



User Manual



Revision History

VERSION	DATE	AUHTOR	CHANGE DESCRIPTION
01	6/1/2017	P. YACKEL	Initial revision
02			
03			

Reference document

VERSION	USER MANUAL

Table of Contents

LOGGING ON TO SMARTFOLIO	4
MAINTENANCE	6
COLLECTIONS	13
FINANCIALS/TRANSACTIONS	16
CREDIT CARD DETAILS	19

I. LOGGING ON TO SMARTFOLIO

- Open a browser and go to <https://my.parkfolio.com>
- A login page should appear:

Welcome

Login

pyackelscus

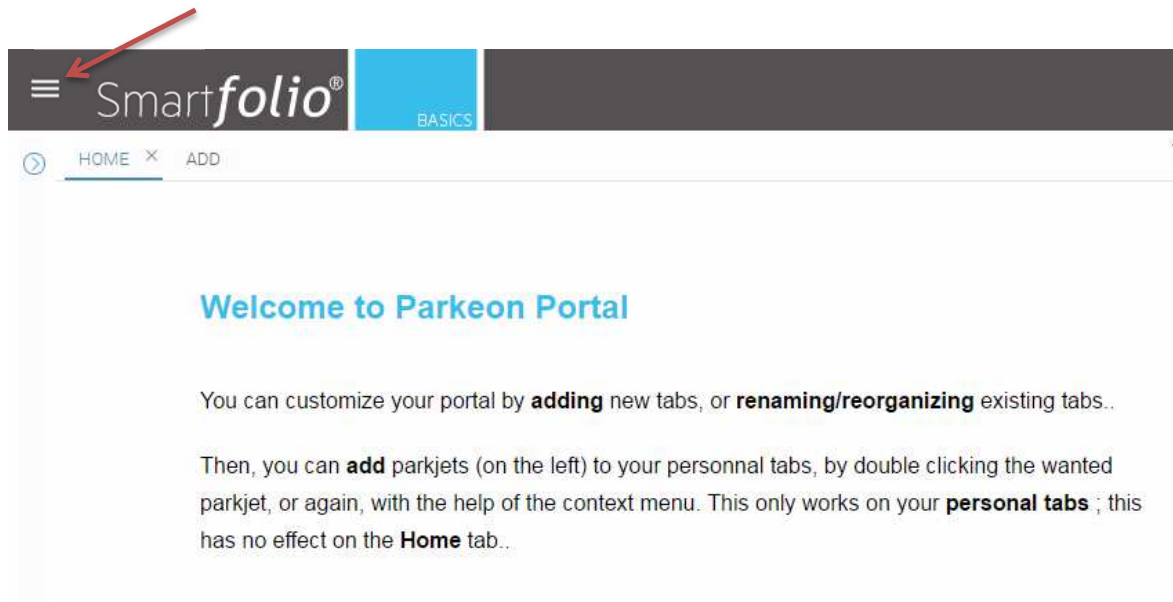
Password

[Did you forget your Password ?](#)

Sign In

- Enter the correct username and password. Contact the Parkeon Helpdesk if you do not have a Username and Password or need your password reset.

- Upon successful log-in a welcome screen will appear. There is a menu bar in the top left corner.



- In the drop down, choose Preference. Where it says Language, choose American.
- Verify and change the email address if necessary
- Under Spreadsheet Software, Choose Excel CSV (Comma)
- Click OK

Preference

Personal Informations

Login: pyackelscus

Firstname: Patrice

Lastname: YACKEL

Email: pyackel@parkeon.com

Change password

Preferences

Theme: []

Language: American

Spreadsheet Software: Excel CSV (Comma)

Profile

Display the Home tab:

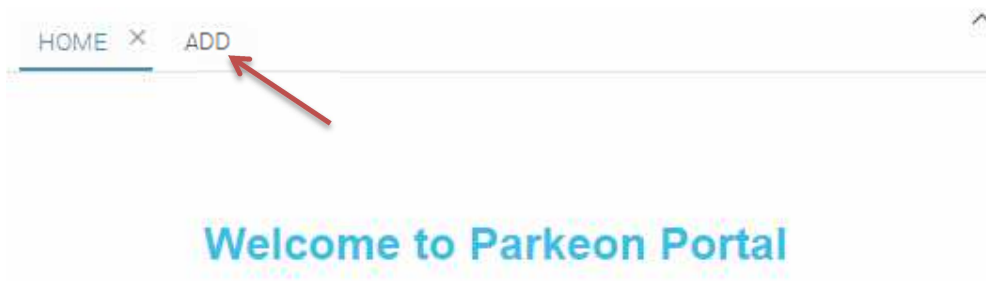
Cancel OK

II. Maintenance

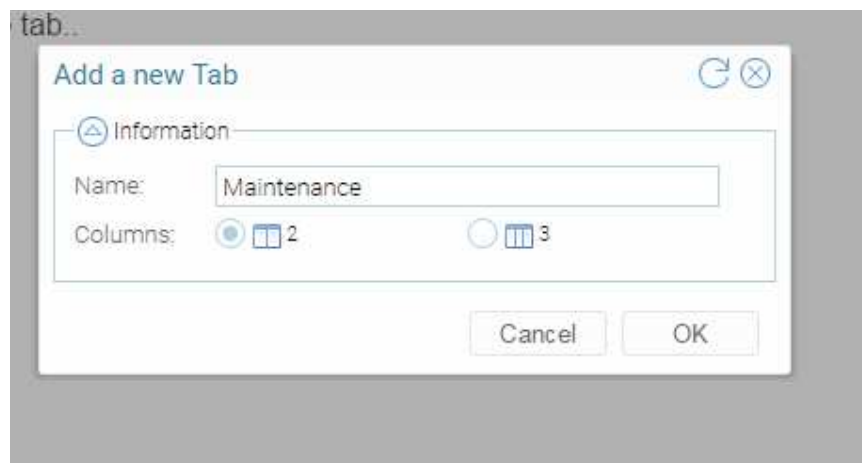
➤ Parkjets

- Here we will create a dashboard for Maintenance reports
- Choose MyParkfolio in the drop down menu and then choose Parkjets

