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CSC and VPS Software Program (Work Package 2)

VECTOR User Guide

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Chapter 1 - About This Guide

Purpose

This guide provides an overview of VECTOR functionality and gives instructions on the use of VECTOR functions in the Customer Service Center (CSC) environment.

This guide is intended to serve as a reference for particular functions. It is not intended to replace formal or on-the-job training on VECTOR.

Note: This guide has been written from a global user perspective. Your usage may be different based on your business rules.

Audience

This guide is intended for use by:

- Customer Service Representatives (CSRs),
- Individuals with a need to understand how VECTOR processes operate, and
- Potential customers.

User Prerequisites

Users of this guide should have a basic knowledge of personal computer (PC) operations in a graphical user interface (GUI) environment.

GUI System Standards

Understanding the basic Graphical User Interface (GUI) standards used in the design of VECTOR will help you perform tasks while using VECTOR. Applying GUI standards means that you can expect to see consistent graphical and functional conventions throughout the system. It also means that you can expect actions (for example open, save, search, etc.) to perform the same from subsystem to subsystem and screen to screen. This section will describe the different types of VECTOR screens and the basic GUI components found on them.

Screen Types

VECTOR includes several different types of screens. Some types are used only once, while other types are used numerous times within the system. The types of screens and their basic uses include:

- A Login screen used to log into VECTOR,
- A Change Password screen used to change your system password,
- A Main Menu screen used to access the various functions within VECTOR, and
- Function screens used to add and manipulate user data, run reports, and perform various other functions within the system.

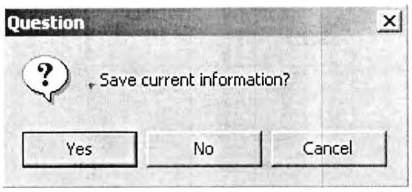
The following sections describe the components that can be found on most VECTOR function screens:

Minimize, Maximize, and Close Buttons

Minimize, maximize, and close/exit buttons appear in the upper right corner of each main function screen. These buttons are used to perform the following actions on the screen:

Button	Description
Minimize	The screen "shrinks" in size and its title and the application logo appears at the bottom of the desktop. The screen and its data are not gone from the system they are just hidden from view, and can be restored by clicking on the screen title.
Maximize	If the screen has been minimized or resized, this button restores it to a full-screen view.
Close/Exit	This button closes the screen. It is used on the VECTOR Main Menu screen to exit out of the system.
	This is an example of the Minimize, Maximize, and Close/Exit buttons:

NOTE: If you click the Close button on an active screen, a **pop-up Question** screen will display asking if you want to save the edits you made. Choose ***YES*** if you want to save the edits. Choose ***NO*** if you want to close the screen without saving your edits. Choose ***CANCEL*** if you are not finished making edits or want to review the screen before closing.



Title Bar, Menu Bar, Toolbar, Status Bar, Tool Tips

Except for the Main Menu, each VECTOR screen will include the following items:

Item	Description
Title bar	Displays the name of the application and the active screen.
Menu bar	Lists commands grouped under main headings.
Toolbar	Displays button icons used to open specific function screens.
Status bar	Displays prompts (such as the name of the field you are in) or other information (such as system status).
Tool tips	Short, float-over text describing the function of buttons. Displays when the cursor passes over the buttons on the screens.

Button Icons

At the top of the screen there are a series of button icons that represent the screens from which specific system functions can be performed. Clicking a button opens that screen. This is an example of the ETC Account Maintenance Application toolbar:

Field Navigation

Once you are in the screen, you can navigate from field to field by:

- Using the ***Tab*** key to move forward from field-to-field or box-to-box on the screen. You can also move to an active field by clicking inside it.
- Using ***Tab + Shift*** to move backward one field at a time on the screen.
- Clicking in an active field.

On some lookup tables, VECTOR allows the supervisor to configure **Business Rules** to pre-set the default for a field in order to speed up data entry. For example, if a number of mail-in applications must be entered, the supervisor can set the customer type to mail-in, and this entry reappears for each new customer until it is changed.

Field Types

There are several different types of fields used on VECTOR screens. Each type of field has special features that differentiate them from each other. The fields and their use are described below:

Data Entry Fields

Data entry fields are fields to which data can be added or edited. These fields are identified on the screen by a white background. You can move to data entry fields by clicking in them, or by using the *TAB* key.

Configurable Fields

Configurable fields on VECTOR screens are non-standard fields that appear depending on business rules established by an agency during system configuration. These fields may be either required, display only, or optional for the specific agency, depending on business rules established during system configuration. These fields will appear only if they are configured to do so.

NOTE: For more information about the business rules that have been configured for your agency, please see your supervisor.

Required Fields

At times you will be required to enter data into specific fields on VECTOR screens before you can leave the field or save the record. These kinds of fields are called Required fields because they require data entry. If you try to close the screen or save the record before information has been entered in all required fields, a pop-up Information window displays telling you which field requires data entry. Currently these fields are not visually distinguishable from other types of fields on the screen.

May Be Required Fields

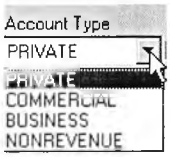
Sometimes specific fields on VECTOR screens will be required depending on data entered in a previous field. These kinds of fields are called May be Required or Optional fields. The same pop-up window described above displays if you try to close the screen or save the record before data has been entered in the field. Currently, these fields are not visually distinguishable from other types of fields on the screens.

Display Only Fields

Display only fields are gray background fields that cannot be edited by the user and that contain data that is presented for viewing only. They typically contain data that is hard-coded by the system, for example a date field that automatically populates with the current system date. Some fields, if configured to do so through business rule settings, will become display only based on values entered in other fields in the screen. They can also display data that was entered on a previous screen and is then defaulted to the active screen so that it does not have to be re-entered. Examples of this are a customer's address and phone number. Display only fields are often referred to as being "grayed out".

Drop-Down Lists

Some screens will include drop-down list fields. These fields contain a list of pre-determined fixed values from which you can choose. They are identified by a down-pointing triangle (called an arrow), as in the example below. To select an option from a drop-down list, click the down arrow and then click the value you want to use. To select an option from the list using the keyboard, tab to or click in the field and type the first letter of the option you want to select. If there is more than one option beginning with the same letter, continue pressing that letter until the desired option appears in the field.



