



SELECT *pi*TM



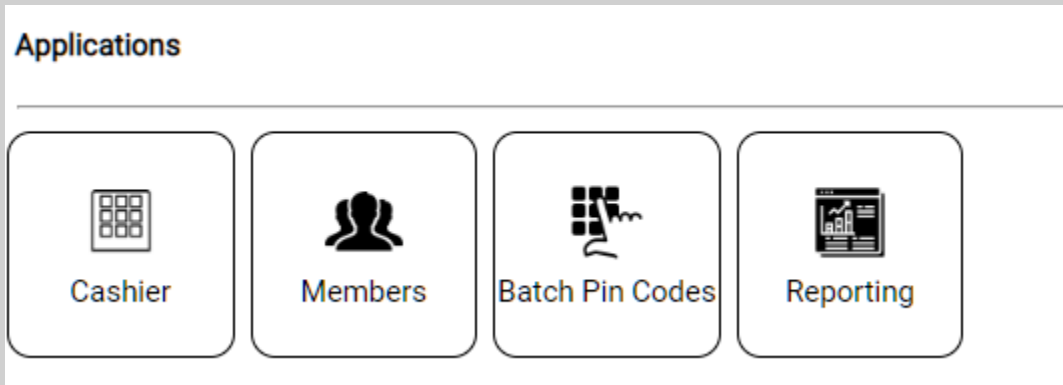
User Manual v2.0

2/24/2023 – up to date for version 2.2.1.97

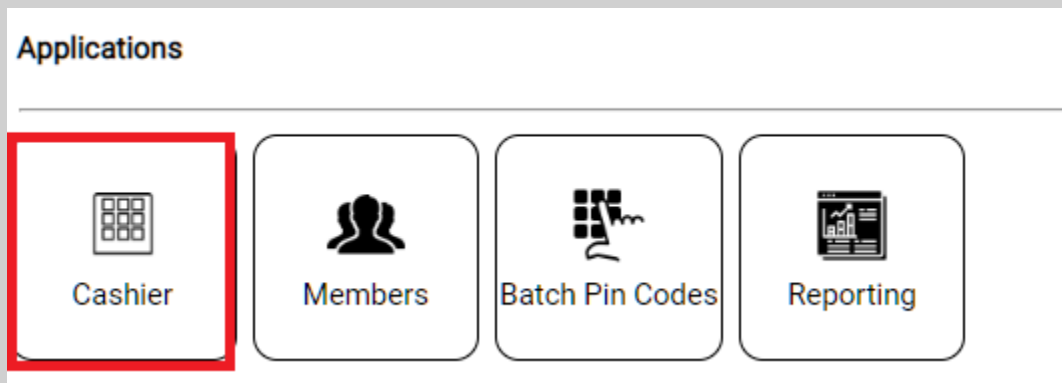
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Applications



Cashier



Uses:

- Generate Pin Codes with a QR code to scan at dispenser
- Create Range accounts for user at dispenser. Value is added as a dollar amount to be redeemed at dispenser
- Lookup Pin codes to see if they have been used at dispenser/expired

- Search database for existing customers
- Cash log (if using bill acceptor on dispenser) will show all cash entered into machine
- Exit will close Cashier, generate shift report, and return to main Select Pi Ace menu
- Right side panel will show dispenser network status. Green = Connected to internet, Red = Not connected to internet