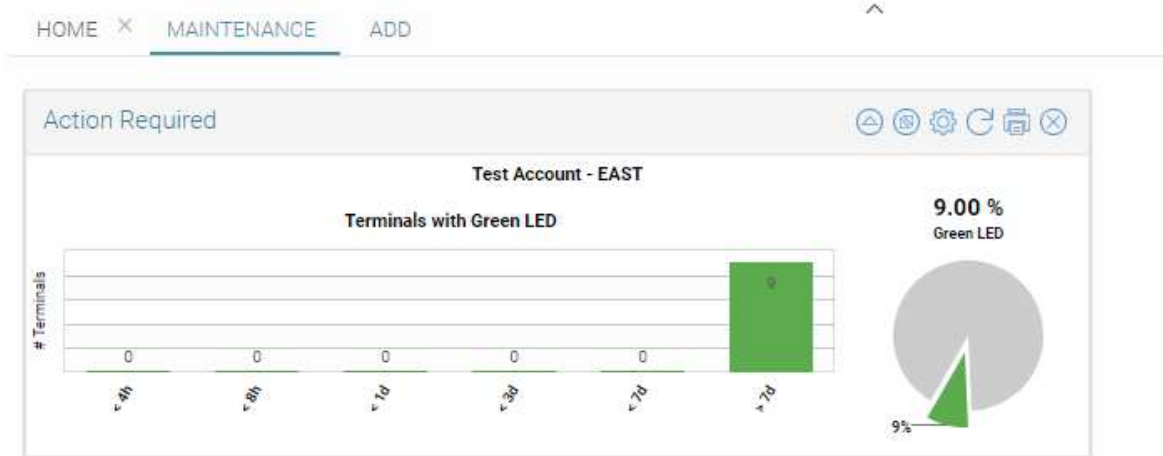
- Click Add at the top of the screen



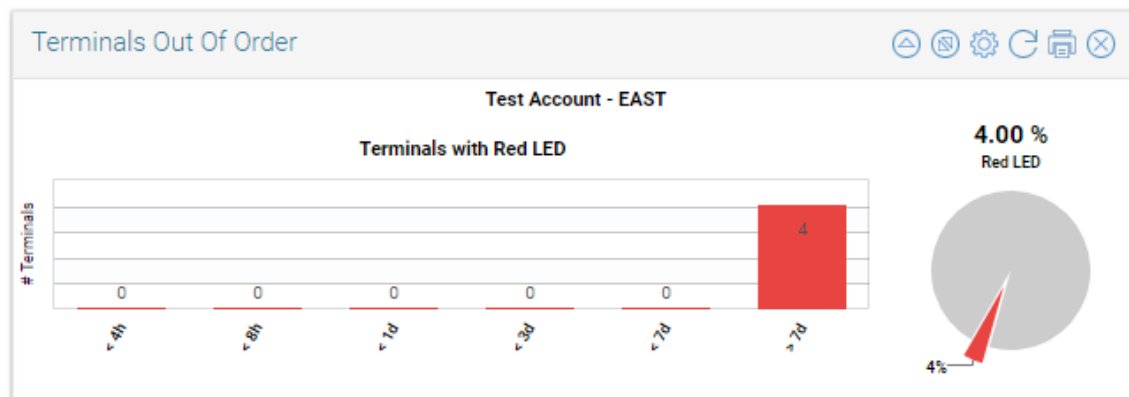
- Name this tab Maintenance and choose 2 columns or 3 depending on the size of your screen



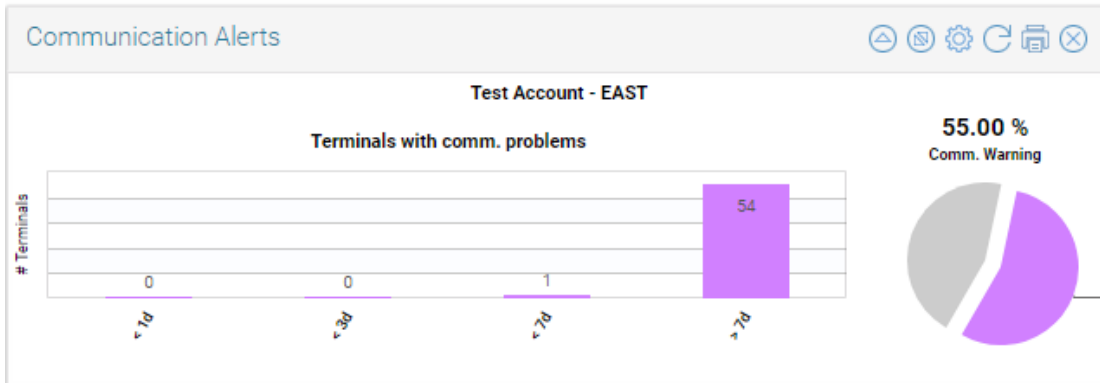
- On left side of screen, drag over Action Required into the blank space or double click to add