Relationship to Other Documents

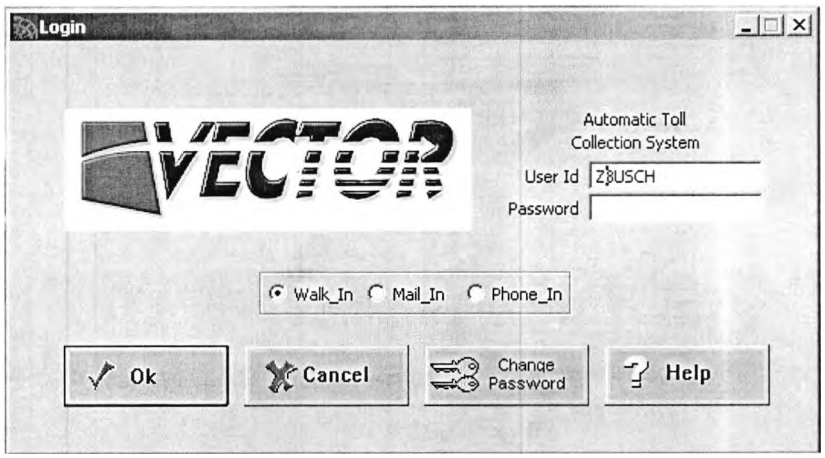
- Refer to the VECTOR Functional Description Document (FDD) for more detailed information on VECTOR and its subsystems.
- Refer to the VECTOR Reports Description Document (RDD) for detailed information on various reports.

CHAPTER 2 – GETTING STARTED

LOGGING INTO VECTOR

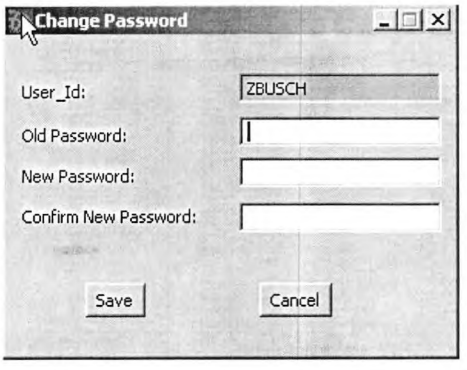
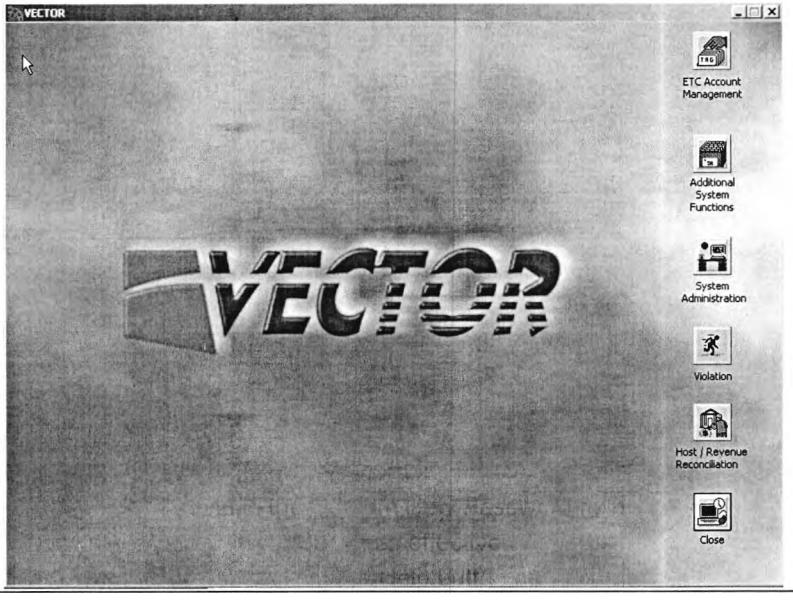
Each user must be properly set up with a user ID and password prior to using VECTOR for the first time. Your supervisor will provide you with this information.

Look on your desktop for the **VECTOR** icon. Double-click the icon to launch the VECTOR program and the following Login screen appears with the cursor blinking in the **User Id** field.



To log into VECTOR, complete the fields in this screen as follows:

Step	Action
1	Type your User Id – your supervisor will supply you with this. Press the tab key when done.
2	Type your Password – your supervisor will supply you with this for your first login; you should change the password to one you select after logging in the first time.
3	• Click the radio button for the appropriate transaction type: • Walk_In – if the CSR is at the CSC walk-in center. • Mail_In – if the CSR is working in the lockbox department. • Phone_In – if the CSR is working in the phone-in department.

Step	Action
4	When complete, select one of the following: • Click OK to finish logging in. • Click Cancel if you do not wish to log in now. • If you are prompted to change your password or if this is the first time you are logging into the system, click the Change Password button and follow the on-screen directions to change your password. All passwords must contain between four and eight characters and may be alphanumeric (a combination of letters and numbers). If you select Change Password, the following screen appears  • Type your old password (this is case sensitive) in the Old Password field. • Type the new password in the New Password field. • Type the new password again in the Confirm New Password field. • Click Save and your new password becomes effective. • In future versions of VECTOR, clicking the Help button on the main log in screen will bring up a help screen. • After you click the OK button, or have completed changing your password, the opening VECTOR screen appears. 

On the right side of the screen, there are buttons associated with the functions within VECTOR. The chapters that follow describe these functions in more detail.

Main screen icon	Subfunctions	Description overview
ETC Account Management	Open an Account Find an Account Maintain and make changes to an account Manage Account Financials Assign a Device View Account History Reports	The main purpose of this function is to allow the CSR to create new customer accounts and maintain existing accounts.
Additional System Functions	Tag Inventory Automated Correspondence Batch Tag Assignment MTOL/VTOL Posting Information VLM Edit Close Help Exit	The main purpose of this function is to allow for the managing of devices, posting manual and violation tolls and generating automated correspondence. It also allows for the box set allocation of tags.
System Administration	Employee Service Center Security Report Maintenance Plaza Maintenance Batch Jobs System Configuration Reports Close Help Exit	This function was designed to facilitate system administration and configuration.
Violation	Image Review Assign Find Transaction Identify Viol. Reports Close Exit	The main purpose of this function is to allow the CSR/violations department, to complete image review, identify a violator, assign tolls and fines to an account and find transactions.
Host / Revenue Reconciliation	Deposits Revenue Bags Adjustments Find Transaction Reports Close Help Exit	The main purpose of this function is to allow the CSR to enter information regarding transactions for day end reconciliation.
Close		From the main screen, this closes the VECTOR application.

