



Tag Management Add an Account

Tech Guide

WASHLINK SYSTEMS

Tag Management: Add an Account

This document provides comprehensive information for configuring your Tag Management Accounts.

When emailing or calling for assistance, you must have the following information available:

Location Name: _____

Contact Person: _____

Contact Phone: _____

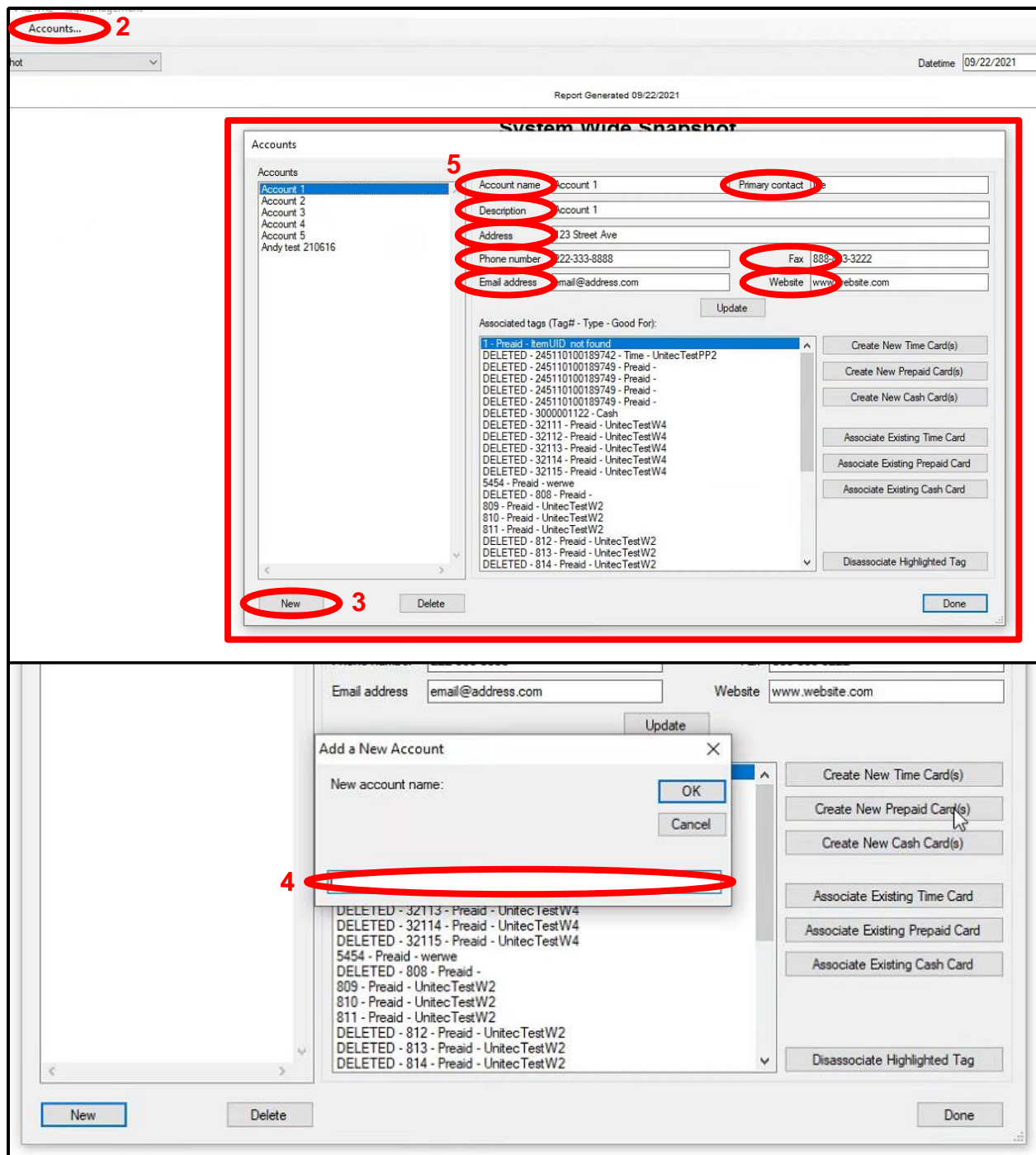
Director Service Tag: _____

Distributor Name: _____