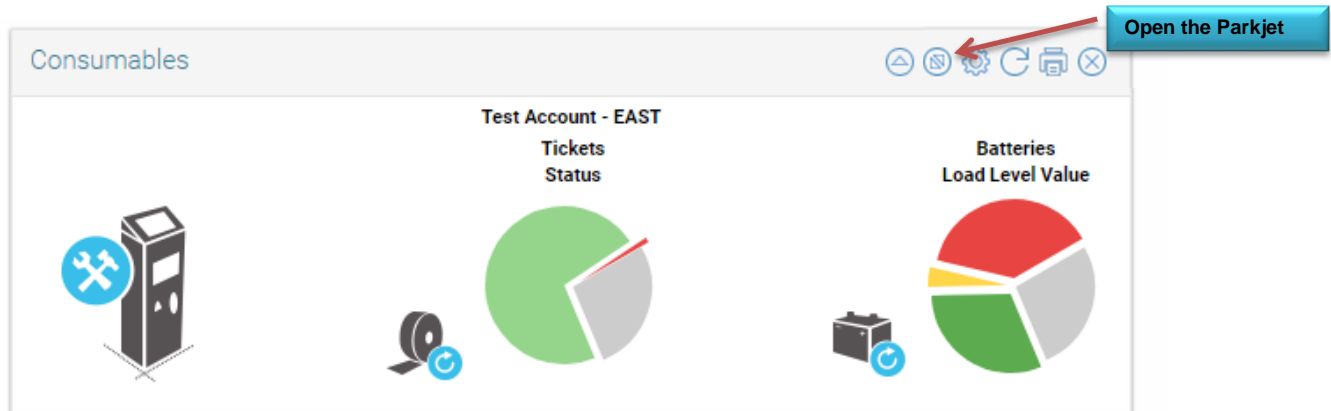
- Action Required will show you machines with green alarms (ex: coin jam, low paper, etc). With a green alarm that machine is still operating in some capacity.
- Clicking on the bars in the graph will open up the details for each meter
- Next, drag over Terminals Out of Order



- This Parkjet will show you machines in red alarm (ex: no paper, no battery voltage). With a red alarm, the machine is not operational.
- Clicking on the bars in the graph will open up the details for each meter
- Next, drag over Communication Alerts



- This Parkjet shows machines that have are in communication failure. Any time a machine communicates a time stamp is generated (last communication). The server constantly checks the current time against the last communication time. If it reaches 27 hours, the server will send an alarm, which is shown here.
- Again, clicking on the bars in the graph will open up the details for each meter
- Finally, drag over Consumables



- This Parkjet will show you ticket levels:
 - Ticket levels are determined by black tick marks on the paper roll. Levels will show as >500 until the roll hits 500 tickets left. At this point a double tick mark is present on the ticket roll and the machine will start counting down from 499 tickets. At 200 tickets, a red slice will appear in the ticket status.
- This Parkjet will also show you battery levels:

- The load level is the voltage at the time of a ticket print (when most power is consumed). The unladen level is the battery voltage of the battery in standby mode. You should be more concerned with the load level.
- If you open the Parkjet it will give you the details for each meter:

Consumables

Test Account - EAST

	Date	Time	Meter Code	Name	Zone Desc	Circuit Desc	Tickets	Load Level
1	11/30/2011	11:38 am	0	*0 (Frib6)			NA	0.000
2	05/04/2017	03:37 pm	1	*1 (Neops)			> 500	0.000
3	12/11/2015	01:11 pm	7	*7 (Neops)			> 500	13.156
4	03/01/2016	10:15 pm	11	*11 (Neops)			> 500	0.000
5	01/20/2015	02:29 pm	14	*14 (Neops)			> 500	0.000
6	03/07/2016	11:17 am	24	*24 (Frib6)			NA	0.000
7	01/31/2017	02:52 pm	41	*41 (Neops)			> 500	0.000
8	11/23/2015	09:18 pm	45	*45 (Neops)			> 500	0.000
9	03/28/2012	04:41 am	57	*57 (Frib6)			> 500	11.950
10	12/11/2015	07:52 am	77	*77 (Neops)			NA	0.000
11	05/10/2017	08:38 am	100	100			> 500	12.469
12	11/18/2016	02:45 am	101	*101 (Neops)			> 500	0.000

Page 1 of 2 | Download | Show on Map | 93 Records

➤ This dashboard will show you all current issues and current status of the meters. It will stay how you set it up initially unless you make changes.

