BUSINESS ACCOUNT MANAGEMENT SYSTEMS (BAMS)

USER GUIDE

redspottedhanky.com

Contents

Introduction

This document details the processes involved in using the redspottedhanky Business Account Management System (BAMS). It includes a walkthrough of all aspects of the systems, from the first logon to setting up your users and monitoring your account.

Key Points

- The green circle will highlight any key buttons you need to press.
- If you see a blue box like the one below, please note that this will not appear on your account but to cover personal information to show you in this guide. You will find your data under there.

Account Activation

Once your application for a redspottedhanky Business Account is successful, you'll receive an email confirmation similar to the example below:-

Congratulations - Your Red Spotted Hanky Account has been approved (Application Ref:)

WE To

This message is part of a tracked conversation. Click here to find all related messages or to open the original flagged message.

Thank you for your recent application for a redspottedhanky Corporate Account.

Your application was successful. Please wait 24 hours for your business account to be activated before using the website. Your corporate account allows you to purchase via credit card or on account. Your credit limit for paying on account is £1.

There are two portals which you now have access to.

The first portal is the corporate management admin portal. This can be accessed from

https://business.redspottedhanky.com/Users/Default.aspx

Your username is
Your password is

This will allow you to set up employees as users, create travel policies, restrictions and access the reporting suite.

The second portal allows for the purchase of rail tickets. This can be accessed from http://corp.tickets.redspottedhanky.com/rshcorp/en/Account/Login

Each employee once sent up as a user from the admin portal only needs to register and they can then purchase rail tickets. The account can be accessed via http://corp.tickets.redspottedhanky.com/rshcorp/en/Account/Login

If you have any questions in the interim please contact our redspottedhanky Team on 0800 3777748

Yours sincerely,

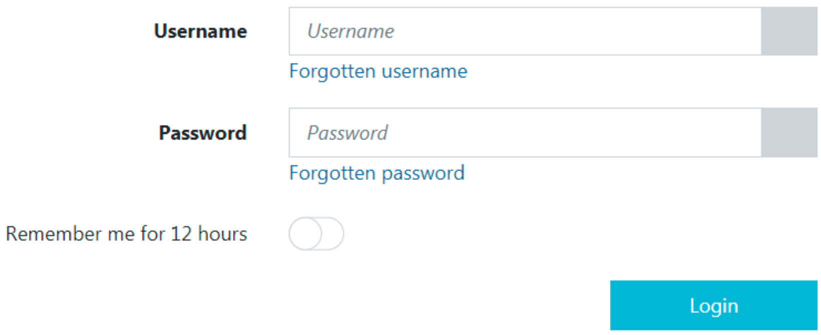
redspottedhanky team

(Please note that this is an automated message, do not reply to it. If you have any issues please contact your normal representative instead - thank you.)

BAMS

Logon

Upon clicking the link to the website, you will be presented with the login page below



(Screenshot 1)

Enter the Username and Password that was sent to you in the email and press login.

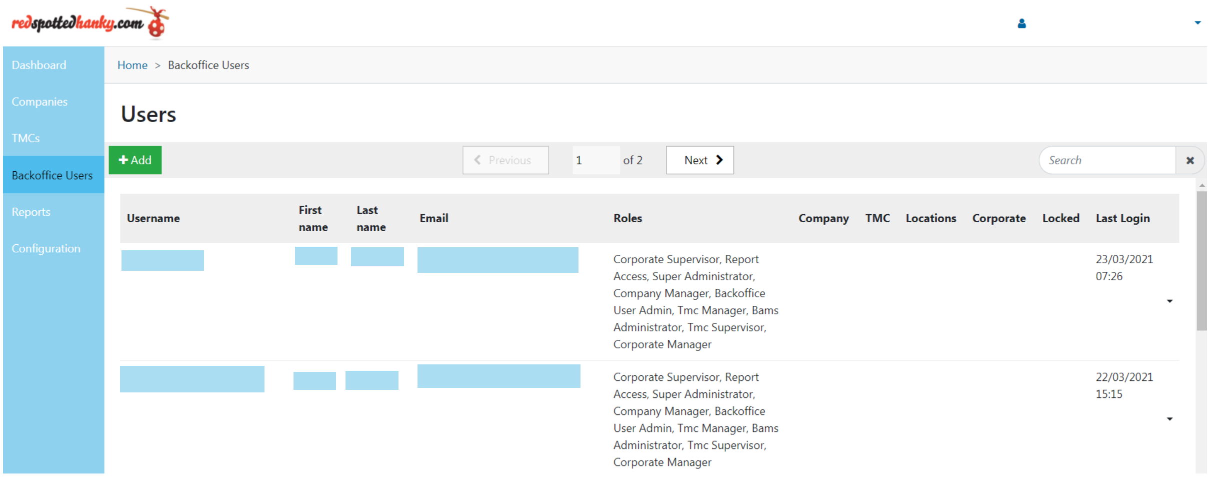
The following screen will be displayed

(Screenshot 2)

This screen gives you a welcome message, and on the left, you will be able to see the clickable buttons to take you to the relevant pages.

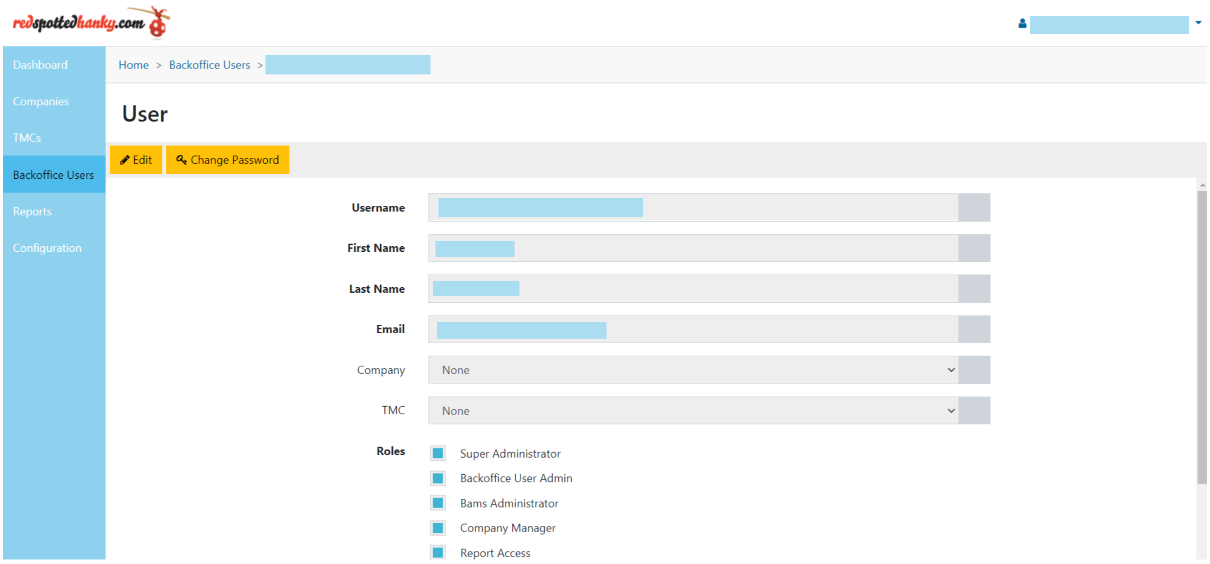
Password and Username Change

To Change your passwords or Username, you need to click Backoffice Users > Here, you will be presented with the screen below.



