

BACK-OFFICE MANAGEMENT

Services Advina Escubie a service Assigned services Opcoming services Manage Manage Tantis Marka Partile - Jaillees BerthVend

14 14 26 25

1475.56

Assian

18108860

8.88

1884

OPERATION MANUAL

Assign a

350

Ó

Add a



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



Amendments

Amendment Number	Details	Date
Ver 1 Rev 0	New Document.	May 2022
Ver 1 Rev 1	Addition of Periodic Billing feature	July 2022

Product:	BerthVend Back-Office Operation Manual
Applicable Models:	N/A
Document Type:	Operation Manual
Document Code:	BVBOM-01-V01-R1
Language:	UK English (Original)
Date Published:	July 2022
content contained wit organisation and is use	the publishers of this document and own the rights to use the text, images and all technical thin. Content supplied by third parties / partner organisations remains the property of that ed by agreement with the supplier. rcise care to ensure content is as accurate as possible at the time of publication. However, no cy should be inferred.
Rolec Services Ltd, Ral +44 (0) 1205 724754 enquiries@rolecserv.co	phs Lane, Boston, Lincolnshire PE20 1QU. United Kingdom. D.uk



Contents

Contents	2
Safety	3
Safety Advice within this Manual	3
Product Overview	4
Marina Operator – Back-Office Software	
Sign In Screen	
Save your Favourite Screen	
Application Navigation	
Screen Navigation	
Dashboard Screen	
Data Sorting	
Setting Dates and Time	
Date Setting Calendar	
Time Setting Clock	
Services	13
Marina	
Map Filter	
Search the Site	
Pedestal Information	
Berth Information	
Enable and Remove Services	
Assigned Services	23
Periodic Billing	
Upcoming Services	25
Manage	
Manage Tariffs	26
Add a New Tariff	
Edit an Existing Tariff	
Delete a Tariff	
Add a Discount Group	
Edit a Discount Group	
Delete a Discount Group	
Marina Profile	
Add a Logo Add a Technical and Accounts Contacts	
Edit or Delete a Technical or Accounts Contacts	
General Settings	
Bank & Payment Details	
Small Balance Write Off	
Automate Periodic Billing	
Tax Rates	
Manage Utilities	
Admin	
Change Password	
Forgotten Passwords	
Sign Out	
Customers	13
New Customer	
Manage Customers	
Add a New Customer	
Edit or Delete Customer Details	
Billing	
Email Billing Reminder	
Clear Payment	
Reporting	
Usage Report	
Transaction Report	
Revenue Report	55



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 <u>services</u>' 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.

)entradición K + ∂ Č Ó K kalatikainheadan	- 0 × € 8 0 ≉ 0 1
BerthVend	Welcome to BerthVend Back-Office
	Usename *
	Password* Proprint your peased of Paset
	Egy In Air heart

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

BerthVend Back Office × +				~	- 0
→ C A a backonice-test.bertriveno.com				• Q 🖻 ★ 🖪 🕻	> * 🛯 🚳
BerthVend	148 Assigned Dut of service	Services Marina Enable a Service Assigned Services	Customers New Customer Manage Customers Billing		×
Enable a Service	Add a Customer 9 Outstanding Payments	Upcoming Services Manage Manage Tariffs Marina Profile Manage Alfilies Admin Change Password Sign Out	Reporting Usage Report Transaction Report Revenue Report		

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 \equiv shown next to the BerthVend logo on any other screen within the application.

≡ <a>BerthVend

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 <u>view</u> 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.

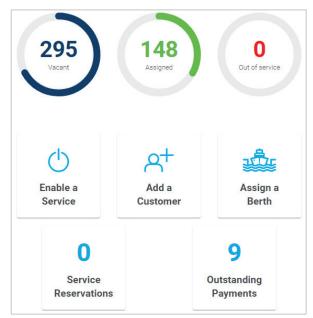


Figure 5 Dashboard Marina Summary and Easy Access Buttons



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.

edestal	
: P15	
ailable utilities:	
MPH-P15-E1	1 🕜 🕢 Fault 🖌 4 🛛 🛠
MPH-P15-E2	2 🕓 🖉 Fault 🖌 4 🕸 🔆
MPH-P15-W	1 🕚 Assigned
MPH-P15-W	2 🔇 Assigned
	Fault Pedestal: P15 Utility ID: #0067 Utility Type: Electricity Status: Fault / Breaker Tripped Type: 16 Amp Single Phase Plugged in: No Fault: BREAKER_TRIPPED Tariff: Default Electricity - (€0.20

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.

Services	Customers
Marina	New Customer
Enable a Service	Manage Customers
Assigned Services	Billing
Upcoming Services	
Manage	Reporting
Manage Tariffs	Usage Report
Marina Profile	Transaction Report
Manage Utilities	Revenue Report
Admin	
Change Password	
Sign Out	

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.

.00.						20 80 80
Barthy Utilities Ove						Puth Maina (E
Maily 4	usity type	thilly description	Sanccalda	Network adda	Pedeulal relations	Tutt
*Meretral	· · · · · · · · · · · · · · · · · · ·	to care sincle above	Vane	oritor		na saqaata saqa-joa mt
794582-0142	¢ Cestroly	15 Arro Single Press	(yay	ordine	1/2	Or Passale Tertli-(42-15)
	4 mixer cas	19 mills single officer	(Venet	orêse	897	weredowice can'the (counting
11-0-182447	4 Cachely	" di Kena Single Phone	(var	ordine		CorPerantin Techt-(42,-45)
THE DE GET	4 Bat ch	The day a bench of and	Verse	on third?	112	ennessaa tanti (st.ast
*******	4 Dectroly	S Fern Single Physics	Maget	ordan	DVI.	ConFederation Text (461-65)
THE SHE GED	👌 Vaks	214 Tup	visare.	with the	127	Octual Water (20.32)
*******	© V.***	304° TAN	Vent	arita	432	Orferit (www300.82)
THE SHE OF 35	👌 Vale	1/2 (Dup	Visare	or line	125	Oc well Water (50.32)
-	Q Scene	021046		oritor	#25	(Index a series - 3 at 64)
PM-SHI-0/22	🎸 Wales	1/2 De	18397	otilise	125	Cenard Water (\$0.32)
1441821422	A 10199	12100	(and the second s	oritine	925	Orferik wares - Dat #2-



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.