➤ For more detail, you can go to the drop down menu in the top left, go to MyParkfolio, and then Maintenance

- Click on Maintenance alerts and hit the display button in the bottom left corner



- This combines the 4 Parkjets above into one screen and gives you the ability to filter by different parameters

Meter Code	Battery	Tickets Rem...	Last comm. date	C...	Start date time	Reason	Peripheral	Duration	Zone Desc	Circuit Desc	Address
1 9819999	7	7	8/18/2015 1:42:22		8/18/2015 1:18:4	PayBySpace configuration fault	Operation	1564:30			
					8/18/2015 1:18:4	Payment failure (no payment method available)	Main Board	1564:30			
2 9810209	0.000V	6.500	10/14/2016 9:24:07		10/14/2016 8:42	MCB failure: communication problem	Coin Box	5553:28			
					10/13/2016 2:28	PayBySpace configuration fault	Operation	5552:31			
3 2020005	0.000V	6.500	6/19/2015 2:45:16		6/19/2015 2:34:2	PayBySpace configuration fault	Operation	171:18:10			
4 101	0.000V	6.500	5/5/2017 10:36:34		1/16/2017 9:19:3	Payment failure (no payment method available)	Main Board	3274:20			
5 100	12.469V	6.494	8/10/2017 8:38:58		3/22/2017 2:29:5	Coin payment failure (selector change return pr	Coin Selecto	1709:11			
					3/22/2017 2:29:5	Coin payment failure (no selector or voltage faul	Coin Selecto	1709:11			
6 4152	12.240V	6.475	8/19/2016 9:56:38		8/4/2016 3:24:47	Card payment fault (maintenance request)	Card Reader	7229:21	chris test	chris meters	
					8/4/2016 3:24:47	Card payment fault (bank card application invali	Card Reader	7229:21			
7 4145	10.810V	6.488	6/1/2017 9:53:33		5/23/2017 3:49:4	Power supply fault (on-load battery voltage insu	Battery	224:09	chris test	chris meters	
8 99999999	0.000V	6.500	4/18/2017 9:12:00		3/29/2017 10:53	Note payment fault (initialisation problem)	Bill/Note Rei	1545:32			
9 9970003	0.000V	9.999	1/30/2017 9:41:35		1/29/2017 8:14:5	Card payment fault (collection not performed)	Card Reader	2964:27			
10 411	0.000V	6.500	6/16/2016 5:01:25		6/16/2016 5:01:2	MCB failure: communication problem	Coin Box	8403:40			
11 4142	12.069V	200	5/23/2017 10:55:29		5/22/2017 5:33:5	MCB failure: communication problem	Coin Box	245:32	chris test	chris meters	
12 4149	11.897V	6.482	5/23/2017 6:44:29		5/22/2017 6:16:2	MCB failure: communication problem	Coin Box	245:28	chris test	chris meters	
13 414	0.000V	6.500	7/7/2016 11:35:41			NA					
14 1002	0.000V	6.500	3/24/2017 9:49:42			NA					
15 102	0.000V	6.500	2/24/2017 4:10:53			NA					
16 442	0.000V	6.500	7/14/2015 1:23:02			NA					
17 77777777	0.000V	6.999	2/18/2013 3:05:25			NA					

- You can filter by the alert type, the peripheral, or the location
- You can also click on the grouping button on bottom left (see above picture) to group by peripheral, zone or circuit
- Right clicking on any line in the display window will allow you to view the individual meter
- Scrolling all the way over to the right will show you the GSM coverage for each meter. This goes as high as 31: >15 is good, 10-15 will cause issues, <10 is very poor coverage.

- The next menu is under Maintenance, and Alert History
 - This is a maintenance report. It will give you a historical view of all alerts at the meter.

Duration	Meter Code	Peripheral	Reason	Zone Desc	Meter Start Date	Meter End Date	Circuit Desc	Date	Month
00:04	4146	Card Reader	Card payment fault (maintenance request)	chris test	06/01/2017 12:15 pm	06/01/2017 12:19 pm	chris meters	06/01/2017	June
00:04	4146	Card Reader	Card payment fault (bank card application invalid)	chris test	06/01/2017 12:15 pm	06/01/2017 12:19 pm	chris meters	06/01/2017	June

- This will give you the type of alert (green/red/system), the meter code, the duration of the alert, the peripheral, and the reason
- You can filter by peripheral, reason, date, etc
- This report will show you all alarms for the date range indicated
- It allows you to see trends by issue, or by machine
- You are able to group by peripheral, reason, circuits, etc
- This report will only show red, green and purple alarms, not all events

- The next menu to look at is under Maintenance, then All Events
 - This is an events log of every communication from the meters

Meter Date Time	Meter Code	Peripheral	Reason	Meter Desc	Agent code	Zone Desc	Circuit Desc	Date	Month	Year
06/02/2017 12:50 am	34100002	-	Life signal with failure	34100002	0			06/02/2017	June	2017
06/02/2017 12:50 pm	34100002	Coin Box	Coin payment fault (coinbox upper limit reached)	34100002	0			06/02/2017	June	2017
06/02/2017 12:50 pm	34100002	Main Board	Payment failure (no payment method available)	34100002	0			06/02/2017	June	2017

- Here you can filter by alert, date, peripheral, and location and you can use grouping to create a summary by meter, peripheral, reason, etc
- Besides red, green and purple alerts, you will also see other types of alerts in this menu.. For example, all yellow events are actions performed at the meter.



All available alerts to choose or filter by

●	03/24/2017 01:32 pm	34100001	Operation	Test ticket printing (No. 211)
○	03/24/2017 09:10 pm	34100002	-	Life signal without failure

III. Collections

- The collection menu can be found under MyParkfolio.
- It includes the information from all physical cash collections
 - Go to Collection Management, and then Collection Alerts
 - This shows you what cash levels the machines are at
 - It shows the date and time the information was updated, the meter number, payment type, the amount, and number of items for each payment type.
 - This can be used to monitor machine levels to schedule collections. Alerts will also be sent when the levels reach a certain threshold.