(Screenshot 3)

From here, select your Username in the column. You will then get a screen like below.



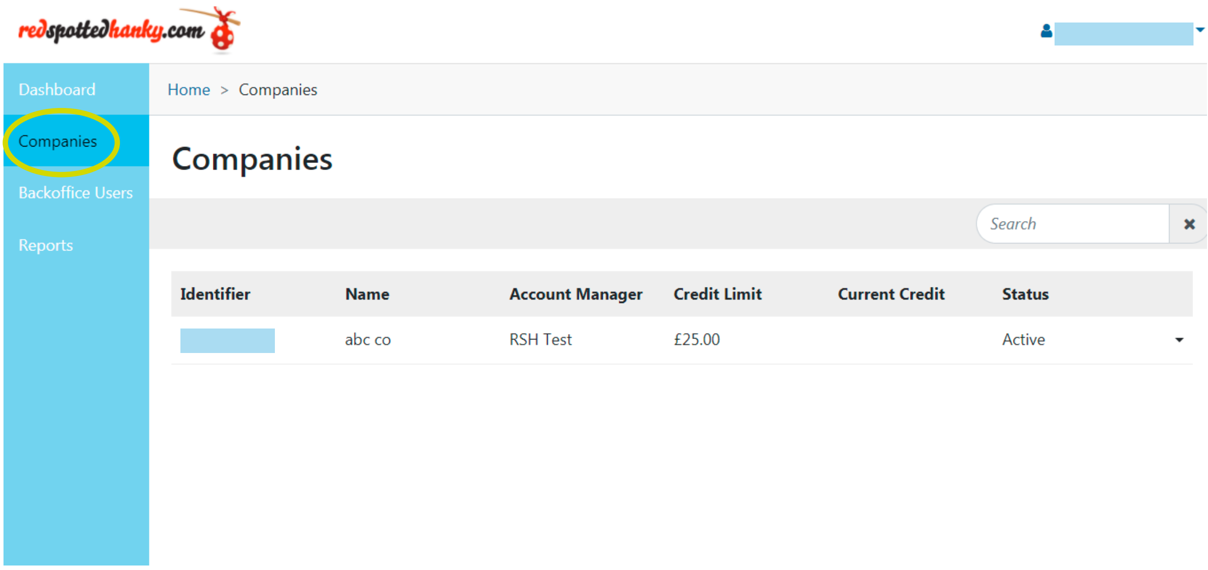
(Screenshot 4)

You will see two yellow boxes, as highlighted above. You can click these to change your password or update account information.

Companies

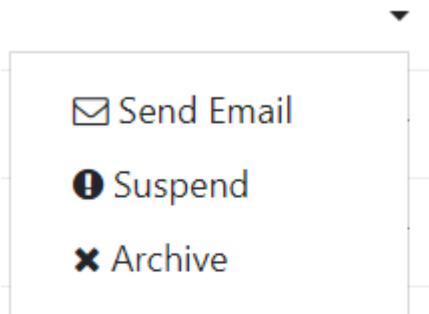
Click the 'Companies' link on the left tab, as indicated below.

The following screen is displayed.



(Screenshot 5)

This screen is the main screen used to manage your account. It an arrow dropdown on the right as highlighted. This will display a dropdown as shown below, and this is a quick way for you to send an email, suspend the account or archive the account.

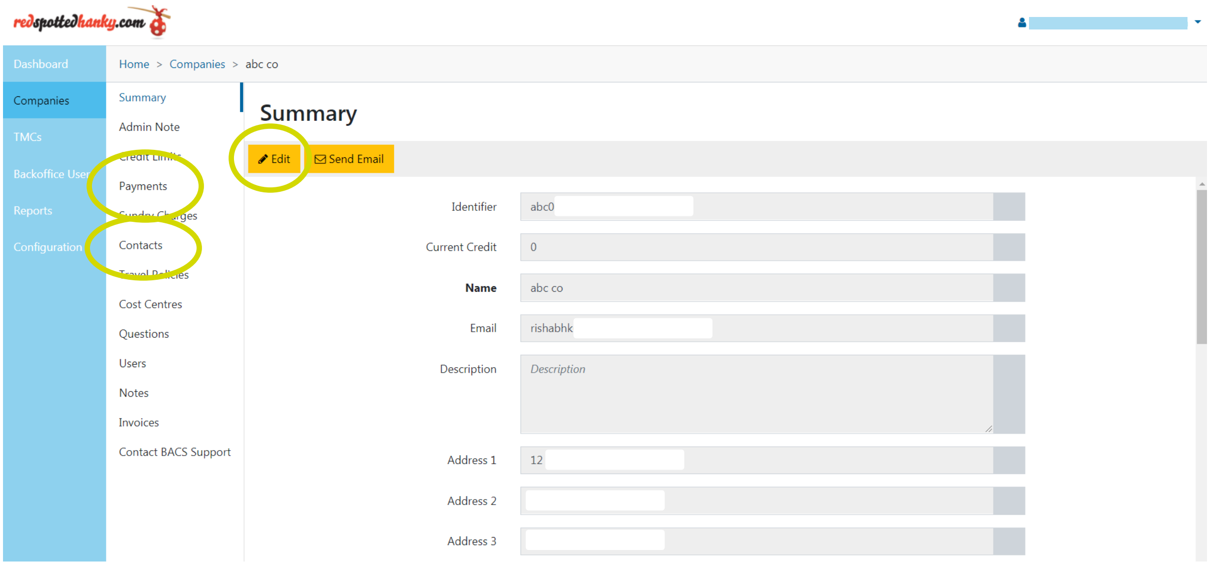


(Screenshot 6)

This screen also shows your company's details along with your current credit spend amount and details of your current credit limit. Your company will be highlighted should your credit limit be reached or exceeded.