PM-SIM-0001

Utilities Ove	rview	
Sort: 👽 Identity 🕥		
Identity \downarrow	Utility type	Utility description
PM-SIM-0443	4 Electricity	16 Amp Single Phase

Figure 9 Data Sort Descending 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.

Sort: 🔨 Identity 🛞		
Identity 个	Utility type	Utility descriptio

Figure 10 Data Sort Ascending Order

4 Electricity

16 Amp Single Phas

Utilities Ove	rview	
Sort: 🔨 Identity 🛞 🗸	Utility type 🛞 Clear	
Identity 个	Utility type \downarrow	Utility description
PM-SIM-0001	4 Electricity	16 Amp Single Phase
Utilities Ove	rview	
Sort: 🗸 Utility type 😒		
Identity	Utility type $ \downarrow $	Utility description
PM-SIM-0004		1/2" Tap

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.

Start

28/01/2022

Date Setting Calendar

- 1. Click on the calendar icon 🖨.
- 2. A calendar will be displayed in a popup.
- 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.

2022 Fri, Jan 28	
2019	-
2020	- 1
2021	- 1
2022	- 1
2023	- 1
2024	- 1
2025	-
Cancel	ок

Figure 12 Date Setting Fields

End

04/02/2022



Figure 13 Calendar Date Selector

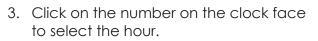


Time Setting Clock

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

Start Time 04:10 PM

Figure 14 Set the Time



4. The pop-up will change to show the minutes clock face.

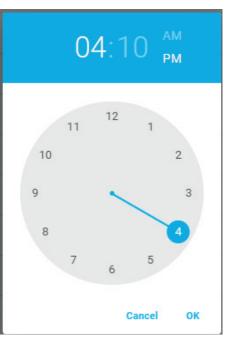


Figure 15 Set the Hours

- 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.

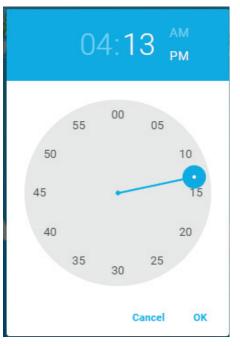


Figure 16 Set the Minutes



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
- 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).

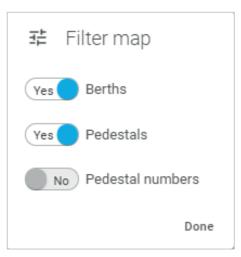


Figure 19 Display Filter Options

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.

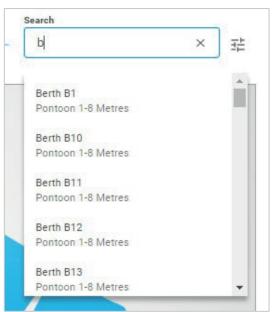


Figure 20 Dynamic Search 1



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.

- 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.

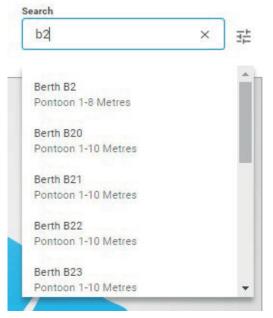


Figure 21 Dynamic Search 2

Berth	×
Location: B2 Mooring Type: Pontoon	
Length Over All: < 8 Metres Currently occupied by Customer: Morgan Sullivan	
Boat: Scarlet Account type: Invoice Occupied since: 16/11/2021 15:59	

Figure 22 Berth Details



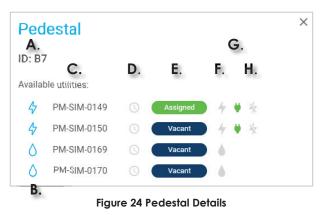
Pedestal Information

- 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.
- 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

- 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.
- 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.

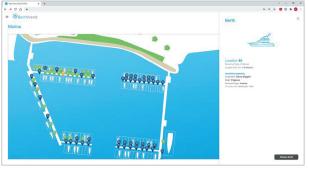


Figure 26 Display Berth Information Panel

Berth	×
A	
Location: B1	
Mooring Type: Pontoon	
Length Over All: < 8 Metres	
Currently occupied by	
Customer: Barry Wiggins	
Boat: Pegasus	
Account type: Invoice	
Occupied since: 06/05/2021 14:36	

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.

