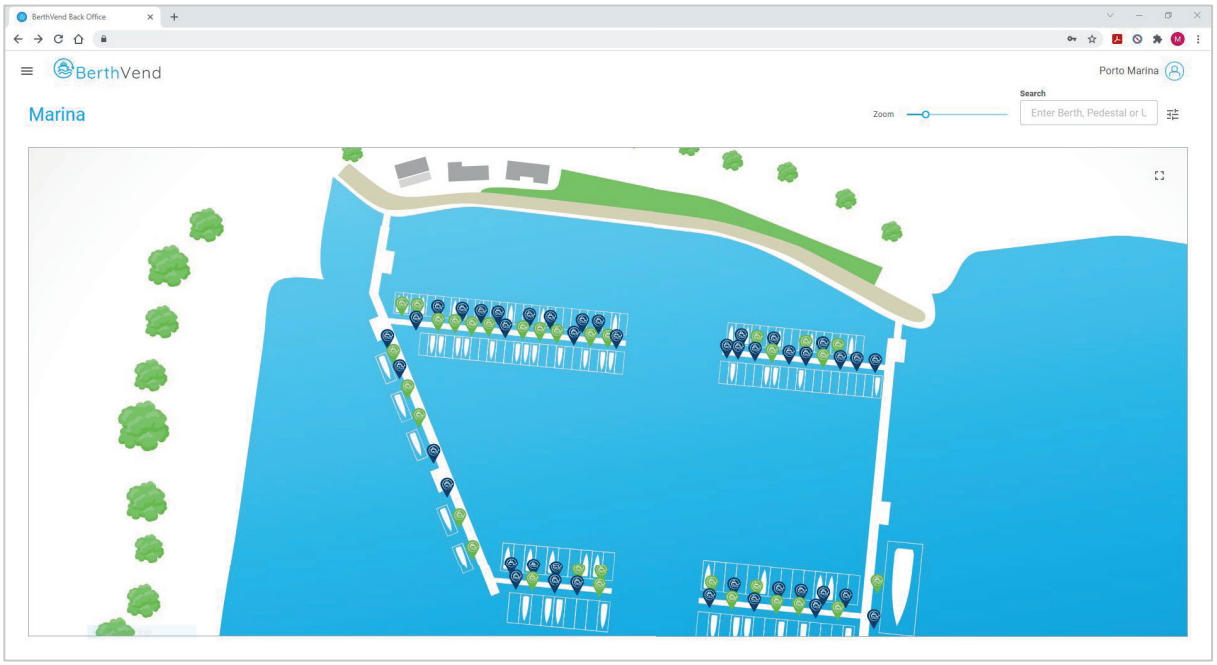


Figure 17 Marina Site Plan

- Use the Zoom slider above the site plan (or use the mouse scroll wheel) to enlarge or shrink the scale of the site plan.
- Click on the plan and hold the mouse button down. Now move the mouse to drag the plan in any direction.
- Click on the enlarge icon ⛶, shown in the top right-hand corner of the site plan, to toggle the plan between full screen and normal viewing modes.

2. Move your cursor over the site plan. You will see berths and pedestal markers react when touched by the cursor.
   - Click on the marker to display details about the berth or pedestal on a slide-out panel, from where other actions can be performed.

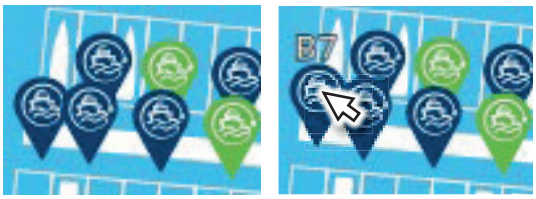


Figure 18 Interactive Reaction

Map Filter

For viewing clarity, the site plan (Map) can be filtered to turn ON or OFF the display of:

- Berths
- Pedestals
- Pedestal Numbers

1. Click on the settings icon shown above the site plan, on the right-hand side of the screen.
2. A pop-up window will be displayed with selectable options.
3. Choose which options to turn ON or OFF.
4. When the appropriate filters have been set, the pop-up can be closed by clicking on the **Done** button (or anywhere on the screen).

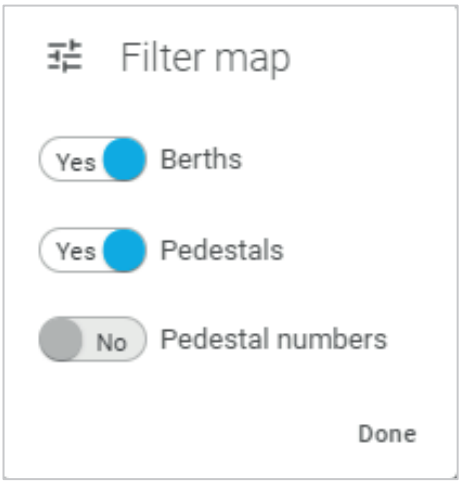


Figure 19 Display Filter Options

Search the Site

The Search function shown above the site plan, on the right-hand side of the screen, allows operators to quickly view Berth and Pedestal details without needing to find and physically click them on the site plan.

The search takes place 'dynamically' and will automatically start to display search results from the moment the first character is entered into the search field.

As more characters are entered, the results will become increasingly accurate.

For example: the search shown opposite has had only one character, 'b' entered.

Automatically, the search starts to return results for all berths and pedestals with a 'B' designation (B1, B10, B11….B20, etc).

It can be seen by the size of scroll bar at the side of the results list that, in this instance, there are a lot of search returns.

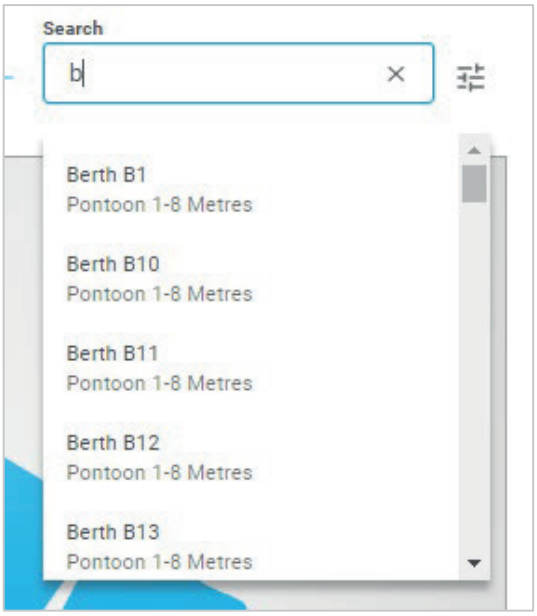


Figure 20 Dynamic Search 1

The search field has now had a second character added.

It can be seen by the size of the scroll bar that the number of results has become more accurate.

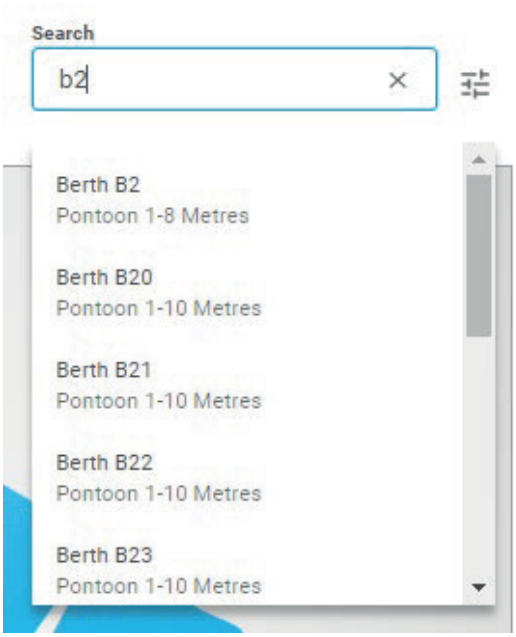


Figure 21 Dynamic Search 2

1. To view details, select the appropriate search result from the list.
2. The details of the selected item will be displayed in a pop-out panel on the right-hand side of the screen.

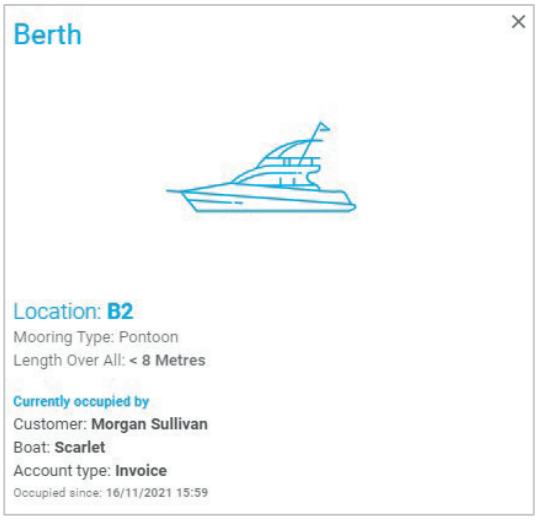


Figure 22 Berth Details

Pedestal Information

1. Click on one of the pedestal markers to display its details in an information panel on the right-hand side of the screen.
   - If required, click anywhere on the site plan to close the information panel.

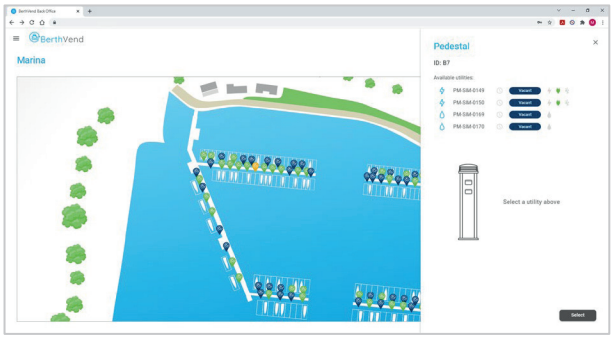


Figure 23 Display Pedestal Information Panel

2. The basic details at the top of the Pedestal information panel can show further detail.
   - Items D, F, G and H are grey in colour when inactive and will change colour when active.
   - Hover the cursor over items D, F, G and H to display information in a small pop-up.

A. ID number of the pedestal.
B. The type of the utilities (services) on that pedestal.
C. The ID number of each of the individual utilities.
D. Whether the utility is booked.
E. Whether the utility is assigned, vacant, in fault or offline.
F. Whether the utility is being delivered.
G. Whether the electricity utility is connected to a cable.
H. The status of the electrical breaker.

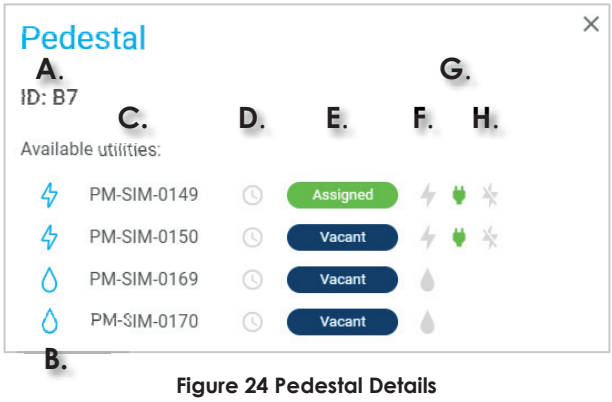


Figure 24 Pedestal Details

3. Click on one of the utility rows to display further detail about that pedestal and the status of the specific utility.

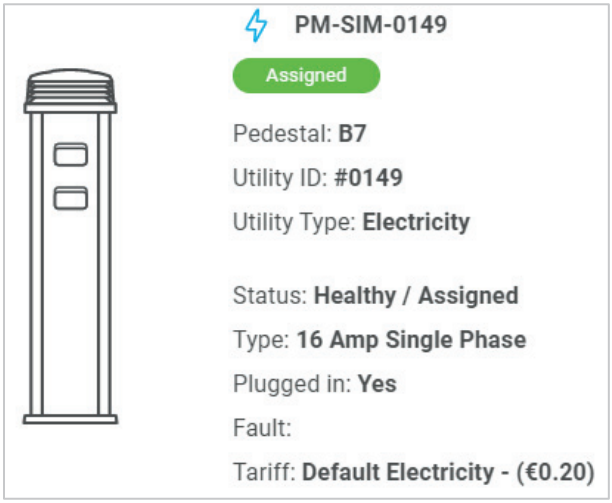


Figure 25 Additional Pedestal Details

Berth Information

1. Click on one of the berths displayed on the site plan to display its details in an information panel on the right-hand side of the screen.
   - If required, click anywhere on the site plan to close the information panel.

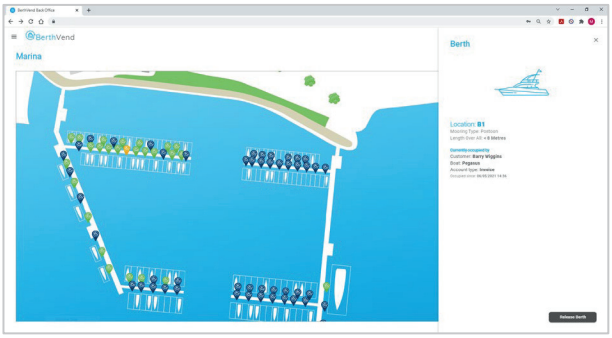


Figure 26 Display Berth Information Panel

2. If the Berth is occupied, the information panel shows:
   - The berth location (ID number)
   - The mooring type.
   - The size limit of the berth.
   - The customer's name.
   - The boat's name.
   - The account type.
     - Invoice.
     - Pre-pay.
   - When the berth was occupied by the customer.

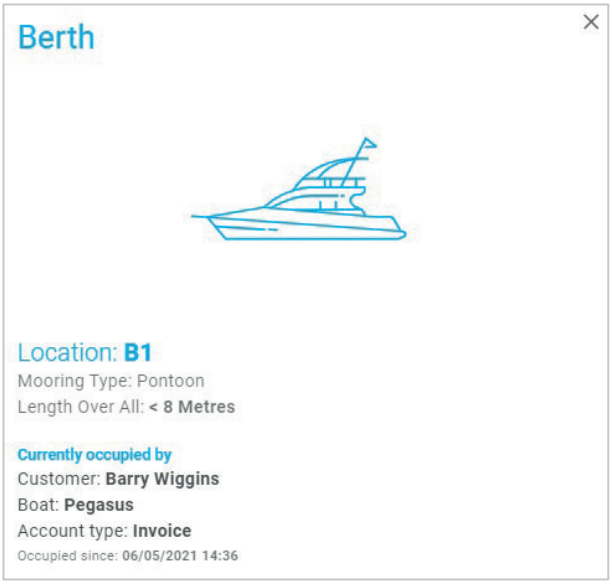


Figure 27 Occupied Berth Details

3. If the selected berth is not occupied, the Berth information panel will only show:
   - The berth location (ID number).
   - The mooring type.
   - The size limit of the berth.

Enable and Remove Services

NOTES:

- A **SERVICE** is the combination of assigning and supplying a utility to a customer with a tariff.
- A **UTILITY** is the Water or Electricity available from the pedestal.
- A **TARIFF** is the monetary charge to the customer for use of the service/utility.

1. Click on the **Enable a Service** text on the Dashboard screen to display the Enable a Service slide-out panel.

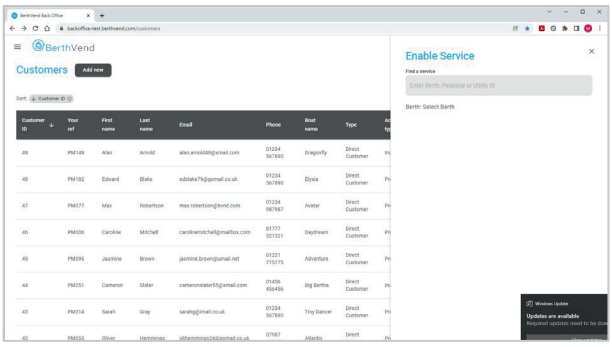


Figure 28 Enabling a Service on the Customers Screen

2. Enter a Berth, Pedestal or Utility ID into the grey search field.
3. As the ID is entered, the system will perform a dynamic search and will display increasingly accurate results as more of the ID is entered.
4. Results are listed below the search field.
5. Select the appropriate result from those listed.