	Date time	Meter Code	Payment Type	Number ...	Amount	Current status	Zone Desc
1	06/02/2017 12:49 a...	34100002	Coins	1,659	\$ 308.45	Coin payment fault (coinbox limit reac...	
2	06/01/2017 11:05 p...	34100001	Coins	689	\$ 127.85		

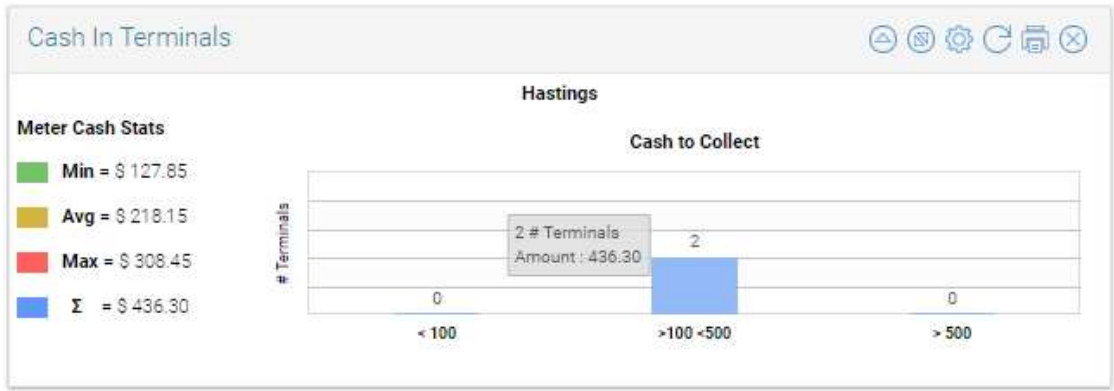
- Next, go to Collection Management and then Collection Progress
 - This shows what collections have occurred at the machines

	Meter Date Time	Meter Code	Peripheral	Reason	Meter Desc	Agent code	Zone Des
1	06/02/2017 01:33 pm	34100002	Coin Box	Coin collection inserted into database	34100002	0	
2	06/02/2017 01:33 pm	34100002	-	MCB key recognition	34100002	0	
3	06/02/2017 01:33 pm	34100002	Operation	Coin collection notification	34100002	0	
4	06/02/2017 01:38 pm	34100001	-	MCB key recognition	*34100001 (Neop...	0	
5	06/02/2017 01:39 pm	34100001	Operation	Coin collection notification	*34100001 (Neop...	0	
6	06/02/2017 01:40 pm	34100001	Coin Box	Coin collection inserted into database	*34100001 (Neop...	0	

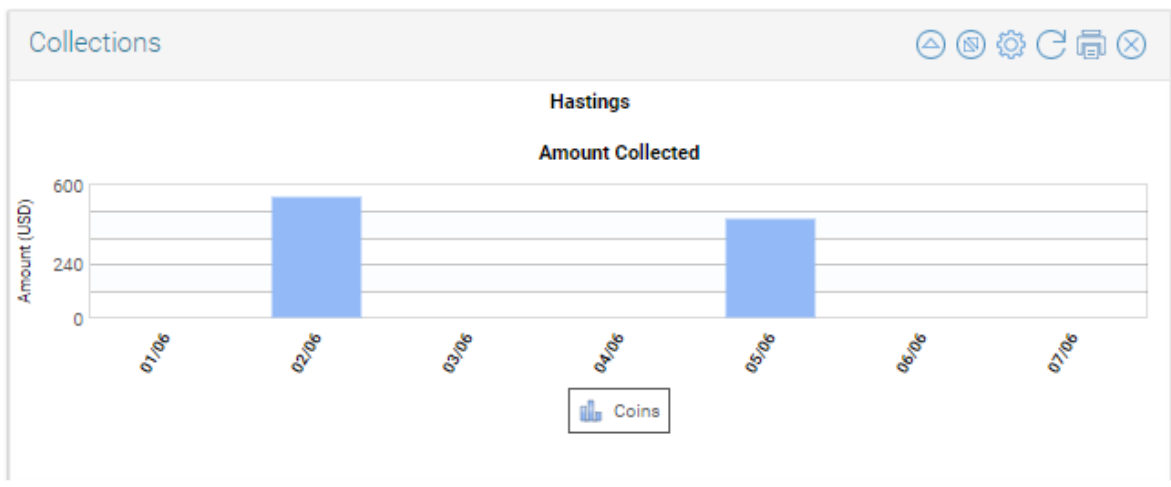
- You can sort by date, meter, etc
- Collection events occur in the following sequence:
 - MCB Key Recognition = key is presented at meter and door is opened
 - Coin collection notification – canister has been removed (same for bill stacker)
 - Collection complete – door is closed
 - Collection inserted into database – collection receipt has printed
- Next, go to Collection Management and then Collection Results
 - This will show you what was collected and the collection receipts
 - Shows the time of the collection, meter, amount and number collected
 - Double clicking on an individual line will pull up the collection receipt for that particular collection
 - You can filter by date range and meter or group by payment type, zone, or date/time