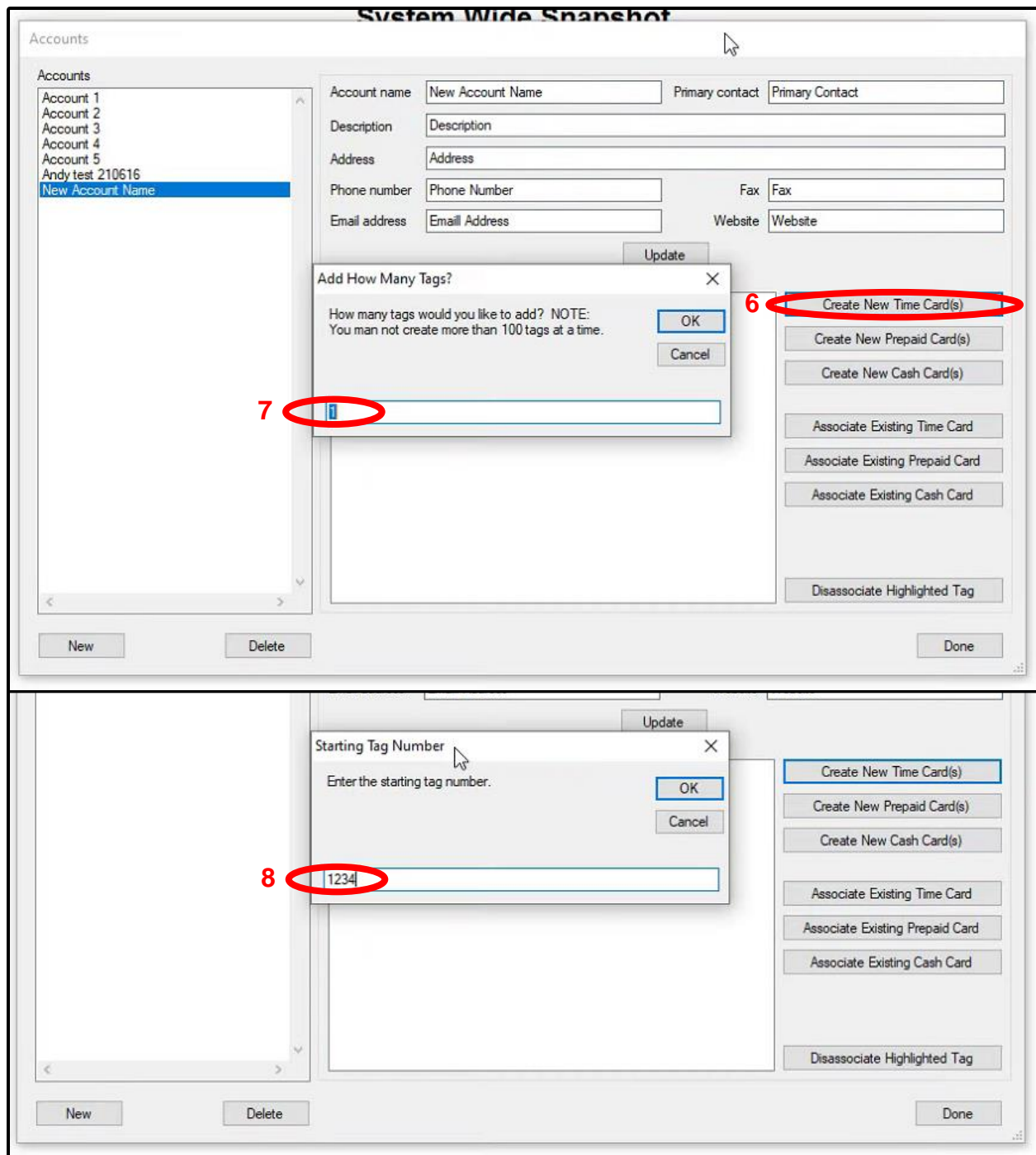
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1. Open the Tag Management app from the desktop of the Washlink Server and log in.
2. Select Accounts from the tabs on the top left.
3. Select New in the window that pops up to create a new Account.
4. Enter the new Account Name in the popup window and select OK.
5. Fill in as much or as little of the Account Info as you need for your records.



