



NXTWASH

POS

TRAINING GUIDE

Updated 12/30/2024

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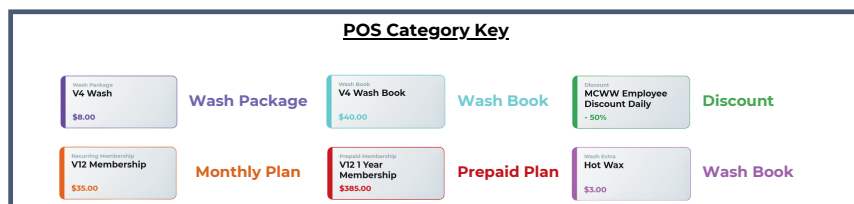
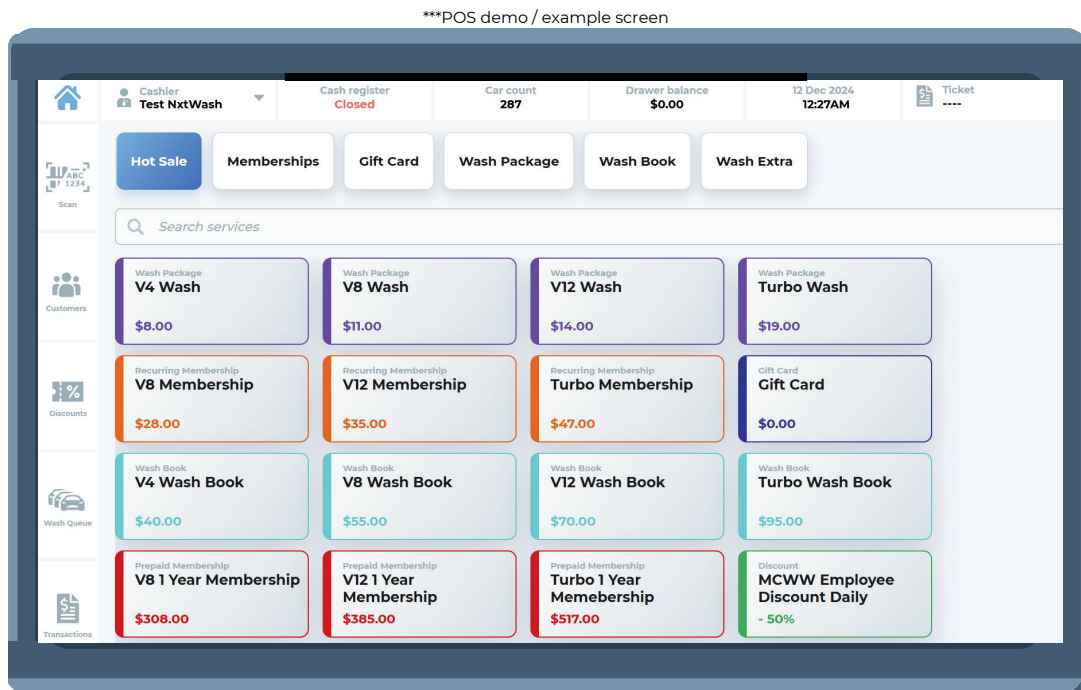
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POS Overview

Hardware Overview



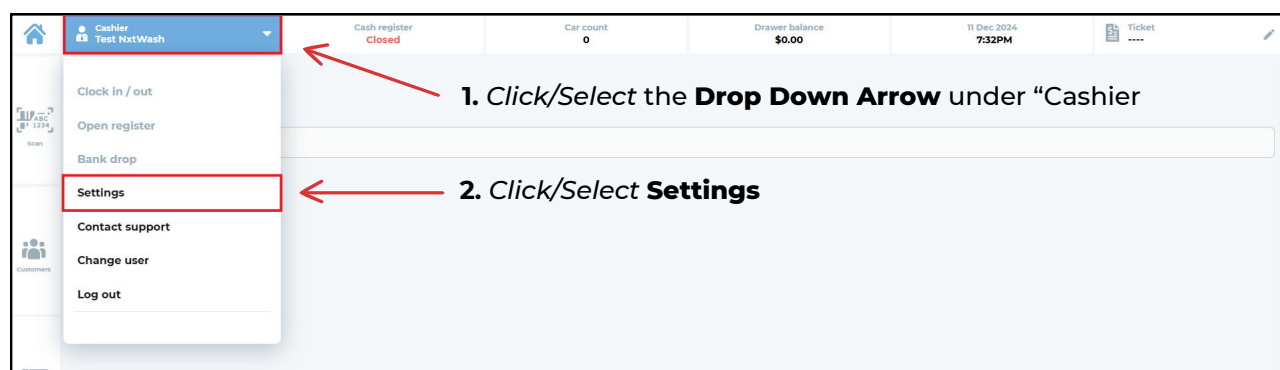
POS Layout



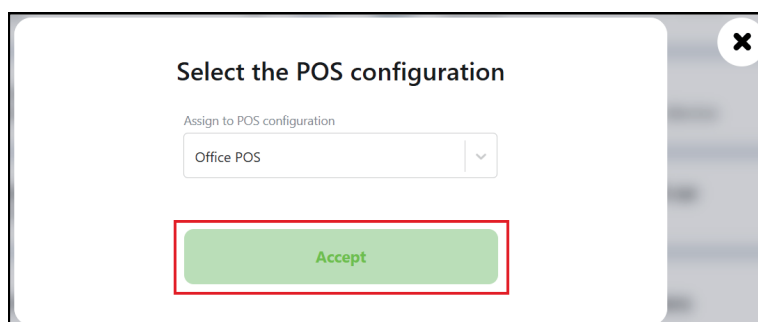
POS Start Up and Configuration

Log In & Configuration

- ➡ To start up the NxtWash POS, open the Chrome Browser on your POS device
- ➡ Go to the URL "pos.nxtwash.com"
- ➡ At the log in screen, enter the username and password given by your manager to log in
- ➡ At the POS home screen, go to the top left hand corner to the right of the "home" icon and click on the drop down to the right of the User Info as shown below:



- ➡ In the **Settings** Menu select "**POS Configuration Settings**" and then choose the device from the drop down



- ➡ Once the POS Configuration is assigned, Click/Select "Accept"
- ➡ Click/ Select the "Update Content Settings" button to apply the POS Configuration
- ➡ Click/Select the Home button icon and the POS configuration settings have now been applied to the device

POS Navigation

Top Panel Guide

 Cashier
Test NxtWash

Cash register
Closed

Car count
287

Drawer balance
\$0.00

12 Dec 2024
12:27AM

 Ticket



 **HOME Button** Cashier
Test NxtWash **Settings Tab**Cash register
Closed **Register Status**Car count
287 **Car Count**Drawer balance
\$0.00 **Register Balance**12 Dec 2024
12:27AM **Date/Time** Ticket
---- **Sales Ticket**

Side Panel Buttons

 **Scan Barcode**
(WashBook, Gift Card, Promo Code)

 **Wash Queue**
(Digital Queue on POS)

 **Customers**
(Search, Edit, Add Vehicles)

 **Transaction History**
(Recent sales and invoices)

 **Discounts**
(Add Discounts to sales on ticket)

Sales Categories

Hot Sale

Memberships

Gift Card

Wash Package

Wash Book

Wash Extra

-  **HOT SALE** shows most popular sales items and service offerings
-  Customize the **Sale Categories** in the **Admin Panel** and add/remove services and items

Open and Closing Procedures from POS

Opening the Register

- ➡ At the POS Home Screen, *Click/Select* the “**Cashier**” drop down arrow
- ➡ In the drop down menu, *Click/Select* “**Open Register**”
- ➡ *Enter* the amount of cash you will open with inside the POS Register under “**Enter Opening Amount**” and *Click/Select* “**Open Register**” button

The screenshot shows the 'Register' screen in a POS system. On the left, there's a sidebar with a 'Shift close' button and a user icon labeled 'None'. Below this, it shows 'Opening balance \$0.00', 'Cash transactions \$0.00', and 'Amount in register \$0.00'. At the bottom of the sidebar, it displays the time '10:48 AM', the date 'Thursday, 12 December 2024', and the address '634 Haddonfield Rd'. The main area on the right is titled 'Enter opening amount' and features a text input field containing '\$ 200.00'. Below the input field is a numeric keypad with buttons for digits 1-9, a decimal point, and a clear button. At the bottom of the main area is a blue button labeled 'Open register'.

- ➡ The POS will refresh back to the Home Screen with a **GREEN** notification alert that the Cash Register is **OPEN** and will now display as Open at the top of the POS
- ➡ In the Settings Menu select POS Configuration Settings and then choose the device from the drop down

Bank Drop

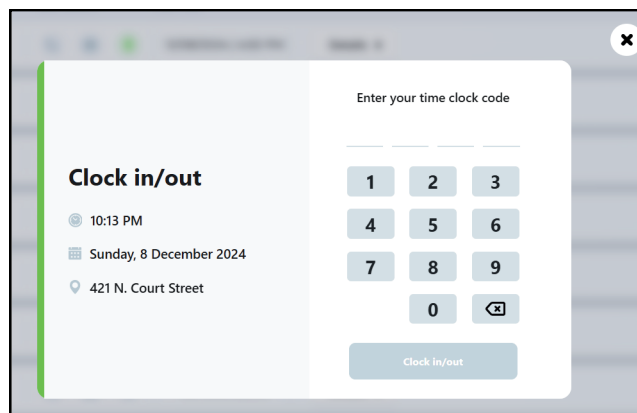
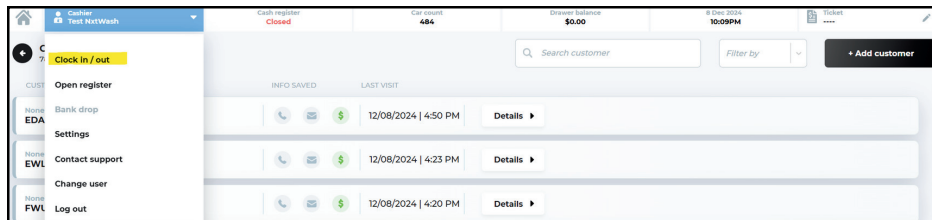
- ➡ *Click/Select* the “**Cashier**” drop down arrow
- ➡ In the drop down, *Click/Select* “**Bank Drop**”
- ➡ When the Bank Drop pop up window appears, *choose* the category from the drop down to choose what type of Bank Drop you will perform
- ➡ *Click/Select* “**Accept**”
- ➡ *Enter* the amount to drop and *Click/Select* “**Confirm**”
- ➡ The drop will then reflect in the Admin Panel reporting for your cash records

Closing the Register

- ➡ At the POS Home Screen, *Click/Select* the **"Cashier"** drop down arrow
- ➡ In the drop down menu, *Click/Select* **"Close Register"**
- ➡ In the Register pop up window, you will see Opening Balance, Cash Transactions and Amount In Register on the left hand side of the window
- ➡ *Enter* the amount you are closing the Register with after counting cash and *Click/Select* "Close Register"
- ➡ In the drop down menu, *Click/Select* **"Close Register"**

Clock In / Out

- ➡ At the POS Home Screen, *Click/Select* the **"Cashier"** drop down arrow
- ➡ In the drop down menu, *Click/Select* **"Clock In / Out"**

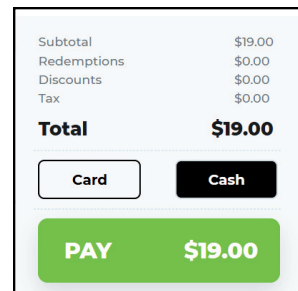
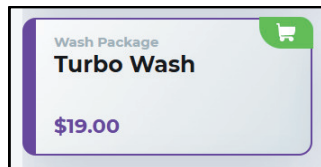


- ➡ In the Time Clock window, *Enter* the employee **4 digit code** from the Admin Panel
- ➡ *Click/Press* the blue **Clock In/Out** button
- ➡ *Shift details will be tracked in the Admin Portal*

