Flowpoint Cloud Customer Manual

Flowpoint Environmental Systems

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Terms of Use

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Introduction

Flowpoint Cloud is an online application that works in combination with Flowpoint water dispensing stations (stations).

Flowpoint Cloud makes it easy for you to buy water, manage your trucks, view your account, and run reports.

Logging In

Flowpoint Cloud can be accessed from any computer, with an internet connection, and a web browser.

Your Flowpoint Cloud web address is:
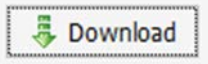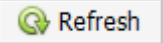
Using the Manual

The Top Menu

The instructions in this manual direct you to use the Top Menu headings, and drop down menus. This is just one way to access these features, you will discover other ways!

🏠 Home	🚚 Trucks	📄 Reports	🖥 Admin	📕 Log Out

Common Functions

Function	Description
⬇ Download	View or save the displayed information in Microsoft Excel format. For Transaction Lists, PDF is also an option.
[ ] ▽	Search the field by entering the first characters of a word.
↻ Refresh	Update screen information
✓ Save	Save information and exit the feature
✗ Cancel	Exit the feature without saving.

Flowpoint Cloud Home

Feature Buttons

Use the buttons on the home page to access application features:
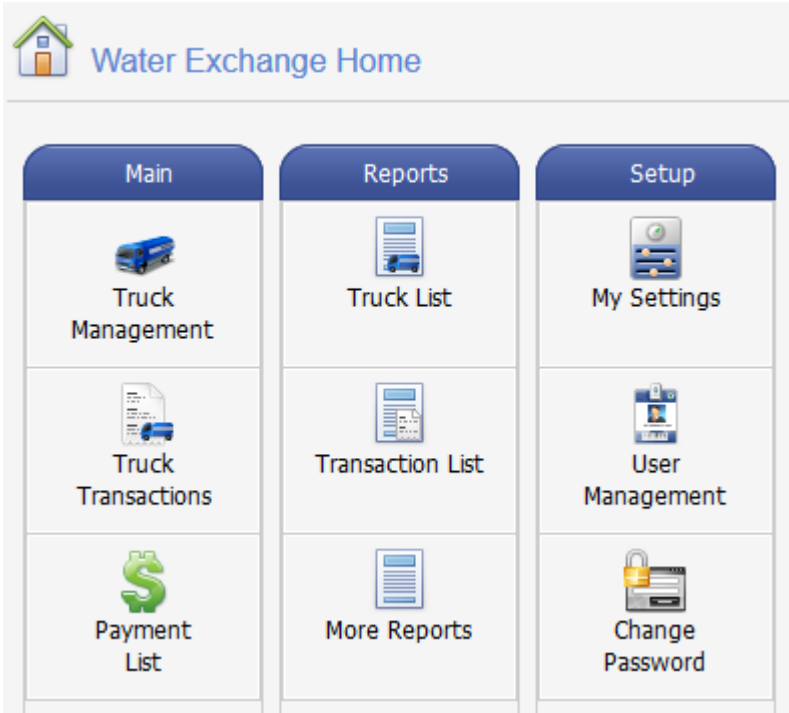
Status

The status screen gives you an overview of your account activity:
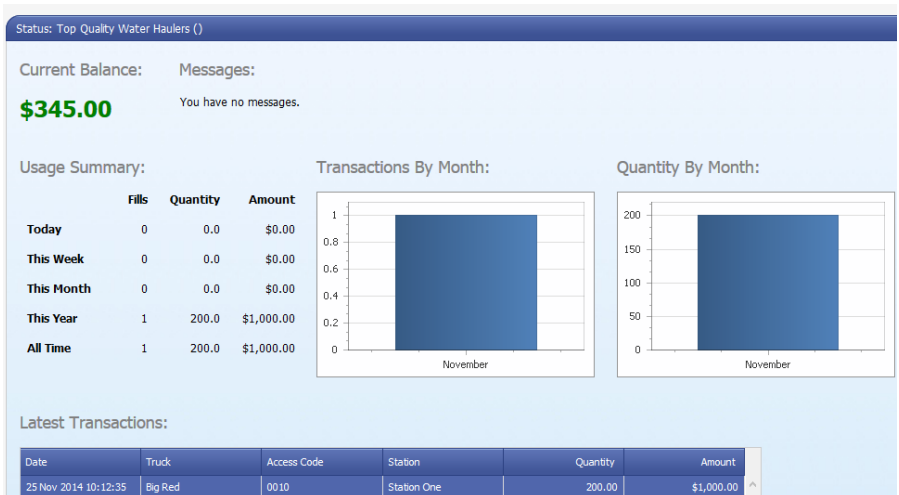
Trucks

Before you can buy water, you must enter a truck record in Flowpoint Cloud. Each truck needs an access number and PIN to buy water at the station.