6. Create a new TIME based Tag/Card by selecting Create New Time Card(s).
7. In the popup window enter how many sequentially numbered Tags/Cards you would like to create and select OK.
8. In the popup window enter the beginning number of the sequentially numbered Tags/Cards and select OK.

Accounts

SYSTEM WIDE SNAPSHOT

Add New Time Card 1234

Tag Details

Type 9 Time Card Sale

Expires on 10 09/22/2021

Item good for 11 Pkg1

Customer Information 12

First Name

Last Name

Street

Apt #

City

State

Zip

Cell

Phone

email

Birthday

Car Make

License

Note 1

Note 2

Note 3

Note 4

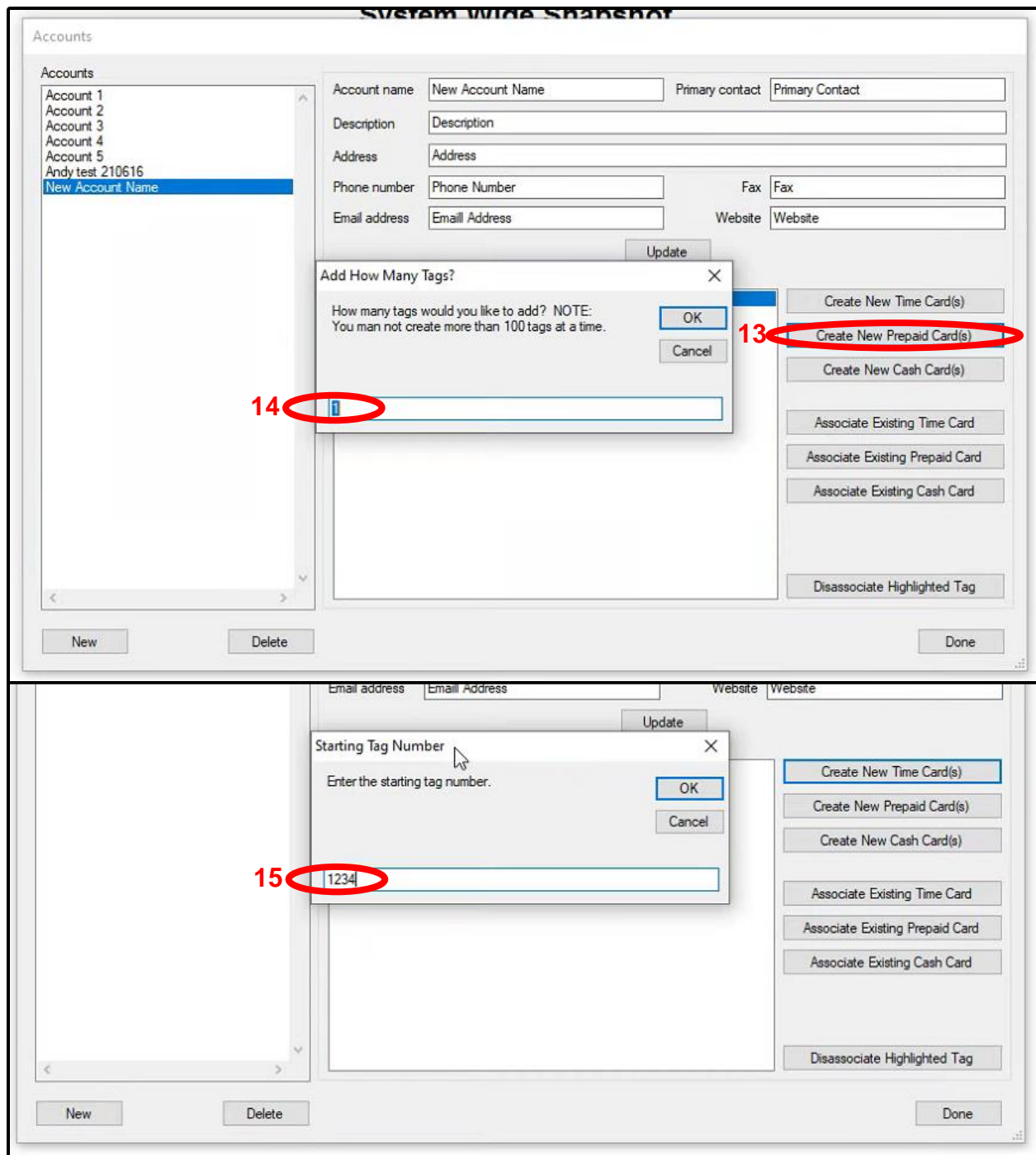
Note 5

Note 6

Note 7

Done

9. In the popup window select what Type of TIME Tags/Cards you would like to create.
10. In the popup window select when the TIME Tags/Cards should expire.
11. In the popup window Select the Item Good for (Wash Package) that should be applied upon usage of the TIME Tags/Cards.
12. In the popup window enter as much or as little Customer Info as you require for your records.



13. Create a new PREPAID based Tag/Card by selecting Create New Prepaid Card(s).
14. In the popup window enter how many sequentially numbered Tags/Cards you would like to create and select OK.
15. In the popup window enter the beginning number of the sequentially numbered Tags/Cards and select OK.