VECTOR SERVICE

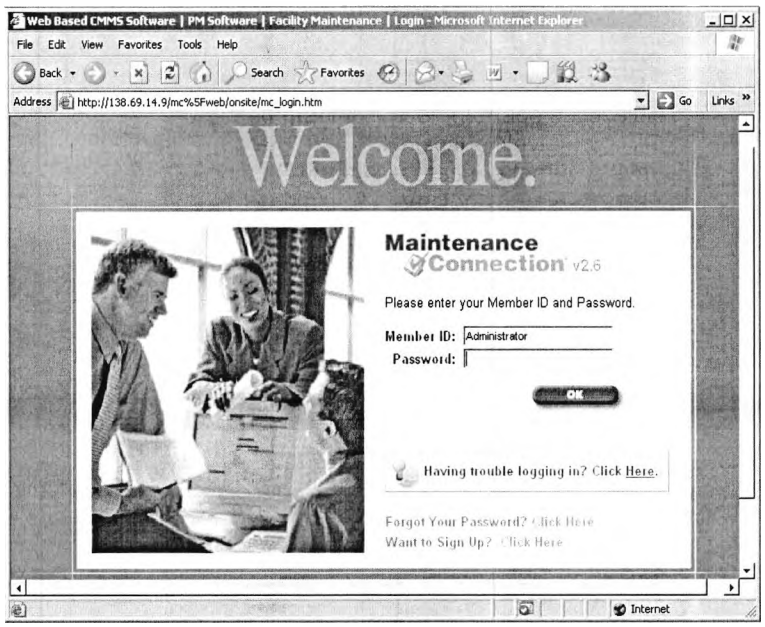
The Vector$_{Service}$ application is a web-based graphical user interface accessible via a minimum web browser such as Microsoft Internet Explorer 6.0®, or Netscape Navigator 6.2®. System users must have an active and approved member ID and password to access the features available within Vector$_{Service}$. To receive a valid member ID and password contact your Vector$_{Service}$ system administrator.

ACCESSING VECTOR$_{SERVICE}$

To access Vector$_{Service}$ perform the following steps:

Step	Action
1.	Select your preferred web browser software application
2.	Enter the web address into the browser address *(addresses will vary based on project)*
3.	PRESS [ENTER] ON YOUR KEYBOARD

Once complete you will be presented with the following welcome screen. This screen provides the functionality to gain access to Vector$_{Service}$, request a new user account, or the password for an existing account and to access the trouble shooting menu.



REQUEST A NEW USER ACCOUNT

To request a new user account, complete the following steps:

Step	Action
1	Select the "Want to Sign Up? Click Here" link from the Welcome screen
2	Select the "I am an existing Member of the Maintenance Connection." Checkbox"
3	Enter your preferred Member Name
4	Enter your preferred Password

5	Press the [TAB] key, or click you mouse pointer in the Password field
6	Enter a valid password in the Password field
7	Press [ENTER] on your keyboard, or select the (OK) button

Successful completion of this procedure will generate the $Vector_{Service}$ Module Selection screen. This screen provides a listing of the four main components of $Vector_{Service}$. Selecting one of the four module descriptions will connect you to the selected application. Module selection is accomplished by simply "clicking" your mouse on the module description text.

REQUEST A PASSWORD FOR AN EXISTING USER ACCOUNT

If you have forgotten your system password you can request to have it sent to your email address. To accomplish this perform the following procedure:

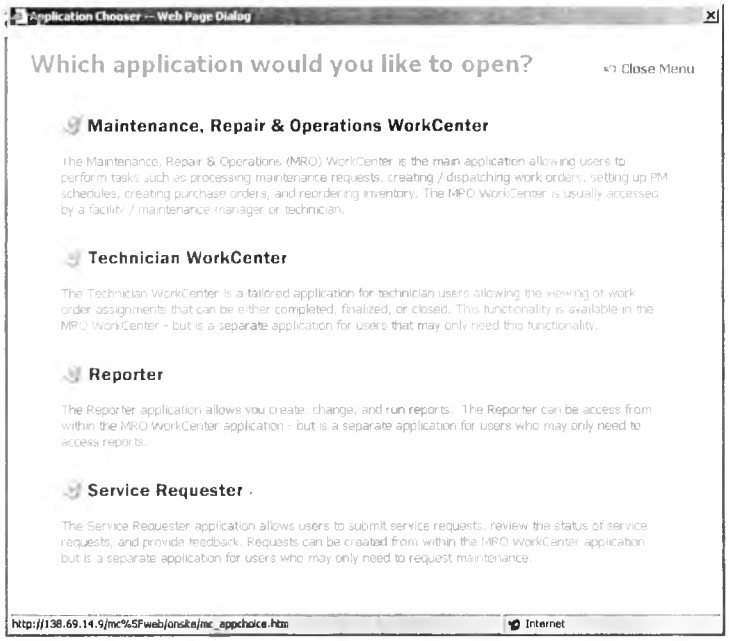
Step	Action
1	Select the "Forgot Your Password? Click Here" link from the Welcome screen
2	Enter your email address in the Email Address field
3	Select (OK)

APPLICATION LOGIN

Once you have accessed the $Vector_{Service}$ Welcome screen perform the following procedure:

Step	Action
1	Enter a valid member ID into the Member ID field
2	Press the [TAB] key, or click you mouse pointer in the Password field
3	Enter a valid password in the Password field
4	Press [ENTER] on your keyboard, or select the (OK) button

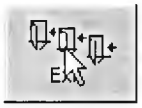
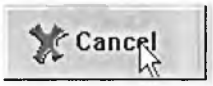
Successful completion of this procedure will generate the $Vecto_{rService}$ Module Selection screen. This screen provides a listing of the four main components of $Vector_{Service}$. Selecting one of the four module descriptions will connect you to the selected application. Module selection is accomplished by simply "clicking" your mouse on the module description text.



LOGGING OUT

Follow these steps when you want to log out of VECTOR.

IMPORTANT!: Be sure to save information entered on VECTOR screens that you want to save before logging out. If you log out before saving the information you will need to re-enter it when you log back in.