Berthilend Back Offi	ie X	+										~		0	×
> C Q	# backoffice-	test.berthvend.co	en/oustomers							22		0	* [1 0	,
E Ber Custome	rthVend rs M	new							Enable Service Find a service Enter Berth, Pedestal or Ubity (D					2	×
Sort (& Custome	0.01								Berth: Select Berth						
Customer ID +	Your ref	First name	Last name	Errel	Phone	Boat name	туре	40 178							
49	PM149	Alat	Amold	alan anoldstightal.com	01234 567890	Dragonfly	Direct Customer	10							
40	PM102	Edward	Diake	edblake?%@gomail.co.uk	01234 567890	Dysia	Direct Customer	Pm							
47	PM0277	Max	Robertson	max robertsong/bind.com	01234 907907	Avatar	Direct Customer	Pm							
40	Ph/000	Caroline	Mitchell	carolisentchell@malbox.com	01777 321321	Daydream	Direct Customer	Ptt							
45	PM005	Jasmine	Brown	jasmine browngiumail.net	01221 775775	Adventure	Direct Cuitomer	PD							
44	PM251	Cameron	Slater	cameronslater55gxmail.com	01456 456456	Dig Dertha	Direct Customer	in.							
43	PM314	Sarah	Gray	sarahggimail.co.uk	01234 567890	Tiny Dancer	Direct Customer	Ph			Update		date wallabl		
42	PM355	Oliver	Hemminas	olhemmines24@eomail.co.sk	07587	Atlantia	Direct	PD							ľ

Figure 28 Enabling a Service on the Customers Screen

- Enter a Berth, Pedestal or Utility ID into the grey search field.
 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.

If a Utility ID (Service) is entered/selected from the search, the panel will change to

show the details fo	or that service. How	ever, the exact Utility IE) may not be known to you.

Berth A33

Berth B33 Pontoon 1-10 Metres

Pontoon 1-10 Metres

Htility PM-SIM-0330

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.

Enable a Service	×
Summary Select Pedestal	
	•
Berth: B33 ×	

Figure 29 Enable a Service Panel 1

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.

Enable a Service	×
Summary	
Pedestal: A10 ×	
Berth: Select Berth	
Select a customer	
Enter a customer name or boat name	
	Add new

Ena	ble a Serv	ice			×
	ary stal: A10 × B33 ×				
Availab	le utilities				
\$	PM-SIM-0046	0	Vacant	● 4 ♥ ☆	
4	PM-SIM-0047	0	Vacant	4 🗰 🛠	
4	PM-SIM-0048	0	Vacant	4 # *	
٥	PM-SIM-0049	0	Assigned	6	
٥	PM-SIM-0050	0	Vacant	6	
٥	PM-SIM-0064	0	Vacant	. A	
		Sel	ect a utilit	y above	

Summary

Pedestal: A10 \times

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.

elect a customer	
da	×
David Ascot	-
Darksyde	
Darren Thompson	
Deborah	

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.
- 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.

Enable a Ser	vice	×
Summary		
Pedestal: A10 \times		
Berth: B33 ×		
Customer: Caroline Mi	tchell ×	
Boat: Daydream		
Account type: Pre-Pay		
Balance: €79.87		
Yes Assign the se	ervice immediately	
	4 PM-SIM-0046	
	Vacant	
	Pedestal: A10	
	Pedestal: A10 Utility ID: #0046	
	Utility ID: #0046	
	Utility ID: #0046 Utility Type: Electricity	
	Utility ID: #0046 Utility Type: Electricity Status: Healthy / Vacant	
	Utility ID: #0046 Utility Type: Electricity Status: Healthy / Vacant Type: 16 Amp Single Phase	

Figure 33 Enable a Service Panel 4

× **Ongoing Service** Off Service Off Customer: Caroline Mitchell Current Usage Current cost Boat: Daydream Berth: D7, E7, B33 0.00 €0.00 Account type: Pre-Pay kWh €0.20 / kWh Discount: 4 PM-SIM-0046 Pedestal: A10 Utility ID: #0046 Utility Type: Electricity Status: Healthy / Assigned Type: 16 Amp Single Phase Plugged in: Yes Fault: Tariff: Default Electricity - (€0.20)

Figure 34 Ongoing Service Panel

- 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.



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.

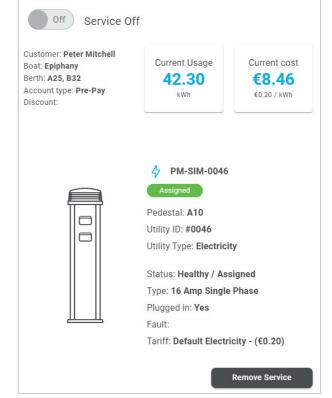


Figure 35 Enable a Service Panel 6

- 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.

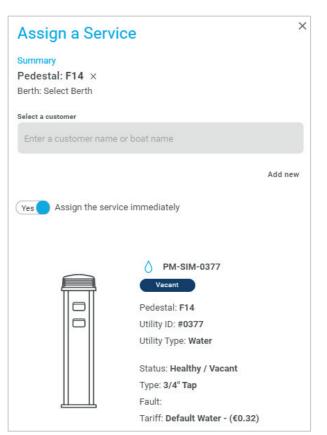
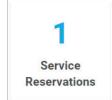


Figure 36 Assign a Service Panel



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



Upcoming	Services			
ion: (4 Startime ()				
Identity	Pedestal reference	Usility type	Utility description	Service status
PM-SIM-0048	A10	Electricity	16 Amp Single Phase	Vacant

Figure 37 Upcoming Services

dashboard on the Service Reservations button.

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.

Assigned Services														
Sort: 🔱 Start time 😋														
Identity	Utility type	Service status	Pedestal reference	Berth reference	Utility description	Tariff	Customer	Boat	Meter	Start time \downarrow				
PM-SIM-0049	💧 Water	Assigned	A10	A25	1/2' Tap	Default Water - (€0.32)	Peter Mitchell	Epiphany	0.00M*	08/02/2022 19:00:00				
PM-SIM-0093	👌 Water	Assigned	A14	A35	1/2" Tap	Default Water - (€0.32)	David Ascot	Darksyde	0.00M3	08/02/2022 19:00:00				
PM-SIM-0012	& Electricity	Assigned to H No	42	44	16 Amo Sinole Phase	Default Electricity - (#0.20)	Duby Mills	Anuila	0.28kWb	07/12/2021 10:41:48				

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 slideout panel to make sure you still want to cancel the assignment.
- 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.
- 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.