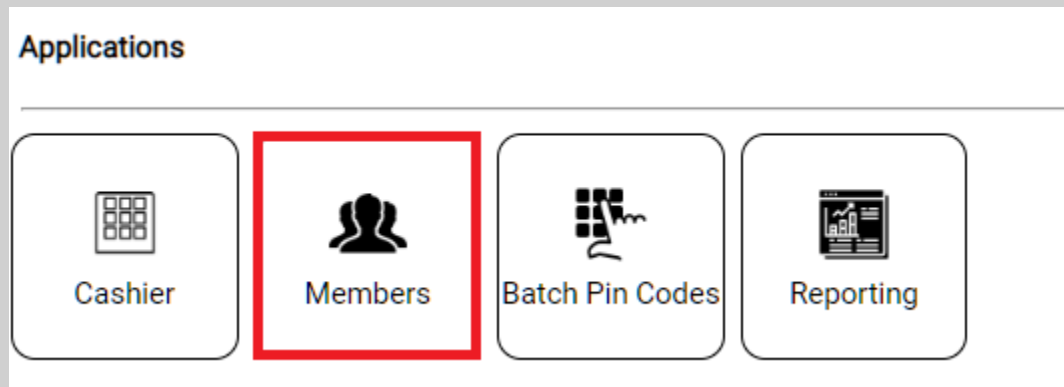
Account Management from Cashier

1. Personal Information

- Last Name – Entered by facility, last name of customer
- First Name - Entered by facility, first name of customer
- Email - Entered by facility, email address of customer. **Note – this field is used to link mobile app customers to existing plastic range accounts. This must match is customer registered with in mobile app or mobile app will not use this account and will instead make a new account.**
- Mobile - Entered by facility, mobile phone number of customer
- Balance – current balance of customer account
 - Add Credit – Used to add or remove balance to customer account
- Phone - Entered by facility, phone of customer
- Address - Entered by facility, address line 1 of customer
- Address 2 - Entered by facility, address line 2 of customer
- City - Entered by facility, city the customer lives in
- State - Entered by facility, State the customer lives in
- Zip - Entered by facility, mailing zip code of the customer
- Country - Entered by facility, country the customer lives in
- Category – related to Category Management menu from System Configuration. This is how you apply a category to an account. Simply select your custom category from drop down menu to apply the category to customer account.
- Linked Cards
 - Add Card – used to add a new card to customer account
 - Remove Card – used to remove card from customer account
 - QR Code – a printable range card replacement. Customer should protect and treat them as a normal range card.
- Linked Emails
 - Add email – used to add email to range account. Can be linked to mobile app
- Disabled – account will no longer be able to dispense balls at ball dispenser.
- Can Expire – range cards do not expire by default. If you'd like the card to expire. To add an expiration date – check this box and enter a date.

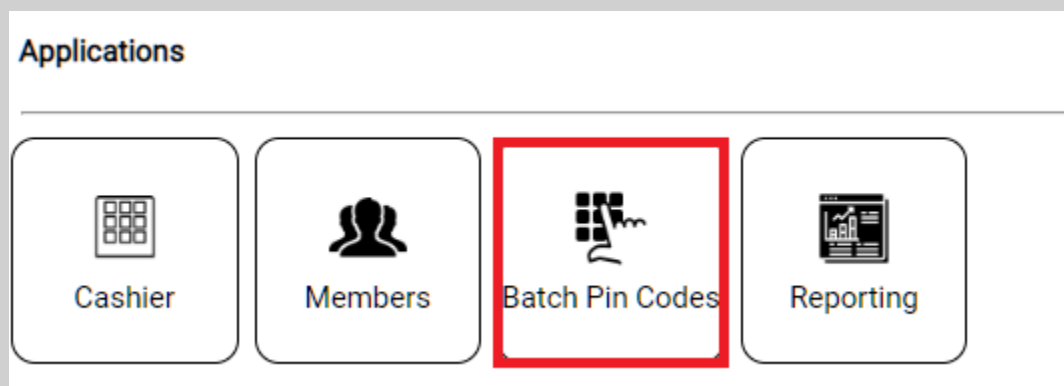
- ### 2. Notes
- entered by facility, you may type here in plain text. Customer notes or information you wish to save replated to customer. Range indecent, IOU's, etc.

Members



1. **Manually Adding a member** – Use the plus (+) button at the top left corner to manually create a range account.
2. **Search Features** – This is the same interface from “Lookup Member” button from Cashier, it allows you to search database for existing range accounts by first name, last name, phone number, member number, or email.