Step	Action
1	From any VECTOR screen, click the **Exit** icon button on the toolbar: 
	VECTOR closes the subsystem and the Main Menu screen appears:
2	Click the **Close** button.
	The Main Menu screen closes and the Login screen appears:
3	Click the **Cancel** button to finish logging out of VECTOR. 

CHAPTER 3 - ETC ACCOUNT MANAGEMENT

This chapter describes the processes associated with the Electronic Toll Collection (ETC) Account Management subsystem. It also includes step-by-step instructions on how to use each of the subsystem functions.

SUBSYSTEM FUNCTIONS

The ETC Account Management subsystem is organized by functions that are used to open, edit, save, and update information about VECTOR customer accounts. With the ETC Account Management subsystem, you can perform specific functions such as:

- Open a new account
- Find existing account information
- Maintain and update existing account information
- Manage account financials
- Assign devices to an existing account
- View account history
- Generate reports
- Perform Customer Remote Management

The functions are represented by buttons on the ETC Account Management Application toolbar. The toolbar also includes buttons used to close function screens, and exit the VECTOR application entirely. To initiate each function, click the corresponding button on the toolbar.

SUB-FUNCTIONS

Each function within the ETC Account Management subsystem is managed through sub-function screens that are opened from tabs located under the toolbar. The sub-function tabs that display vary depending on which main function was selected (highlighted). In the example below, sub-function tabs for the Open Account function are displayed:

BUSINESS RULES

VECTOR is a highly flexible system that allows agencies to tailor the system to meet their unique processing and business needs. During system implementation, agencies review VECTOR functionality and define how they will implement it. VECTOR implementation includes (among other things) the loading of tables that contain agency business rules that drive the automation of VECTOR functionality. For example, business rules can control how different VECTOR customer accounts are opened and maintained, add options to field characteristics, or determine which reports will be used. These tables are not hard coded so that, as an agencies business needs change, the tables can be modified to reflect the new business rules.

FIELD CHARACTERISTICS

Basic field characteristics and options for VECTOR screens are detailed in this user guide. Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information on any characteristics that may be different on your system.

ACCESS THE SUBSYSTEM

To access the ETC Account Management subsystem, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon.
2	The ETC Account Management Application function toolbar displays.

ETC Account Management - Open Account

The ETC Open Account function is used to open (set up) a brand new ETC account in VECTOR. When you open a new account, you need to enter numerous pieces of customer information that is organized into sub-functions identified by a tab on the Open Account screen. Clicking each sub-function tab opens the screen for that sub-function. The seven sub-functions are:

- Demographics
- SubAccounts
- Replenish
- Vehicles
- Devices
- Plans
- Payments

Access the Open Account Function

To access the ETC Account Management Open Account function, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Open Acct button. The Open Account function and sub-function tabs display. Screen focus is on the Demographics tab.

Account Types

Customer accounts can be easily categorized and grouped for processing. The types of accounts available are:

Type	Description
Private	Individual customer with a pre-paid account
Business	Business customer with a pre-paid account

The type of account determines which set of business rules apply and what screen and field options are available for the account. Additionally, an agency may choose to use only some of the account types. Instructions on how to open each type of account and how to use each applicable field are included in this section.

NOTE: For more information about the business rules that have been configured for your agency, please see your supervisor.

Open an Account in VECTOR

When opening a new VECTOR account, information must be entered on the Demographics, Vehicles, Devices, Plans, and Payments sub-function tab screens before the new account record can be saved. The following sections describe the process for opening each type of account. An example of each Open Account sub-function tab screen, how to access it, field, command button, and array column descriptions, and instructions on how and when to use each sub-function are also included in this section.

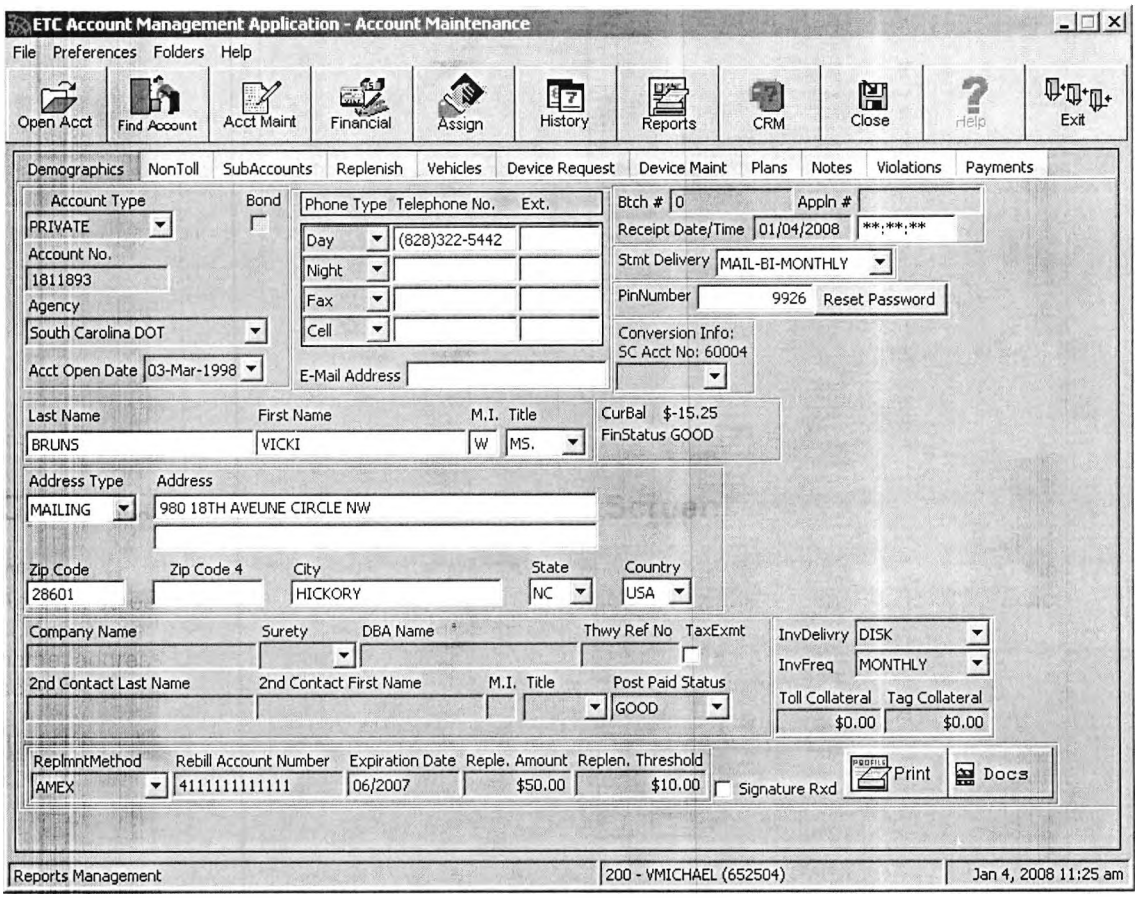
IMPORTANT!: All required data must be entered on these tab screens before the record can be saved. VECTOR will display an information dialog box when the entire process is complete and an account number has been assigned. If you exit VECTOR before completing the entire "Open an Account" process, any data entered on the Open Account sub-function tab screens will be lost and will need to be re-entered.