Should you choose to purchase tickets via debit/credit card only, your credit limit will be displayed as £0.00.

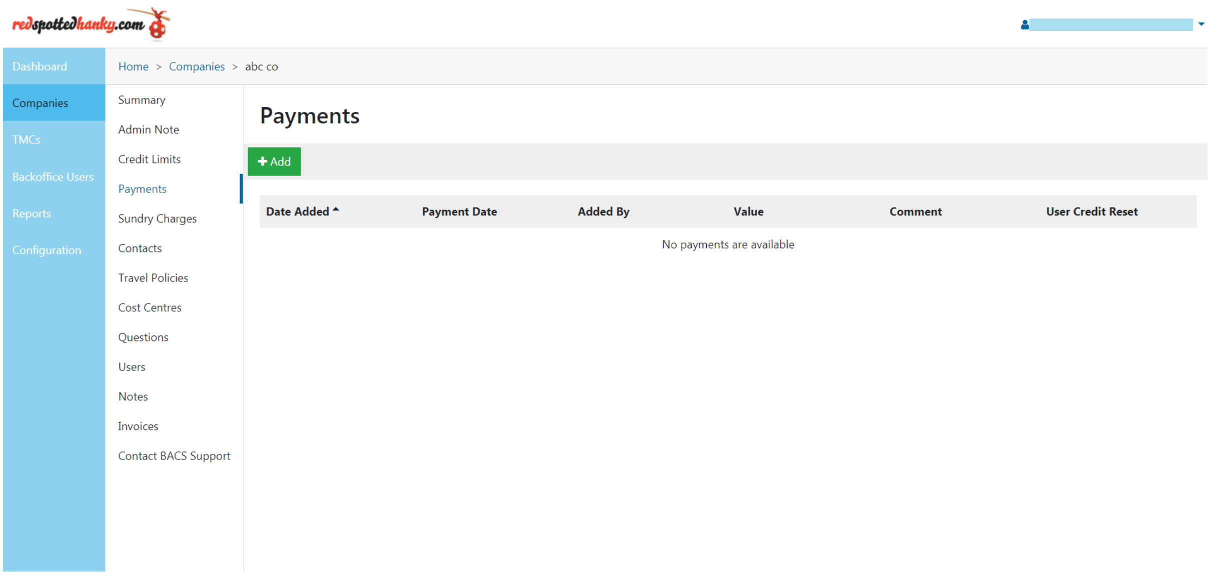
If you click the identifier link to the account (As highlighted in Screenshot 5) that you want to access, you will be shown a screen below. This will present you with a summary page of that account where you will be able to go in and edit the information such as, Description, website, phone number and any other pieces of information that have not already been filled out. To do so, you need to click the edit button highlighted in screenshot 7.



(Screenshot 7)

Payments

Once you are in the area above in screenshot 7, click the payments tab as highlighted to take you to the screen below (Screenshot 8). Home > Companies > Identifier > Payments

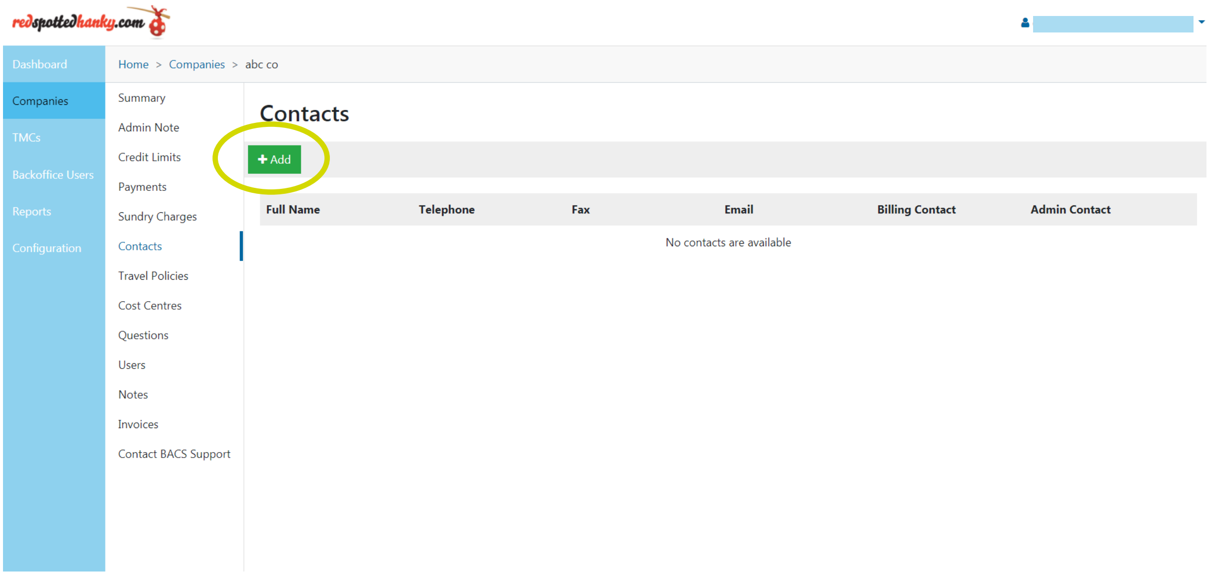


(Screenshot 8)

This screen is only for tickets purchased on account, not for tickets purchased via debit/credit card, and will show all payments taken by direct debit.

Contacts

Click the contact button as highlighted in screenshot 7. Home > Companies > Identifier > Contact