Batch Pin Codes

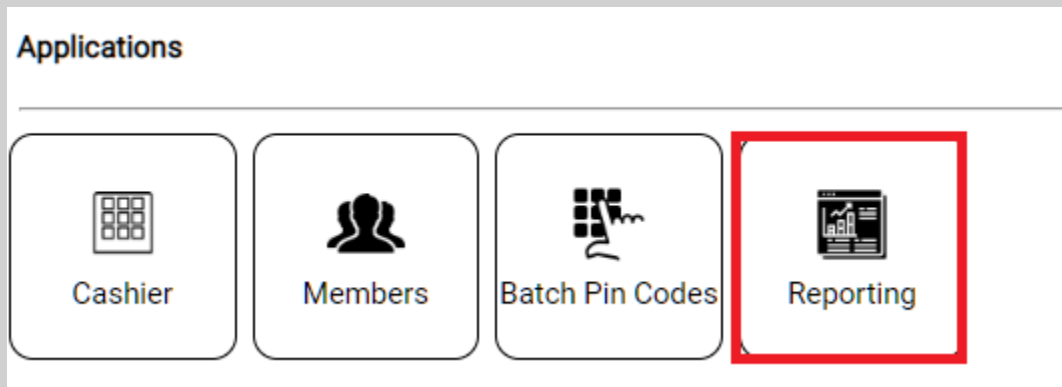


Batch pin code menu allows you to quickly generate multiple pin tickets at once. You can generate up to 300 codes per batch cycle.

Batch pin code options:

- a. Title – Ticket header for pin codes, will also appear on your reports
- b. Number of Balls – The number of balls that the generates codes will dispense
- c. Number of Pin Codes – The number of pin codes you will generate
- d. Pin Expiration Days – a number of days the codes will remain valid
 - a. End of Day – checking this box will instead make pin tickets expire at 11:59pm the day they are printed
- e. Separate Page Per Pin – will format codes to print 1 per page. If this is not checked you will get a list instead of individual codes
- f. Generate – generates codes based on your settings entered

Reporting

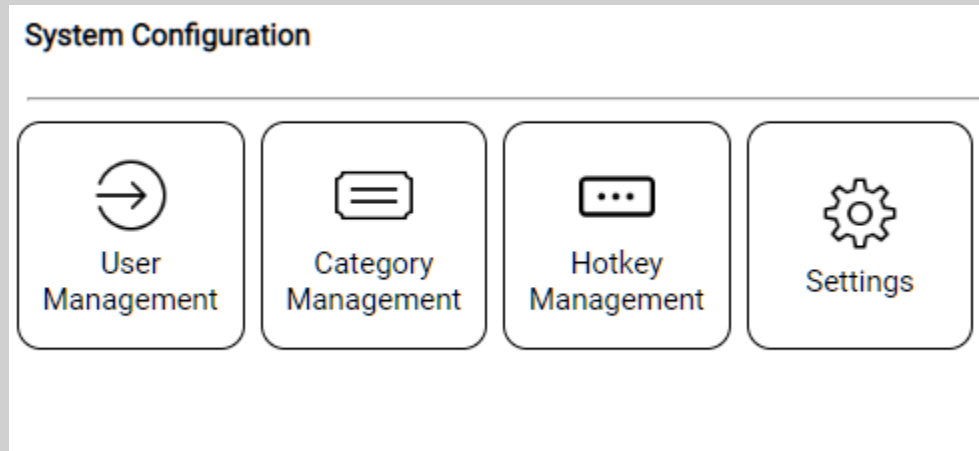


i. **Running Reports** – You run all reports the same way, Select the report you'd like to view. Select a start date and end date, then press 'View'. The report will be displayed in your browser.