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. Plugged in: Yes Fault: Tariff: Default Electricity - (€0.20)

Figure 40 Bill Current Usage

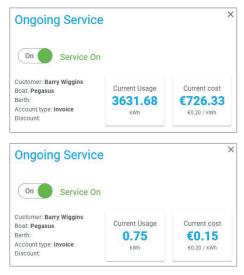


Figure 41 Before and After Periodic Billing

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.

Porto Marina 🖲						Vend	≡ 🕲 Ber
						Services	Upcomir
							Sort: 🔶 Start tin
omer Boat Start time 🗸	Customer	Tariff	Service status	Utility description	Utility type	Pedestal reference	Identity
J Ascot Darksyde 14/02/2022 16:07:00	David Ascot	Default Electricity - (€0.20)	Vacant	16 Amp Single Phase	4 Electricity	A10	PM-SIM-0048
Ascot Darksyde 14/02/202216	David Ascot	Default Electricity - (€0.20)	Vacant	16 Amp Single Phase	Electricity	A10	PM-SIM-0048

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.

- 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 slideout 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.

ariffs Add n	ew					
ort: 🔱 Tariff name 🔇						
Tariff name ↓	Service type	Tariff description	Rate	Currency	Unit	Last change
EV Pedestal Tariff	Electricity	Single Phase Electricity	€0.45	EUR	kWh	25/05/2021 14:28:44
Default Water	Water	1/2" Tap	€0.32	EUR	Ma	18/05/2021 22:09:13
Default Electricity	Electricity	Single Phase Electricity	€0.20	EUR	kWh	30/04/2021 11:18:58
ort: 🔶 Discount name 🔇		Discount rate				
Discount Gro Discount name @ Discount name ↓ Test discount group		Discount rate 25%				

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.
- 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.

≡	Ве	rthVend
Т	ariffs	Add New

Figure 45 Add New Tariff

Add Tariff		×
Tariff Name *		
Description		
Service Type		
Electricity	*	
Rate		
0.00		EUR
Unit		
kWh	*	

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.

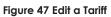
The Edit Tariff form will be displayed in a slide-out panel.

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.

Edit Tariff		>
Tariff Name *		
EV Pedestal Tariff		
Description		
Single Phase Electricity		
Service Type		
Electricity	•	
Rate		
0.45		EUR
Unit		
kWh	*	
Apply to all		



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.

Edit Tariff

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.

Tariff Name *		
EV Pedestal Tariff		
Description		
Single Phase Electricity		
Service Type		
Electricity	-	
Rate		
0.45		EUR
Unit		
kWh	*	
Apply to all		

Figure 48 Edit Tariff Panel (Top)

2. Click on the **Delete** (Delete) icon 🗑 Delete Save & Close shown at the bottom of the Edit Tariff slide-out panel. Figure 49 Edit Tariff Panel (Bottom) A confirmation message will be displayed. 3. If you are sure the Tariff can be Delete tariff deleted, click on the Delete button and the Tariff will be removed from the system. Are you sure you want to delete this tariff? Delete Cancel

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.

ariffs Add ne	ew					
ort: 🔱 Tariff name 🕲						
Tariff name ↓	Service type	Tariff description	Rate	Currency	Unit	Last change
EV Pedestal Tariff	Electricity	Single Phase Electricity	€0.45	EUR	kWh	25/05/2021 14:28:44
Default Water	Water	1/2" Tap	€0.32	EUR	M ³	18/05/2021 22:09:13
Default Electricity	Electricity	Single Phase Electricity	€0.20	EUR	kWh	30/04/2021 11:18:58
Default Electricity Discount Gro ort: (Discount name (Discount name (Test discount group	UDS Add new	Single Phase Electricity Discount rate 25%	€0.20	EUR	kWh	30/04/2021 11:18:58

Figure 51 Add a Discount Group

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

Discount Groups Add New

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 %.
- 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.

Add Discount Group	×
Discount Group Name *	
Discount Rate (%) *	
0	\$

Figure 53 Enter Discount Details



Edit a Discount Group

 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.

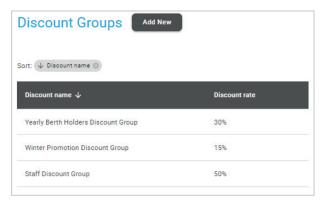


Figure 54 Edit Discount Group 1

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.

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.

Edit Discount Group	×
Discount Group Name *	
Winter Promotion Discount Group	
Tax Rate (%) *	
15	

Figure 55 Edit Discount Group 2

Edit Discount Group	×
Discount Group Name *	
Summer Promotion Discount Group	
Discount Rate (%) *	
5	

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.
- 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.

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 57 Edit Discount Group Panel (Top)

Telete	Update
Figure 58 Edit Discount Group Pane	l (Bottom)

Delete discount group	
Are you sure you want to delete this discou customers assigned to this group will be ha group unset.	2 1 1
Cancel	Delete

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.