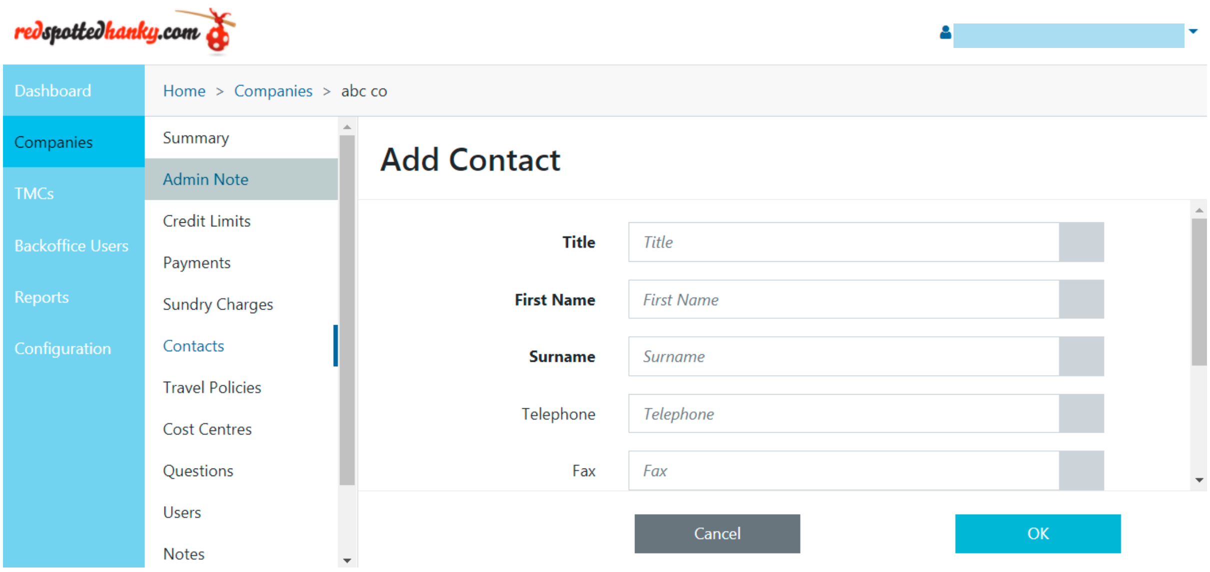


(Screenshot 9)

This screen displays all existing Contacts set up for your company and allows you to add, edit or delete.

To add a new contact, click the "Add" button highlighted above in screenshot 9.

This screen below is displayed (this screen below is also displayed when editing existing Contacts)

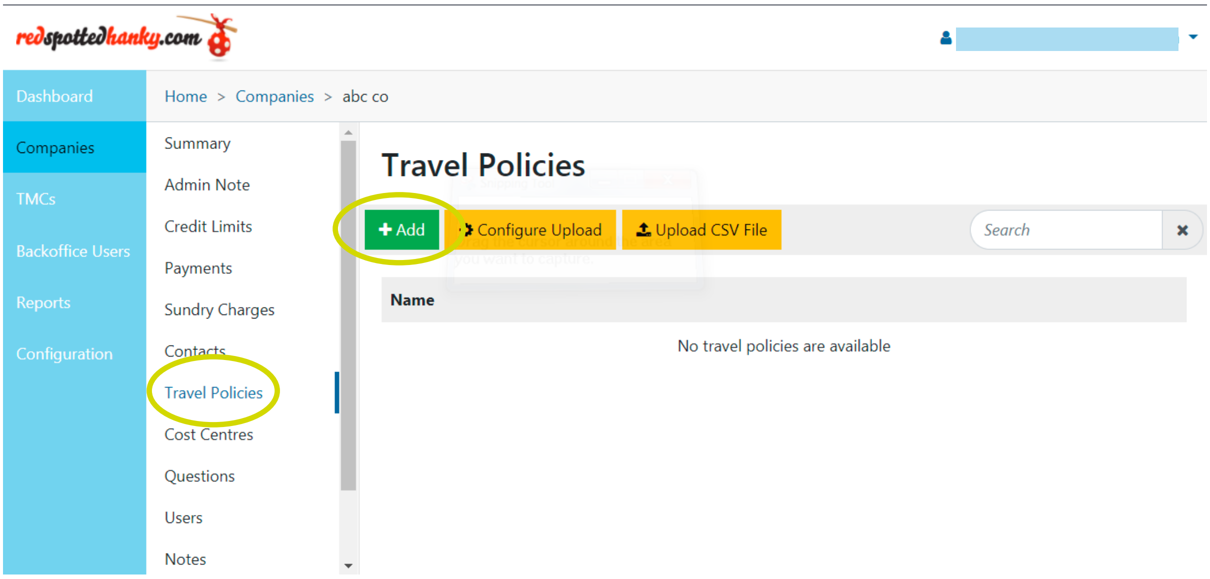


(Screenshot 10)

Enter details for each of your Contacts; then press Submit to save.

Travel Policies

Click the Travels Policy button found on the left tab and highlighted below in screenshot 11.

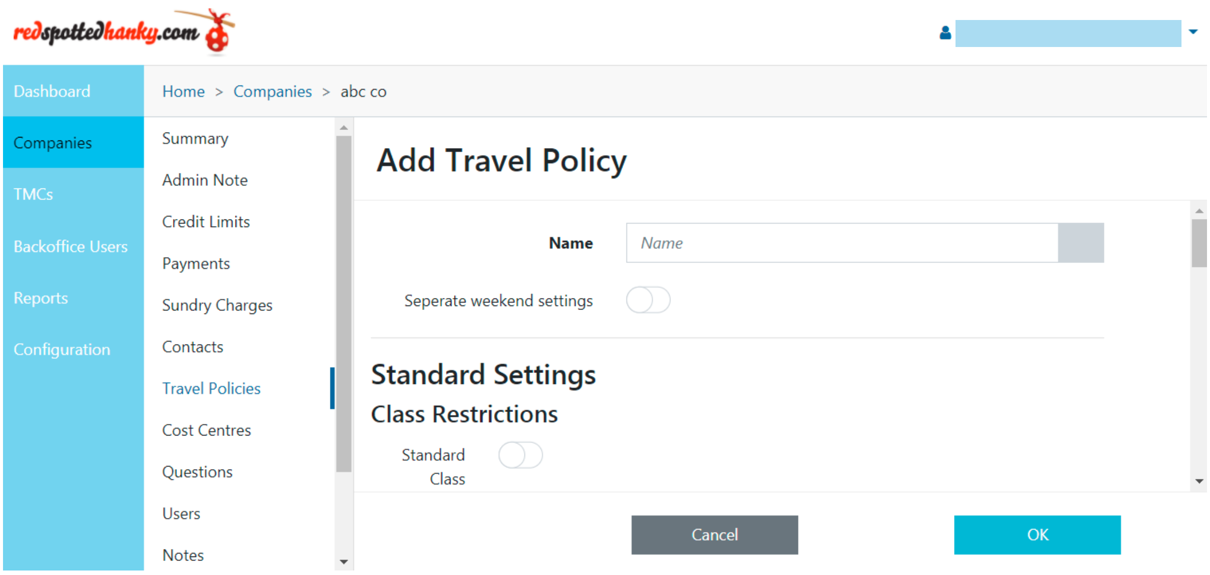


(Screenshot 11)

The screen displays all Travel Policies that have been set up by your company and allows you to add, edit and delete*. A Travel Policy gives you the ability to configure options relating to the purchase of tickets, which can then be assigned to individual users.