Once an account is opened, additions, edits, updates, and deletions to the account can only be made through the Account Maintenance function. See the Account Maintenance section of this guide for more information and instructions.

NOTE: It is not necessary to add sub-account or replenishment information to a new account when it is opened. However, once the account is opened (saved), this information can only be added through the Account Maintenance function.

Open Account – Demographics Tab Screen

When you click the Open Acct button on the ETC Account Management Application toolbar, the Open Account screen displays with screen focus on the Demographics tab screen. The Demographics screen is used to enter basic information about the customer who is opening the account, such as name, address, phone numbers, etc. This is an example of the Open Account – Demographics tab screen:



Access Open Account - Demographics

To access the Open Account - Demographics tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.

Step	Action
2	Click the Open Acct button. The Open Account – Demographics screen displays.

ETC Account Management Application - Account Maintenance

File Preferences Folders Help

Open Acct | Find Account | Acct Maint | Financial | Assign | History | Reports | CRM | Close | Help | Exit

Demographics | NonToll | SubAccounts | Replenish | Vehicles | Device Request | Device Maint | Plans | Notes | Violations | Payments

Account Type: PRIVATE
Bond
Account No.: 1811893
Agency: South Carolina DOT
Acct Open Date: 03-Mar-1998

Phone Type / Telephone No. / Ext.
Day: (828)322-5442
Night
Fax
Cell
E-Mail Address

Btch #: 0 Appln #:
Receipt Date/Time: 01/04/2008 **:**:**
Stmt Delivery: MAIL-BI-MONTHLY
PinNumber: 9926 Reset Password
Conversion Info: SC Acct No: 60004

Last Name: BRUNS First Name: VICKI M.I.: W Title: MS.
CurBal $-15.25
FinStatus GOOD

Address Type: MAILING Address: 980 18TH AVEUNE CIRCLE NW
Zip Code: 28601 Zip Code 4: City: HICKORY State: NC Country: USA

Company Name Surety DBA Name Thwy Ref No TaxExmt
2nd Contact Last Name 2nd Contact First Name M.I. Title Post Paid Status: GOOD
InvDelivry: DISK
InvFreq: MONTHLY
Toll Collateral: $0.00 Tag Collateral: $0.00

ReplmntMethod: AMEX Rebill Account Number: 4111111111111 Expiration Date: 06/2007 Reple. Amount: $50.00 Replen. Threshold: $10.00
Signature Rxd
Print Docs

Reports Management | 200 - VMICHAEL (652504) | Jan 4, 2008 11:25 am

FIELD DESCRIPTIONS: OPEN ACCOUNT – DEMOGRAPHICS

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

Fields are listed in alphanumeric order, not the order presented on the screen.

Field Name	Description, Format, and Features
2nd Contact M.I.	The middle initial of the customer's second contact person. ***NOTE:*** Not applicable to private accounts.
2nd Contact Title	The title of the customer's second contact person. Options are: • CAPT • DR • LT • MISS • MR • MRS • MS • SGT
Receipt Date/Time	The date and time that the account was opened.
2nd Contact First Name	The first name of the customer's second contact person. ***NOTE:*** Entry in this field is required if a name is entered in the 2nd Contact Last Name field. ***NOTE:*** Not applicable to private accounts.
2nd Contact Last Name	The last name of the customer's second contact person. ***NOTE:*** Not applicable to private accounts.
Account No.	The identification number automatically assigned to the account by VECTOR. Since an account number is not assigned until the record is saved, this field is always empty when opening a new account. ***DISPLAY ONLY***
Account Type ***CONFIGURABLE***	The type of account being opened. Options are: • BUSINESS • COMMERCIAL • NONREVENUE • PRIVATE ***DROP-DOWN LIST***
Acct Open Date	The date that the account is opened. Defaults to the current system date and cannot be edited. ***DISPLAY ONLY***
Address	The customer's street address.

Field Name	Description, Format, and Features
Address Type	The type of address for the account. Options are: • BILLING • MAILING (DEFAULT) • RESIDENT • SHIPPING • VIOLADDR *DROP-DOWN LIST*
Agency	The name of the business entity that is using VECTOR. *DROP-DOWN LIST*
Application #	The customer's application number for the account. ***NOTE:*** *REQUIRED*
Batch #	The batch number for the account. Defaults to zero (0) if no number is entered.
Bond	Identifies the method the customer is using to assure payment of their account is a bond. *CHECK-BOX*
Card Number	The account number of the credit card being used. ***NOTE:*** *REQUIRED* if AMEX, DISCOVER, MASTERCARD, or VISA is selected in the ReplmntMethod field.
City	The city in which the customer resides. Defaults based on the zip code entered.
Company Name	The name of the business or non-revenue entity opening the account.
Conversion Info: SC Acct. No:	The pre-existing SC account number before conversion to the new version of VECTOR. *DROP-DOWN LIST*
Country	The country in which the customer resides. Defaults based on zip code entered. Options are: • CAN • USA *DROP-DOWN LIST*
DBA Name	The name the company uses to "do business as" (DBA). ***EXAMPLE:*** A cleaning company is doing business as "Mighty Maids," but Acme Cleaning owns the company.
E-Mail Address	The email address for the account holder.
Expiration Date	The expiration date of the credit card being used. ***NOTE:*** *REQUIRED* if AMEX, DISCOVER, MASTERCARD, or VISA is selected in the ReplmntMethod field.
Ext.	The extension that corresponds to the telephone number entered in the adjacent field. Four different phone extensions can be entered: Day, Night, Fax, and Cell.
First Name	The first name of the customer or primary contact person.