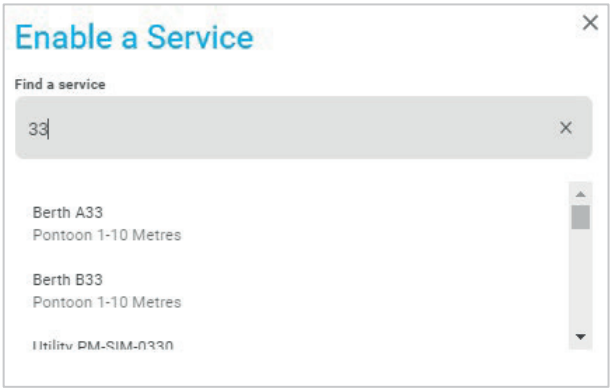


Figure 29 Enable a Service Panel 1

If a Utility ID (Service) is entered/selected from the search, the panel will change to show the details for that service. However, the exact Utility ID may not be known to you.

In the example above, the ID for a Berth has been selected from the search results.

A berth may have a number of pedestals each with a number of services, so this is not enough information to enable a specific service.

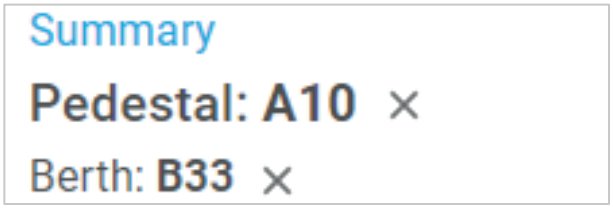
Additional information must be entered to find the required service.

6. Click in the grey search field. The field will display a list of all of the pedestals located on that berth.
7. Select the appropriate pedestal number from those listed.

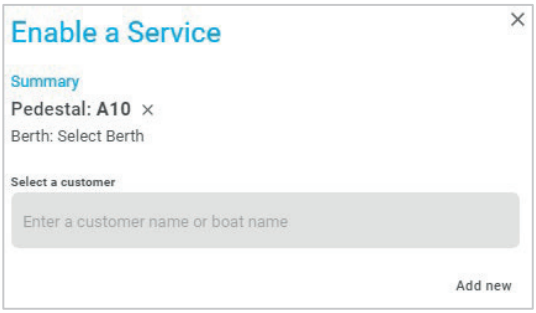
Figure 30 Enable a Service Panel 2

NOTE: If an incorrect selection is made, it can be undone by clicking on the 'X' shown next to the selected item.

The screen will change to show the previous state and a new selection can be made.



8. The panel will change to show the utilities available on that pedestal.
9. Click on one of the **Vacant** utilities listed on the panel.
   - If the berth is already assigned to a customer, the panel will change to show the details for the selected utility. Move to step 10.
   - If the berth is not already assigned to a customer, the customer must be selected from those available within the system, or a new customer must be created.



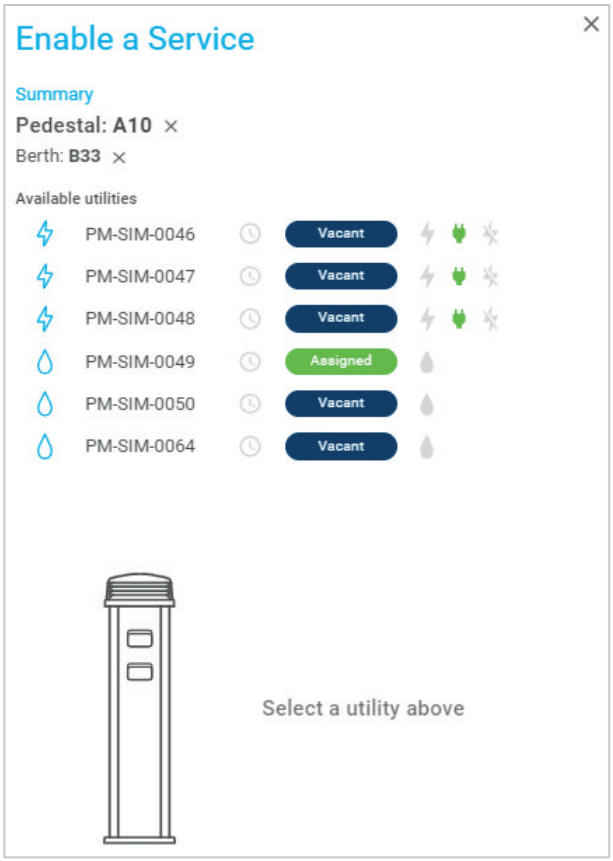


Figure 31 Enable a Service Panel 3

To select an existing customer enter their name into the **Select a Customer** field.

- As characters are entered the dynamic search will show the most relevant names until the required name can be selected.

Figure 32 Select a Customer

To add a new customer, click on the **Add New** text.

- The Add a Customer slide-out panel will be displayed allowing the customer's details to be entered.
- When all of the required details are correct, click on the Create button shown at the bottom of the panel.
- The customer will be added to the system and this customer will be automatically entered into the Enable a Service panel.

10. With the Pedestal, Berth and Customer details now available the panel will be as shown opposite.
11. If the service is to be assigned immediately, make sure the **YES** option is selected then click on the **Assign Service** button at the bottom of the panel.

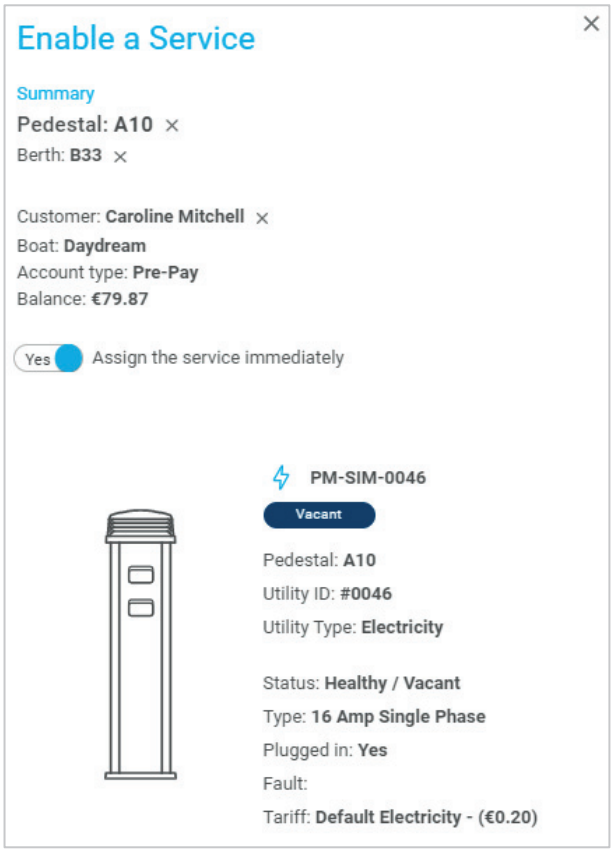


Figure 33 Enable a Service Panel 4

12. When the Service/Utility has been assigned the screen will change to show the details of:
    - the customer to who it is assigned.
    - the name of the boat.
    - the berth(s).
    - the customer's account type.
    - the current usage and cost.
13. Click the slider button at the top of the panel to turn the service ON or OFF.
    - The system may take a few seconds to acknowledge the change of state.

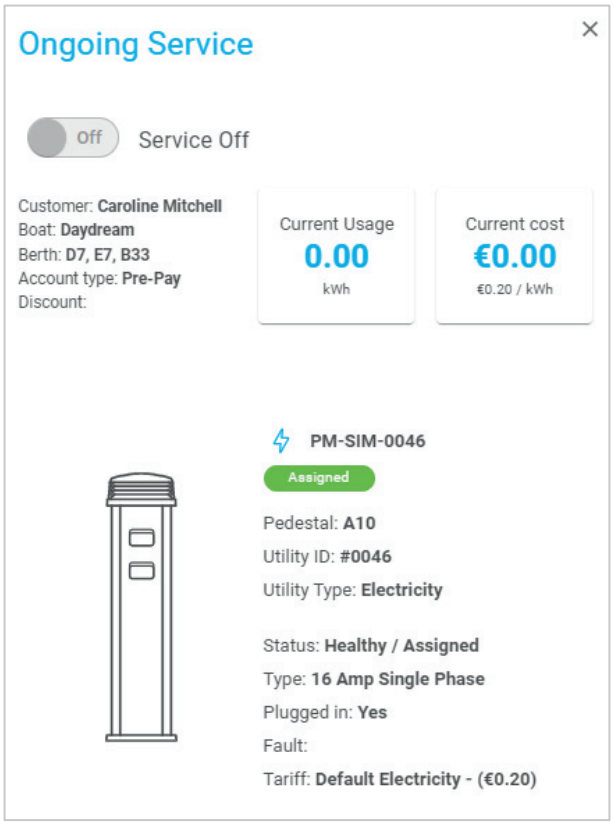


Figure 34 Ongoing Service Panel

Alternatively, the service can be removed.

This removes the service from its association with a specific customer

14. To remove a service, click on the **Remove Service** button at the bottom of the panel.

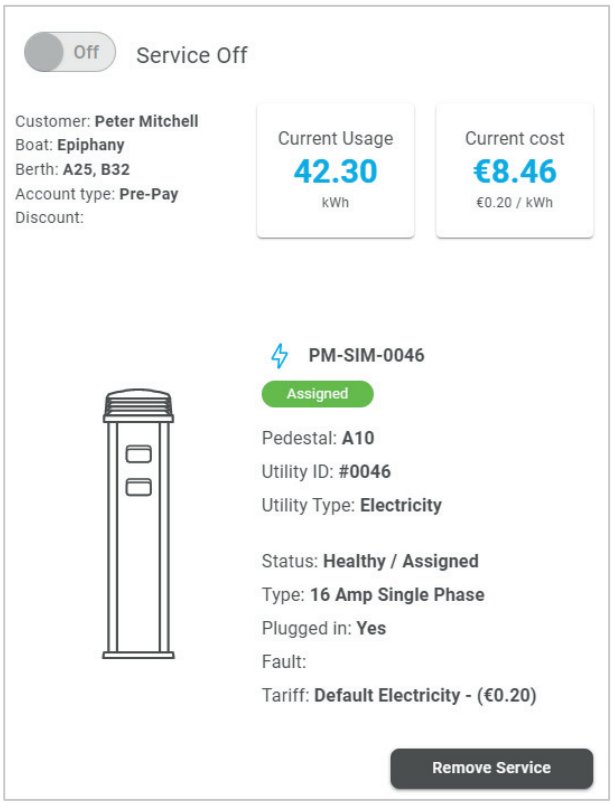


Figure 35 Enable a Service Panel 6

15. When a service is removed, the panel will change to allow the service to be Enabled (associated) with another customer.
16. Enter an existing customer name or **Add new** customer.
17. Move the slider to select whether the service will be assigned immediately or will be assigned at a later point in time.
    - The default setting is for the service to be assigned immediately.
    - If the service will be assigned later, set the date and time when the service will start.

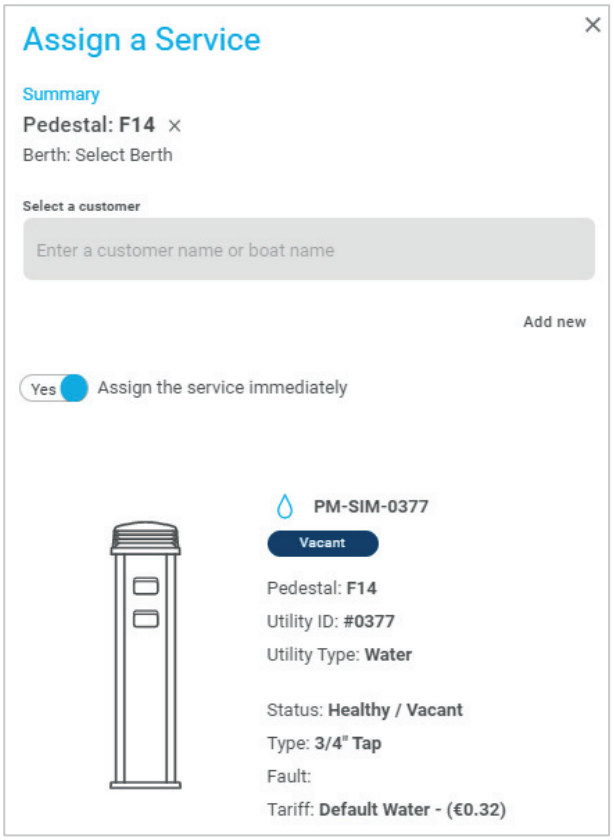


Figure 36 Assign a Service Panel

If the service is assigned to become active at a later point in time, an entry will be displayed on the **Upcoming Services** screen and will be displayed on the dashboard on the **Service Reservations** button.

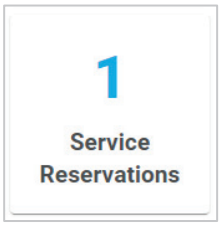


Figure 37 Upcoming Services

The number shown on the Service Reservations button indicates the number of services that have been reserved but not yet started.

If required, the utility can be assigned to a different customer or boat up to the moment the reservation is due. At this point the utility is automatically assigned to the customer on the reservation.

Assigned Services

All of the services currently assigned and 'active', are listed in the Assigned Services table.

1. From the Dashboard, click on the **Assigned Services** text.
2. The Assigned Services screen will be displayed showing a table of all services that are assigned and active.
   - Services that are reserved for assignment but are not yet active are NOT shown. These reserved but inactive services are shown on the **Upcoming Services** screen.

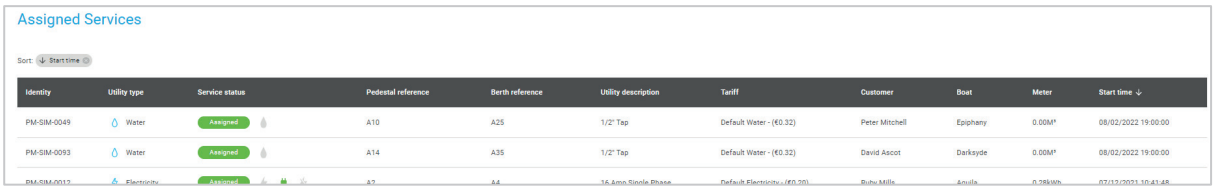


Figure 38 Assigned Services Table

The table shows details about the service, the tariff, who it is assigned to, and the start time, etc.

The Service status column shows a green **Assigned** indication.

3. To cancel an assigned service, click on the row in the table. A slide-out panel will be displayed.
4. Check the details shown on the slide-out panel to make sure you still want to cancel the assignment.
5. If you still wish to cancel the assignment, click on the **Remove Service** button shown at the bottom of the slide-out panel.
6. If required, the Service may now be assigned on the **Enable a Service** screen.

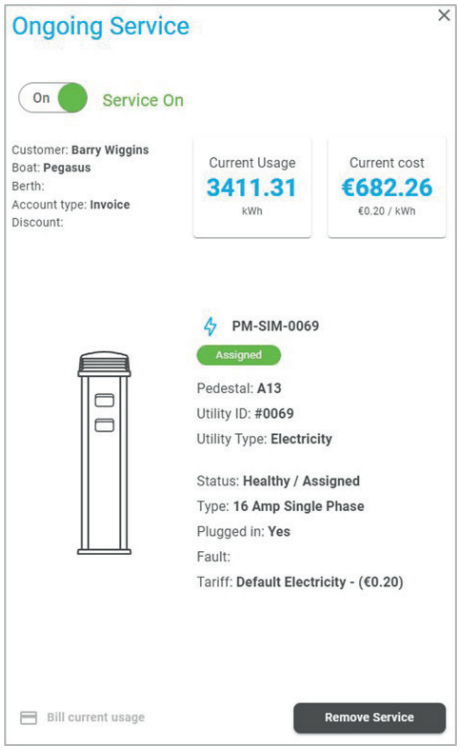


Figure 39 Remove an Assigned Service

Periodic Billing

The marina (you) may start a service against a customer and you could intend to leave that service with that customer for a prolonged period of time e.g. the whole year. During this time, you may wish to bill the customer for their current usage but don't wish to remove and re-assign the service to do so.