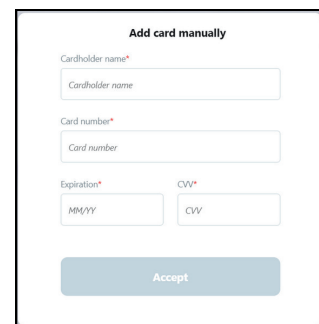
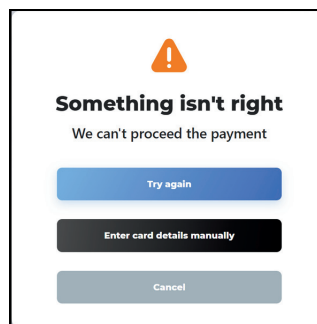
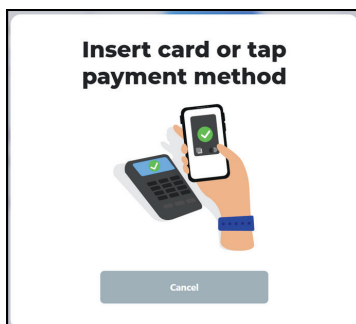
Payment on POS

CASH And CREDIT Payments

- ➡ Click/Select the Item the customer wants to purchase, once selected the item will be added to the Sales **Ticket**
- ➡ You can cycle through **Categories** using the Top Slider
- ➡ For most transactions, you will be able to pay by **CASH** or **CARD**
- ➡ After choosing the items to purchase, you can see your sales summary on the Sales **Ticket** on the right side of the screen

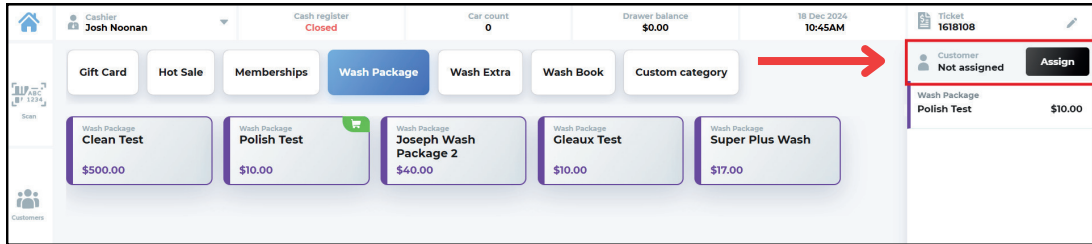


- ➡ For a **CASH** payment, Click/Select **CASH**
 - ➡ **Enter** the exact amount of **CASH** given by the customer in the pop up window
 - ➡ Click/Select **Proceed**
- ➡ For a **CREDIT** payment, Click/Select **CREDIT**
 - ➡ Click/Select **PAY**
 - ➡ The payment device will light up from the **"Welcome"** screen to **Insert/ Tap** screen
 - ➡ **Tap** or **Swipe** card on the **PAX Terminal**
 - ➡ If Card payment fails, the Card can also be entered manually on the POS

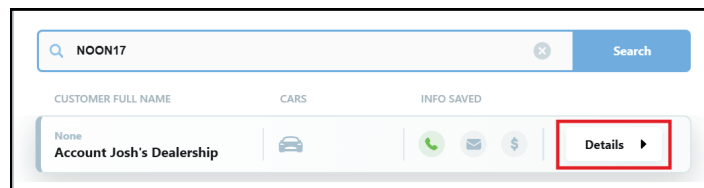


Invoicing

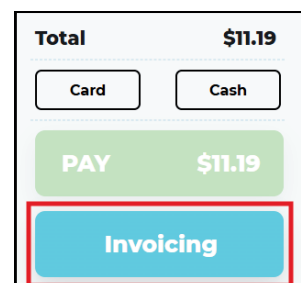
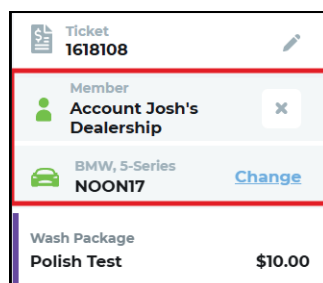
- ➡ At the POS Home Screen, *Click/Select* the Wash that the Fleet/ Invoice enabled client would like to purchase
- ➡ To **enable Invoicing** for an account/ customer, you will need to “**Allow Invoicing**” under the customer profile in the Admin Portal
- ➡ Once the Wash is selected, you will need to **assign** the sale/ticket to the customer



- ➡ *Click/ Select* “**Assign**”
- ➡ In the “**Assign Customer**” pop up window, *search* the customer you will assign by **name, phone number, RFID tag, or License Plate** and *Click/Select* “**Search**”
- ➡ *Click/ Select* “**Details**” once the customer is found and shown below the search bar



- ➡ *Click/ Select* “**Assign**” under the customer again in the pop up window
- ➡ The wash will now have the Fleet/ Invoiced customer assigned to the sale ticket and you can now finish the sale by selecting “**Invoice**” under Pay





Promotional Codes

-  At the POS Home Screen, *Click/Select* the Wash the customer would like to purchase
-  *Click/Select* “**Scan**” from the Tabs on the left hand side
-  Scan/Enter the **Code**
-  The **Ticket** will now display the **Promotion** applied to the current sale and you can proceed to take remaining balance payment by **CASH**, **CREDIT**, or **Gift Card**

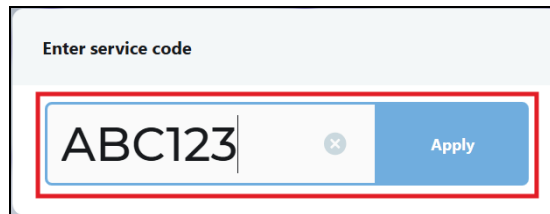
Discounts

-  At the POS Home Screen, *Click/Select* the Wash the customer would like to purchase
-  *Click/Select* “**Discounts**” from the Tabs on the left hand side
-  Click/Select the Discount you want to apply to the sale ticket
-  The **Ticket** will now display the **Discount** applied to the current sale and you can proceed to take remaining balance payment by **CASH**, **CREDIT**, or **Gift Card**