Adding a Truck

Add a truck record in Flowpoint Cloud for each truck you own:

Truck Management

1. Point —>Trucks
2. Click —> Truck Management
3. Click —> New
4. Follow the guidelines below to enter truck details:

* indicates the field must contain information

Field	Description
Access number*	Automatically assigned four digit number. **Do not change!**
PIN* (Personal Identification Number)	Must be four digits . Drivers will remember the PIN if they choose it.
Truck Name *	Truck number, or unique identifier
Description	Could include, truck make and model, or other details you want to track.
Driver	Drivers first and last name.
Plate #	Truck license plate number.
Volume (U.S. Gal)	Capacity of the truck in U.S. gallons.
This truck is Active	Remove the check mark to prevent a truck from using the station.

5. Click —> Save

Editing Truck Information

To change truck information:

1. Point —> Trucks
2. Click —> Truck Management
3. Click to select the truck to edit
4. Click —> Edit
5. Change truck details
6. Click —> Save

Resetting a PIN

Reset a forgotten PIN any time by:

1. Point —> Trucks
2. Click —> Truck Management
3. Click to select the truck to edit
4. Click —> Edit
5. Enter a new four digit PIN
6. Click —> Save

Stopping water sales to a truck

To prevent a truck from buying water at the station:
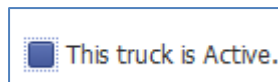
1. Point —> Trucks
2. Click —> Truck Management
3. Click to select the truck to edit
4. Click —> Edit
5. Click to remove the check mark beside *This Truck is Active*

This truck is Active.

6. Click —> Save

When a truck record is no longer active, the station will not accept the access number and PIN assigned to the truck.

Account Balances and Payments

Account Balances

The current balance displayed on the home page includes all payments and truck transactions received by Flowpoint Cloud.

Use the Payment List and Truck Transactions list to review details of both.

Feature buttons are available on the Home page:
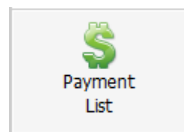
Payment List

The Payment List includes all payments processed against your account.
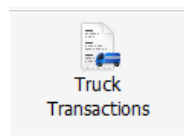
Truck Transactions

Truck Transactions list includes all water purchases made through your account.

Payments

Payment methods are set by your water vendor and may vary between invoiced and prepay customers.

Invoiced Customers

Information about frequency, due dates, and payment options are available from your water vendor.

Prepay Customers

As a prepay customer you must maintain a balance in your account to buy water.

Buying Water

To buy water at a station, the driver will use an access terminal and fill hose.

Using the Access Terminal

Drivers enter their access number and PIN using an access terminal like the one shown below.
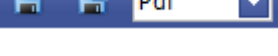
Steps drivers follow to buy water:

1.	Connect the water fill hose to the tank
2.	Enter your four digit access number, press '**ENTER**'
3.	Enter your four digit PIN, press '**ENTER**'
4.	Enter the volume of water wanted, press '**ENTER**'
5.	Confirm the hose is connected
6.	Press '**START**' to start water flow • Volume of water dispensing is displayed on the screen • The water will stop automatically once the requested volume is reached Press '**STOP**' to stop water

Reports

Report	Description
Invoice Summary	Transactions list by batch that includes year to date information.
Invoices	Your invoices, grouped by batch.
Monthly Volume	Monthly breakdown of the quantity and cost of water bought.
Prepayments	Record of the money deposited to your account between a start and end date.
Service Charges	Service charges applied to your account between a start and end date.
Transaction Summary (Transaction Summary by Station)	Water purchase details between a start and end date, grouped by station
Transactions by Truck (Transaction List)	Water purchase details for all or selected trucks between a start and end date
Truck List	The truck list includes the following details for each of your trucks: • access number • PIN • truck and driver name • status • plate # • capacity

Report Viewer Toolbar

Function	Description		
	Search for a word or phrase		
	Print the complete report		
	Print the current page		
	Scroll back		
	Go to a page		
	Scroll forward		
	Select the file format for export		
	PDF	Adobe Reader (default)	
	XLS	Microsoft Excel	
	XLXS	Microsoft Excel 2010 or newer	
	RTF	Rich Text Format	
	MHT	Mime Html	
	HTML	Hypertext Markup Language	
	TEXT	Plain text format	
	CSV	Comma-separated values	
	IMAGE	PNG picture format	
	Export and save the report to a file.		
	Show the report information in the selected file format.		