Applying **Bill current usage** will calculate the current bill for a customer (minus anything they have already been billed for on this session).

1. From the Dashboard, click on the Assigned Services text.
2. The Assigned Services screen will be displayed showing a table of all services that are assigned and active.
3. Select the correct/required customer and service to which the billing is to be applied. A slide-out panel will be displayed showing the details of the customer and the service.
4. At the bottom of the panel, click the text button Bill current usage.

   A pop-up message will be displayed.
5. Confirm the message to run the billing process.

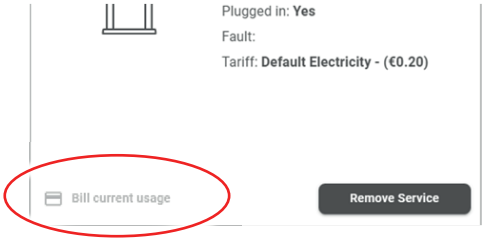


Figure 40 Bill Current Usage

The process takes around a minute, and when complete, the totals for Usage and Cost will be refreshed and reset to zero, from which point the totals will start to accrue again.

> **NOTE:** If the rate of usage and/or the tariff is very high, totals may accrue while the process is running. In this instance, the totals shown may (as shown opposite) not be zero.

The current billed usage can be viewed in the **Usage**, **Transaction** and **Revenue** reports but the customer will NOT be automatically invoiced.

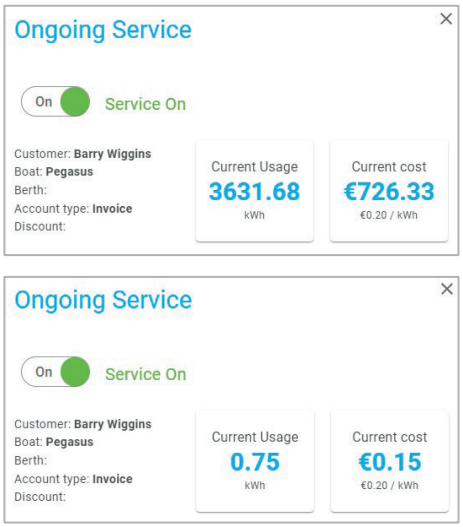


Figure 41 Before and After Periodic Billing

Periodic billing can be applied manually on an individual basis as described on the previous page, but it can also be performed automatically for all customers by enabling it from the Marina Profile screen.

Refer to **Automate Periodic Billing** for further details.

> **NOTE:** All billing uses the tariff that was assigned at the point the service started. If the tariff must be changed, the service must be removed and then reassigned.
>
> Refer to **Manage Tariffs** for further details.

Upcoming Services

Services that have been reserved for assignment but not yet started are automatically entered into the Upcoming Services table.

The start time is determined at the point the entry was made into the system.

1. From the Dashboard, click on the **Service Reservations** button or on the **Upcoming Services** text.
2. The Upcoming Services screen will be displayed showing a table of all services that are assigned to start at a future date and/or time
   - Services that are assigned as 'active' are NOT shown. These assigned, active services are shown on the **Assigned Services** screen.

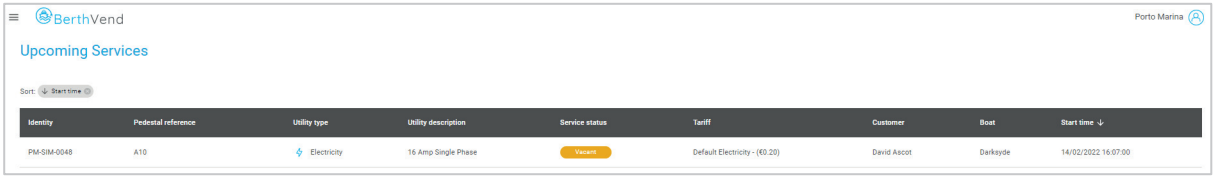


Figure 42 Upcoming Service Table

The table shows details about the service, the tariff, who it is assigned to, and the start time, etc.

The Service status column shows an orange/yellow **Vacant** indication.

3. To cancel an assigned service from starting at the time that has been set, click on the row in the table. A slide-out panel will be displayed.
4. Check the details shown on the slide-out panel to make sure you still want to cancel the assignment.
5. If you still wish to cancel the assignment, click on the Remove Service button shown at the bottom of the slide-out panel.
6. If required, the Service may now be assigned on the **Enable a Service** screen.

Figure 43 Remove an Upcoming Service

Manage

Manage Tariffs

The Manage Tariffs screen displays a Tariffs table and a Discount Groups table.

Both tables enable new entries to be made or existing entries to be edited or deleted.

1. From the Dashboard, click on the **Manage Tariffs** text.
2. The Manage Tariffs screen will be displayed.

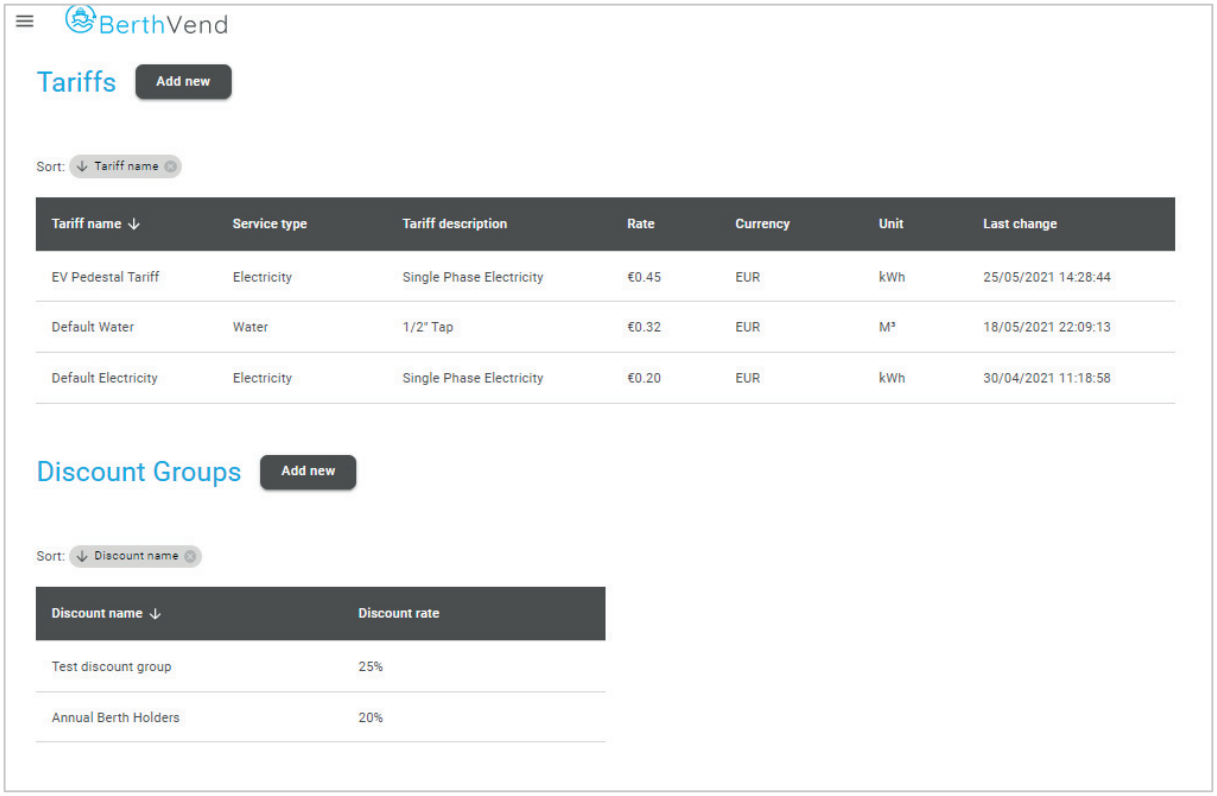


Figure 44 Manage Tariffs

Add a New Tariff

1. In the Tariffs area of the screen, click on the **Add New** button.
2. A slide-out panel will be displayed to enable tariff details to be entered.

Figure 45 Add New Tariff

3. Enter the details of the new tariff.
   - Tariff Name
   - Description (for example 'Single Phase Electricity', or '1/2 inch Tap').
   - Select Electricity or Water from the drop-down list.
   - Enter the rate to be paid for the service.
   - Select the appropriate units for the service type from the drop-down list.
4. When all entries are complete, click on the **Add** button shown at the bottom of the panel to enter the new tariff into the system.

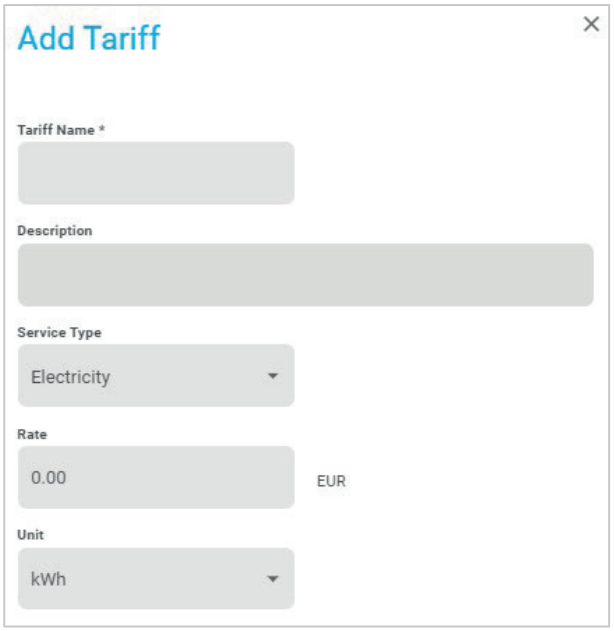


Figure 46 Enter Tariff Details

NOTES: When adding a new Tariff, it must be assigned to a Service Type which is selected from the options available on the screen. It is possible to selectively assign different Tariffs on the Utilities Overview screen. Refer to **Manage Utilities**.

The currency is set by the Back-Office provider during the initial configuration of the system and cannot be changed by the user. If the currency needs to be changed, contact the Back-Office provider.

Edit an Existing Tariff

1. Choose the tariff to be edited.
2. Click on the row in Tariffs table for the chosen tariff.

   The Edit Tariff form will be displayed in a slide-out panel.
3. Amend the details shown for the tariff as required.

If required, there is the option to apply the currently displayed Rate to all Service Types of the same name.

4. Click on the **Apply to all** button. The system will request confirmation of the change before it is applied.
5. When the amendments are complete, click on the **Save & Close** button shown at the bottom of the panel.

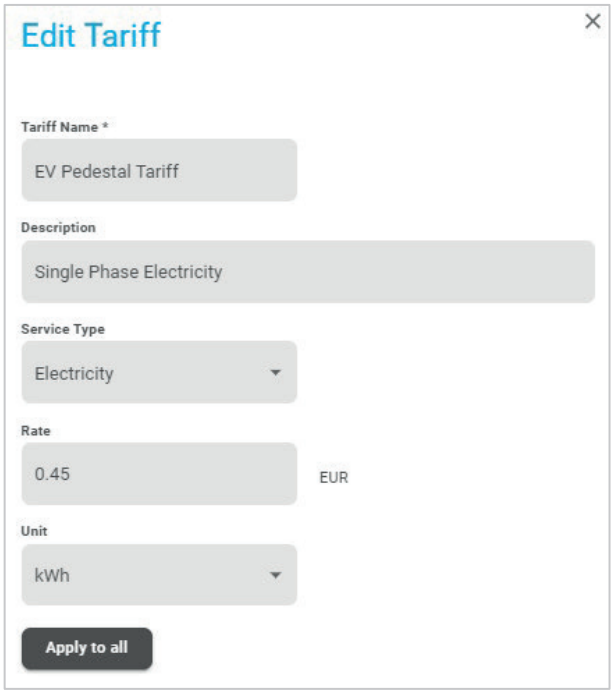


Figure 47 Edit a Tariff

NOTE: Changes to the Tariff are applied immediately and can seen on the Utilities Overview screen.

- Changes to the Rate are only applied from that point forward.
- Any ongoing services will continue to receive the tariff applicable at the time the service was assigned or reserved. New tariffs will be applied on any new services.

Delete a Tariff

If a Tariff is no longer required, it can be removed from the system.

1. In the Tariffs area of the screen, click on the row of Tariff that is to be removed.

   The Edit Tariff slide-out panel will be displayed.

   Make sure the panel shows the details of the Tariff you wish to delete.

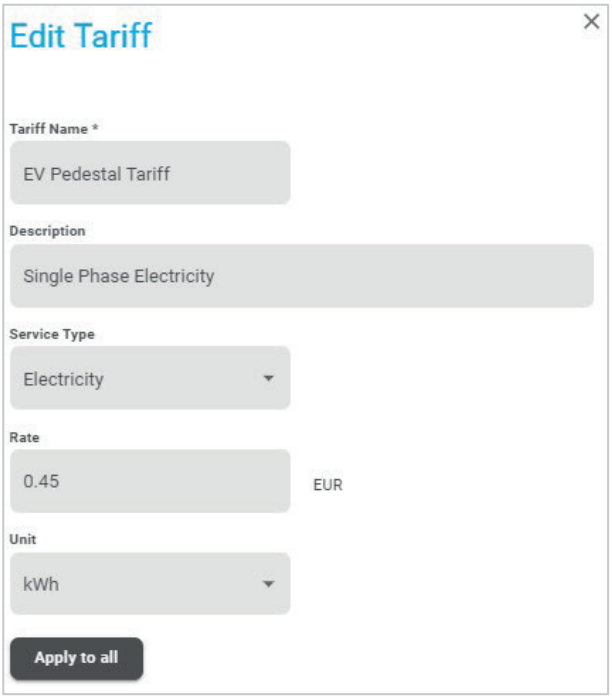


Figure 48 Edit Tariff Panel (Top)

2. Click on the **Delete** (Delete) icon shown at the bottom of the Edit Tariff slide-out panel.

   A confirmation message will be displayed.

Figure 49 Edit Tariff Panel (Bottom)

3. If you are sure the Tariff can be deleted, click on the Delete button and the Tariff will be removed from the system.

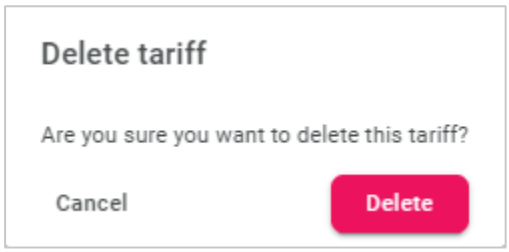


Figure 50 Delete Confirmation Message

NOTE: Deletion of a Tariff does not stop the use of the tariff if it is already applied to services. Deletion of the Tariff prevents that Tariff being a selectable option when assigning the Tariff to be used on the **Utilities** screen.

Add a Discount Group

Discount Groups enable % reductions to be applied to selected customers on standard tariffs.

Once a discount group has been created, it can be applied to new or existing customers on the **Customers** Screen.