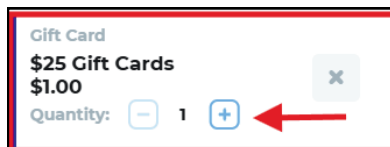
Selling Gift Cards and Washbooks

Gift Cards

- ➡ Click/Select **"Gift Cards"** from the Sales Categories at the top menu bar
- ➡ Choose the Gift Card option the customer would like to purchase
- ➡ Choose a pre-set Gift Card amount or if the option is enabled for **"Open Gift Card"** you can choose that option to enter any amount
- ➡ **"Pre Set" Gift Card** or set amount
 - ➡ Click/Select **Gift Card** from options
 - ➡ In the pop up window, *enter* the **Code** shown on the physical blank Gift Card and hit **"Apply"**



- ➡ The **Ticket** will now display the Gift Card details and allows you to sell multiple cards in the same Ticket by selecting the **"Quantity"** **"+"** or **"-"** button



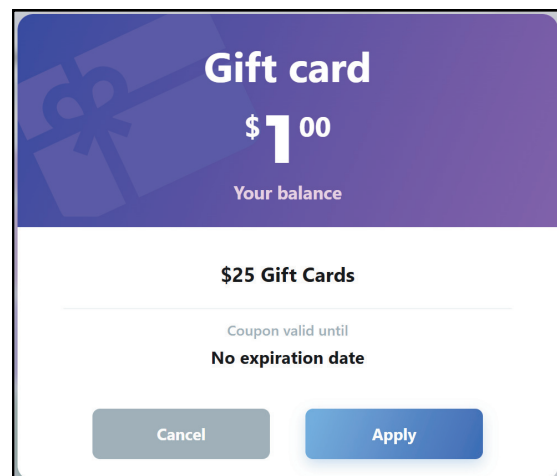
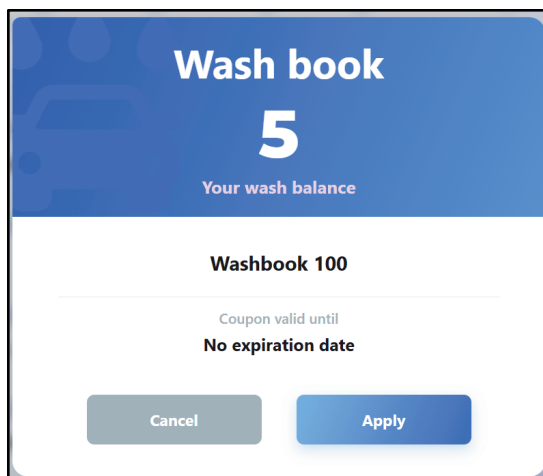
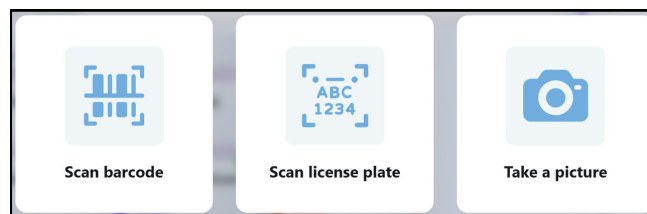
- ➡ Once finished adding the card and quantity, *proceed* to checkout with **CASH** or **CREDIT**
- ➡ **"Open Price" Gift Card**
 - ➡ Click/Select **Gift Card** from options
 - ➡ In the pop up window, *enter* the **Dollar Amount** the customer would like to load on the physical blank Gift Card and hit **"Apply"**
 - ➡ In the next pop up window, *enter* the **Code** shown on the physical blank Gift Card and hit **"Apply"**
 - ➡ The **Ticket** will now display the Gift Card details and allows you to sell multiple cards in the same Ticket by selecting the **"Quantity"** **"+"** or **"-"** button
 - ➡ Once finished adding the card and quantity, *proceed* to checkout with **CASH** or **CREDIT**

Wash Books

- ➡ Click/Select **“Wash Books”** from the Sales Categories at the top menu bar
- ➡ Choose the Wash Book option the customer would like to purchase
- ➡ Enter the **code** on the blank physical Wash Book into the pop up window and Click/Select **“Apply”**
- ➡ The **Ticket** will now display the Wash Book details and allows you to sell multiple books in the same Ticket by *selecting* the **“Quantity”** **“+”** or **“-”** button
- ➡ Once finished adding the book and quantity, *proceed* to **checkout** with **CASH** or **CREDIT**

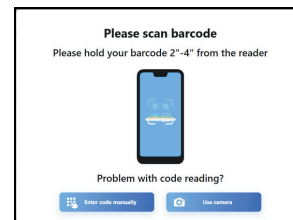
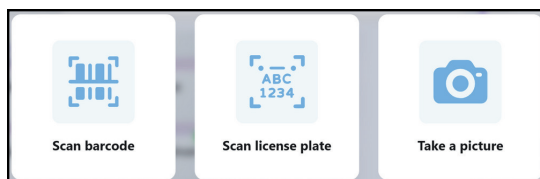
Gift Card and Wash Book Balance Lookup

- ➡ Click/Select **“Scan”** from the tabs on the left hand side
- ➡ Click/Select **“Scan Barcode”**
- ➡ Scan or Enter the **barcode** from the **Gift Card** or **Wash Book** to check the balance
- ➡ The pop up window will then display the **Dollar Amount** or **Wash Amount** balance left on the **Gift Card** or **Wash Book**