	Meter Date Time	Meter Code	Collection numb...	Trans. count	Payment Type	Amount	Zone Desc	Circuit Desc	Date	Month	Year	Hour of Day	Day of W
1	06/02/2017 01:33 p...	34100002	71	41983-42864	882	Coins	\$ 378.00		06/02/2017	June	2017	01 pm	Friday
2	06/02/2017 01:38 p...	34100001	54	15598-15966	969	Coins	\$ 169.25		06/02/2017	June	2017	01 pm	Friday

- There are also Collection Parkjets for a quick view of the collection status. Add a tab in the Parkjet screen and name it “Collections” as was done for the Maintenance parkjets
 - First drag over the Cash in Terminals
 - This is the Parkjet which shows the same information as the Collection Alerts above

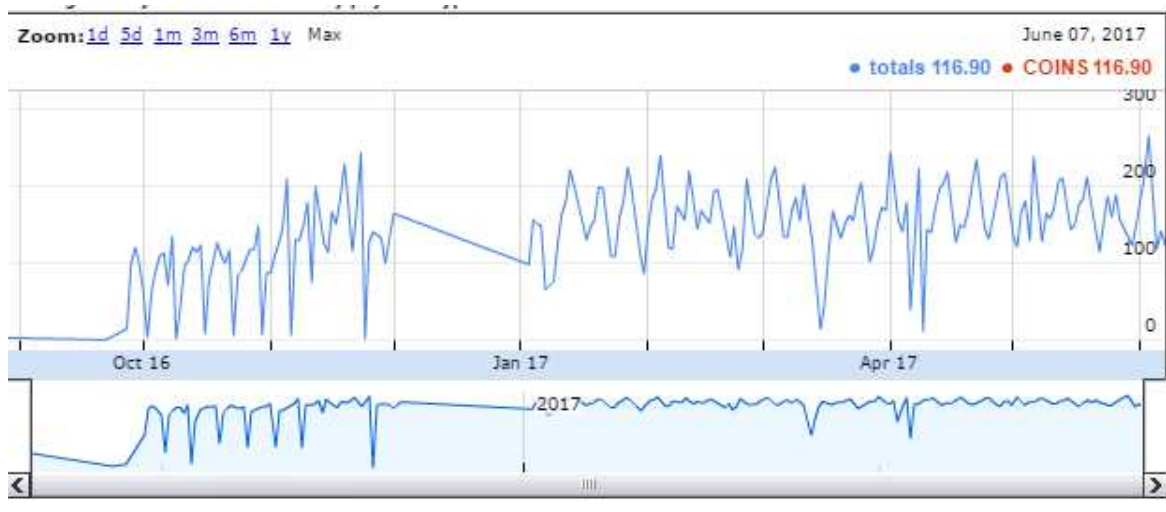


- Clicking on the bar in the graph will pull up each individual meter's information
- The next Parkjet to drag over is Cash Collections.
 - This will show you the amount collected over the last 7 days
 - You can get the collection details by clicking on any of the bars on the graph

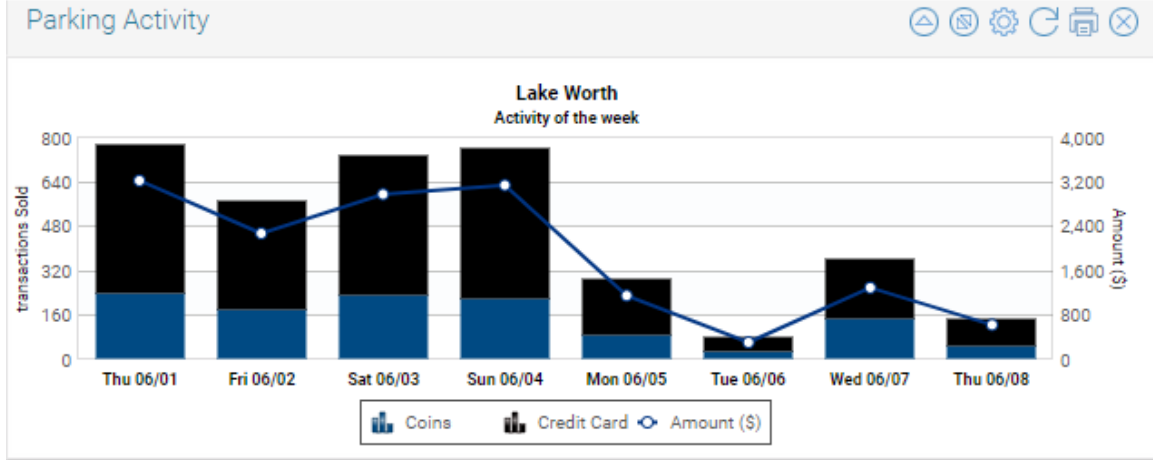


IV. FINANCIALS/TRANSACTIONS

- We will first look at the Parkjets available for financials
- Add a tab in the Parkjets screen and name it “Financials”
 - First, drag over the Parkjet named Transactions
 - This will show you the revenue per day
 - It allows you to see trends in the revenue over a time period
 - You can zoom in on a specific range using the time frames in the upper right corner for 1 day, 5 days, 1 month, 3 months, 6 months or 1 year
 - If you hover on a particular day it will show the total for that day
 - The totals for the time period are shown at the top right corner



- Next, drag over the Parkjet, Parking Activity
 - This will show you the number of transactions or tickets sold for the week
 - Each bar is color coded to show the amount of each payment type. Hovering on the bar will show you the totals.
 - Clicking on any of the bars will show you the transactions that make up the total