Field Name	Description, Format, and Features
Last Name	The last name of the customer or primary contact person.
M.I.	The middle initial of the customer or primary contact person.
Phone Type	Identifies the type of telephone number and extension entered in the adjacent fields. Four different phone extensions can be entered: Day, Night, Fax, and Cell.
Pin Number	The personal identification number for the account. This number is customer-defined.
Post Paid Status	Indicates the post-paid status on the account. Only business and commercial accounts can have post paid accounts. All other account holders must pre-pay. Options are: • GOOD (DEFAULT) • SUSPEND *DROP-DOWN LIST*
Rebill Account Number	The customer's financial institution checking or savings account number. ***NOTE:*** *REQUIRED* if CHECKING or SAVINGS is selected in the ReplmntMethod field.
Receipt Date/Time	The date and time that the account application was received. Defaults to the current system date and cannot be edited.
Reple. Amount	The amount the account is to be replenished to. *DISPLAY-ONLY* *NOTE:* This field will display populated for already established accounts.
Replmnt Method	The primary method that will be used to replenish account funds. Options are: • AMEX • CASH (DEFAULT) • CHECK • CHECKING • DISCOVER • MASTERCARD • NREV • PO (not applicable to Private accounts) • SAVINGS • VISA *DROP-DOWN LIST*
Replen. Threshold	The amount the account has as a balance that flags the system it is time to replenish the account. *DISPLAY-ONLY* *NOTE:* This field will display populated for already established accounts.
Signature Rxd	Used for batch processing of application signatures. ***NOTE:*** Not used when opening an account. *CHECKBOX*
State	The state or Canadian province in which the customer resides. Defaults based on the zip code entered. *DROP-DOWN LIST*

Field Name	Description, Format, and Features
Stmt Delivery	The method and frequency of delivery by which the customer prefers to receive their account statement. Options are: • NONE-NONE • DISK-BI-MONTHLY (not applicable to Private accounts) • DISK-MONTHLY (not applicable to Private accounts) • E-MAIL-BI-MONTHLY • E-MAIL-MONTHLY • MAIL-BI-MONTHLY • MAIL-MONTHLY *DROP-DOWN LIST*
Surety	Identifies the method the customer is using to assure payment of their account. Options are: • BOND • CASH • PO • SURETY 2 • SURETY 3 • WAIVER ***NOTE:*** Used for business and non-revenue accounts only. *DROP-DOWN LIST*
Tag Collateral	The amount that the company wants to post as collateral for tags.
Tax Exmt	Indicates that the business or non-revenue entity is exempt from paying taxes. ***NOTE:*** Not applicable to private accounts. *CHECKBOX*
Telephone No.	The primary customer's telephone number. Four different telephone numbers can be entered: Day, Night, Fax, and Cell.
Thwy Ref No	The identification number of the toll road.
Title	The title of the primary contact person on the account. Options are: • CAPT • DR • LT • MISS • MR • MRS • MS • SGT *DROP-DOWN LIST*
Toll Collateral	The amount that the company wants to post as collateral for tolls.
Zip Code	The postal zip code associated with the city and state (or Canadian province) in which the customer resides.
Zip Code 4	The 4-digit postal zip code extension associated with the city and state (or Canadian province) in which the customer resides.

OPEN A PRIVATE ACCOUNT

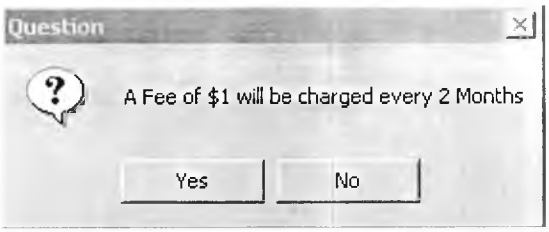
A private account is assigned to an individual customer who typically accrues one or two tolls per day. Opening a private account is a multi-step process that involves entering information on several sub-function tab screens: Demographics, Vehicles, Devices, Plans, and Payments. Entering information on the SubAccounts and Replenish tab screens at this point is recommended, but not required.

IMPORTANT!: All required data must be entered on these screens before the record can be saved. VECTOR will display an information dialog box when the entire process is complete and an account number has been assigned. If you exit VECTOR before completing the entire process, any data entered on the screens will be lost and will need to be re-entered.

NOTE: Some field values and characteristics may appear differently on your system than as described in the steps below based on the business rules configured for your agency. Please see your supervisor for more information.

To open a **private** account, complete the following steps:

NOTE: See the Field Descriptions: Open Account – Demographics section of this guide for a list of options for each drop-down list field unless otherwise noted. .

Step	Action
1	Access the Open Account – Demographics tab screen.
2	Select Private from the Account Type drop-down list.
3	Enter the customer's daytime, nighttime, fax, and cellular phone numbers and extensions (if any) in the applicable Telephone No. and Ext. fields.
4	Enter the customer's e-mail address in the E-Mail Address field.
5	If you are completing a mail-in batch of applications, enter the batch number from the cover sheet in the Btch # field.
6	Enter the application number from the application form in the Appln # field. If you have access to barcode scanning devices, scan the bar-coded number from the form into this field. ***NOTE:*** *REQUIRED* Phone CSRs must enter this information manually.
7	Enter the time that the application was received in the Receipt/Time field. The Receipt Date field defaults to the current system date and cannot be edited.
8	Select an option from the Stmt Delivery drop-down list.
9	If your system is configured to do so and E-MAIL-MONTHLY is selected in the Stmt Delivery field, the following pop-up dialog box displays:  If the customer chooses to pay this fee, click ***YES*** and proceed to step 11. The $1 fee will be automatically added to their account.
10	If the customer does not want to pay this fee, click ***No*** and change the selection in the Stmt Delivery field.