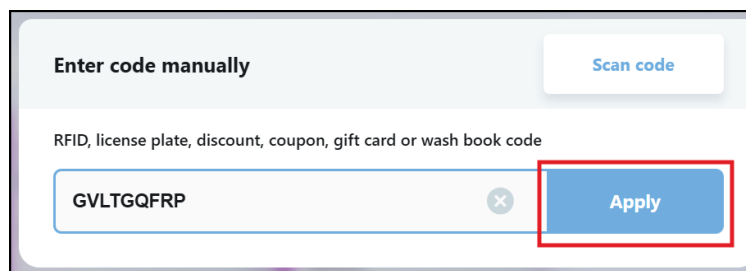


Gift Card Redemption

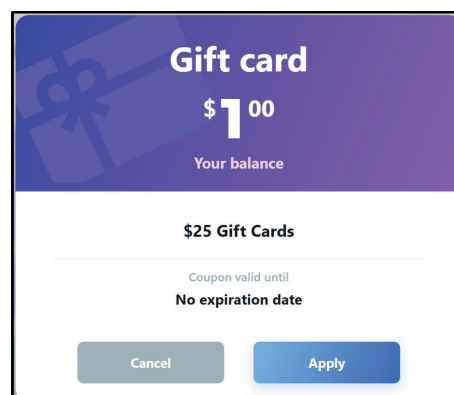
- ➡ At the Home Screen, *Click/Select* the **Service Item** the customer wants to purchase
- ➡ *Click/Select* **"Scan"** under the Home button
- ➡ At the pop up window, *Click/Select* the **"Scan Barcode"** button



- ➡ You can use the Barcode Scanner to **scan the code** or **enter the code manually** by *selecting "Enter Code Manually"*



- ➡ **Enter the code** and *Click/Select "Apply"*

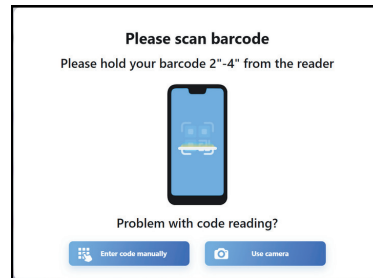
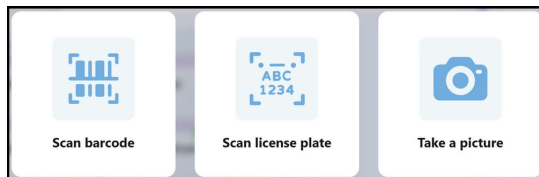


- ➡ Confirm the balance and *Click/Select "Apply"* to use the Gift Card as payment
- ➡ **IF** there is a remaining balance after the Gift Card is used, the balance left can then be paid by **CASH** or **CREDIT** at the bottom of the sale ticket

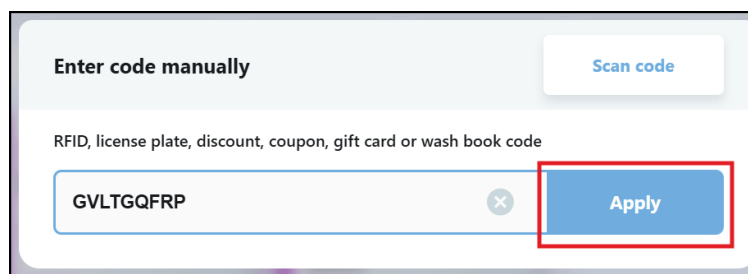
Wash Book Redemption

➡ Click/ Select **"Scan"** under the Home button

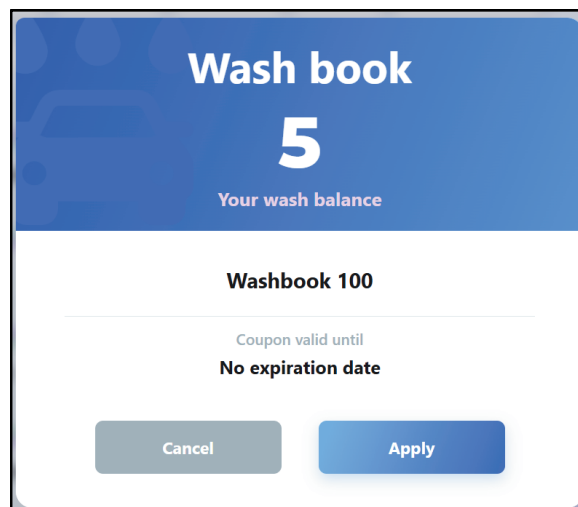
➡ At the pop up window, Click/Select the **"Scan Barcode"** button



➡ You can use the Barcode Scanner to **scan the code** or **enter the code manually** by selecting **"Enter Code Manually"**



➡ Enter the code and Click/Select **"Apply"**



➡ Click/Select **"Apply"** and in the sales ticket the Wash Book will be applied. Click/ Select **"Redeem"** to finish redeeming the wash book

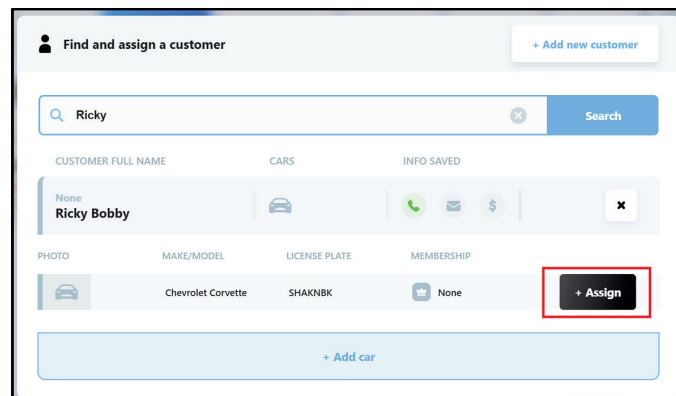
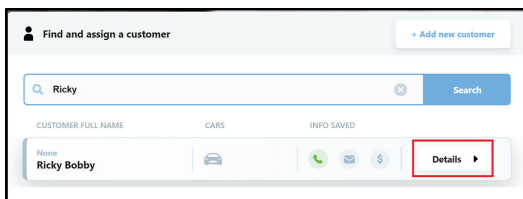
Memberships

Selling a Membership

- ➡ Click/Select **"Membership"** from the Sales Categories at the top menu bar
- ➡ **"Memberships"** will show both **Pre-Paid** and **Recurring** options at the toggle bar below the Categories menu



