Portal TI®

MARKETING FEATURES WITH PROGRAMMING INSTRUCTIONS

House Accounts

What it's all about:

When effectively placed in the marketing mix, house accounts can actually double your carwash business. With this Unitec feature, you can create as much house account business as your "regular" carwash business. All it takes is a little extra work to set the system in motion. So roll up your sleeves and read on. Here's how to create more business for your carwash.

The Portal TI supports both monetary-based and product-based accounts. The accounts may be set up as a code, or may be used in conjunction with our VIP Wash Pass card. These can be setup as various fleet packages for corporate clients, or for individual customers who wish to open an account with your wash.

Product-based accounts: A product-based account provides a set number of uses for a particular wash package at a specific price. If a taxi company wished to purchase fifty basic wash packages at a discounted rate, you would use this type of account. Then each time a taxi used the wash, the total number of uses would be deducted by one until all the washes were used. By allowing upgrades, you can prompt the user to select a more expensive wash when they use the account. They would pay for the difference with cash or credit card.

Monetary-based accounts: A monetary-based account allows you to assign a specific monetary value to a customer's account without necessarily charging the full amount. This way, you can sell $50 worth of washes for $40. Each time the account is used, the remaining balance is reduced by however much the customer chooses to spend. This allows customers to select any wash package.

Marketing Tips:

- Store managers or district managers can market and sell house accounts. A company with a large number of stores or locations can choose to employ a full time House Account Representative to sell and set up house accounts.
- Site owners or their attendants can sell house accounts. It's easy once you've mastered the setup.
- To build your fleet business, recognize opportunities and seek out customers. Clearly explain the advantages. Go for businesses that have their names on their vehicles and explain the value of a clean car for their image.
- Here are some good customers to target: Car Dealers (new and used), Courier Services, Pest Control Companies, Heating & Cooling Contractors, Electrical Contractors, Small Rental Car Companies, City or Town Governments (Police, Public Works Departments, Inspections & Permits

Divisions, etc.), and any large businesses that provide company cars for their employees.

- Here are some pricing examples: Take $2 off the top wash when a customer purchases 10 washes or more. Sell a VIP Wash Pass card or code with a $50 value for $40. If you only have three wash levels, add a fourth wash, which is not marketed to the public. Use this wash for your volume house account customers. A car dealer may only want a basic two-pass wash to clean the dust off. This can be sold for $2 to $3 per wash.

For Carwash Owners Revenue Sharing at Petroleum Sites:

House accounts can be more profitable for the carwash owner in the typical C-Store/Express Lube revenue sharing arrangement. If the carwash equipment owner also owns the carwash building, and is only paying a commission to the C-Store or Express Lube owners, he will not need to pay a commission on house accounts (making them more profitable).

House Account Management

The Portal TI allows you to manage house accounts at an individual level or at a group level. By setting up House Account Profiles, you can quickly and easily set up individual accounts based on the predetermined products you wish to sell, such as corporate accounts for police or taxi companies. Assigning new house accounts to a House Account Profile populates all the fields with your predetermined values. At the same time, you can customize accounts for individual customers or companies by setting up individual house accounts without assigning a House Account Profile. This provides you with specific customization as well as the ability to mass-market packaged discounts.

Programming Instructions for House Account Profiles

House Account Profiles allow you to set up standardized house account packages. You can define the details of the house accounts that will be assigned to this group. When a new account is created, you can assign it to this account profile and all the details will be automatically populated, including the "contract," or the terms of the account. This allows you to have multiple house account products to market to different clients without having to setup the details of each account each time a product is purchased.

1. From the House Account Functions screen, click the House Account Profiles button to display the Account Profile Selection screen.
2. Click the New button to display the House Account Profile Setup screen.
3. Fill in the appropriate information for the following fields:
    - Profile Name – The name of the profile.
    - Selling price – The price the customer will be charged.
    - Fixed Price? – Check this box to charge the customer the same amount when the account is recharged. If this box is not checked, then the cashier can override the price when recharging the account.