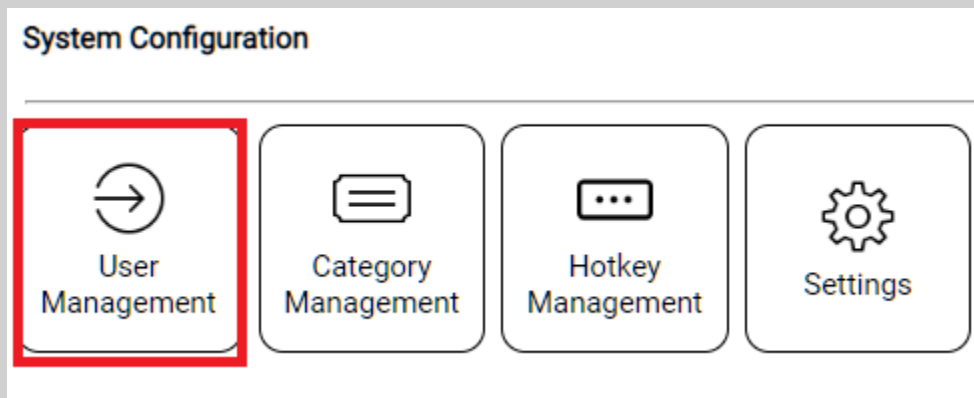
ii. **Report Descriptions**

- a. Summary Report - Totals in system
- b. Cashier Earnings Report - Income from all cashier location
- c. Dispenser Earnings Report - Income from all dispenser stations
- d. Totals by Credit Card Types - Income by credit card types
- e. Totals by Bucket Size - Total bucket sales
- f. Totals by Stations - Income by each dispenser station
- g. Dispenser Summary - Summary of each dispenser station
- h. Cashier Audit Trail - Cashier activities
- i. Card Reader Logs - Card reader activities
- j. Credit Card Voids - Card reader voided transactions
- k. Member Purchases - Purchases made by members
- l. Activity - Activities at the dispenser station and mobile app
- m. End of Shift - End of shift report for user session
- n. Takings by Cahier - Takings by each cashier
- o. Balls dispensed by Day of Month - Number of balls dispensed by the day of month
- p. Balls Dispensed by Day of Week - Number of balls dispensed by the day of week
- q. Balls Dispensed by Hour - Number of balls dispensed by hour
- r. Balls Dispensed by Station - Number of balls dispensed by ball machine station
- s. Balls Dispensed by source - Number of balls dispensed by source
- t. Balls Dispensed by Source/Bucket - Balls dispensed by source for each bucket
- u. Income Collected by Source/Bucket - Income collected by source for each bucket

System Configuration



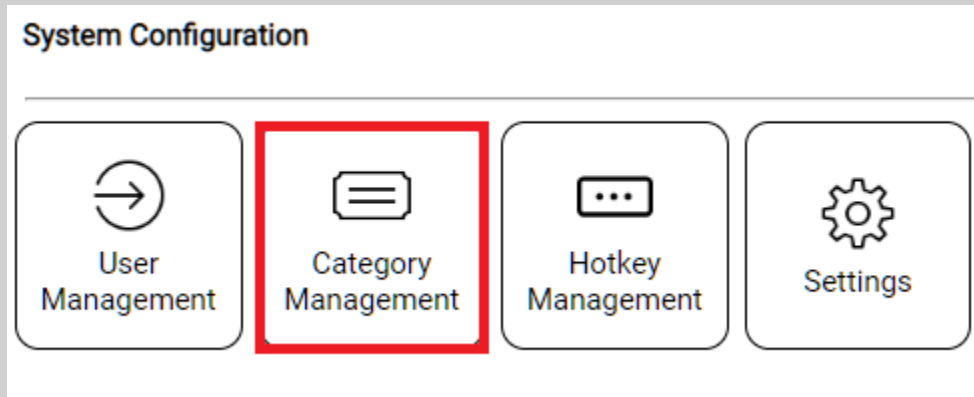
User Management



- Used to create new user accounts for staff use of portal.getselectpi.com. To create a new account, Select the plus (+) button at the top left corner of screen. You will need a display name and email address. The email address must be valid.
- 'Administrator' check box gives the user access to the full system, if administrator is **not** checked they will only have access to 'Cashier' menu.
- To give some premsions but not all, check Administrror and disable the menus you do not wish user to have access to.