Accounts

System Wide Snapshot

Add New Prepaid Card 1234

Tag Details

Type 16 Gift Card Sale

Quantity left 17 10

Item good for 18 IPkg1

Customer Information 19

First Name

Last Name

Street

Apt #

City

State

Zip

Cell

Phone

email

Birthday

Car Make

License

Note 1

Note 2

Note 3

Note 4

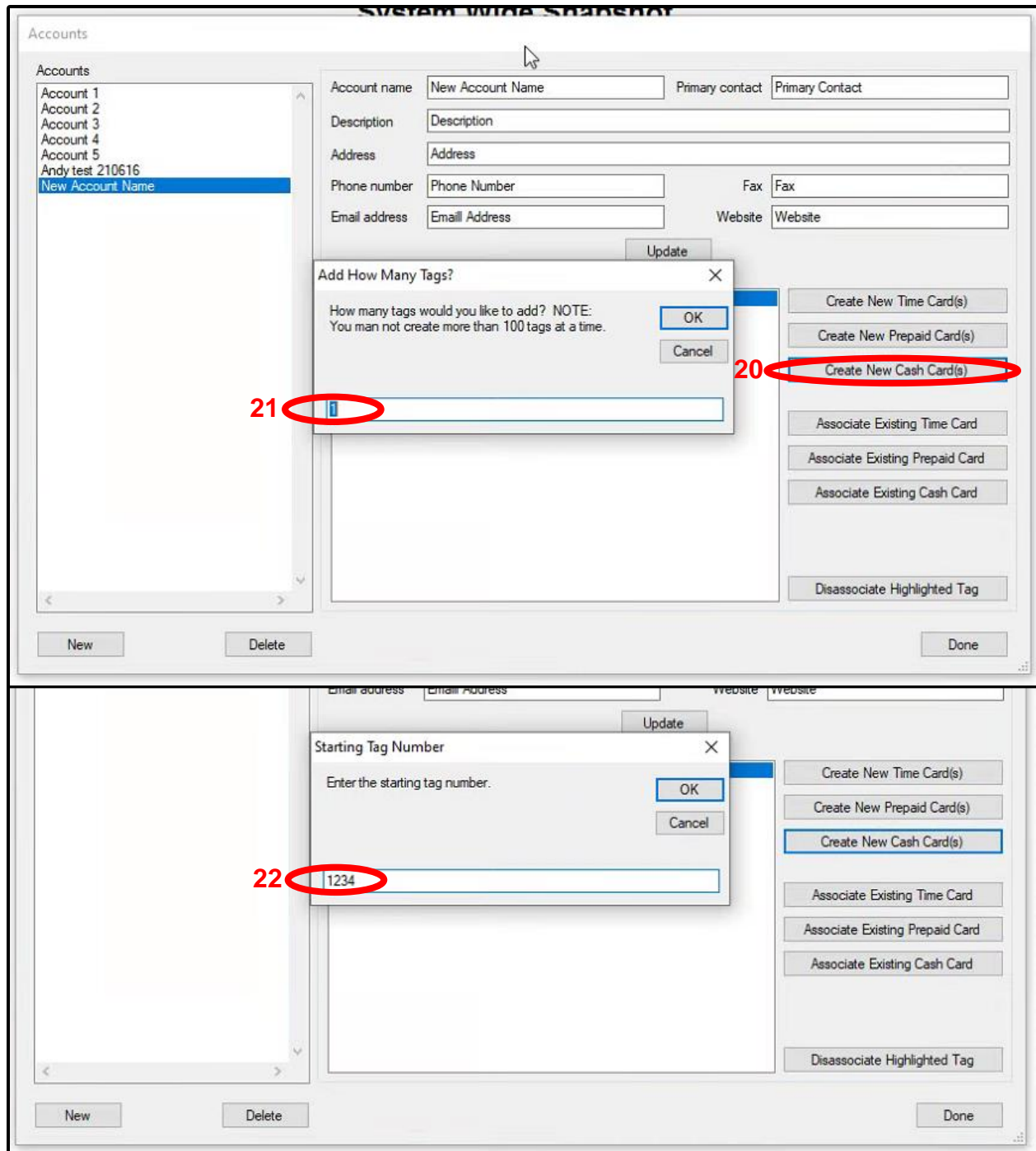
Note 5

Note 6

Note 7

Done

16. In the popup window select what Type of PREPAID Tags/Cards you would like to create.
17. In the popup window enter the Quantity Left (the number of Washes to apply) to the PREPAID Tags/Cards.
18. In the popup window Select the Item Good For (Wash Package) that should be applied upon usage of the PREPAID Tags/Cards.
19. In the popup window enter as much or as little Customer Info as you require for your records.



20. Create a new CASH based Tag/Card by selecting Create New Cash Card(s).
21. In the popup window enter how many sequentially numbered Tags/Cards you would like to create and select OK.
22. In the popup window enter the beginning number of the sequentially numbered Tags/Cards and select OK.