BerthVen	d		
Profile			
PORTON Sudied by	Max size 2mb	o in any automated emails.	
Technical Contact Let us know who we should	d contact regarding technical and / c	or site management issues.	
Sort: ↓ Name 🔘			
Name 🗸	Position	Email	Phone
Robert Turner	Technical Director	rob@rolecserv.co.uk	01205 724754
Sort: 🔶 Name 💿			
Name \downarrow	Position	Email	Phone
Glenn Armstrong	Position Accounts Manager	Email glenn@berthvend.com	Phone 01205 724754
Glenn Armstrong Add General Settings Settings and company infortation your customer experi	Accounts Manager rmation that will be used to ence	glenn@berthvend.com Bank & Payment Details Please provide details of the BACS account that you would like displayed on any emails.	NG 1996 171
Glenn Armstrong Ad General Settings Settings and company info tailor your customer experi-	Accounts Manager rmation that will be used to ence Porto Marina	glenn@berthvend.com Bank & Payment Details Please provide details of the BACS account that you would like displayed on any emails. Account Name Porto Marina	NG 1996 171
Glenn Armstrong Add General Settings Settings and company infortation your customer experi	Accounts Manager rmation that will be used to ence	glenn@berthvend.com Bank & Payment Details Please provide details of the BACS account that you would like displayed on any emails. Account Name Porto Marina Account / IBAN 0111111 Number Soft / SWIFT or BIC 11-11-11	
Glenn Armstrong Add General Settings Settings and company info tailor your customer experi- company Name VAT / Tax Number	Accounts Manager rmation that will be used to ence Porto Marina AB123456-1 Kranid 213 00,	glenn@berthvend.com Bank & Payment Details Please provide details of the BACS account that you would like displayed on any emails. Account Name Porto Marina Account /IBAN 0111111	NG 1996 171
Glenn Armstrong Add General Settings Settings and company info tailor your customer experi- Company Name VAT / Tax Number Address Email	Accounts Manager mation that will be used to ence Porto Marina AB123456-1 Kranidi 213 00, Greece, Porto Marina info@berthvend.com	glenn@berthvend.com Bank & Payment Details Please provide details of the BACS account that you would like displayed on any emails. Account Name Porto Marina Account / IBAN 01111111 Number Sort / SWIFT or BIC 11-11-11 Code Show Bank Info On Yes	VERSE 77
Glenn Armstrong Add General Settings Settings and company info tailor your customer experie Company Name VAT / Tax Number Address Email Phone Number	Accounts Manager mation that will be used to ence Porto Marina AB123456-1 Kranidi 213 00, Greece, Porto Marina info@berthvend.com	glenn@berthvend.com Bank & Payment Details Please provide details of the BACS account that you would like displayed on any emails. Account Name Porto Marina Account /IBAN 01111111 Soft / SWIFT or BIC 11-11-11 Code Show Bank Info On Billing Emails Small Balance	

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.

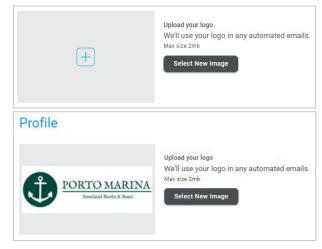


Figure 61 Upload Logo

- 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.

Technical Contact Let us know who we should contact regarding technical and / or site management issues.						
Sort: 🔶 Name 🕲						
Name ↓	Position	Email	Phone			
Robert Turner	Technical Director	rob@rolecserv.co.uk	01205 724754			
Add Accounts Contact Let us know who we should contact regarding billing, reconciliation and bank payment issues.						
Sort: 🔱 Name 🕲						
Name \downarrow	Position	Email	Phone			
Glenn Armstrong	Accounts Manager	glenn@berthvend.com	01205 724754			
Add						

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.

Add a Technical Contact	×
Name *	
Position	
Email	
Phone Number	

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.

Bob Smith Position Technical Manager Email bobsmith@mymarina.co.uk	Edit a Technical Contact	13
Position Technical Manager Email bobsmith@mymarina.co.uk	Name *	
Technical Manager Email bobsmith@mymarina.co.uk	Bob Smith	
Email bobsmith@mymarina.co.uk	Position	
bobsmith@mymarina.co.uk	Technical Manager	
	Email	
	bobsmith@mymarina.co.uk	
Phone Number	Phone Number	
0123 4567890	0123 4567890	
	Delete	Save & Close

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.

General Settings

Settings and company information that will be used to tailor your customer experience

Company Name	Porto Marina
VAT / Tax Number	AB123456-1
Address	Kranidi 213 00, Greece, Porto Marina
Email	info@berthvend.com
Phone Number	+30 12345 67890
Edit	

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.

No Breaker trip
No Cable disconnect
App settings
Max Active Services
10
No Usage Timeout (Mins)
2

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.

Bank & Payment Details

Please provide details of the BACS account that you would like displayed on any emails.

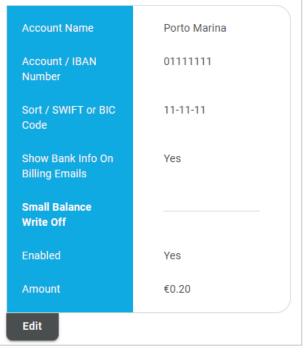


Figure 67 Bank & Payment Details

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.

Small Balance Write Off	
This setting will automatically write off c €0.00 up to a value of your choice.	ustomer balances if their balance dips below
Yes Switch On	
Up to amount	
0.2	
Balances between €0.00 and -€0.20 will	be automatically 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.

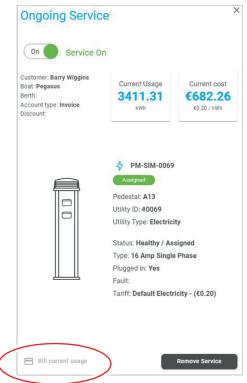


Figure 69 Bill Current Usage

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.

Periodic Billing	rough w	our ongoing services and process usage
against the customer account.	ough y	our ongoing services and process usage
Yes Switch On		
Billing Interval		Billing Day
Weekly	•	Monday -
		Save & Close

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.