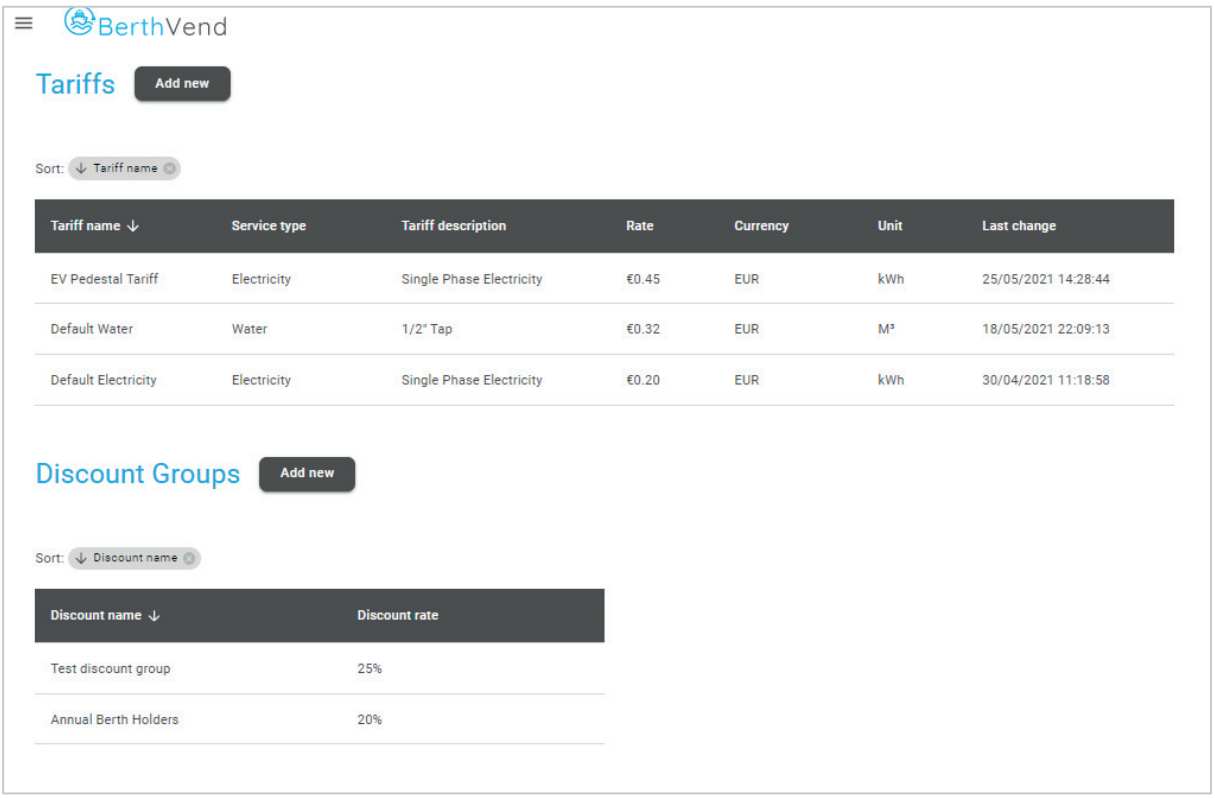


Figure 51 Add a Discount Group

1. In the Discount Groups area of the screen, click on the **Add New** button.

Figure 52 Add New Tariff

2. A slide-out panel will be displayed to enable discount group details to be entered.
3. Enter the details of the new discount group.
   - Discount Group Name
   - Discount Rate %.
4. When all entries are complete, click on the **Add** button shown at the bottom of the panel to enter the new discount group into the system.

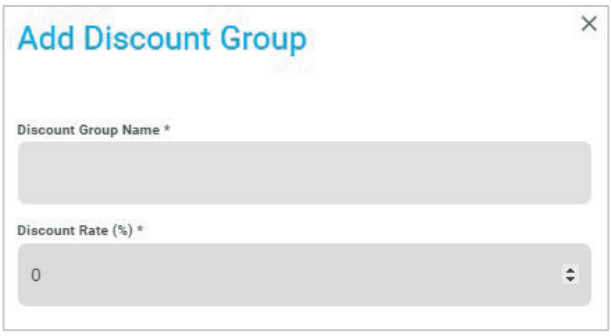


Figure 53 Enter Discount Details

Edit a Discount Group

1. In the Discount Groups area of the screen, click on the row of the Discount Group that is to be edited.

   The details of the selected Discount Group will be displayed in a slide-out panel.

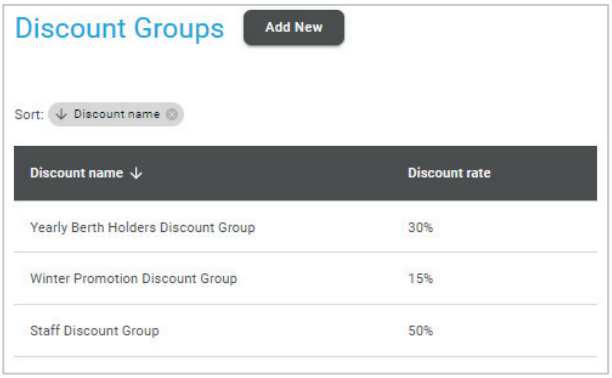


Figure 54 Edit Discount Group 1

In this example, the Winter Promotion Discount Group has been selected.

The Discount Group Name and/or the Discount Rate (%) can be edited.

2. Click in the field to be edited and enter the new name or % rate as appropriate.

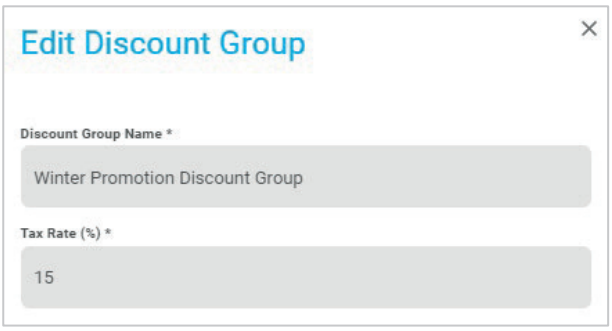


Figure 55 Edit Discount Group 2

3. When all entries are complete, click on the **Update** button shown at the bottom of the panel to enter the changes into the system.

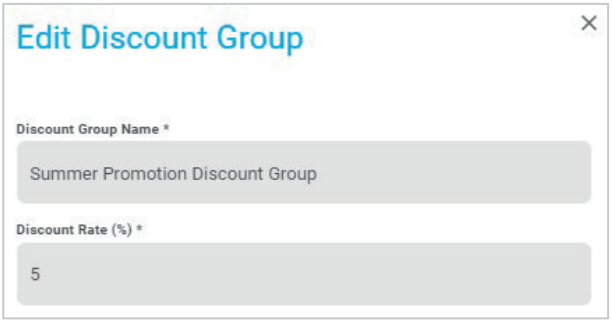


Figure 56 Edit Discount Group 3

NOTE: Any customers who have the previous Discount Group currently applied to their account will automatically have the renamed discount group or new % applied to their account.

- The new rate is only applied to fees from the date it is applied.
- Any ongoing services will continue to receive the rate that was applicable at the time the service started. This will continue until the service is stopped. At this point the new rate will, if applicable, be applied when the service is next started.

Delete a Discount Group

If a Discount Group is no longer required, it can be removed from the system.

1. In the Discount Groups area of the screen, click on the row of Discount Group that is to be removed.

   The Edit Discount Group slide-out panel will be displayed.

2. Make sure the panel shows the details of the Discount Group you wish to delete.

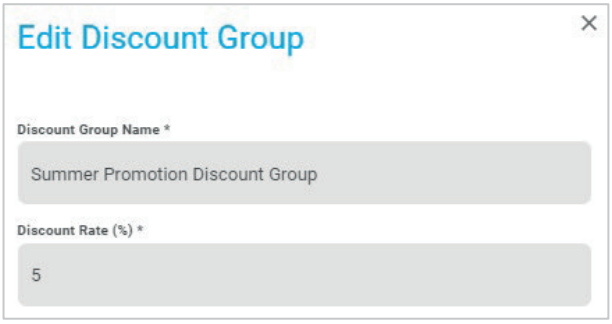


Figure 57 Edit Discount Group Panel (Top)

3. Click on the **Delete** (Delete) icon shown at the bottom of the Edit Discount Group slide-out panel.

   A confirmation message will be displayed.

Figure 58 Edit Discount Group Panel (Bottom)

4. If you are sure the Discount Group can be deleted, click on the Delete button and the Discount Group will be removed from the system.

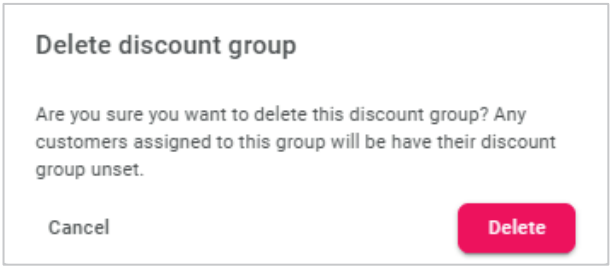


Figure 59 Delete Confirmation Message

NOTE: Deletion of a Discount Group removes the discount from any customers to who the discount was applied.

- This does not affect any services that are not related to the discount.
- Any ongoing services will continue to receive the discount that was applicable at the time the service started. This will continue until the service is stopped. At this point the discount will cease to be applied.

Marina Profile

The Marina Profile is where details about the Marina are entered and stored.

- Marina logo image.
- Technical Contact details.
- Accounts Contact details.
- General Settings.
  - Company name.
  - VAT / Tax Number.
  - Address.
  - Email.
  - Phone Number.
- Bank & Payment Details.
  - Account Name.
  - Account / IBAN Number.
  - Sort / SWIFT or BIC Code.
  - Small Balance Write Off and Amount.
- Tax Rates.

1. Click on the **Manage Profile** text on the Dashboard screen to display the Profile screen.

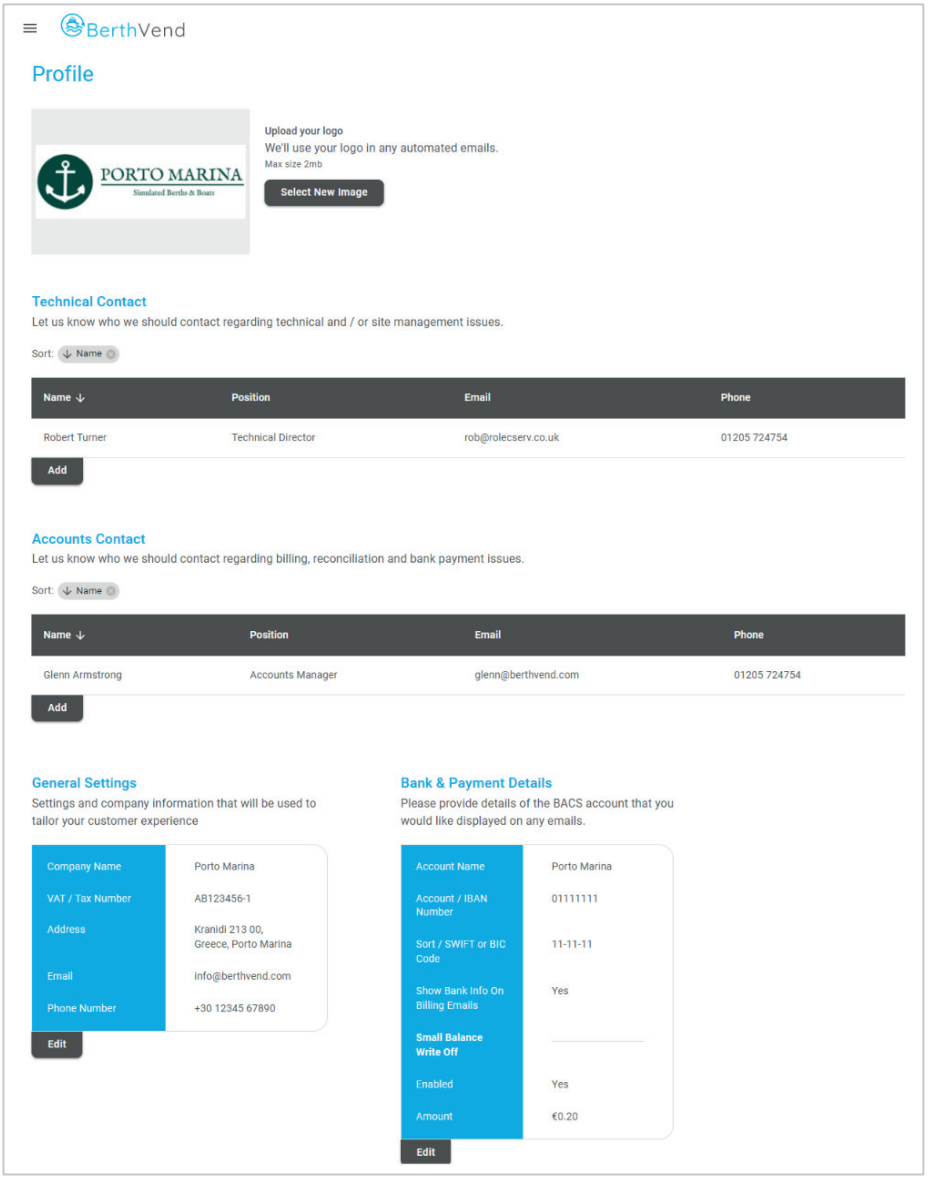


Figure 60 Profile Screen

Add a Logo

The company/marina logos is used when sending emails from the BerthVend system to customers. A logo is not mandatory but there will be a blank area in the message if a logo is not used.

Logo images should meet the following specifications:

- **Dimensions** = Not applicable, the software will automatically scale the image whilst maintaining the aspect ratio.
- **File size** = 2 MB maximum.
- **File formats** = JPG or PNG.

1. On the Profile screen, click on the **Select New Image** button.

   A File Explorer window will open on the host computer.

2. Using the file explorer, navigate to where the logo is stored.

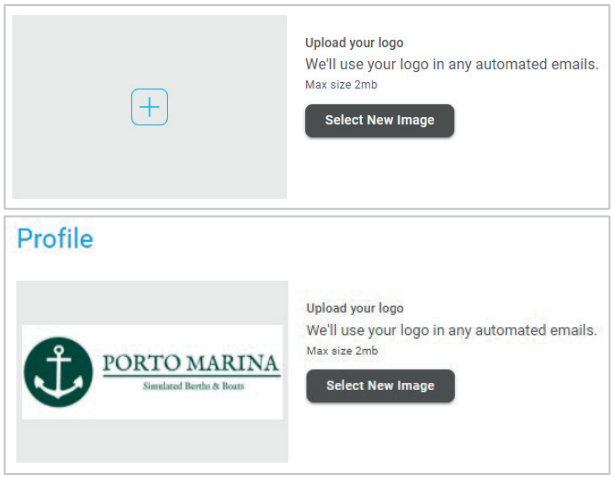


Figure 61 Upload Logo

3. Select the image file to be used then click on the Open button to upload the image to the BerthVend system.
   - Alternatively, the image file can be dragged and dropped into the light grey area of the screen showing the ⊞ icon where the image will be displayed.

   Once uploaded the image should be displayed on the Profile screen.

4. If the image does not display correctly or a different image is required, repeat the steps above to upload the required logo.
5. It is advised to create a 'TEST' customer account in the system (refer to **New Customer**). With a test account, you can send an email to your own email address, and you will see how the logo is displayed on the message.

Add a Technical and Accounts Contacts

- The **Technical Contact** is the person on the staff of the Marina who acts as the point of contact with the BerthVend provider for technical problems and management work.
- The **Accounts Contact** is the person on the staff of the Marina who acts as the point of contact with the BerthVend provider for issues regarding billing, reconciliations and bank payments.

The following steps describe adding a Technical Contact but the process is the same when adding an Accounts Contact.