To add a Travel Policy, click the "Add" button highlighted in screenshot 11.

The following screen is displayed (this is also displayed when editing existing Travel Policies)



(Screenshot 12)

*A Travel policy can only be deleted if not currently attached to a user.

The following options are available when configuring a Travel Policy: -

Class Restrictions

Standard Class Allowed – If selected, the user can only travel in this class.

First Class Allowed – If selected, the user can only travel in this class.

Class Hard Restriction – If selected, the above options are enforced; otherwise, only a warning will be given.

Ticket Purchase

Normal Tickets Allowed – If selected, the user can purchase this type of ticket

Season Tickets Allowed* - If selected, the user can purchase this type of ticket

Maximum Ticket Price

Max Normal Price – enter a maximum price for this ticket type

Normal Price Restriction – if selected, the above options are enforced; otherwise, only a warning will be given

Max Season Price* - Enter a maximum price for this ticket type

Season Price Hard Restriction – If selected, the above option is enforced; otherwise, only a warning will be given

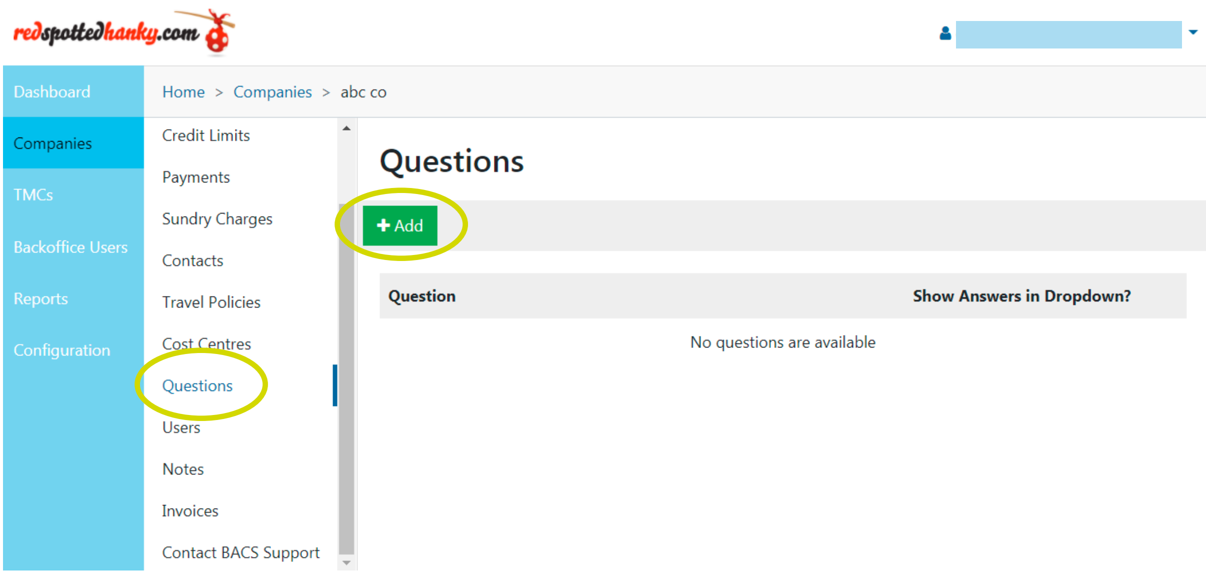
*PLEASE NOTE SEASON TICKETS CANNOT YET BE PURCHASED

Once all the above details have been entered, press Submit to save.

Questions

This section is optional.

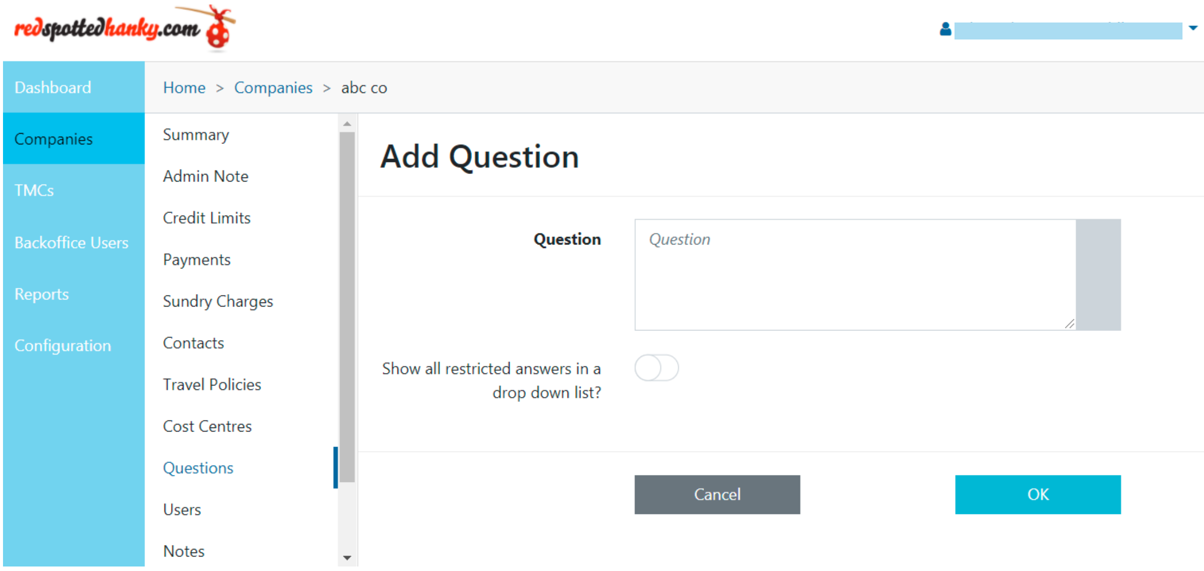
Click the "Question" button on the left, and the following screen will be displayed.



(Screenshot 13)

This screen displays all questions set up for your company and allows you to add, edit, or delete.

You can set up four questions, which users are required to answer when booking train tickets. These questions can also be used for reporting purposes.