Tax Rates

If any tax applies to your services you can add in the rates here and they will be applied to the service transactions.

Sort: 🔶 Service type 🛞)	
Service type \downarrow	Tax rate	Tax rate label
Electricity	5%	
Default	24%	ΦΠΑ
Add		

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.

Edit a Tax Rate	×
Service Type: Default	
Tax Rate (%) *	
24	
Label	

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

Utilities Overvi	ew					
Sort: (Tariff						
Identity	Utility type	Utility description	Service status	Network status	Pedestal reference	Tariff ↑
PM-SIM-0001	Electricity	16 Amp Single Phase	Vacant	online	A1	Default Electricity - (€0.20)
PM-SIM-0002	Sectricity	16 Amp Single Phase	Vacant	online	A1	Default Electricity - (€0.20)
PM-SIM-0003	5 Electricity	16 Amp Single Phase	Vacant	online	A1	Default Electricity - (€0.20)
D14 2114 0006	A Electricity	16 Ame Single Diseas	Vacant	antina	40	Default Fleensieitur (#0.20)

Figure 74 Utilities Overview Screen

Tariff *

Default Electricity €0.20 / kWh Default Water €0.32 / M³

Super Yacht Tariff €1.00 / kWh

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.

× Utility PM-SIM-0001 Assigned from: 11/03/2022 09:00:00 Pedestal: A1 Utility ID: #0001 Utility Type: Electricity Status: Healthy Type: 16 Amp Single Phase Fault: Tariff: Default Electricity - (€0.20) Tariff * Default Electricity €0.20 / kWh

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.

New Password *	
New Password *	
Confirm Password *	

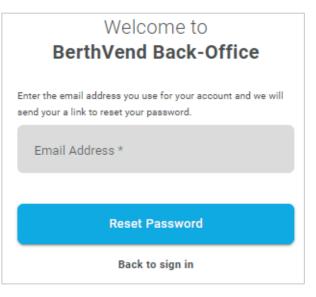
Figure 77 Change Password

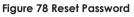
NOTE: Passwords must contain 8 or more characters and are case sensitive.

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.





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

- 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.

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**.
- 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.**

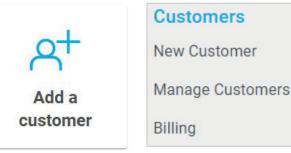


Figure 79 Add a New Customer

Add a customer		×
Your customer reference		
First Name *	Last Name *	
Email		
Phone		
Boat Name *		
Discount Group		
Account Type *	•	
Pre-Pay	•	
Credit * 0.00		
	Create	

Figure 80 Add a New Customer Form

- 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.

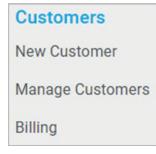


Figure 81 Manage Customers

C & #												© * □
Bert											Po Search Joe Blogg:	rto Marina 🙆
Customer ID	0											
ustomer ID 🤟	Your ref	First name	Last name	Email	Phone	Boat name	Туре	Account type	Balance	Currency	Billing frequency	Status
9	PM149	Alan	Arnold	alan.arnold48@xmail.com	01234 567890	Dragonfly	Direct Customer	Invoice	€150.00	EUR	Monthly	Active
8	PM182	Edward	Blake	edblake79@gomail.co.uk	01234 567890	Elysia	Direct Customer	Pre-Pay	€75.00	EUR	N/A	Active
7	PM077	Max	Robertson	max.robertson@bvnd.com	01234 987987	Avatar	Direct Customer	Pre-Pay	-€1.45	EUR	N/A	Active
6	PM006	Caroline	Mitchell	carolinemitchell@mailbox.com	01777 321321	Daydream	Direct Customer	Pre-Pay	€80.00	EUR	N/A	Active
5	PM095	Jasmine	Brown	jasmine.brown@umail.net	01221 775775	Adventure	Direct Customer	Pre-Pay	€50.00	EUR	N/A	Active
4	PM251	Cameron	Slater	cameronslater55@xmail.com	01456 456456	Big Bertha	Direct Customer	Invoice	€250.00	EUR	Monthly	Active
3	PM314	Sarah	Gray	sarahg@imail.co.uk	01234 567890	Tiny Dancer	Direct Customer	Pre-Pay	€80.00	EUR	N/A	Active
2	PM055	Oliver	Hemmings	olihemmings24@gomail.co.uk	07987 987987	Atlantis	Direct Customer	Pre-Pay	€90.61	EUR	N/A	Active
1	PM160	Wendy	Ross	wendy.ross@imail.co.uk	01345 323454	Augustus	Direct Customer	Invoice	€150.00	EUR	Monthly	Active
0	PM133	Peter	Mitchell	pmitchell7@umail.net	01234 890123	Epiphany	Direct Customer	Pre-Pay	€56.54	EUR	N/A	Active
9	PM227	Sean	Ogden	sean.ogden@bvnd.com	01122 354354	Merlin	Direct Customer	Pre-Pay	€75.00	EUR	N/A	Active
8	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

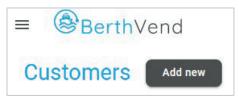
The Customers table provides a view of all customers currently registered within the system and shows details about them, their boat and their account/billing.

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



Add a New Customer

- 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.

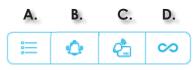




Edit or Delete Customer Details

- 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.