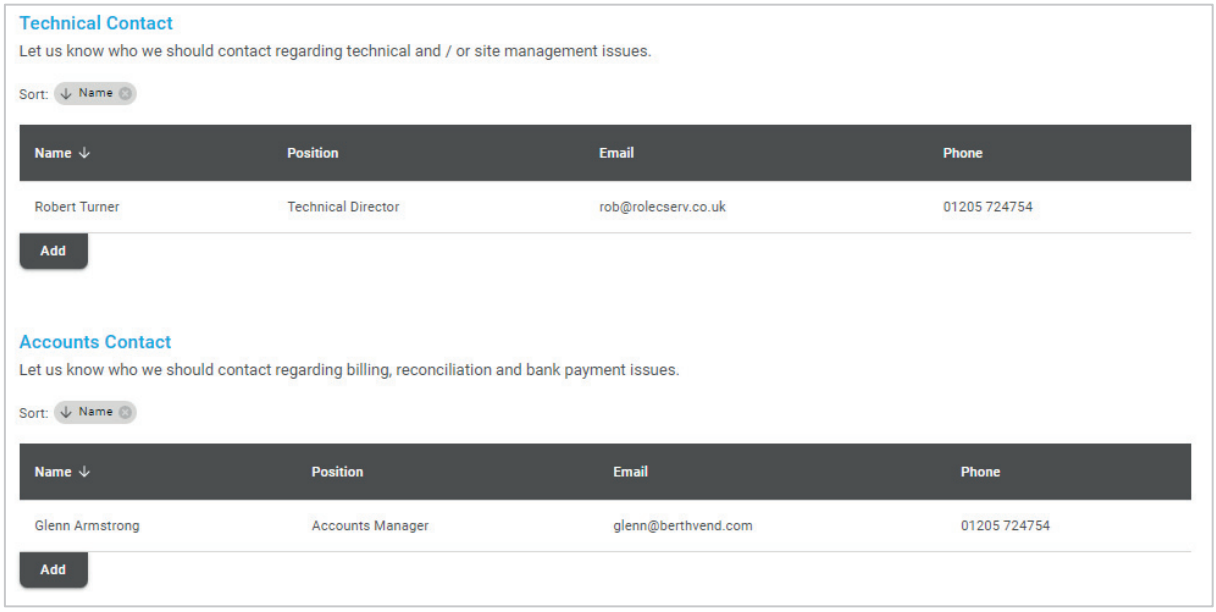


Figure 62 Add Technical and Accounts Contacts

1. On the Profile screen, move to the Technical Contact area then to click on the **Add** button.

   A slide-out panel will be displayed allowing the entry of the contact details.

2. Enter the Name, Position, Email Address and Phone number of the contact person.

3. When all entries have been made, click on the **Save & Close** button at the bottom of the panel.

   The contact details will be entered into the table.

Figure 63 Add a Contact

NOTE: If required, multiple contacts can be added to both the Technical Contact and Accounts Contact tables.

Edit or Delete a Technical or Accounts Contacts

1. Click on the row showing the name of the contact to be edited or deleted
   - The **Edit** slide-out panel will be displayed.

To edit the contact details:

2. Click in the fields to be changed and edit the characters as required.
3. When all changes are complete, click on the **Save and Close** button shown at the bottom of the panel.
   - The slide-out panel will close and the amended details will be shown on the main screen.

To delete the contact details:

2. Click on the **Delete** (Delete) icon shown at the bottom of the panel.
   - A Delete contact confirmation message will be displayed.
3. If you are sure the contact is to be deleted, click on the **Delete** button.
   - The contact will be removed from the system and the main screen will be displayed with the deleted contact no longer shown.

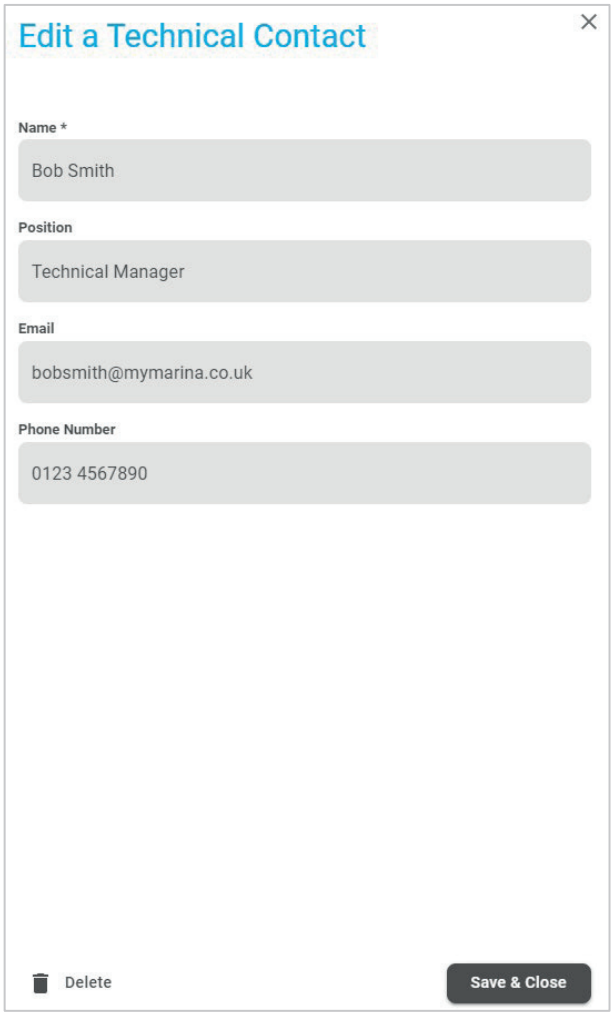


Figure 64 Edit a Contact Panel

General Settings

1. On the Profile screen, move to the General Settings area.

   When the system is used for the first time, the fields may be completely empty (sometimes the Company Name will already be entered by the BerthVend provider).
2. Click on the **Edit** button.
3. The General Settings will be displayed in a slide-out panel.
4. Enter the details required into the blank fields.
5. When all entries are complete, click on the **Save and Close** button shown at the bottom of the panel.

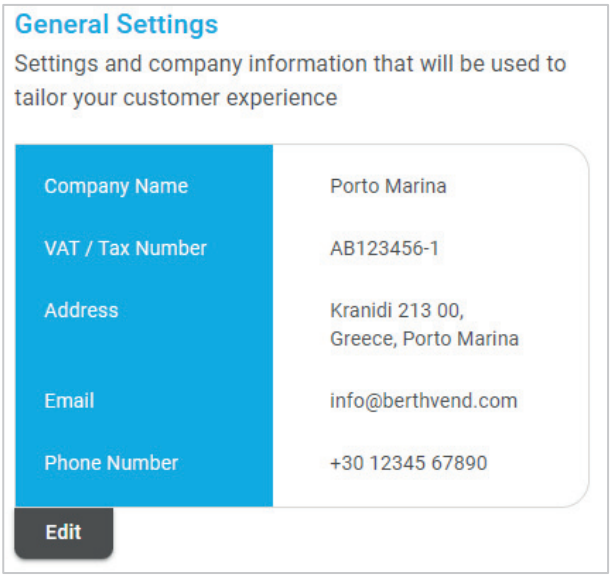


Figure 65 General Settings

6. If changes are required, click on the **Edit** button.
7. Edit the details in the fields as required.
8. When all edited fields are complete, click on the **Save and Close** button shown at the bottom of the panel.

The Edit General Settings panel has additional setting that can be configured.

Default Customer Settings:

- **Breaker trip** – When set to **YES**, the customer will be alerted if the pedestal breaker 'trips'.
- **Cable disconnect** – When set to **YES**, the customer will be alerted if a power cable is removed from a pedestal while power is being delivered to the boat.

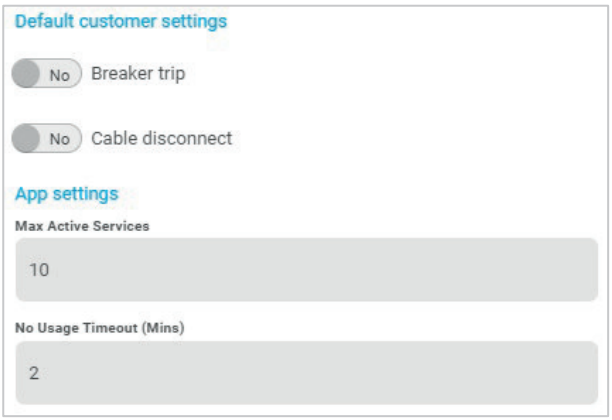


Figure 66 Default Customer Settings

App Settings:

- **Max Active Services** – This is the maximum number of concurrent assigned services a user of the BerthVend app can assign to themselves for this marina.
- **No Usage Timeout (Mins)** – *This is the number of minutes the system will wait, following no usage of that utility being detected, until it terminates that service for a service assigned by a BerthVend app user.*

Bank & Payment Details

1. On the Profile screen, move to the General Settings area.

   When the system is used for the first time, the fields may be completely empty.
2. Click on the **Edit** button.
   - The Bank and Payment Details will be displayed in a slide-out panel.
3. Enter the details required into the blank fields.
4. When all entries are complete, click on the **Save and Close** button shown at the bottom of the panel.
5. If changes are required, click on the **Edit** button.
6. Edit the details in the fields as required.
7. When all edited fields are complete, click on the **Save and Close** button shown at the bottom of the panel.

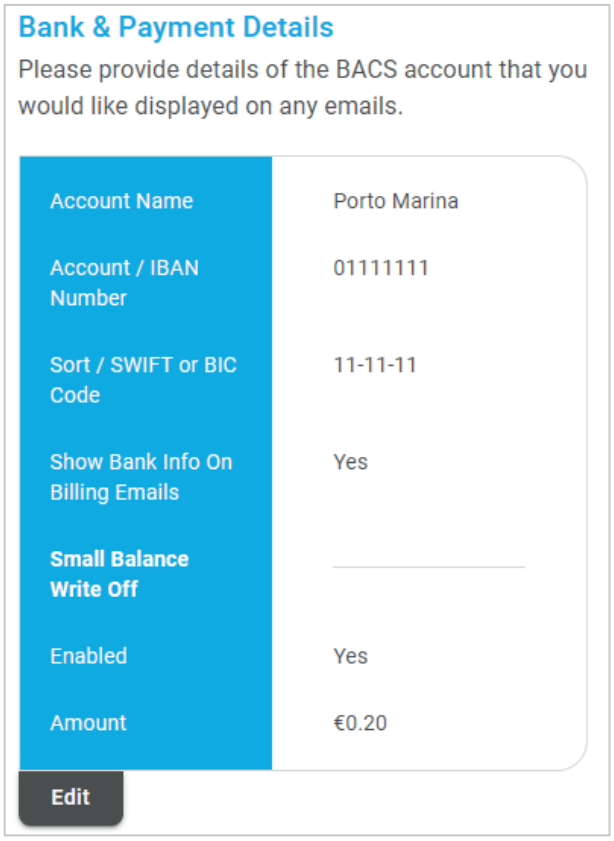


Figure 67 Bank & Payment Details

When the Edit details are displayed there are additional settings that can be made which are not shown in the normal Bank and Payment Details panel.

Small Balance Write Off

The section in the lower half of the form is provided to enable or disable 'small balance write off'. This is money owed to the marina that it may not be worth or practical to collect.

If enabled, (and an account balance goes into debit which is below or up to this amount), the system will automatically write off this balance back to 0 and add a transaction to the account to show it has been written off.

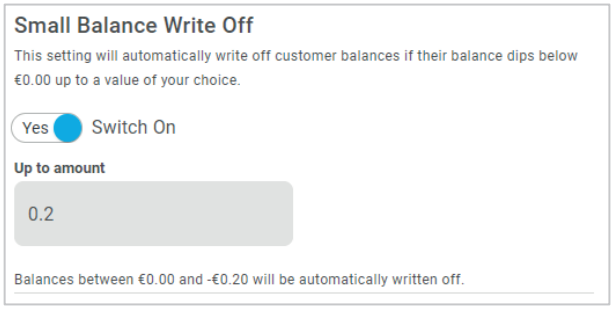


Figure 68 Small Balance Write Off

Automate Periodic Billing

The marina (you) may start a service against a customer and you could intend to leave that service with that customer for a prolonged period of time e.g. the whole year. During this time, you may wish to bill the customer for their current usage but don't wish to remove and re-assign the service to do so.

Applying **Bill current usage** will calculate the current bill for a customer (minus anything they have already been billed for on this session).

There are two area in the software that use this functionality.

The feature can manually be applied for selected services from the live service slide-out panel for the utility in question.

At the bottom of the panel there is the option to **Bill current usagae**.

Once applied, the services will then show the live, unbilled total for the service and not the total of the whole session.

Refer to **Periodic Billing** for further details.

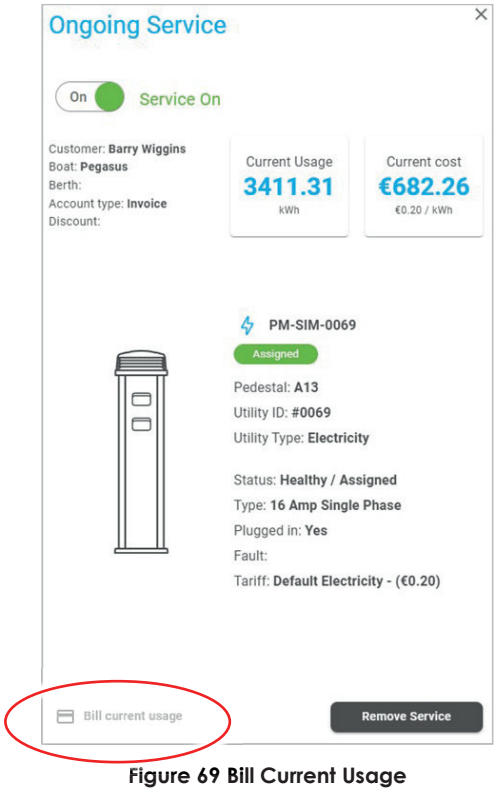


Figure 69 Bill Current Usage

Coming back to the **Edit** panel for **Bank & Payment Details**, there is the option to automate the billing of current usage.

This feature can be turned on or off using the switch shown opposite.

Once enabled, the Billing Interval and the Billing Day can be selected, and from that point the the current usage for all services will be billed at 23:45 (Europe/London time) on the day selected.

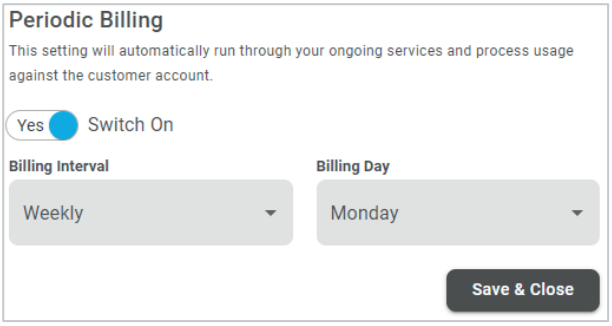


Figure 70 Periodic Billing

The current billed usage for customers can be viewed in the **Usage**, **Transaction** and **Revenue** reports but the customer(s) will NOT be automatically invoiced.

Tax Rates

If applicable to your business and/or your location, tax may be applied to the services you provide. These can be added in the Tax Rates panel.

The default rate is the standard rate of tax applied to products and services.

If required, an additional tax amount can be added for water and/or electricity.

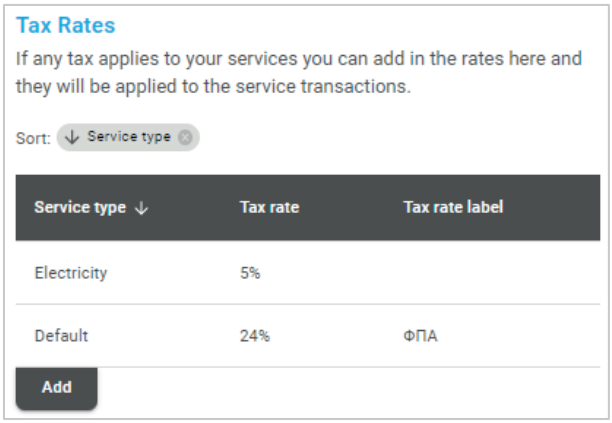


Figure 71 Tax Rates

To add a tax:

1. On the Profile screen, move to the Tax Rates area then to click on the **Add** button.

   A slide-out panel will be displayed allowing the Tax Rate details to be entered.