- ➡ **Recurring Membership Sign Up**
 - ➡ Click/Select the **"Recurring Memberships"** toggle
 - ➡ **Choose** the plan the customer wants to sign up for from the options
 - ➡ On the Ticket, Click/Select **"Assign"** under the invoice number
 - ➡ **IF** the customer has an existing profile, *search* for the customer by **Name, Phone,** or **License Plate** and **Assign** the customer to the Membership
 - ➡ **IF** the customer does not have a profile, Click/Select **"Add New Customer"** on the top right of the pop up screen
 - ➡ Once customer is found Click/Select the **"Details"** button and on the next screen, Click/Select **"Assign"** under the customer vehicles as shown below:



- ➡ The next window will ask the customer to **agree to the terms and conditions** by *checking* the box. Click/Select **"Save"** if the customer wants to **Opt-In** for **SMS** or Click/Select **"Cancel"** if the customer declines
- ➡ The **Sales Ticket** will now show the customer assigned to the membership sale with the **License Plate** or **RFID Tag** displayed under the **Customer Name**
- ➡ Click/Select **"Card"** and *Insert* the card into the **credit card terminal** to Pay **CREDIT**



Recurring memberships

Prepaid memberships

Prepaid Membership Sign Up

-  Click/Select the **"Prepaid Memberships"** toggle
-  **Choose** the plan the customer wants to sign up for from the options
-  On the Ticket, Click/Select **"Assign"** under the invoice number
-  **IF** the customer has an existing profile, *search* for the customer by **Name, Phone, or License Plate** and **Assign** the customer to the Membership
-  **IF** the customer does not have a profile, Click/Select **"Add New Customer"** on the top right of the pop up screen
-  Once customer is found, Click/Select the **"Details"** button and on the next screen Click/Select **"Assign"** under the customer vehicles
-  The next window will ask the customer to agree to the terms and conditions by **checking the box** and Click/Select **"Save"** if the customer wants to Opt-In for SMS or Click/Select **"Cancel"** if the customer declines (optional)
-  The **Sales Ticket** will now show the customer assigned to the membership sale with the **License Plate or RFID Tag** displayed under the **Customer Name**
-  Click/Select **CASH** or **CARD** (you can also pay by Gift Card by *Clicking/Selecting* Scan to redeem card) and finish the sale

Family Plan and Additional Vehicles sign up

-  To *add* an additional vehicle to an existing customer profile, Click/Select **"Customers"**
-  *Search Customer* by **Name, Phone, License Plate or RFID tag** by the **Filter drop down**
-  When the account is found, Click/Select **"Add Car"**
-  Enter the New Vehicle Info and Click/Select **"Save Car"**
-  Confirmation will pop up saying **"New Car has been successfully added"**
-  Click/Select the **"Membership Details"** tab at the top
-  Click/Select **"Assign Membership"**
-  You will be redirected to the memberships page, you will see the ticket assigned to our customer, select the **new membership**
-  Once added to the ticket, Click/Select on **Card** and then **"Pay"**

Redeeming a Membership

- ➡ **IF** POS has LPR Camera or RFID reader attached, the redemption will auto redeem with a confirmation prompt for the employee to confirm to redeem
- ➡ **IF** there is no attached camera or reader, you can choose “Scan” to scan a tag or instead manually search the customer on the “Customer” tab
- ➡ Once customer is found after search, *Click/Select* “**Details**” and then “**Redeem**” under the customer vehicle

The screenshot shows a search interface titled "Find and assign a customer". It includes a search bar with the text "Ricky" and a "Search" button. Below the search bar is a table with columns: "CUSTOMER FULL NAME", "CARS", and "INFO SAVED". The first row shows "None" for the name, "Ricky Bobby" for the car, and icons for phone, email, and payment. A "Details" button with a right arrow is highlighted with a red box.

CUSTOMER FULL NAME	CARS	INFO SAVED
None Ricky Bobby		

The screenshot shows the details page for a customer named "Member SDPUUY09". It includes a header with a car icon, contact icons, and a "No information" status. Below the header is a section with fields for "Phone number" (6462467295), "Email address" (No email added), and "Payment method" (Credit Card **** 4005). There is an "Edit customer" button. Below this is a table with columns: "PHOTO", "MAKE/MODEL", "LICENSE PLATE", "MEMBERSHIP", "NEXT PAYMENT", and "STATUS". The first row shows a car icon, "None", "SDPUUY09", "New Membership", "01/09/2025", and "Active". A "Redeem" button is highlighted with a red box. There are also "Edit" and "+ Assign" buttons. At the bottom is a "+ Add car" button.

PHOTO	MAKE/MODEL	LICENSE PLATE	MEMBERSHIP	NEXT PAYMENT	STATUS
	None	SDPUUY09	New Membership	01/09/2025	Active

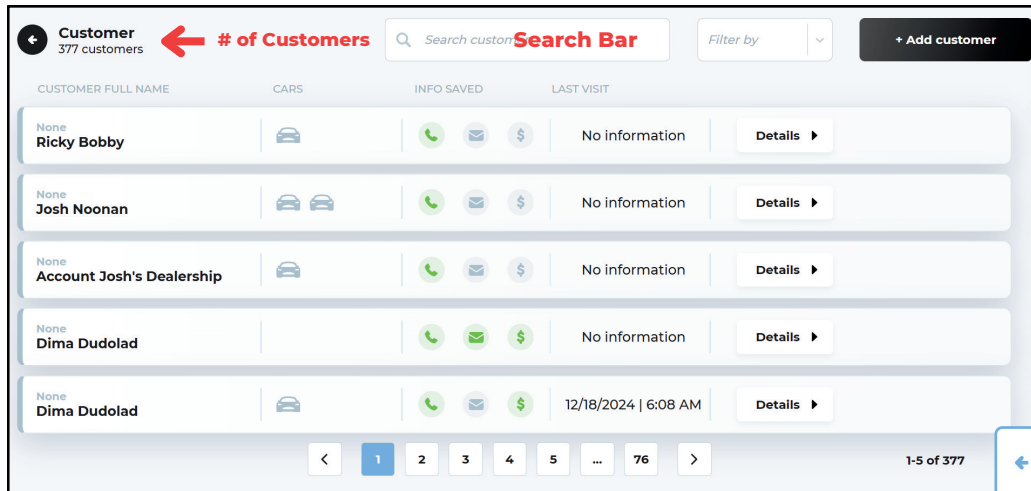
- ➡ The **Sales Ticket** will now display the customer info and you can then *Click/Select* **Redeem** to redeem the customer