Customer	
	≅ ✿ ֎ ∞
Your customer reference	
PM182	Account active Yes
First Name *	Last Name *
Edward	Blake
Email	
edblake79@gomail.co.uk	
Phone	
01234 567890	
Boat Name	
Elysia	
Discount Group	
	*
Account Type	Billing Frequency
Invoice 🔻	•
Notifications	
No Breaker trip	No) Cable disconnect
Dreaker trip	No Cable disconnect
Add credit	
Amount *	
0.00	Add
Delete customer	Save & Close

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 selfservice 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.

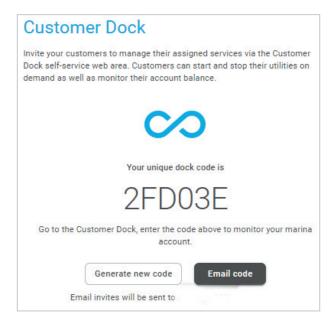


Figure 85 Self-Service Invitation



- 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.



4 Electricity

77.98 kWh

Status: Off

PM-SIM-0236

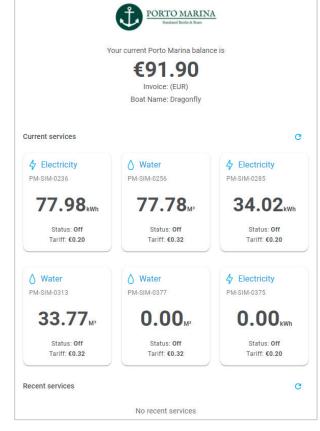
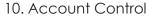


Figure 86 Customer Self Service Screen



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

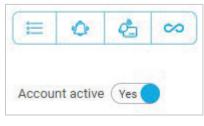


Figure 87 Account Control

Notifications	
No Breaker trip	No Cable disconnect

Figure 88 Notifications

Cable Disconnect.

 Use the slider switches to enable or disable notifications in the event of:

14. Add Credit Area

•

•

12. Notifications Area

Breaker Trip.

- 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.



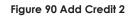
Figure 89 Add Credit 1



Customers

- 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.

€10.00 to be added.		1
You are making a c	hange to the current balance of	€150.00
New cre	edit balance: €140.00)
Er	mail a receipt 🔵 No	
Delete customer		Save & Close



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.

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.

Delete customer

 Save & Close

 Figure 91 Delete Customer

 Delete customer

 Are you sure you want to delete this customer?.

 Cancel

 Delete

 ct

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.

Customers	
New Customer	
Manage Customers	S
Billing	



erthVend Back Of	fice X	+											~	- 0
CO												e r Q (2)	☆ <mark>ひ</mark>	0 * 0
Berth													F	Porto Marina 🥃
L 🔱 Customer ID	Your ref	First name	Last name	Email	Phone	Boat name	Туре	Account type	Balance	Currency	Billing frequency	Status	Action	
7	PM077	Max	Robertson	max.robertson@ovnd.com	01234 987987	Avatar	Direct Customer	Pre-Pay	-€1.45	EUR	N/A	Active	A	
3	PM110	Sem	Nomis	sam.norris@umail.net	01987 123654	Liberty	Direct Customer	Pre-Pay	-€37.71	EUR	N/A	Active	-23	D
8	PM089	Vicky	Wallace	vickywallace333@hotmail.co.uk	01984 921843	Botticelli	Direct Customer	Pre-Pay	-€6.44	EUR	N/A	Active	-E	D
5	PM126	Sultana	Rahman	sultana@rolecserv.co.uk	01567 357975	Nautilus	Direct Customer	Pre-Pay	-€0.38	EUR	N/A	Active	-13	D
		Martin	Georgeson	martin@rolecserv.co.uk		Nico	Direct Customer	Invoice	-€1,670.98	EUR	Quarterly	Active	-23	D
0	BM-123	Julie	Watts	kieranr@vendelectric.com	01234 56789	Horizon	Direct Customer	Invoice	-0839.94	EUR	Monthly	Active	-23	D
	PM003	David	Ascot	kieranr@vendelectric.com	01234 567891	Darksyde	Direct Customer	Invoice	-€160.45	EUR	Quarterly	Active	-Ea	D
	CASH	Cash	Account	kieranr@vendelectric.com	07234 567896	Carresco	Direct Customer	Invoice	-€62.99	EUR	Annually	Active	12	D
	P-003	Joseph	Katako	klerainrushby@gmail.com	01234 789456	Katakoray	Direct Customer	Invoice	-€6,007.93	EUR	N/A	Active	-20	D
	P-002	Barry	Wiggins	kieranr@vendelectric.com	09876 543210	Pegasus	Direct Customer	Invoice	-€4,045.02	EUR	N/A	Active	B	D

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

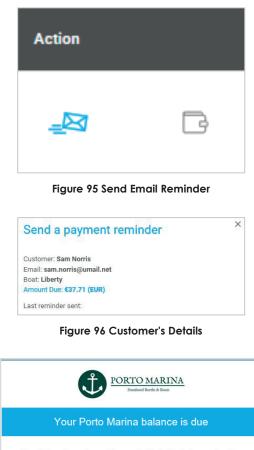
- 1. Identify the customer who is to be sent a billing reminder.
- 2. Click on the **Send email reminder** (envelope) icon shown in the Action column for the selected customer.

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

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.

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.



Your balance for marina services used at Porto Marina is now due. If you have made payment within the last few days, please ignore this email and your account will be updated accordingly.



Thanks & best regards Porto Marina tel: +30 12345 67890

email: info@berthvend.com

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.

 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.

- 2. Make sure the correct customer has been selected.
- 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.
- If an email confirmation of payment is to be sent to the customer, move the 'Email a receipt?' slider switch to the Yes position.

Action	
<u>-</u> 23	Ē

Figure 98 Clear Ballance

Clear payment	×
Customer: Sam Norris	
Email: sam.norris@umail.net	
Boat: Liberty	
Amount Due: €37.71 (EUR)	
Yes Clear the full amount?	