(Screenshot 14)

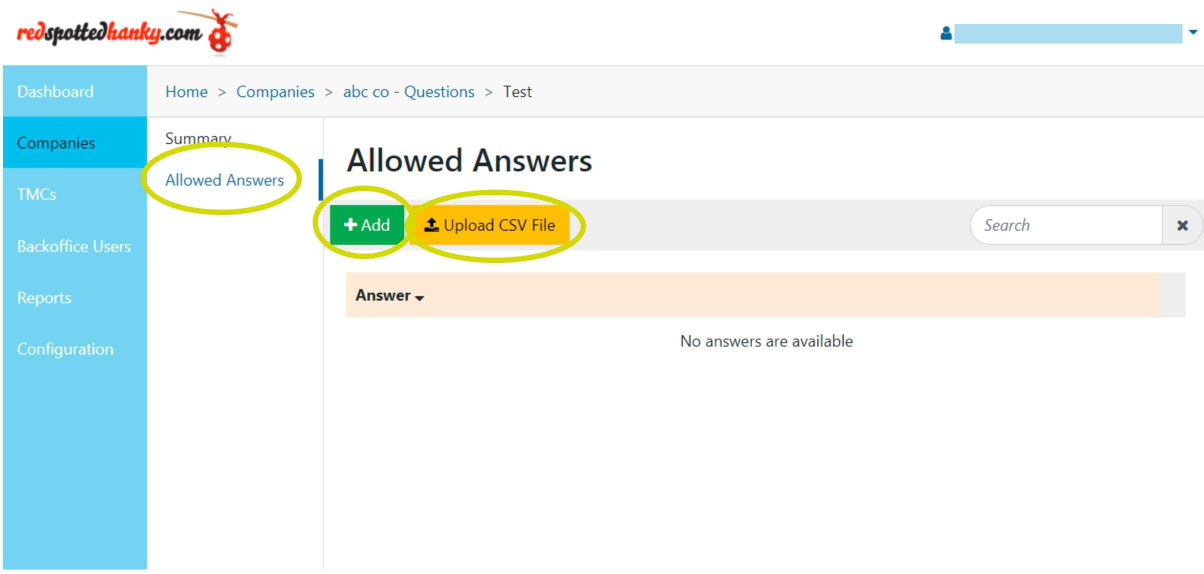
For each question that is set up, you also have the option of setting up restricted answers. This allows for a fixed answer only to be entered and can give greater report flexibility and provide an extra layer of validation when tickets are booked. To show all restricted answers, highlight the button highlighted in screenshot 14.

Please refer to the section below for details of how to set up Restricted Answers.

Restricted Answers

Once you have submitted (saved) your question, you can now add restricted answers. To get there, you need to select your saved question in the Question field, and then you will be taken to a summary page. This is where you can edit the question. Then below is the Allowed Answers that you will click and then press adds to add allowed answers.

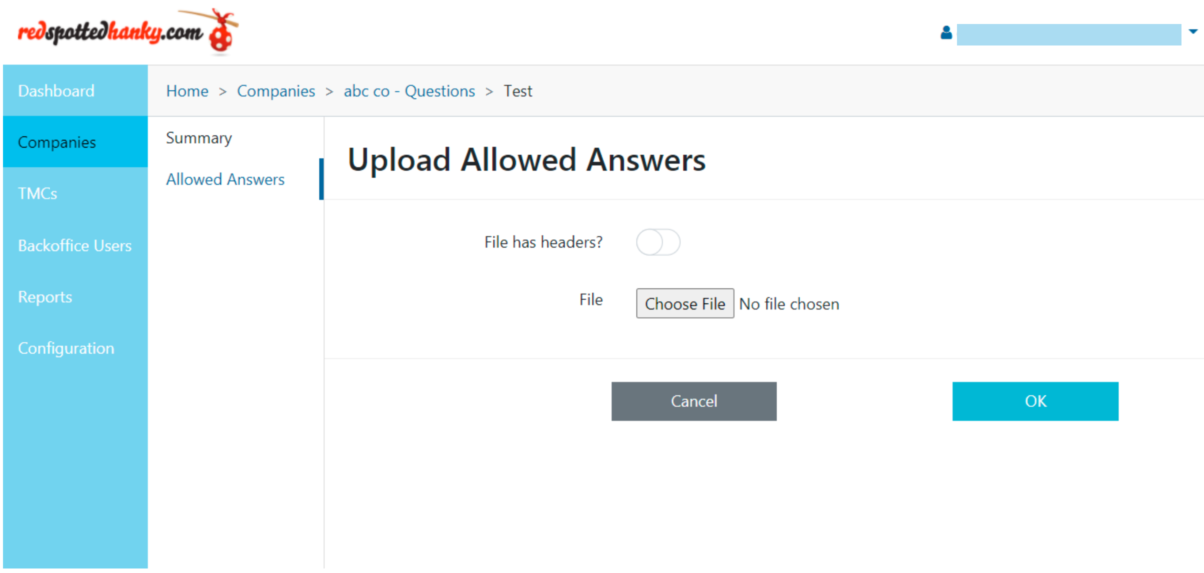
The following screen is displayed.



(Screenshot 15)

Another way to add Allowed Answers if you have lots to add is by uploading a text file. To do this, click the Upload CSV File. This is also highlighted and is the yellow button.

The following screen is displayed.



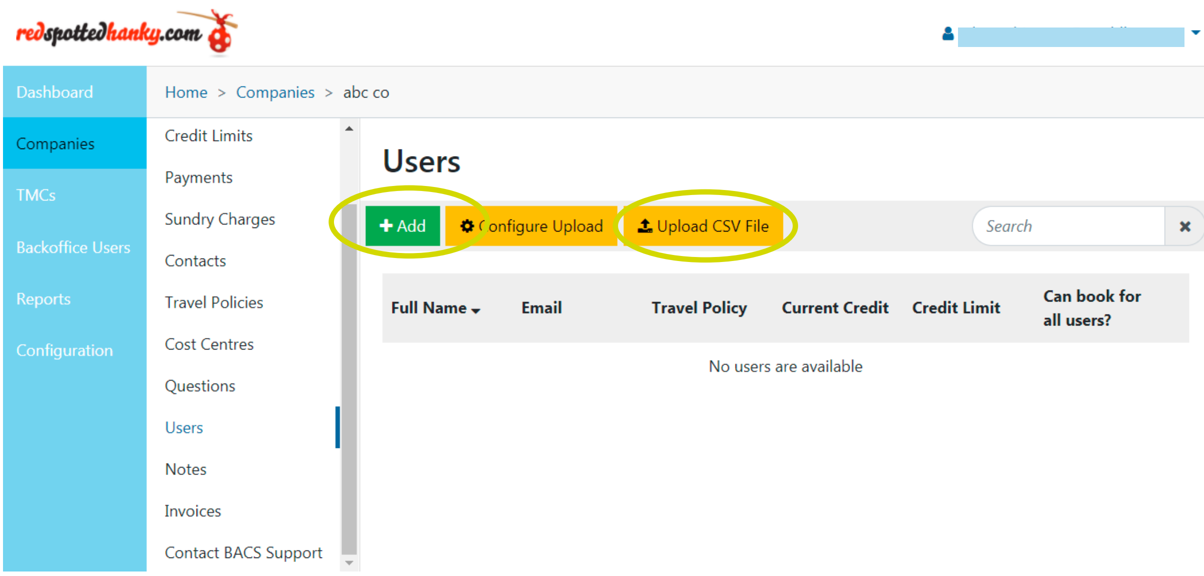
(Screenshot 16)

Here you want to select your text file and then select that box if your file has headers. Then click "Ok", and all your Allowed Answers will be there.