Step	Action
11	Enter a personal identification number (PIN) chosen by the customer in the Pin Number field. *REQUIRED*
12	Enter the customer's last name in the Last Name field. *REQUIRED*
13	Enter the customer's first name and middle initial in the First Name and M.I. fields. *REQUIRED*
14	Select an option from the Title drop-down list.
15	Select an option from the Address Type drop-down list.
16	Verify that the billing address is the same as the mailing address or obtain the correct billing address at this time.
17	Enter the customer's street address in the Address fields. *REQUIRED*
18	Enter the customer's address zip code in the Zip Code field and any zip code extension in the Zip Code 4 field. The City, State, and Country fields default automatically based on the zip code entered. *REQUIRED*
19	Select an option from the Replmnt Method drop-down list.
20	If the replenishment method chosen is AMEX, DISCOVER, MASTER CARD or VISA, the adjacent field label changes to Card Number and the Expiration Date field becomes active. Enter the credit card account number in the Card Number field. *REQUIRED*
21	Enter the date that the credit card expires in the Expiration Date field. *REQUIRED*
22	If the replenishment method chosen is CHECKING or SAVINGS, the Routing Number field appears and the Rebill Account Number field becomes active. Enter the financial institution's routing number for the customer's checking or savings account in the Routing Number field. *REQUIRED*
23	Enter the customer's financial institution checking or savings account number in the Rebill Account Number field. *REQUIRED*
24	Click the SubAccounts tab and follow the directions in the Add a Sub-Account section of this guide to add at least one sub-account entry.
25	Click the Replenish tab and follow the directions in the Set the Account Replenishment Properties section of this guide to set replenishment properties.
	OR
26	Click the Vehicles tab and follow the directions in the Add Vehicles to an Account section of this guide to add at least one vehicle to the account. *REQUIRED*

IMPORTANT!: If you exit VECTOR before completing the entire "Open a Private Account" process, any data entered on this and subsequent Open Account sub-function tab screens will be lost and will need to be re-entered.

OPEN A BUSINESS ACCOUNT

A business account is designed for use by businesses such as taxi fleets and florist delivery fleets. These businesses have a high volume of tolls, a large number of devices, and a large number of vehicles. This type of account is prepaid only. Information must be entered on the Demographics, Vehicles, Devices, Plans, and Payments sub-function tab screens. Entering information on the SubAccounts and Replenish tab screens at this point is recommended, but not required.

IMPORTANT!: All required data must be entered on these screens before the record can be saved. VECTOR will display an information dialog box when the entire process is complete and an account number has been assigned. If you exit VECTOR before completing the entire process, any data entered on the screens will be lost and will need to be re-entered.

NOTE: Some field values and characteristics may appear differently on your system than as described in the steps below based on the business rules configured for your agency. Please see your supervisor for more information.

To open a **business** account, complete the following steps:

NOTE: See the Field Descriptions: Open Account – Demographics section of this guide for a list of options for each drop-down list field unless otherwise noted. .

Step	Action
1	Access the Open Account – Demographics tab screen.
2	Select Business from the Account Type drop-down list.
3	Select TaxiLimo to indicate that the business is a taxi or limousine service.
4	Enter the primary customer's daytime, nighttime, fax, and cellular phone numbers and extensions (if any) in the applicable Telephone No. and Ext. fields.
5	Enter the primary customer's e-mail address in the E-Mail Address field.
6	If you are completing a mail-in batch of applications, enter the batch number from the cover sheet in the Btch # field.
7	Enter the application number from the application form in the Appln # field. If you have access to barcode scanning devices, scan the bar-coded number from the form into this field. ***NOTE:*** Phone CSRs must enter this information manually.
8	Enter the time that the application was received in the Receipt/Time field. The Receipt Date field defaults to the current system date and cannot be edited.
9	Select an option from the Stmt Delivery drop-down list.
10	Enter a personal identification number (PIN) chosen by the customer in the Pin Number field. *REQUIRED*
11	Enter the primary customer's last name in the Last Name field. *REQUIRED*
12	Enter the primary customer's first name and middle initial in the First Name and M.I. fields. *REQUIRED*
13	Select an option from the Title drop-down list for the primary customer's title.
14	Select an option from the Address Type drop-down list.
15	Enter the primary customer's street address in the Address fields. *REQUIRED*
16	Enter the primary customer's address zip code in the Zip Code field and any zip code extension in the Zip Code 4 field. The City, State, and Country fields default automatically based on the zip code entered. *REQUIRED*
17	Verify that the billing address is the same as the mailing address or obtain the correct billing address at this time.
18	Enter the name of the company in the Company Name field. *REQUIRED*

Step	Action
19	Select an option from the CollateralType or Surety drop-down list.
20	Enter the name that the company uses to "do business as" in the DBA Name field.
21	Select TaxE to indicate that the company is exempt from paying taxes.
22	Enter a second customer contact name in the 2nd Contact Last Name, 2nd Contact First Name, and 2nd Contact M.I. fields if applicable.
23	Select an option from the 2nd Contact Title drop-down list if applicable.
24	Select an option from the Post Paid Status drop-down list.
25	Select an option from the InvDelivry drop-down list.
26	Select Monthly from the InvFreq drop-down list.
27	Enter the dollar amount the company wants to post as collateral for tolls in the Toll Collateral field.
28	Enter the dollar amount the company wants to post as collateral for tags in the Tag Collateral field.
29	Select an option from the Replmnt Method drop-down list.
30	If the replenishment method chosen is AMEX, DISCOVER, MASTER CARD or VISA, the adjacent field label changes to Card Number and the Expiration Date field becomes active. Enter the credit card account number in the Card Number field. *REQUIRED*
31	Enter the date that the credit card expires in the Expiration Date field. *REQUIRED*
32	If the replenishment method chosen is CHECKING or SAVINGS, the Routing Number field appears and the Rebill Account Number field becomes active. Enter the financial institution's routing number for the customer's checking or savings account in the Routing Number field. *REQUIRED*
33	Enter the customer's financial institution checking or savings account number in the Rebill Account Number field. *REQUIRED*
34	Click the SubAccounts tab and follow the directions in the Add a Sub-Account section of this guide to add at least one sub-account entry.
35	Click the Replenish tab and follow the directions in the Set the Account Replenishment Properties section of this guide to set replenishment properties.
	OR
36	Click the Vehicles tab and follow the directions in the Add Vehicles to an Account section of this guide to add at least one vehicle to the account. *REQUIRED*
37	Click the Save button again at the end to save the record.

IMPORTANT!: If you exit VECTOR before completing the entire "Open a Business Account" process, any data entered on this and subsequent Open Account sub-function tab screens will be lost and will need to be re-entered.