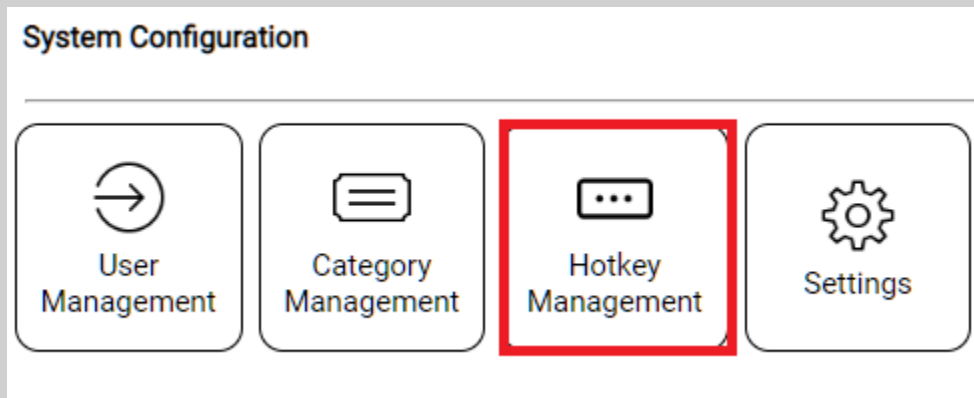
- d. Disable account will prevent account from being logged into
- e. 2-factor authenticator will require the Google Mobile Authenticator app to be linked to your user account.

Category Management



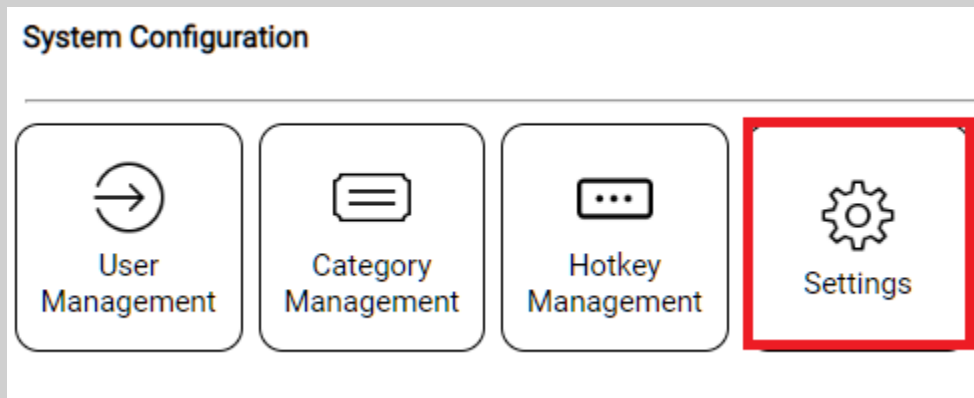
- a. Used to create specials that are applied on an account level
- b. Types of specials
 - i. Flat percentage-based price discount – allows category to change price of buckets. Ex. 100% discount would remove 100% of the price for EACH bucket size. This **must** apply to all sizes available at dispenser. You can limit by minutes before discount reuse, and number of discounts per day.
 - ii. Flat percentage-based ball count increase - allows category to change number of balls in buckets. Ex. 100% discount would add 100% extra balls to EACH bucket size. This **must** apply to all sizes available at dispenser. You can limit by minutes before discount reuse, and number of discounts per day.
 - iii. Complete price/sizing override – allows category to adjust price and or size of bucket based on time and day. You can set 4 time/day periods. You may not remove the option to dispenser a bucket, but you could set it to \$0 and 0 balls. Customer interaction with this bucket would result in the 'dispense' of a 0-ball bucket that cost \$0, but the button will still display on screen.
- c. **IMPORTANT:** Do not edit or change 'Standard' unless instructed by Support. Please call support if you think there is a reason to change this.