2. Select the Electricity or Water Service Type.
3. Enter a figure for the Tax Rate % that will be applied to the bills.
4. If required, add a label.
   - This label is what will be shown on the email receipts sent to customers e.g. VAT which is worth noting. Otherwise, no label will be shown

Figure 72 Add a Tax Rate

5. When all entries have been made, click on the **Add** button at the bottom of the panel.

NOTE: Once a service type has been added and saved, the service type cannot be changed or removed and will always be applied to the bills. However, if the rate of tax changes or the tax Is removed by the government, the Tax Rat % applied can be edited to the new tax rate or even 0%.

To edit a tax rate:

6. Click on the row of the rate to be edited.

   A slide-out panel will be displayed allowing the Tax Rate details to be edited.

7. When all entries have been edited as required, click on the **Update** button at the bottom of the panel.

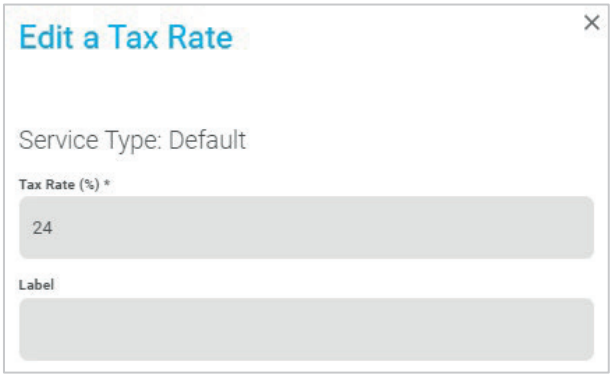


Figure 73 Edit a Tax Rate

Manage Utilities

The Utilities Overview screen displays a table of the utilities available at the marina and lists:

- Identity
- Utility type
- Utility description
- Service status
- Network status
- Pedestal reference
- Tariff

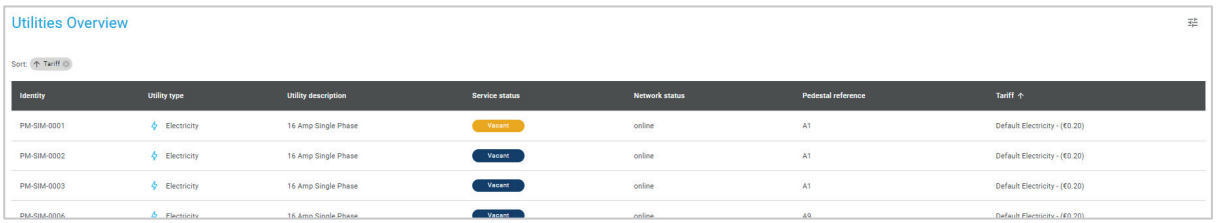


Figure 74 Utilities Overview Screen

1. From the Dashboard, click on the Manage Utilities text.

   The Utilities Overview screen will be displayed.

2. Click on one of the rows in the table.

   Details about the selected Utility will be displayed in a slide-out panel.

A dropdown list near the bottom of the panel shows the Tariff currently applied to the utility. If alternative Tariffs are available within the system, they can be selected and applied to the utility.

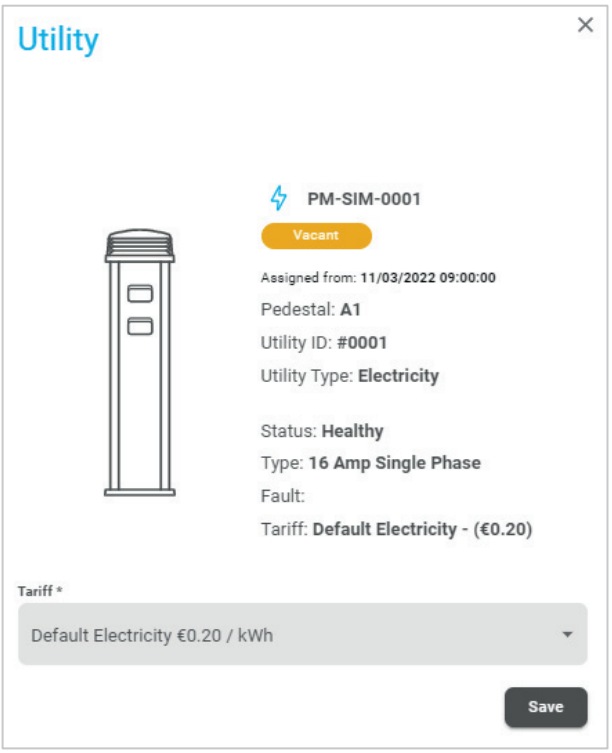


Figure 75 Utility Details

3. Click on the Tariffs dropdown list and select the Tariff to be applied.
4. Click on the **Save** button to confirm the change.

   The change of Tariff will now be shown in the Utilities Overview table.

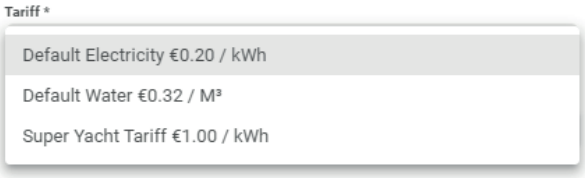


Figure 76 Select a Tariff

NOTE: Tariffs can be created on the **Manage Tarrifs** screen.

Admin

Change Password

1. On the Dashboard, click on the **Change Password** text.
2. The change password form will be displayed on a slide-out panel.
3. Enter the new password into the New Password field.
4. Repeat the entry of the new password into the Confirm Password field.

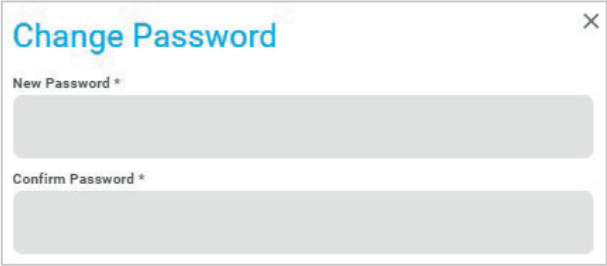


Figure 77 Change Password

NOTE: Passwords must contain 8 or more characters and are case sensitive.

Forgotten Passwords

A password reset can be requested from the login screen.

1. Click on the **Reset** text shown above the Sign in button.
2. The Reset Password form will be displayed in the place of the login form.
3. Enter the email address registered with the BerthVend provider.
4. Click on the Reset Password button.
   - An email containing a 'Reset Password Link' will be sent to the email address.
5. Click on the link in the email then follow the instruction displayed on screen to reset the password.

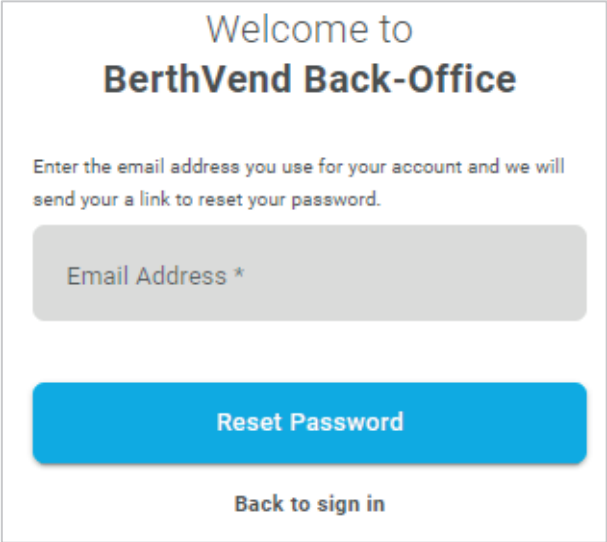


Figure 78 Reset Password

NOTE: If the email address used for the reset password request is not recognised by the system, a temporary password will not be sent.

Sign Out

1. On the Dashboard, click on the **Sign out** text.
2. The BerthVend system will instantly return to the Sign in screen. Any screens/form displayed at the point of sign out will return to their default state and will not be saved.

Customers

New Customer

1. On the Dashboard, click on the **Add a Customer** button or on the **New Customer** text.
2. A form will be displayed in a slide-out panel, allowing the entry of the customer's details and information about fees/payments.

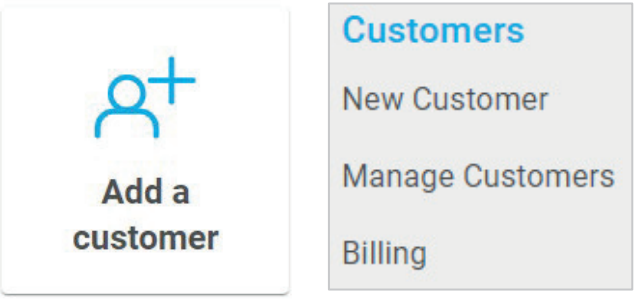


Figure 79 Add a New Customer

NOTE: The form can also be accessed from the Customers screen.

Items marked with an asterisk * are mandatory and must be completed.

In the upper section of the form:

3. Enter a **customer reference** this should be a unique to that customer and will usually be part of a system used by the marina to identify all of its customers.
4. Enter the customer's **Name**, **Email address** and **Phone number**.
5. Enter the **Boat Name**.

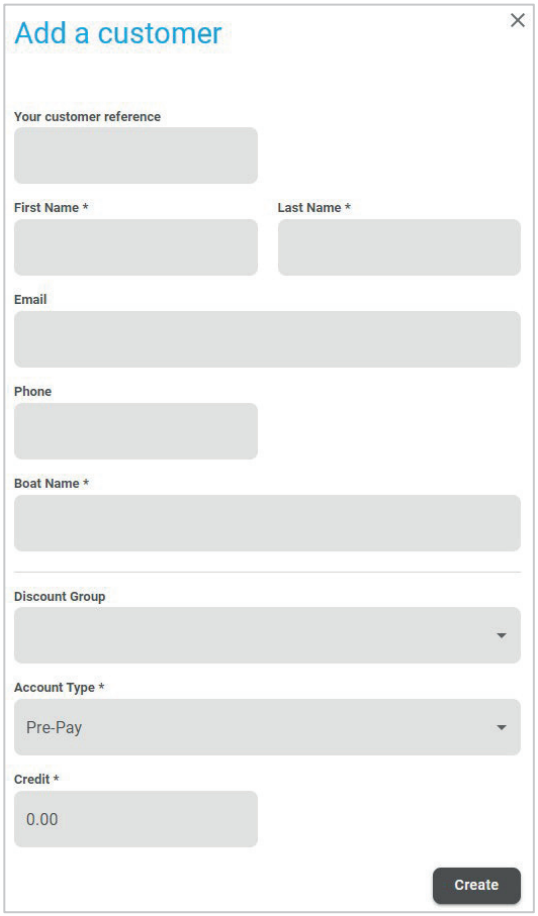


Figure 80 Add a New Customer Form

6. In the lower section of the form:
7. Select a Discount Group to be applied (if required).

NOTE: Discount Groups can be set up or edited on the Tariffs screen and are a percentage reduction of the full rate. For further details see: **Add a Discount Group**.

8. Select the Account Type.
   - If the Invoice account type option is selected, a Billing Frequency selection will be displayed. Select the appropriate Billing Frequency.
9. Enter the amount of credit that may have already been purchased by the customer or that you wish to apply to the customer's 'account'.

10. When you are satisfied all the customer information is correct, click on the **Create** button. The customer's details will be added to system and displayed in the table on the Manage Customers screen.

Manage Customers

1. On the Dashboard, click on the **Manage Customers** text.
2. The Customers screen will be displayed as a table.
3. Like all tables within the application, columns can be sorted in ascending or descending order.

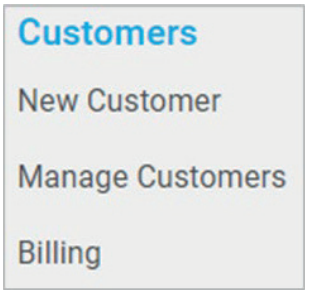
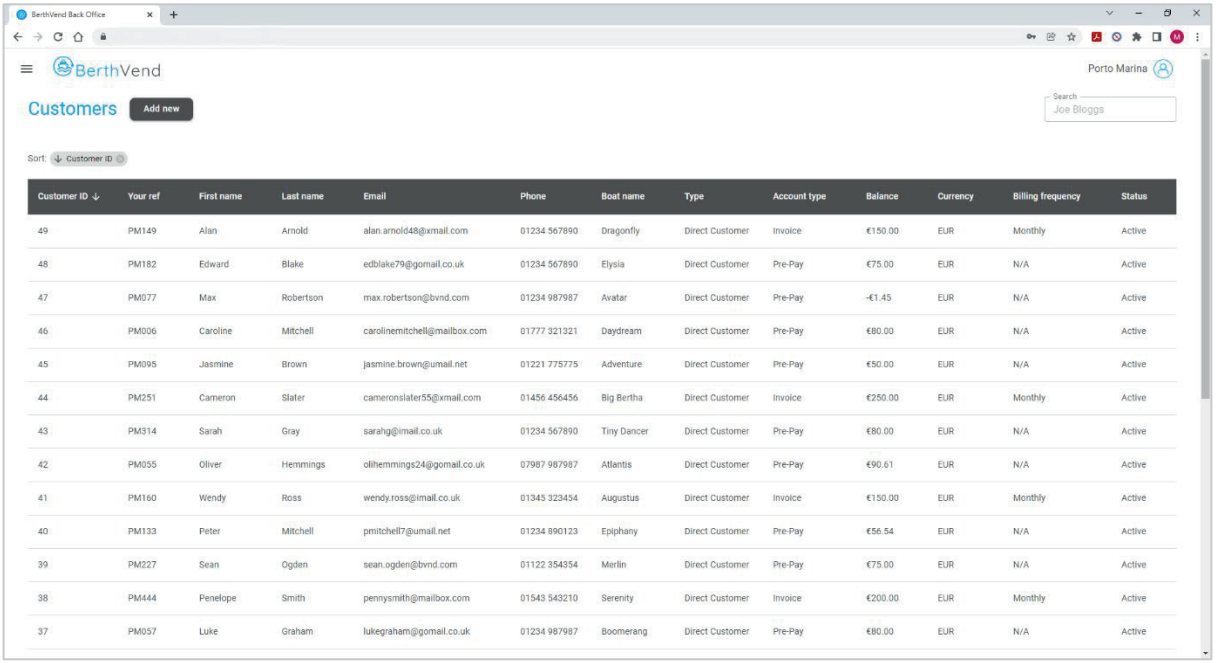


Figure 81 Manage Customers



Customer ID	Your ref	First name	Last name	Email	Phone	Boat name	Type	Account type	Balance	Currency	Billing frequency	Status
49	PM149	Alan	Arnold	alan.arnold48@xmail.com	01234 567890	Dragonfly	Direct Customer	Invoice	€150.00	EUR	Monthly	Active
48	PM182	Edward	Blake	edblake79@gomail.co.uk	01234 567890	Elysia	Direct Customer	Pre-Pay	€75.00	EUR	N/A	Active
47	PM077	Max	Robertson	max.robertson@bvnd.com	01234 987987	Avatar	Direct Customer	Pre-Pay	-€1.45	EUR	N/A	Active
46	PM006	Caroline	Mitchell	carolinemitchell@mailbox.com	01777 321321	Daydream	Direct Customer	Pre-Pay	€80.00	EUR	N/A	Active
45	PM095	Jasmine	Brown	jasmine.brown@umail.net	01221 775775	Adventure	Direct Customer	Pre-Pay	€50.00	EUR	N/A	Active
44	PM251	Cameron	Slater	cameronslater55@xmail.com	01456 456456	Big Bertha	Direct Customer	Invoice	€250.00	EUR	Monthly	Active
43	PM314	Sarah	Gray	sarahg@imail.co.uk	01234 567890	Tiny Dancer	Direct Customer	Pre-Pay	€80.00	EUR	N/A	Active
42	PM055	Oliver	Hemmings	olihemmings24@gomail.co.uk	07987 987987	Atlantis	Direct Customer	Pre-Pay	€90.61	EUR	N/A	Active
41	PM160	Wendy	Ross	wendy.ross@imail.co.uk	01345 323454	Augustus	Direct Customer	Invoice	€150.00	EUR	Monthly	Active
40	PM133	Peter	Mitchell	pmitchell7@umail.net	01234 890123	Epiphany	Direct Customer	Pre-Pay	€56.54	EUR	N/A	Active
39	PM227	Sean	Ogden	sean.ogden@bvnd.com	01122 354354	Merlin	Direct Customer	Pre-Pay	€75.00	EUR	N/A	Active
38	PM444	Penelope	Smith	pennysmith@mailbox.com	01543 543210	Serenity	Direct Customer	Invoice	€200.00	EUR	Monthly	Active
37	PM057	Luke	Graham	lukegraham@gomail.co.uk	01234 987987	Boomerang	Direct Customer	Pre-Pay	€80.00	EUR	N/A	Active

Figure 82 Customers Table Screen

The Customers table provides a view of all customers currently registered within the system and shows details about them, their boat and their account/billing.