- For detailed information on transactions, go to the drop down menu and choose MyParkfolio, and Transaction History
 - Go to Customer Support Hotline
 - This will show you individual transactions for the day as they occur
 - It shows all means of payments and all machines
 - You can find individual transactions using this report
 - You can filter by amount, space number (if applicable) or plate number (if applicable)
 - You can also filter by meter number, amount and payment type
 - You can choose the time frame displayed using the time slider
 - You can go view other days using the back arrow by the date or the calendar icon

Type	Server Date Time	Terminal Date Time	Meter Code	Amount	System ID	Total Duration	Paid Duration	Printed ID	Space #	Plate #	Customer	Phone Num...
	06/07/2017 01:23 am	06/07/2017 01:22 am	94400906	\$ 5.00	279231590	06:40	06:40	7246		EVD7125		
	06/07/2017 03:21 am	06/07/2017 03:20 am	94400906	\$ 3.00	279252118	04:00	04:00	7247		GV22092		
	06/07/2017 06:20 am	06/07/2017 06:19 am	94400019	\$ 1.00	279235692	03:41	01:00	275		P16GSC		
	06/07/2017 06:39 am	06/07/2017 06:38 am	94400903	\$ 10.00	279254083	17:21	17:21	6462		HDJ5703		
	06/07/2017 06:47 am	06/07/2017 06:47 am	94400903	\$ 10.00	279254253	17:12	17:12	6463		C003227		
	06/07/2017 06:56 am	06/07/2017 06:56 am	94400050	\$ 0.50	279254564	02:33	00:30	360		EX31828		
	06/07/2017 07:32 am	06/07/2017 07:30 am	94400042	\$ 1.00	279256479	02:29	01:00	1924		IGF66937		
	06/07/2017 07:32 am	06/07/2017 07:30 am	94400051	\$ 2.00	279256485	03:29	02:00	1465		DRH1347		
	06/07/2017 07:35 am	06/07/2017 07:35 am	94400903	\$ 10.00	279256676	18:24	18:24	6464		PVT7989		
	06/07/2017 07:39 am	06/07/2017 07:38 am	94400904	\$ 5.00	279256665	04:00	04:00	7198		GV21540		
	06/07/2017 07:40 am	06/07/2017 07:40 am	94400907	\$ 0.25	279256929	00:20	00:20	18537		CFE9481		
	06/07/2017 07:48 am	06/07/2017 07:47 am	94400031	\$ 2.00	279257552	03:12	02:00	877		EFV6505		
	06/07/2017 07:57 am	06/07/2017 07:55 am	94400050	\$ 2.00	279258045	03:04	02:00	361		FWT5316		
	06/07/2017 07:58 am	06/07/2017 07:57 am	94400050	\$ 1.25	279258155	02:17	01:15	382		Z11FKM		
	06/07/2017 08:00 am	06/07/2017 07:59 am	94400042	\$ 0.75	279258321	01:45	00:45	1925		H		
	06/07/2017 08:02 am	06/07/2017 08:03 am	94400906	\$ 2.00	279258527	02:40	02:40	7248		FE88884		
	06/07/2017 08:05 am	06/07/2017 08:03 am	94400054	\$ 2.00	279258681	02:56	02:00	312		DLV8400		
	06/07/2017 08:05 am	06/07/2017 08:03 am	94400011	\$ 1.00	279258690	01:56	01:00	272		1ANRD9		
	06/07/2017 08:06 am	06/07/2017 08:05 am	94400011	\$ 0.25	279258793	01:09	00:15	273		BAL7306		
	06/07/2017 08:06 am	06/07/2017 08:04 am	94400054	\$ 2.00	279258768	02:55	02:00	313		HPV1115		
	06/07/2017 08:08 am	06/07/2017 08:07 am	94400042	\$ 2.00	279258888	02:52	02:00	1926		GVX6447		
	06/07/2017 08:08 am	06/07/2017 08:06 am	94400906	\$ 4.00	279258890	05:20	05:20	7249		167465L		

- Go to Parking Sales Supervision (under Transaction History)
 - This provides revenue reports
 - You will find a daily breakdown by machine by payment type for the time frame chosen
 - The total is shown at the bottom
 - If you double click on a line, it will show the transactions that make up that line
 - You can download the information in two ways:
 - Click on the download icon, then choose download. This will download the information as it appears on the screen
 - Click on the download icon and then download all transactions. This will download all of the individual transactions that make up the totals
 - You can choose the date range to run the report
 - You can filter by machine and/or payment type
 - You can use the grouping button to group by meter, payment type, zone or date