- Account Type – Select Product Based or Monetary Based. Product Based accounts have a preset number of uses for a wash package. Monetary Based accounts have a starting dollar value and the value of each wash selected is deducted from the account balance when the account is used.
- Mode – Select whether this will be card or code based.
- Print Customer Receipt? – The system will automatically print out a receipt for the customer at the Portal TI when the account is used.
- Print Store Receipt? – The system will automatically print out a receipt at the Console printer when the account is used.
- Show Account Status to Customer? – When this option is set, the Portal TI will display the remaining value of their account.
- Allow upgrades? – This setting will determine if the customer will be prompted for upgrades (assuming that upgrades are turned on) when the account is used.
- Total Uses – This setting is for a product account only and determines how many times the account can be used. This setting will be grayed out if the Account Type is set to Monetary.
- Expires? – This checkbox controls whether an expiration date can be selected from the Expiration Date field. Un-checking this box will set the expiration date to five years.
- Max Uses per Day – This value sets a limit on how many times the account can be used in a day. If this field is blank, then the number of uses per day is unlimited.
- Expiration Date – This setting selects an expiration date for the account. Selections are 1 month, 6 months, 1 year, and 2 years. If a date has been selected, then the account's expiration date is reset each time the account is recharged.
- Value – This is the initial dollar value for a monetary based account. This box will be grayed out when the Account Type is set to product based.
- Tokens – If you want to dispense site tokens as a part of a particular wash package (e.g. for use in vacuum cleaners), use this setting to define how many tokens to dispense when a Product Based type account is used.
- Wash – Allows you to assign the wash package for a product-based account. This field will be grayed out if the Account Type is set to monetary based.

4. Click OK to save your changes and return to the Account Profile Selection screen.

Programming Instructions for Individual House Accounts

Individual house accounts are assigned to each person who will be using the account. This can be any member of the group assigned to a House Account Profile, or individuals who purchase a customized house account.

1. From the House Account Functions, click the House Account Setup button to display the House Account Selection screen.
2. Click the New button to display the House Account Setup screen.
3. Fill in the appropriate information for the following fields:
   - Account Name – The name of the account.
   - Card/Code – Enter the code or card number for the account here. The label for this field will change depending on what Media type you select. If you are setting up a card based account from the Console, you can swipe the card and the account number will automatically be entered. If the account is code based, you can either enter the code manually or leave the field blank to allow the system to automatically assign a code.
   - Profile Name – The name of a house account profile that can be selected to set up default settings for this account. If you select a profile, the contract you setup for the account will automatically populate the Contract section of the screen. You must setup House Account Profiles before setting up the House Account for there to be any profiles in the drop down list.
   - Selling Price – This is the price that the customer will be charged for the account.
   - Active? – This check box allows you to disable the account without deleting it.
   - Fixed Price? – Check this box if the customer will be charged the same amount when the account is recharged. If this control is not checked, then the cashier can override the price when recharging the account.
   - Account Type – Select Product Based or Monetary Based. Product Based accounts have a preset number of uses for one wash package. Monetary Based accounts have a starting dollar value and the value of each wash selected is deducted from the account balance when the account is used.
   - Media – Select Card or Code based on the type of account you are setting up. The Account Number field will be labeled based on the type of media selected. Code accounts can be from 3 to 7 digits. Card Account Numbers must be an 8-digit number. The account number can be encoded on a magnetic card or given to the customer to be entered as a code. If the number you enter is already in use, an error message will pop up.
   - Print Customer Receipt? – The system will give the customer the option of printing a receipt at the Portal TI when they use their account.
   - Print Store Receipt? – The system will automatically print out a receipt for the store when the account is used.
   - Show Account Status to Customer? – When this option is set, the Portal TI will display the remaining value of their account.

- Allow upgrades? – This setting will determine if the customer will be prompted for upgrades (assuming that upgrades are turned on) when the account is used.

4. Click the Schedule button to display the House Account Schedule Setup screen.
5. Enter the times and dates that the customer can use this account.
6. Click OK to return to the House Account Setup Screen.
7. Click the Details button to display the House Account Details Setup screen.
8. Enter the Details of this account's contact information. If the company has already been defined, you can enter the company name and click the search button to find the details already entered into the system.
9. Click OK to return to the House Account Setup Screen.
10. If you have not selected a profile, you will need to setup a contract in the Contracts section of the screen to define the terms of the house account. A Contract defines the terms of the agreement between your site and the customer. Click New to display the House Account Contract screen. Enter the following information:
    - Total Uses – If the house account is product based, enter the total number of uses in this field.
    - Number Used – This field will be grayed out and blank when entering new contracts. If you are viewing an existing contract, the total number of times the account has been used will appear here.
    - Max Uses Per Day – Enter the maximum number of times the account can be used in one day.
    - Contract Price – Enter the amount paid for the account.
    - Expiration Date – Select the expiration date by clicking the button to the right of this field.
    - Wash – If the account is product based, select the wash package to issue when the account is used.
    - Value – If the account is monetary based, enter the total value (not necessarily the amount paid) of the account.
    - Tokens – Enter the number of tokens to dispense when the account is used.
11. Click OK to return to the House Account Setup Screen.
12. Click OK to return to the House Account Selection screen. The account you have just defined will now appear on the list of House Accounts.