Hotkey Management



- a. Buttons displayed on both Select cashier and ball dispenser
- b. Hotkey options:
 - i. Key caption – name of the item
 - ii. Use key caption – overrides the default key type item name text to what is displayed in “key caption” on cashier and dispenser
 - iii. Use Key caption in Mobile app - overrides the default key type item name text to what is displayed in “key caption” on mobile app
 - iv. Key Sku – used a unique identifier for items. Typically, only used for facilities with different prices/sizes on different dispensers.
 - v. Price – the amount to charge for the item
 - vi. Key Type – set the type of item. Generally, only: Pin ticket small, medium, large, jumbo, and range card are used.
 - vii. To Account – for range cards only. Sets the amount that is loading onto the card.
 - viii. Hotkey – a keyboard shortcut for select cashier
 - ix. Display order – order of which the buttons will appear on select cashier screen
 - x. Category – sets a range card key type to automatically apply a category to account when hotkey is creating an account
 - xi. Custom balls – sets value of pin code for pin ticket custom key type
 - xii. Update customer category – sets a range card key type to automatically apply a category to an account when hotkey is used to create OR reload an account
 - xiii. Custom color – changes color of hotkey on select cashier
 - xiv. Active – flags the item to display on select cashier
 - xv. Pin uses – used to allow pin tickets to dispense more than 1 bucket
 - xvi. Durations – used for T-box configurations to set duration of use for codes
 - xvii. Turnstile – used for turnstiles to allow entry

Settings



- a. Customer Required Fields – fields that will be set as required when creating a new plastic range card account. *(Does not change mobile app's requirements for creating account)*
- b. Category Settings - sets default category for all accounts. All accounts created will use this category unless manually set or specified on hotkey. Also, the pricing model used for Credit cards and cash at dispenser. **Recommended: Standard. Please contact support if you feel there is a reason to change this**
- c. Card Reload
 - a. Hot Key – select hotkey to display on dispenser for credit card, cash, range card, and mobile app use.
 - b. Balls – set value of balls for hokey to its immediate right. Also sets quality of balls for POS 3rd party generated pin codes
- d. Hot Key Colors - minor cosmetic change for hotkeys. Allows you to override current default colors. Pin = Blue, Range card = Green, Sale item = yellow, System = grey.
- e. Pin Code Ticket Settings
 - a. Used to set options for pin codes generated from select cashier, if using 3rd party POS pin codes these settings (other than expiration) will do nothing. Interface for customizing pin codes should be available through your POS.
 - b. Pin Code Ticket Settings
 - i. Pin Code digits – set how many digits your pin codes from select cashier will be. Default and recommended: 4
 - ii. Unique Pin codes – removes the 4 digit code from the ticket. Highly recommended if you have long(30+ day) expiration dates for pin tickets.
 - iii. Pin Expiration Days – Set number of days all pins generated from select cashier will be valid for. Between 1-1000 days. Or end of day via checkbox.
 - xviii. Ticket Header – Custom field to print atop your pin codes generated from cashier
 - iv. Page Break end of Ticket – forces page break at end of code, very helpful if your printer has bladed cutter instead of a tear bar.

f. Hours of Operation

- a. Always on – This check boxes will allow dispenser to take customer input any time as long as the dispenser is connected to the internet
- b. Start of day / End of day – Allows you to set hours for the ball dispenser. Outside of your selected start/end time the dispenser will display a message that says “Out of Operation” and will ignore any range card, pin ticket, or credit card input.