Users

To navigate the user section, you need to select your company identifier, then scroll down and click user.

The following screen is displayed.

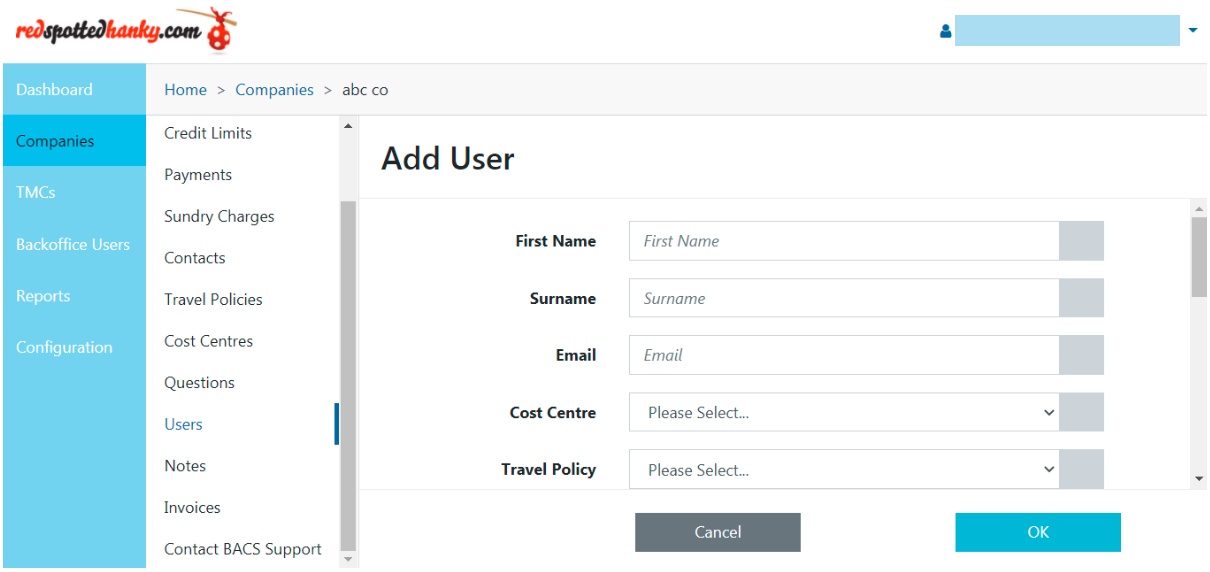


(Screenshot 17)

This screen displays all users set up for your company and allows you to add, edit or delete.

To add a user, you need to click the "Add" button highlighted in screenshot 17.

The following screen will then be displayed.



(Screenshot 18)

The following options are available when configuring a User: -

First Name	- enter first name
Surname	- enter surname
Email	- enter Email address*
Travel Policy	- select a Travel Policy. See the travel policy section for detail**
Payment on Account	- select if tickets can be purchased via this method
Payment on Card	- select if tickets can be purchased via this method
Set Credit Limit	- select to enforce a credit limit
Credit Limit	- enter a credit limit amount
Warning Threshold	- enter a warning threshold amount

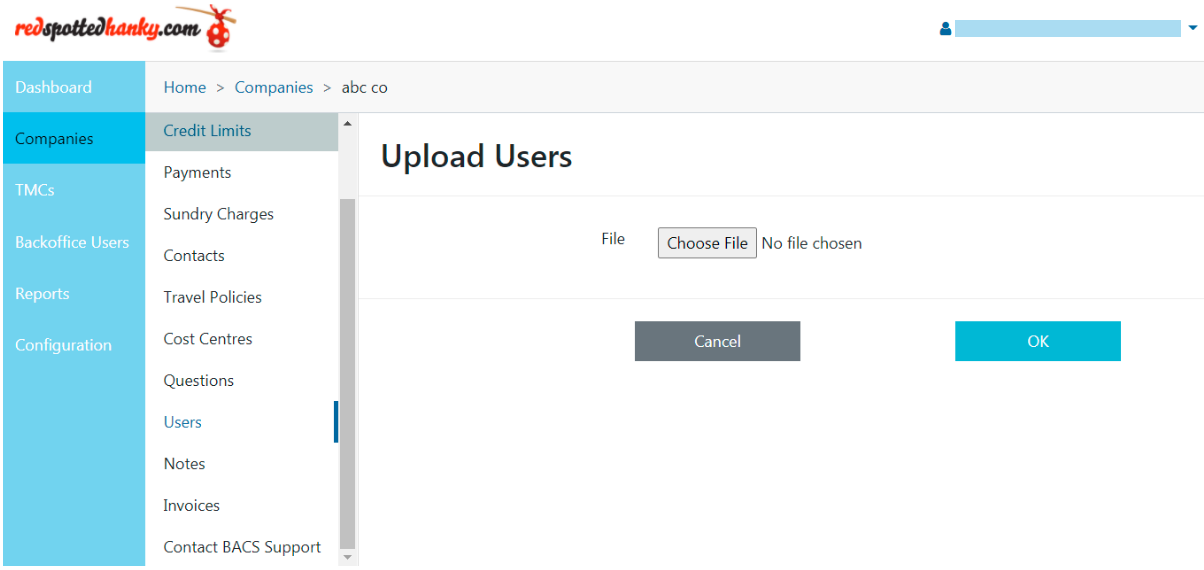
*This Email Address must be used when the user registers for the business account on the redspottedhanky website.

**If a Travel Policy is uploaded that doesn't already exist, then one will be created £0.00 Credit Limits.

Once all the above details have been entered, press "Ok" to save.

If you have a significant number of users you wish to enter, there is also the option to bulk upload via a CSV file. To do this, click the "Upload CSV File" as shown in screenshot 17.

The following screen will be displayed.