The ability to add, edit or remove customers is available on a slide-out panel.

Add a New Customer

1. On the Customers screen, click on the **Add New** button shown next to the screen title.
2. The Add a Customer form will be displayed on a slide-out panel.
3. For further details see: **New Customer**.

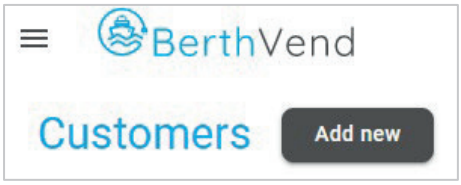


Figure 83 Add a New Customer

Edit or Delete Customer Details

1. On the Customers screen, locate the customer who's details are to be edited.
2. Click on the row occupied by the customer's details.
3. The customer's details will be displayed in a slide-out panel form that is very similar to the Add Customer form.
4. Amend the customer's details as required. Refer to: New Customer for details.
5. When all amendments have been made, click on the **Save & Close** button at the bottom of the panel.
6. To abandon the changes without saving, click the X icon at the top of the panel.
7. This form has additional functionality above that of the Add Customer form.
8. Action Icons

9.
   A. Click on the **Transactions** icon to display a slide-out table showing details of all transactions made against the account.
   - Click on a row within the slide-out table to see additional details about the specific transaction.

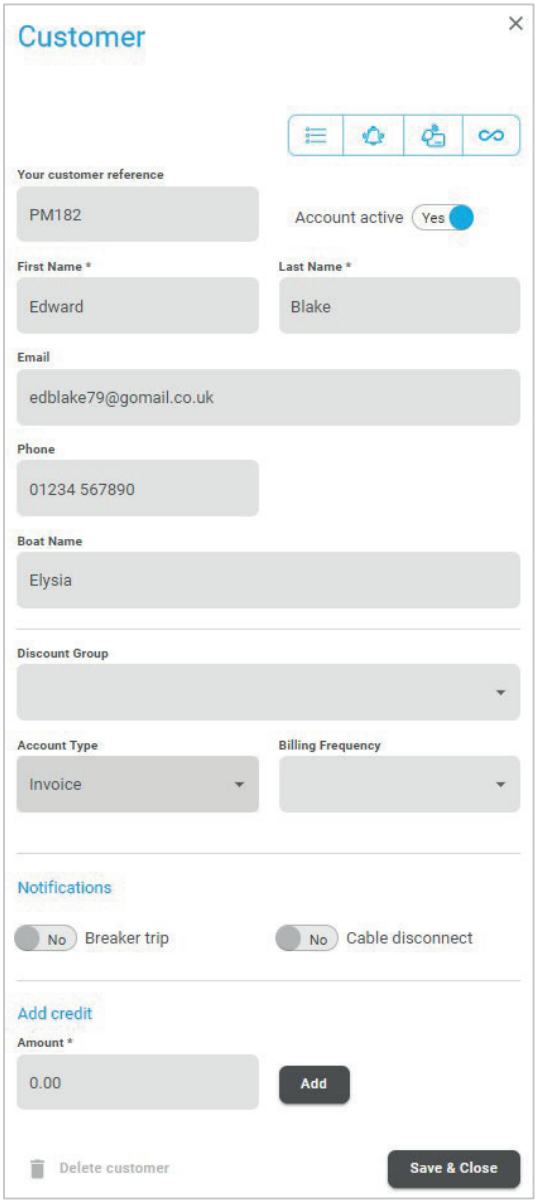


Figure 84 Edit Customer Details

B. Click on the **Logs** icon to display a history of actions related to the selected customer.

C. Click on the **RFID Tag** icon to display a table listing the RFID cards associated with the selected customer.

- If a new RFID card is to be added,
- Click on the **Add new card** button.
- Enter the ID number of the RFID card.
- Click on the **Add** button to save the card to the customer's details.

NOTE: RFID cards can be removed from the customer's details by clicking on the '**X**' icon shown in the **Remove** column of the table. A warning message must first be acknowledged and the card will be removed.

D. Click the **Customer Dock Link** icon to allow customers to manage their own services.

- The Customer Dock information is displayed on a slide-out panel.
- Each invitation to use the self-service area requires a unique code that is emailed to the customer along with the invitation.
- If there is a problem with accessing the self-service area a new code can be generated and sent with a new email.

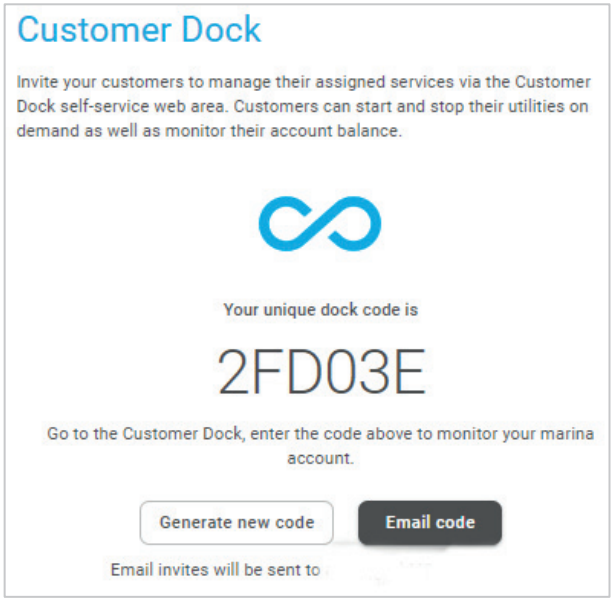
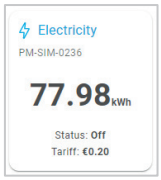
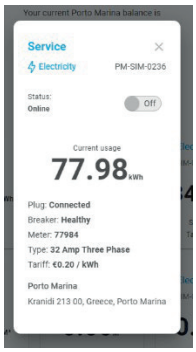


Figure 85 Self-Service Invitation

- The invitation contains a link to the self-service area that can be accessed by web enabled devices.
- The customer logs in using the code and is presented with a view of the cost of services they have used.
- Services can be turned on/off by the customer if they click/tap on the relevant button.



- A pop-up will be displayed to show further details about the service, and a slider switch that allows the service to be turned on/off.



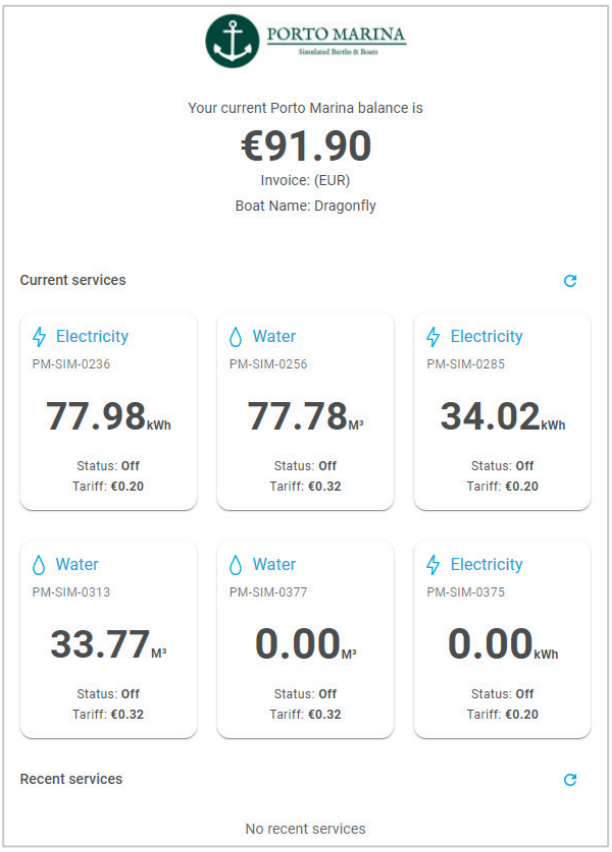


Figure 86 Customer Self Service Screen

10. Account Control
11. Use the slider switch below the Action Icons to turn the customer's account on/off.

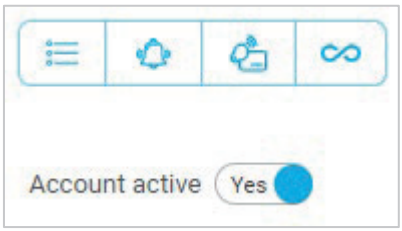


Figure 87 Account Control

12. Notifications Area
13. Use the slider switches to enable or disable notifications in the event of:
    - Breaker Trip.
    - Cable Disconnect.

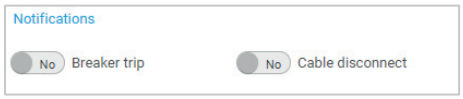


Figure 88 Notifications

14. Add Credit Area
15. Enter a figure into the field for the amount of credit to be added to the customer's account.
16. Click on the **Add** button to enter the figure into the system.

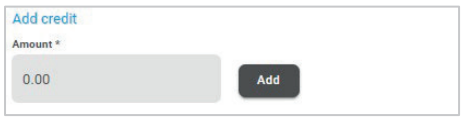


Figure 89 Add Credit 1

17. A message will be displayed showing the customer's current balance and the new balance when the credit is added.
    - There is the option to email the customer with a notification that their credit has changed.
    - If the figures are correct, click on the **Save & Close** button.

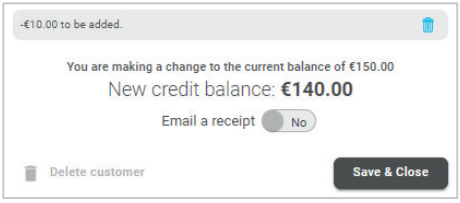


Figure 90 Add Credit 2

NOTE: If the figures are not correct, do not save the change. Amend the figure in the Amount field and Add it again. It will overwrite the original entry and if the figure is now correct it can be saved.
NOTE: If required, negative figures can be entered into the Amount field to reduce the amount of credit available to the customer.

18. Delete Customer
19. If required, a customer's details can be deleted from the system.

The **Delete customer** icon is shown at the bottom of the slide-out panel and will turn RED when the cursor is on it.

Figure 91 Delete Customer

The **Delete customer** icon is shown at the bottom of the slide-out panel and will turn RED when the cursor is on it.

20. Click on the **Delete customer** icon.
    - A warning message pop-up will be displayed.
21. Click on the **Delete** button to confirm the customer is to be deleted.

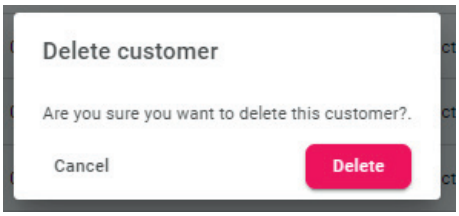


Figure 92 Delete Customer Confirmation

Billing

1. On the Dashboard, click on the **Billing** text.

   The Billing screen will be displayed as a table.

   Like all tables within the application, columns can be sorted in ascending or descending order.

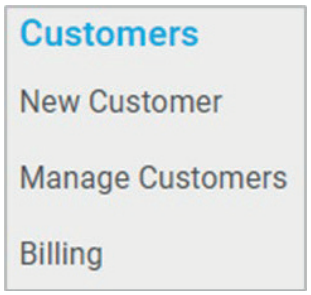


Figure 93 Billing

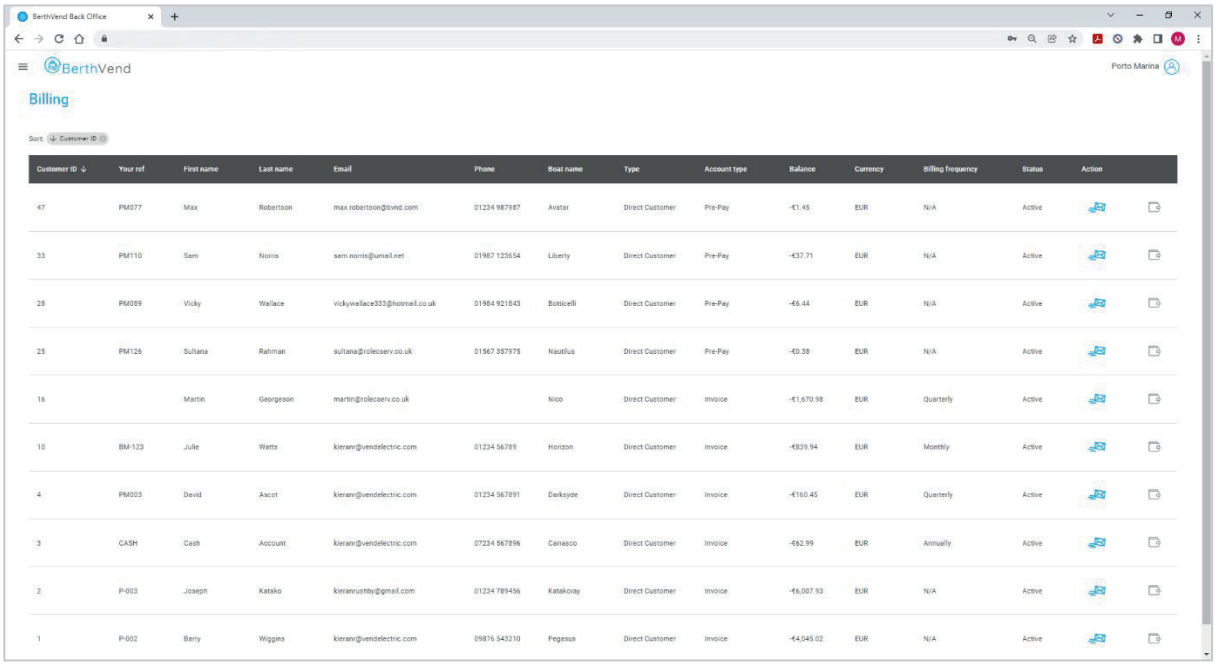


Figure 94 Billing Table Screen

The Billing table provides a view of all customers currently registered within the system whose accounts are in debit.

The table shows details about the customer, their boat, and their account/billing.

In addition, the table provides the ability to send email reminders to the customer about their bill, and the ability to 'clear' the outstanding debit on the customer's account.

Email Billing Reminder

1. Identify the customer who is to be sent a billing reminder.

2. Click on the **Send email reminder** (envelope) icon shown in the Action column for the selected customer.

   A slide-out panel will be displayed showing details about the customer, their boat and the amount of money they owe to the marina.

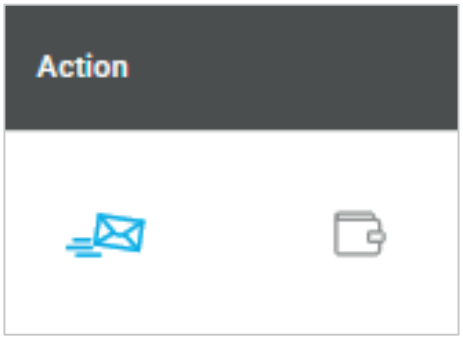


Figure 95 Send Email Reminder

3. View the detail on the slide-out panel. If the details are correct and you still want to send an email to remind this customer about their bill, click on the **Confirm & Send** button shown at the bottom of the slide-out panel.