Date	Meter Code	Payment Typ...	Amount	Trans. count	Total Parking Tim...	Paid Parking Time	Zone Desc	Circuit Desc	Month	Year	Day of Week	Month/Year	Ad...	
1	06/06/2017	94400001	BANK_ONLIN...	\$ 13.84	11	16:26	13:50	Downtown	Zone 10 Downto...	June	2017	Tuesday	June 2017	8
2	06/06/2017	94400001	Coins	\$ 28.50	41	31:14	29:45	Downtown	Zone 10 Downto...	June	2017	Tuesday	June 2017	8
3	06/06/2017	94400001	Bills	\$ 10.00	7	10:00	10:00	Downtown	Zone 10 Downto...	June	2017	Tuesday	June 2017	8
4	06/06/2017	94400005	BANK_ONLIN...	\$ 9.23	7	09:13	09:13	Downtown	Zone 10 Downto...	June	2017	Tuesday	June 2017	8
5	06/06/2017	94400005	Coins	\$ 16.28	16	16:31	16:15	Downtown	Zone 10 Downto...	June	2017	Tuesday	June 2017	8
6	06/06/2017	94400005	Bills	\$ 1.00	1	01:00	01:00	Downtown	Zone 10 Downto...	June	2017	Tuesday	June 2017	8
7	06/06/2017	94400009	BANK_ONLIN...	\$ 17.00	12	17:00	17:00	Downtown	Zone 10 Downto...	June	2017	Tuesday	June 2017	8
8	06/06/2017	94400009	Coins	\$ 26.50	48	29:05	28:30	Downtown	Zone 10 Downto...	June	2017	Tuesday	June 2017	8
9	06/06/2017	94400009	Bills	\$ 5.00	5	04:42	04:42	Downtown	Zone 10 Downto...	June	2017	Tuesday	June 2017	8
10	06/06/2017	94400010	BANK_ONLIN...	\$ 3.00	2	03:00	03:00	Downtown	Zone 10 Downto...	June	2017	Tuesday	June 2017	8
11	06/06/2017	94400010	Coins	\$ 4.50	6	05:18	05:18	Downtown	Zone 10 Downto...	June	2017	Tuesday	June 2017	8
12	06/06/2017	94400010	Bills	\$ 3.00	2	04:00	04:00	Downtown	Zone 10 Downto...	June	2017	Tuesday	June 2017	8
13	06/06/2017	94400011	BANK_ONLIN...	\$ 27.21	18	27:42	27:13	Downtown	Zone 10 Downto...	June	2017	Tuesday	June 2017	6
14	06/06/2017	94400011	Coins	\$ 22.75	29	25:53	22:40	Downtown	Zone 10 Downto...	June	2017	Tuesday	June 2017	6
15	06/06/2017	94400011	Bills	\$ 8.00	6	09:01	09:00	Downtown	Zone 10 Downto...	June	2017	Tuesday	June 2017	6
16	06/06/2017	94400015	BANK_ONLIN...	\$ 17.00	10	16:52	16:52	Downtown	Zone 10 Downto...	June	2017	Tuesday	June 2017	4
17	06/06/2017	94400015	Coins	\$ 32.75	43	32:53	32:53	Downtown	Zone 10 Downto...	June	2017	Tuesday	June 2017	4
18	06/06/2017	94400015	Bills	\$ 29.00	18	31:00	31:00	Downtown	Zone 10 Downto...	June	2017	Tuesday	June 2017	4
19	06/06/2017	94400019	BANK_ONLIN...	\$ 15.28	9	15:17	15:17	Downtown	Zone 10 Downto...	June	2017	Tuesday	June 2017	1
20	06/06/2017	94400019	Coins	\$ 28.75	38	30:30	30:20	Downtown	Zone 10 Downto...	June	2017	Tuesday	June 2017	1
21	06/06/2017	94400019	Bills	\$ 9.00	6	09:00	09:00	Downtown	Zone 10 Downto...	June	2017	Tuesday	June 2017	1
22	06/06/2017	94400020	BANK_ONLIN...	\$ 23.00	16	23:30	23:00	Downtown	Zone 10 Downto...	June	2017	Tuesday	June 2017	1
23	06/06/2017	94400020	Coins	\$ 20.25	26	19:46	19:46	Downtown	Zone 10 Downto...	June	2017	Tuesday	June 2017	1
24	06/06/2017	94400020	Bills	\$ 8.00	6	05:44	05:44	Downtown	Zone 10 Downto...	June	2017	Tuesday	June 2017	1

V. CREDIT CARD DETAILS

- Finally we will look at reporting for Credit Card transaction details
 - Go to MyParkfolio in the drop down menu, then Collection management, and then choose ePayment Flow Supervision
 - This shows information from the Credit Card Gateway
 - You can choose the date and time range for the report
 - The report shows the date, time, date handling, meter number, amount, banking ID, status, bank status, card type, card number, CTS, etc
 - Date handling is the time the server begins the process
 - Banking ID is a specific, sequential ID for each transaction
 - Status is the transaction status in regards to the meter itself : Completed is when the ticket is printed, Not completed means no ticket was printed and the transaction did not go through, CTS will give you the reason it was not processed if not completed
 - Bank status is the status in regards to the processing flow : In progress (only if in Completed status) means the transaction was settled at the meter, Clearing accepted means the transaction has been settled to the bank

- When the batch settlement occurs each day, the batch will take all In Progress transactions and settle them to the bank. This usually happens early in the morning but it depends on the bank
- The Acquirer batch ID is a unique identifier given to each batch that has been settled. You can group by this using the grouping button. These batches should reconcile with the deposits made at the bank.
- You can filter by status, bank status, or amount in the basic search.
- You can filter by card number (first four or last four digits), meter, or Acquirer Batch ID using the Advanced search.
- You have the ability to issue a refund from this report. A refund cannot be issued unless the bank status is Clearing Accepted.
 - Find the transaction
 - Double click on it
 - Choose refund
 - Enter amount
 - Enter your Smartfolio password
 - Confirm
 - A confirmation receipt will be emailed to you

**If you have any questions, please contact the Parkeon Helpdesk at
1-800-732-6868 x244**