(Screenshot 19)

Browse to the location of your text file and upload the file. Your Users will then be loaded in automatically.

The fields in each line of the file are as follows: -

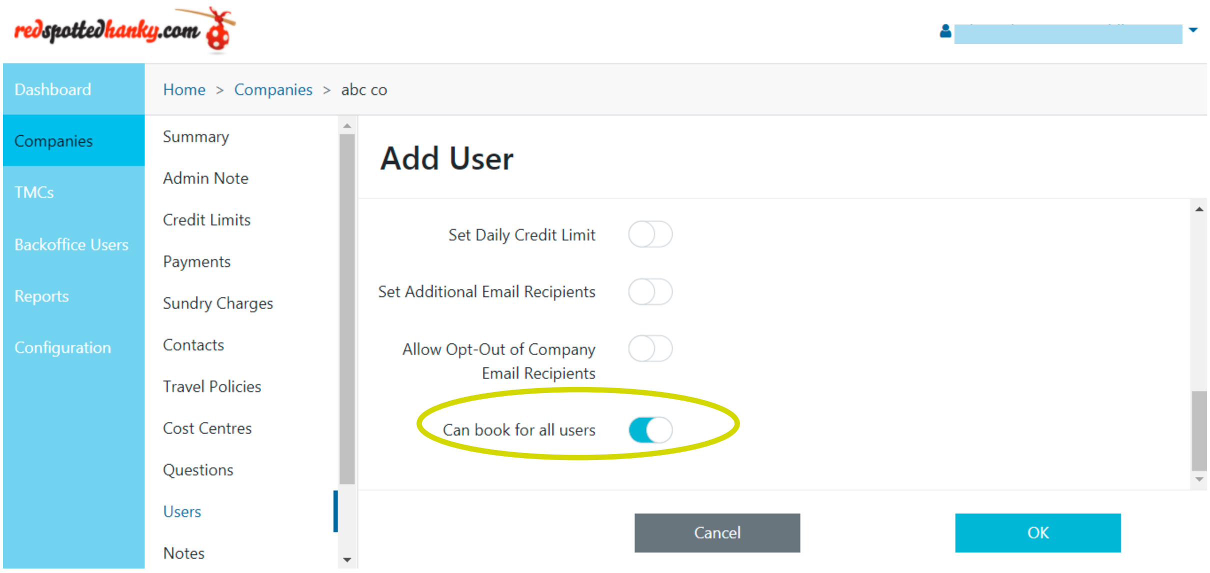
- First Name
- Surname
- Email Address
- Travel Policy Name
- Card Payments Allowed (0 or 1, representing "not allowed" and "allowed")
- Account Payments Allowed (0 or 1, representing "not allowed" and "allowed")
- Credit Limit (empty for no credit limit)
- Remaining Credit Warning Level (empty for no credit limit)
- Default Answer Question 1 (leave empty if no default answer)
- Default Answer Question 2 (leave empty if no default answer)
- Default Answer Question 3 (leave empty if no default answer)
- Default Answer Question 4 (leave empty if no default answer)

Once all the above details have been entered, press "Ok" to save.

Once the user has been created, several other options can configure from the main Users screen.

Book For

From the User page, when you add a new user, you need to scroll to the bottom when filling out the form and select "Can book for all users", as highlighted in screenshot 20. This allows you to book for another person. This tool is excellent for personal assistants who wish to book for someone else in the system.



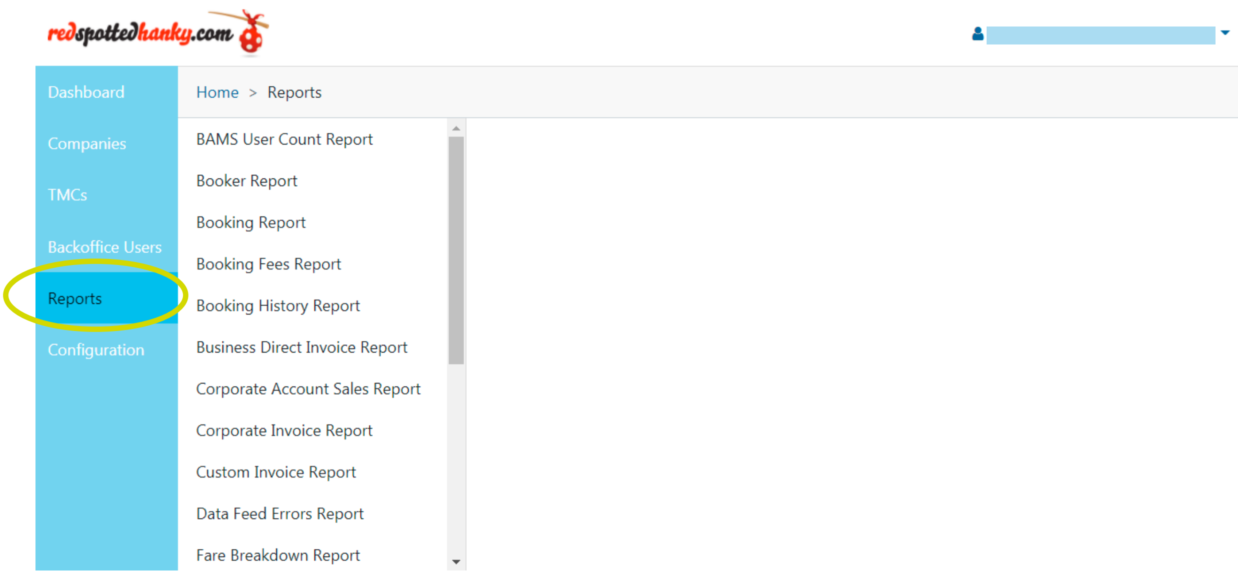
(Screenshot 20)

Reports

There are several pre-defined reports available for you to run.

Click the Reports menu from any screen within the system as indicated below.

The following screen will be displayed.



(Screenshot 21)

All reports are date/time-driven and also contain other optional search criteria. All information can be exported to the following formats:-

- XML
- CSV
- TIFF
- PDF
- Web Archive

- Excel

Booking Report

This report produces a detailed summary relating to each booking, with costings broken down to individual journey level.

Booking History Report

This report produces a high-level summary of journey details.

Corporate Account Sales Report

This report produces a high-level summary of costs by Account Manager.

Corporate Invoice Report

This report produces a summary of orders and payments made against the account.

Payment Methods Report

This report produces a breakdown of all payments made against each payment method.

Customer Invoice Report

This report produces a cost breakdown of all transaction on the account.