Accounts SYSTEM WIDE SPONSOR

Add New Cash Card 1234

Tag Details

Type 23 Cash Card Sale

Balance 24 \$10.00

Item good for 25

Customer Information 26

First Name

Last Name

Street

Apt #

City

State

Zip

Cell

Phone

email

Birthday

Car Make

License

Note 1

Note 2

Note 3

Note 4

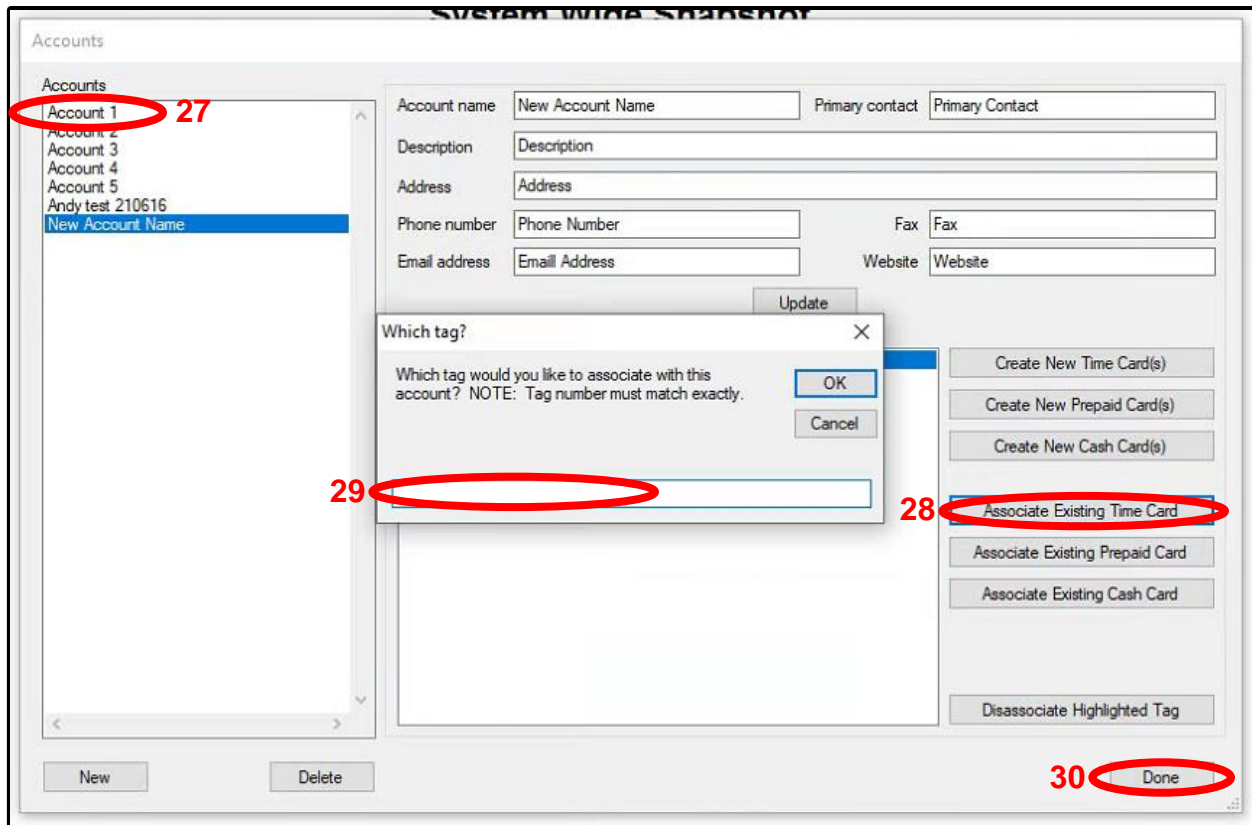
Note 5

Note 6

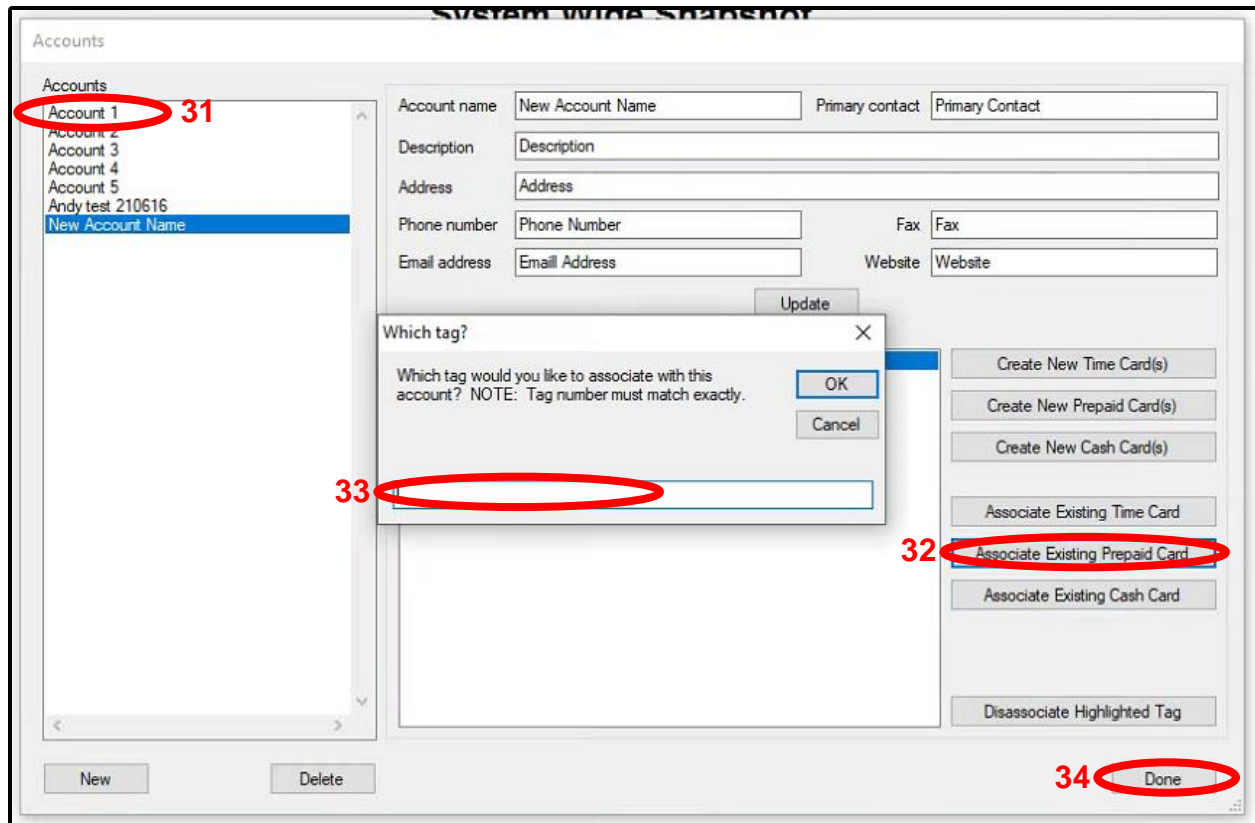
Note 7

Done

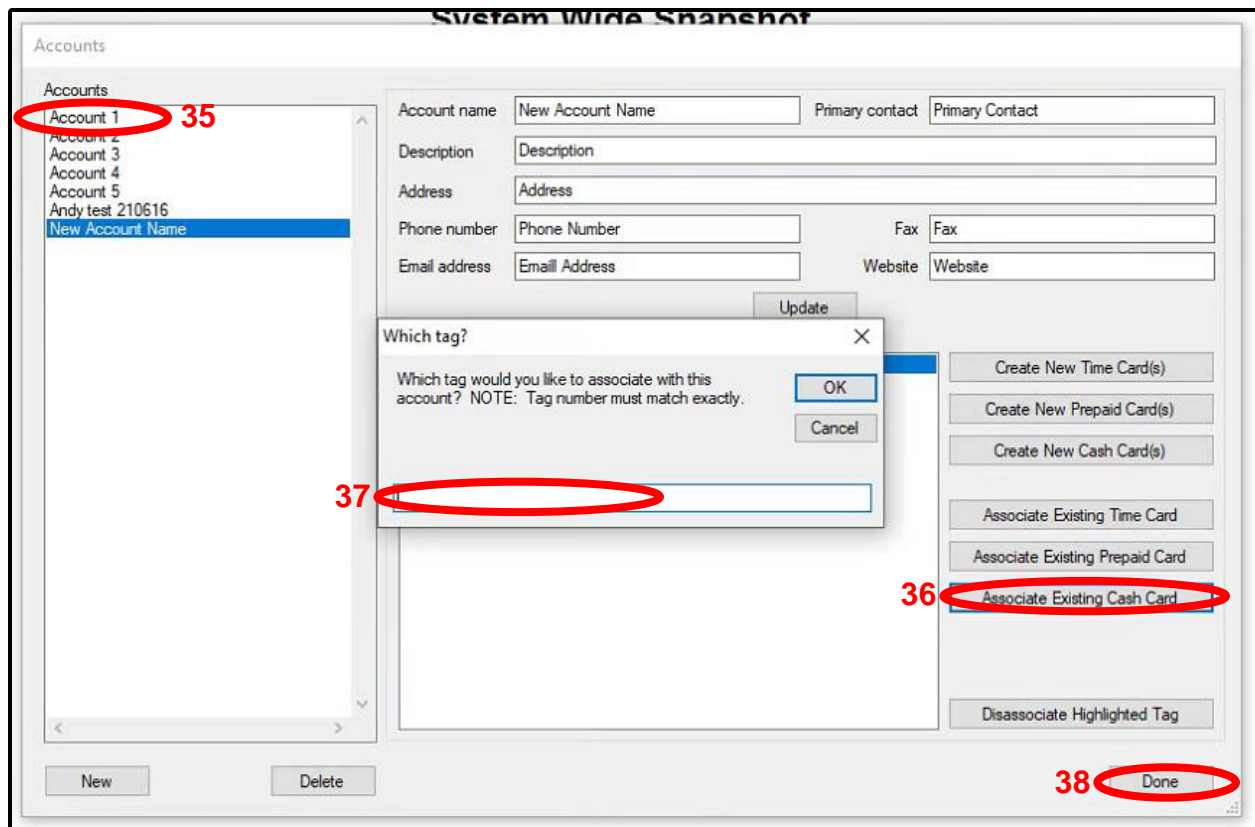
23. In the popup window select what Type of CASH Tags/Cards you would like to create.
24. In the popup window enter the CASH value to apply to the Tags/Cards.
25. Item Good For does not apply to CASH Tags/Cards.
26. In the popup window enter as much or as little Customer Info as you require for your records.