Figure 96 Customer's Details

   The BerthVend system will now generate and send an email to the customer, similar to the image shown here.

   The BerthVend system logs when the email was sent and next time the customer's details are displayed (Figure 96), the information will also display when the last reminder was sent.

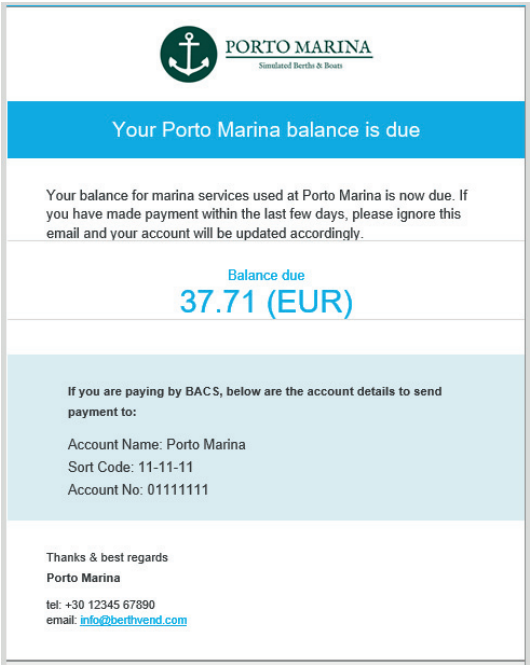


Figure 97 Billing Reminder Email Example

Clear Payment

If a customer who's account is in debit pays their bill (or some of their bill), the amount paid can be removed from what they owe and a new balance (if any) will be calculated.

1. Identify the customer who has paid their bill. Click on the **Clear balance** (wallet) icon shown next to the envelope icon.

   A slide-out panel will be displayed showing details about the customer, their boat and the amount of money they owe to the marina.

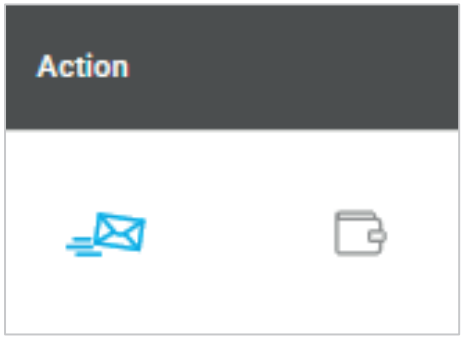


Figure 98 Clear Ballance

2. Make sure the correct customer has been selected.
3. If the full amount has been paid, leave the 'Clear the full amount?' slider switch in the **Yes** position.
4. Enter a reference if required for your records.
5. If an email confirmation of payment is to be sent to the customer, move the 'Email a receipt?' slider switch to the **Yes** position.

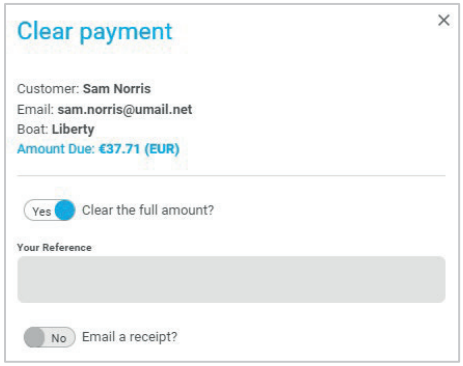


Figure 99 Clear Payment

6. Move to the bottom of the slide-out panel and click on the **Confirm & Send** button.

   The system will process the payment in your records and, with the customer's account no longer in debit, their details will be removed from the Billing table.

NOTE: There is the option to process a **part payment** at step 3 above.

- If only part of the bill has been paid, move the 'Clear the full amount?' slider switch to the NO position.
- A new field will be displayed allowing the total of the part payment to be entered.
- Now, when the payment is processed within the system, it will reduce the bill by the amount of the payment and the customer's details and new debit amount will be displayed in the table.

Reporting

Usage Report

The Usage Report is generated for a defined period of time over a configurable date range and displays an overview of the services used and revenue from those services for the associated owners and their boats.

1. On the Dashboard, click on the **Usage Report** text.

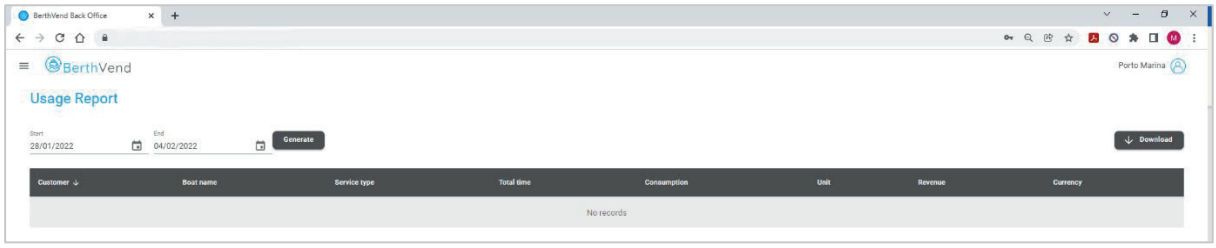


Figure 100 Usage Report 1

When first displayed the table may not show any records.

2. Click on the **Start** date calendar icon.

   A calendar will be displayed in a pop-up.

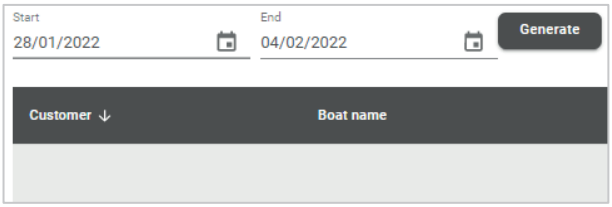


Figure 101 Start Date

3. Use the calendar to select the **Start** date for the report.
4. Click **OK** on the calendar to enter the selected date into the system.
5. If required, select the **End** date for the report.
6. Click on the **Generate** button to display all usage that occurred between the selected dates.

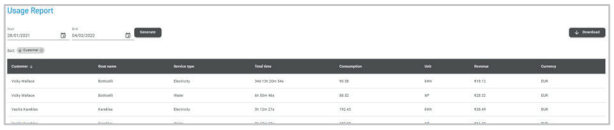


Figure 102 Usage Report 2

If required a CSV file can be downloaded that will display the same data as currently shown on-screen.

7. Click on the **Download** button. The file will be downloaded to the computer's download folder (or wherever has been set to receive downloaded files).
   - The file name will look something like this: usage-1643881033415.csv
   - CSV files can be viewed in spreadsheet software such as Microsoft Excel.

Transaction Report

The Transaction Report is generated for a defined period of time over a configurable date range and displays an overview of the financial transactions and tax applied for the associated owners and their boats.

The report can also filter the results based on the customer's name.

1. On the Dashboard, click on the **Transaction Report** text.

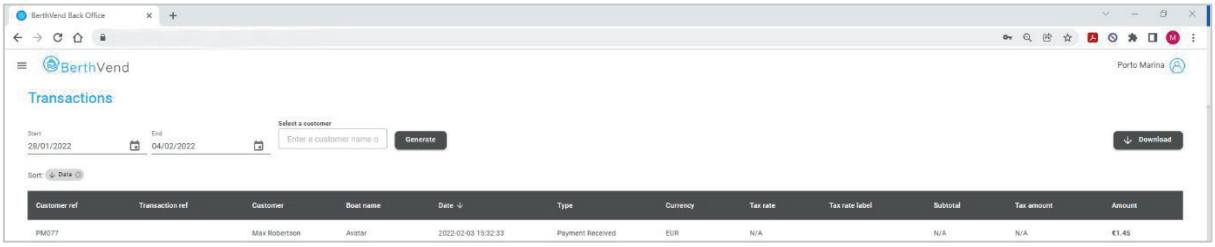


Figure 103 Transaction Report 1

When first displayed the table may not show any records.

2. Click on the **Start** date calendar icon.

   A calendar will be displayed in a pop-up.

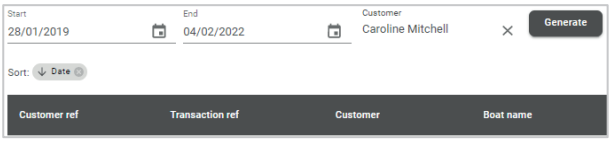


Figure 104 Start Date

3. Use the calendar to select the **Start** date for the report.
4. Click **OK** on the calendar to enter the selected date into the system.

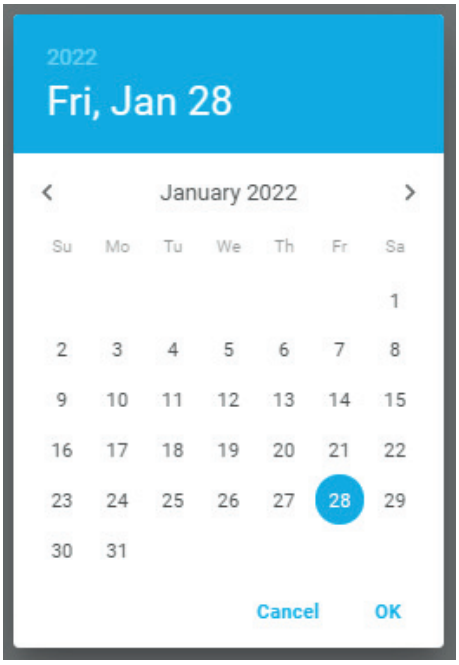
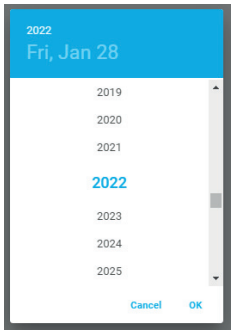


Figure 105 Calendar Date Selector

NOTE:

- Months are selected using the **< >** arrows.
- Individual days are selected by clicking on the numbers (1-31).
- The year can be selected by clicking on the year shown at the top of the calendar.



5. If required, select the **End** date for the report.
6. Click on the **Generate** button to display all usage that occurred between the selected dates.

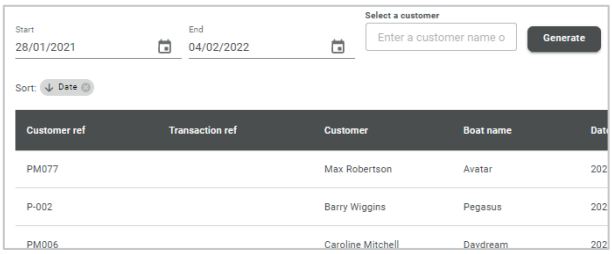


Figure 106 Transaction Report 2

7. If you wish to see all transactions related to a specific customer, the report <u>currently displayed</u> on-screen can be filtered using the customer's name.
8. Enter the customer's name into the Customer field.
   - As characters are entered into the field, the system will dynamically produce a list of possible results from which the required name can be selected.
   - The more characters entered into the field, the more accurate the results.

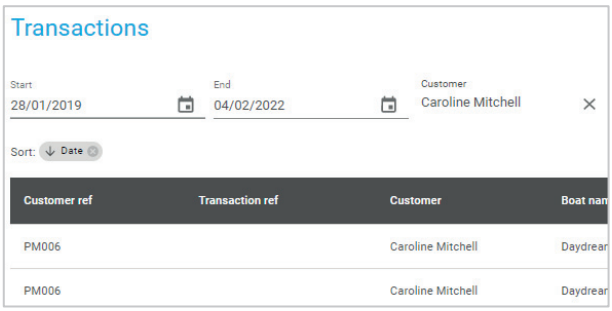


Figure 107 Filter by Customer Name

   - If no results are returned, the customer does not have any records within the start and end period that has been set.

If required a CSV file can be downloaded that will display the same data as currently shown on-screen.

9. Click on the **Download** button. The file will be downloaded to the computer's download folder (or wherever has been set to receive downloaded files).
   - The file name will look something like this: transactions-1643989287282
   - CSV files can be viewed in spreadsheet software such as Microsoft Excel.

Revenue Report

The Revenue Report is generated for a defined period of time over a configurable date range and displays an overview of the revenue earned on specific dates and at specific times, associated with owners and their boats.

1. On the Dashboard, click on the **Revenue Report** text.

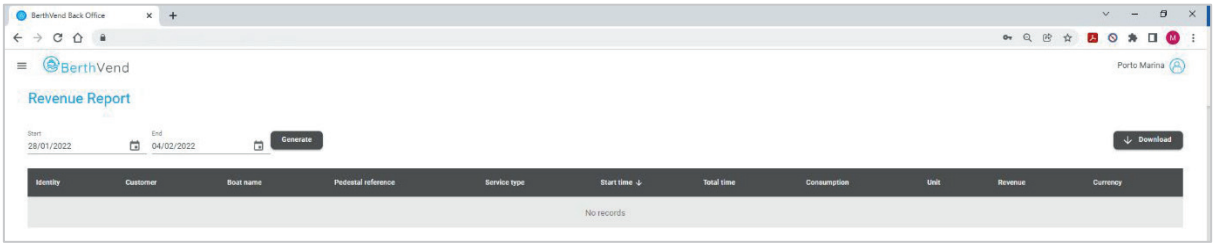


Figure 108 Revenue Report 1

When first displayed the table may not show any records.

2. Click on the **Start** date calendar icon.

   A calendar will be displayed in a pop-up.

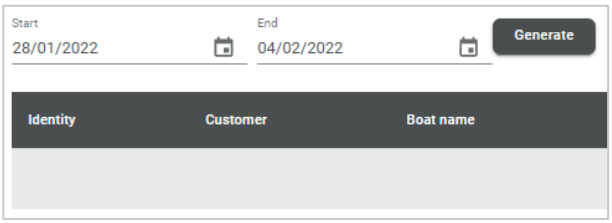
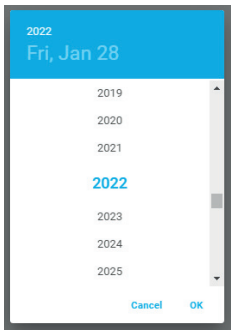


Figure 109 Start Date

3. Use the calendar to select the **Start** date for the report.
4. Click **OK** on the calendar to enter the selected date into the system.

NOTE:

- Months are selected using the **< >** arrows.
- Individual days are selected by clicking on the numbers (1-31).
- The year can be selected by clicking on the year shown at the top of the calendar.



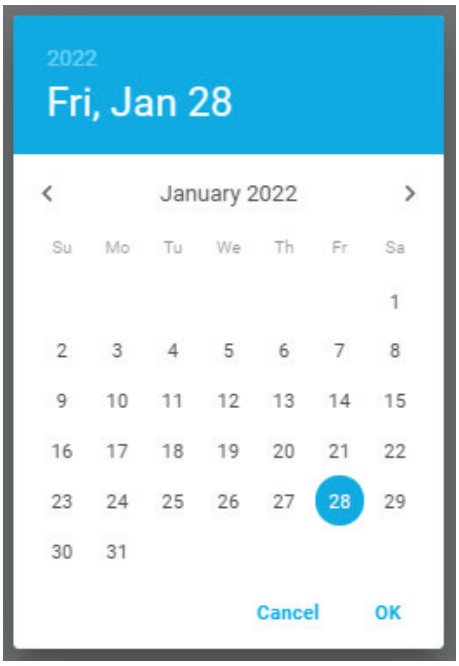


Figure 110 Calendar Date Selector

5. If required, select the **End** date for the report.
6. Click on the **Generate** button to display all revenue that occurred between the selected dates.

Figure 111 Revenue Report 2

If required a CSV file can be downloaded that will display the same data as currently shown on-screen.

7. Click on the **Download** button. The file will be downloaded to the computer's download folder (or wherever has been set to receive downloaded files).
    - The file name will look something like this: revenue-1643989106812.csv
    - CSV files can be viewed in spreadsheet software such as Microsoft Excel.

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