Customers

Customer Tab Overview

Click/Select the “Customers” tab from the left hand side bar

The Customer Home page will show as shown below

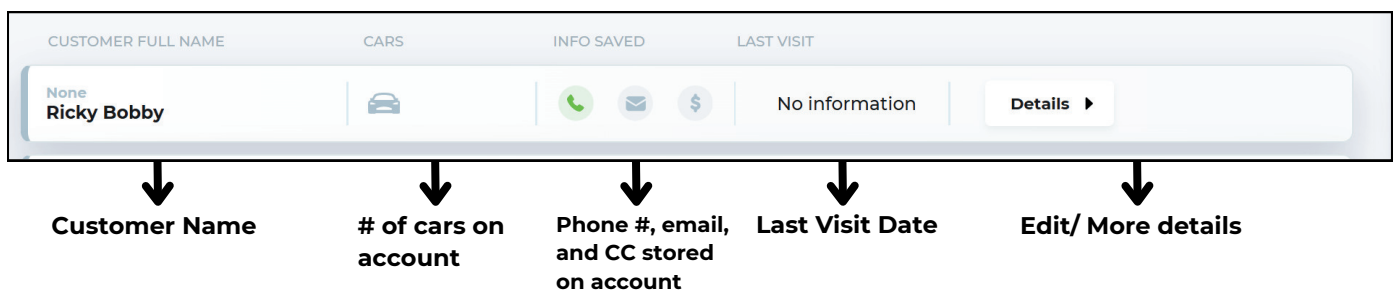


CUSTOMER FULL NAME	CARS	INFO SAVED	LAST VISIT	
None Ricky Bobby			No information	Details ▶
None Josh Noonan			No information	Details ▶
None Account Josh's Dealership			No information	Details ▶
None Dima Dudolad			No information	Details ▶
None Dima Dudolad			12/18/2024 6:08 AM	Details ▶

The Home Page will show most recent customers first and additional customers on the next pages at the bottom

Customer Name, amount of vehicles on account, the info the customer has on their profile, the Last Visit date, and additional details shown upon initial search

Customer Icon Info



CUSTOMER FULL NAME	CARS	INFO SAVED	LAST VISIT	
None Ricky Bobby			No information	Details ▶

↓ ↓ ↓ ↓ ↓

Customer Name # of cars on account Phone #, email, and CC stored on account Last Visit Date Edit/ More details



Member Dima Test			11/26/2024 12:04 PM	Details ▶
---------------------	--	--	-----------------------	-----------

GREEN - Active Member / Active Vehicle(s) / Phone, Email, CC Saved on file

ORANGE - Decline Member / Active Vehicle(s) / Phone, Email, CC Saved on file

RED - Expired Member / Active Vehicle(s) / Phone, Email, CC Saved on file

Search Bar and Filter

- Choose a “**Filter by**” option from the filter drop down at the top of the **Customers Tab**
- Click/Select the “**Search Customer**” bar and type into the **search bar** the info on hand
- **Filter** and **Search** for customer by:
 - *First Name*
 - *Last Name*
 - *Phone Number*
 - *Email*
 - *License Plate*
 - *RFID Tag*
- The customers will now populate based off the search criteria

Adding Customers

- Click/Select the **Customers Tab**
- Click/Select the “**Add Customer**” button at the top right

Customer Info	Cars(0)	Payment methods
---------------	---------	-----------------

- The three Customer sections are: **Customer Info**, **Cars**, **Payment Methods**
- Enter the **Customer Info** such as **First Name**, **Last Name**, **Phone Number**, **Email** and assign a Location to the customer and Click/Select Save
- Once saved, proceed to the Cars section on the top tabs and Click/Select “**Add Car**”
- Enter the **Vehicle Info** such as **License Plate** or **RFID Tag** (optional: Year, Make, Model, Color)
- Click/Select “**Save**” and proceed to the **Payment Methods** tab (optional) and Click/Select the **back arrow** at the top left under Customer Name and “Edit Car”
- Under “**Payment Methods**” you can *Insert* the Customers Credit Card or type the card info in manually to save a customers card on file for future transactions
- Once saved, you can also view “**Washes Balance**” and “**Wash History**”
 - **Washes Balance:** displays customer Loyalty Points and Wash Books on the account
 - **Wash History:** displays the customers redemption and purchase history with the transaction info such as Transaction Photo, Invoice ID,

Editing a Customer

- ➡ On the **Customer** page, *search* for the **Customer** to edit
- ➡ *Click/Select* **Details** to *edit* the customer info
- ➡ *Click/Select* **Edit Customer** or **Edit Vehicle** on the account under the customer info
- ➡ After any edits are made, *Click/Select* **Save Changes** and return to the home screen

Changing Membership and Tag/Plate

- ➡ *Click/Select* the “**Customers**” tab from the left hand side bar
- ➡ *Search* for the customer you would like to *change* the **RFID tag** or **License Plate**
- ➡ *Click/Select* the **Details** button/arrow
- ➡ *Click/Select* the **Customer’s Vehicle** you are changing the tag or plate on under “**Edit**”
- ➡ Under **Edit**, you will see the Customers Plate and Tag Info. To *change/edit* delete the old plate/ tag and retype the new info
- ➡ Once the info is added, *Click/Select* **Save Changes** and the info will be updated