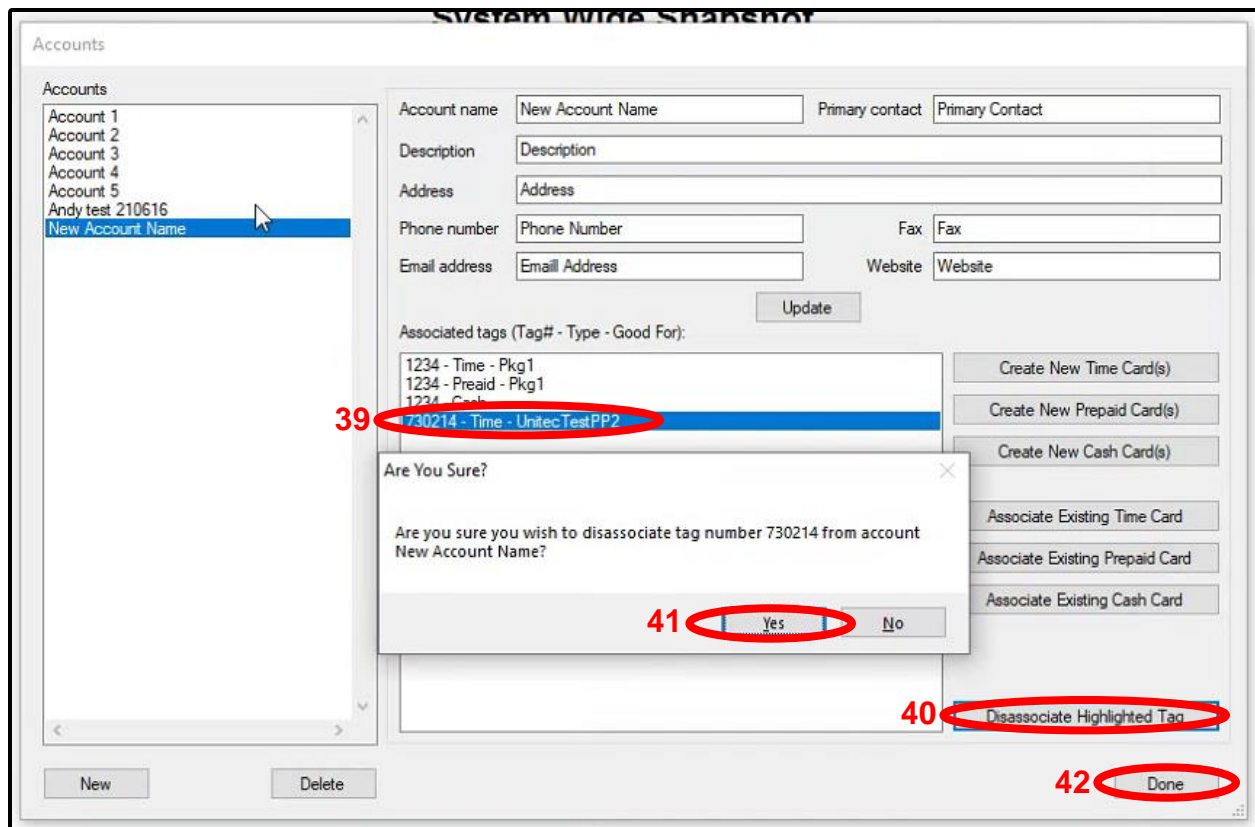
27. Highlight the desired Account with which the existing Tag/Card should be associated.
28. Select Associate Existing Time Card to add an existing TIME Tag/Card to the selected Account.
29. In the popup window enter the exact number of the existing TIME Tag/Card that you would like to add.
30. Select Done when finished.



31. Highlight the desired Account with which the existing Tag/Card should be associated.
32. Select Associate Existing Prepaid Card to add an existing PREPAID Tag/Card to the selected Account.
33. In the popup window enter the exact number of the existing PREPAID Tag/Card that you would like to add.
34. Select Done when finished.



35. Highlight the desired Account with which the existing Tag/Card should be associated.
36. Select Associate Existing Cash Card to add an existing CASH Tag/Card to the selected Account.
37. In the popup window enter the exact number of the existing CASH Tag/Card that you would like to add.
38. Select Done when finished.



39. Highlight the desired Tag/Card that should be disassociated.
40. Select Disassociate Highlighted Tag to remove it from the Account.
41. In the popup window select Yes to confirm or No to cancel.
42. Select Done when finished.