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.

BerthVend Back Office	× +						v - Ø
							• 9 18 18 18 0 18 11 10
■							Porto Marina 🛞
Usage Report							
Start 28/01/2022	End 04/02/2022	Generate					U Download
Customer 🤟	Boat name	Service type	Total time	Consumption	Unit	Revenue	Currency
				to records			

Figure 100 Usage Report 1

When first displayed the table may not show any records.

 Click on the **Start** date calendar icon.
 A calendar will be displayed in a popup.

Start 28/01/2022	ä	End 04/02/2022	Generate
Customer ↓		Boat nam e	

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.

Jsage Report		s148					1. the
A 21/2221	66/02/2022						
Customer 4	Bust name	Bereics type	Tanal Serve	Consumption	-	Rovenue	Currence
Vicky Walkor	Bortorit	Evenicity	345 131 201 546	90.58	647	418.12	0.9
Vicky Wallace.	Retion	Value	an Silve daa	88.32	10	428.22	0.4
Vesta Kankhe	Kavellee	Electricity	25.120.278	192.40	ion .	01.0	8.4
the first the first the	Augustus .	A.L.	ALCO 44		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.

BerthVend Back Office × +										~ - 0
									• Q @ ☆	🖪 🛇 🗯 🗆 🔕
≡ BerthVend										Porto Marina
Transactions										
^{51нт} 28/01/2022 🛅 04/02/2022	Select a sustomer		nerate							U Download
Sort: 🕼 Date 🔘										
Customer ref Transaction ref	Customer	Boat name	Date 🕁	Type	Currency	Tax rate	Tax rate label	Subtotal	Tax amount	Amount
PM077	Max Robertson	Avatar	2022-02-03 15:32:33	Payment Received	EUR	N/A		N/A	N/A	\$1.45

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 popup.

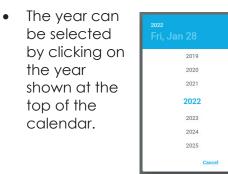
Start 28/01/2019	ö	End 04/02/2022	ä	Customer Caroline Mitchell	×	Generate
Sort: 🔶 Date 💿						
Customer ref	т	ransaction ref	Cus	tomer	Boat nam	ie

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.

NOTE:

- Months are selected using the <> arrows.
- Individual days are selected by clicking on the numbers (1-31).



	²⁰²² Fri, Jan 28								
<		Jan	uary 2	2022		>			
Su	Mo	Tu	We	Th	Fr	Sa			
						1			
2	3	4	5	6	7	8			
9	10	11	12	13	14	15			
16	17	18	19	20	21	22			
23	24	25	26	27	28	29			
30	31								
	_			Cance	el	ОК			

Figure 105 Calendar Date Selector



- 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.

Start 28/01/2021		End 04/02/2022	Select a customer Enter a customer name o			Generate	
Customer ref	Tran	saction ref	Custom	ner	Boat name	D	
PM077			Max Ro	bertson	Avatar	2	
P-002			Barry W	/iggins	Pegasus	2	
PM006			Carolin	e Mitchell	Davdream	2	

Figure 106 Transaction Report 2

- 7. If you wish to see all transactions related to a specific customer, the report <u>currently</u> <u>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.

Transaction	IS				
Start 28/01/2019	Ċ.	End 04/02/2022	Ē	Customer Caroline Mitchell	×
Sort: 🕁 Date 🕥 Customer ref	T	Fransaction ref	Cus	stomer	Boat nan
PM006			Car	oline Mitchell	Daydrear
PM006			Car	oline Mitchell	Daydrear

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.

								~	-	8
							•• Q (P)	\$ J	o * I	3 🔘
									Porto Ma	rina (8
Generate	1								(🔶 Do	wnload
Boat name	Pedestal reference	Service type	Start time 🕹	Total time	Consumption	Unit	Revenue	Curr	noy	
			No records							
				Boat same Pecestal reference Bervice type Blart line 🤳	La) Boat same Pedestal reference Enrelies type Blart line ↓ Total line	La Sour same Pedestal reference Berries type Start time J. Total time Consumption	La Bout same Pudestal reference Bervice type Start time & Youal time Consumption Unit	Generals Boot name Postend reference Service type Bart time & Tood time Consumption Unit Revenue	Centration Sout name Protectal reference Service type Start line & Total line Contamption Unit Newsne Corre	La Boarsanne Pedestal inference Berrike type Blart line j. Toola line Consumption Unit Revenue Currency

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-

Start 28/01/2022	End 04/02/2022	Generate
Identity	Customer	Boat name

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:

up.

- Months are selected using the <> arrows.
- Individual days are selected by clicking on the numbers (1-31).

•	The year can be selected by	2022 Fri, Jan 28
	clicking on the	2019
	year shown at	2020
	the top of the	2021
	calendar.	2022
	calchadi.	2023
		2024
		2025
		Cancel OK

²⁰²² Fri, Jan 28								
<		Jan	uary 2	2022		>		
Su	Mo	Tu	We	Th	Fr	Sa		
						1		
2	3	4	5	6	7	8		
9	10	11	12	13	14	15		
16	17	18	19	20	21	22		
23	24	25	26	27	28	29		
30	31							
				Cance	el	ок		

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.

C 04/02/2022

Ci Cenerara





THE WORLD'S LEADING MARINA SERVICES SPECIALIST



Head office contact: t: +44 (0) 1205 724754 f: +44 (0) 1205 724876 rolec@rolecserv.co.uk

0 0

¥@RolecMarina www.rolecserv.com

6 6

0

. . .