Usernames and Passwords

A username and password lets you log in to Flowpoint Cloud to:

- view company, truck, and transaction information
- look-up, add, or change PIN's
- add or edit truck records
- make prepayments (prepay customers)
- print reports

Primary User

When you apply online for a Flowpoint Cloud account your username is the email address entered in your account application.

After your account is approved, an email message will be sent to you with password directions.

Adding a User

You can add additional users for your company by:

1. Point —> Admin
2. Click —> Website Users
3. Click —> New
4. Enter information in the required User Details fields

* indicates the field must contain information

Field	Description
Email Address/Username*	An email address (will be the username)
First Name *	First name of user
Last Name *	Last name of user
New Password	Type a password, 8 characters or more
Confirm Password	Type the password again

5. Click —> Save

Editing a User

To edit user information:

1. Point —> Admin
2. Click —> Website Users
3. Click to select the username to edit
4. Click —> Edit
5. Make changes
6. Click —> Save

Deleting a User

When you delete a username you stop the person from logging in to Flowpoint Cloud.

Drivers without a username can still buy water

To delete a username:

1. Point —> Admin
2. Click —> Website Users
3. Click to select the username to delete
4. Click —> Delete
5. Click —> Confirm

Disabling a User

Lock an account to prevent a user from logging in to Flowpoint Cloud without deleting their username:

1. Point —> Admin
2. Click —> Website Users
3. Click to select the username to lock
4. Click —> Edit from the Website Users menu
5. Click in the blue box beside Locked to add a check mark

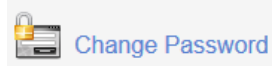Locked Status - Set to Locked to deny login access.

☑ Locked

6. Click —> Save

Changing your password

To change your password while logged in:

1. Point —> Admin
2. Click —> Change Password
3. Complete the password change fields following these guidelines:

Change Password

Field	Description
Old Password	Enter your current password
New Password	Enter a new password, that is 8 characters or more
Confirm Password	Enter the new password again
Security Question	This question is asked when the *I Forgot my Password* feature is used. You do not have to change this information
Security Answer	Leave blank unless you changed your security question

4. Click —> Change Password

The new password is saved and ready for use!

Resetting a Forgotten Password

Reset your password with the *I Forgot my Password* feature on the Flowpoint Cloud site:

1. Go to the Flowpoint Cloud site
2. Click —> Log in to Flowpoint Cloud
3. Click —> I forgot my password
4. Type your email address
5. Click —> Submit
      ** Be prepared to answer your security question
6. Answer the security question
7. Type the displayed security code
8. Click —> Email password information

Glossary of Terms

Access Number: four digit identification number assigned to a customer truck. Access number is used in combination with a PIN to buy water.

Access Terminal: keypad and screen at the station. Customers enter their access number and PIN on the access terminal.

Account: a customer must have an account to have an access number and PIN. Customers can have an invoice or prepay account.

Communication Link: cellular network connection between the access terminal and Flowpoint Cloud.

Download: copies new customer, prepayment, and truck details from Flowpoint Cloud to the access terminal.

Measurement Unit: the measurement used to dispense water. Choices are: U.S. Gallon, Imperial Gallon, Cubic Feet, Cubic Meters, or Barrel.

PIN (Personal Identification Number): four digit password used with an access number to buy water at a station.

Synchronization: copies information between the access terminal and Flowpoint Cloud.

Upload: copies transaction details from the access terminal to Flowpoint Cloud.

Water Dispensing Station (Station): dispenses water to customers. A combination of an access terminal, water fill hose, and communication link.

Water Fill Hose: hose that dispenses water into the tank. The amount of water is controlled by the access terminal.