Adding an Additional Vehicle

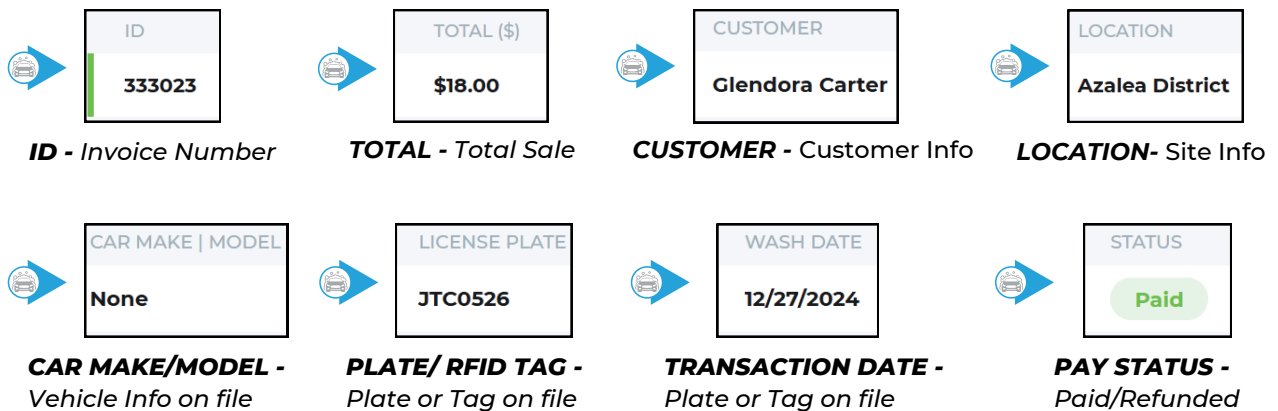
- ➡ On the **Customer page**, *Click/Select* “**Details**”
- ➡ *Search* the **Customer Profile** you wish to add an additional vehicle under
- ➡ On the **Customer page**, *Click/Select* “**Details**”
- ➡ Under **Details**, *Click/Select* “**Add Car**” at the bottom of the page
- ➡ On the **Customer page**, *Click/Select* “**Details**”
- ➡ Add the details of the new vehicle such as **License Plate**, **RFID Tag**, and **Vehicle Make/Model**
- ➡ When finished, *Click/Select* **Save Changes**

Transactions Tab

Transactions Overview

- Click/Select the “Transactions” tab from the left hand side bar
- The Transaction Home page will show as shown below

Transactions							
				Filter (0)	Search transaction		
ID	TOTAL (\$)	CUSTOMER	LOCATION	CAR MAKE MODEL	LICENSE PLATE	WASH DATE	STATUS
332778	\$18.00	None	Azalea District	None	None	12/26/2024	Paid
332777	\$0.00	6856E19	Azalea District	None	6856E19	12/26/2024	Paid
332769	\$0.00	John Fuller	Azalea District	None	7RLNM	12/26/2024	Paid
332768	\$8.00	None	Azalea District	None	None	12/26/2024	Paid
332767	\$0.00	Ryan Fitch	Azalea District	None	pxs9089	12/26/2024	Paid
332766	\$0.01	ANGELA DOTSON	Azalea District	None	momadot	12/26/2024	Paid
332765	\$0.01	rgf3927	Azalea District	None	rgf3927	12/26/2024	Paid



- Search for Transactions by: Invoice ID, Customer Name, License Plate, Wash Date
- Use the Filter to sort by: Unpaid, Paid, Split payment, Refunded, Partially refunded and Canceled

Refunds

Refund a sale

- ➡ Click/Select the **"Transactions"** tab from the left hand side bar
- ➡ Search the **Transaction** at the **search bar**, and when found Click/Select on the arrow to the far right
- ➡ You will then see the **Transaction** in a pop up window with the **Invoice ID** and a brief overview of the sale as shown below:

Transaction details Paid

Customer: **Brandon Castle**
Transaction number: **335221**
Transaction total (\$): **\$29.99**
Tax: **\$0.00**
Payment type: **CardOnFile **** 5373**

Wash date | time: **12/30/2024 | 3:03AM**
Location: **Azalea District**
Lane: **None**
Transaction source: **AutoCharge**
Employee: **None**
Gate number: **None**

License plate: **SBZ2020**
RFID: **None**
Car year: **2019**
Car make: **GMC**
Car model: **Yukon**
Car color: **White**

Image of the car

Get receipt

SERVICE USED	TRANSACTION TYPE	SERVICE AMOUNT (\$)	SERVICE BALANCE	LOYALTY POINTS / CODE
Polish LT 29.99	Sale	\$29.99	-	-

- ➡ To initiate the **refund**, Click/Select the **"Refund"** black button in the upper right hand corner of the **Transaction Details**
- ➡ The **Refund** confirmation screen will pop up asking you to *confirm*. Once *confirmed* the sale will now be refunded as shown below:

Confirm Refund invoice #335221

Are you sure you want to issue a refund?
This action cannot be undone.

Refund Amount: \$29.99

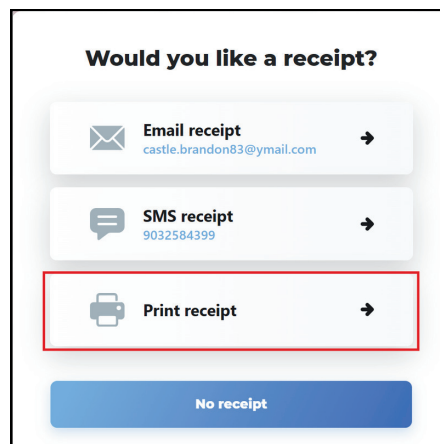
Press 'Confirm' to proceed with the refund or 'Cancel' to return.

Cancel Confirm

Receipts

Print Receipt

- ➡ Click/Select the **"Transactions"** tab from the left hand side bar
- ➡ Search the **Invoice** or **Transaction Info** and when found Click/Select the **far right arrow**
- ➡ On the **Transaction**, Click/Select **"Get Receipt"**
- ➡ In the receipt pop up window, Click/Select **"Print Receipt"** and the receipt will print at the local printer at the POS



SMS/ Email Receipts

- ➡ Click/Select the **"Transactions"** tab from the left hand side bar
- ➡ Search the **Invoice** or **Transaction Info** and when found Click/Select the far right arrow
- ➡ On the **Transaction**, Click/Select **"Get Receipt"**
- ➡ In the receipt pop up window, Click/Select **"Email Receipt"** or **"SMS Receipt"** and the receipt will send via SMS or Email
- ➡ If the customers Email or SMS # is not in the system, the next screen will prompt you to enter the Email or SMS given by the customer and will then send