EDIT DEMOGRAPHIC INFORMATION

Demographic information that has been added on the Open Account – Demographics tab screen can be edited on this screen only as long as the new account has not been saved. Once the account record has been opened and saved to the database, edits to demographics information can only be made through the Account Maintenance function. See the Account Maintenance – Demographics section of this guide for instructions on how to edit demographic information.

To edit demographic information before the account has been opened, follow these steps:

NOTE: See the Field Descriptions: Open Account – Demographics section of this guide for a list of options for each drop-down list field on this screen. .

Step	Action
1	With the un-opened account active on the Open Account screens, access the Open Account – Demographics tab screen.
2	Edit the information in any of the active fields, as needed. ***NOTE:*** If a payment plan has been added to the account through the Open Account - Plans tab screen, the Account Type field on the Open Account – Demographics screen becomes inactive and cannot be changed. The payment plan must first be deleted from the Open Account - Plans tab screen (see Delete a Discount Plan), and then the Account Type field can be edited.

IMPORTANT!: If you exit VECTOR before completing the entire "Open an Account" process, any information you edit on this sub-function tab screen will be lost and will need to be re-entered.

FIND DEMOGRAPHIC INFORMATION

To view demographic information entered for an account that has not yet been opened (saved), click the Demographics tab on the Open Account screen at any time during the "Open an Account" process.

To find demographic information for an account that has been opened, you must first find the account that the information is associated with. See the Find an Account section of this guide for instructions on how to find information about a customer account.

DELETE DEMOGRAPHIC INFORMATION

Certain demographic information that has been added on the Open Account – Demographic tab screen can be deleted through this screen only as long as the new account has not been opened (saved). Once the account record has been opened and saved to the database, demographic information can only be deleted through the Account Maintenance function. See the Account Maintenance – Demographics section of this guide for instructions on how to delete demographic information from an opened account.

To delete demographic information before the account has been opened, follow these steps:

Step	Action
1	With the un-opened account active on the Open Account screens, access the Open Account – Demographics tab screen.
2	Delete Information from any of the following fields as needed. • 2nd Contact M.I. • 2nd Contact Title • 2nd Contact First Name • 2nd Contact Last Name • Application# • Batch# • Collateral Type • DBA Name • Ext. • M.I. • Phone Type • [Receipt Time] • Surety • Telephone No. • Title • Zip Code 4
3	The deleted information will not be included in the account record when it is opened.

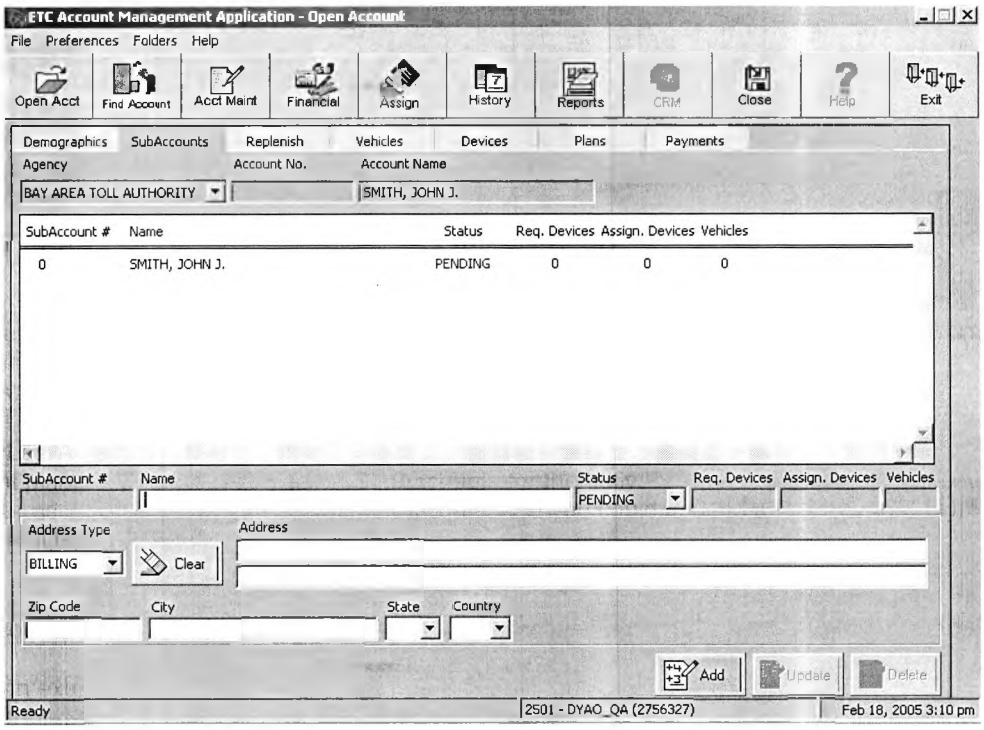
Open Account - SubAccounts Tab Screen

The SubAccounts tab on the Open Account screen is used to assign SubAccounts to the main customer account when the account is first opened. A main account can have an unlimited number of SubAccounts. These accounts contain more specific information, such as individual user names, vehicles, devices, discount plans, and payment options.

EXAMPLE: A floral delivery service may have three locations, a fleet of nine vans, and a monthly payment plan. You would create three SubAccounts for the delivery service (one for each location), assign three different vehicles to each sub-account, and you could use the same monthly payment plan for each sub-account.

NOTE: Assigning SubAccounts when opening an account is not required but is recommended. SubAccounts can be added at any time through the Account Maintenance – SubAccounts tab screen.

This is an example of the Open Account - SubAccounts tab screen.



ACCESS OPEN ACCOUNT - SUBACCOUNTS

To access the Open Account - SubAccounts tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Open Acct button. The Open Account screen displays.
3	Click the SubAccounts tab. The Open Account – SubAccounts tab screen displays.

FIELD DESCRIPTIONS: OPEN ACCOUNT – SUBACCOUNTS

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Field Name	Description, Format, and Features
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private & Non-Revenue Accounts – First Name, Last Name, and M.I. • Commercial & Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. Since an account number is not assigned until the record is saved, this field is always empty when opening a new account. *DISPLAY ONLY*
Address	The sub-account customer's street address. ***NOTE:*** Entry in this field is recommended but not required.
Address Type	The type of address for the sub-account. Options are: • BILLING • MAILING (DEFAULT) • RESIDENT • SHIPPING • VIOLADDR *DROP-DOWN LIST*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
Assign. Devices	The number of devices currently assigned to the sub-account that is selected (highlighted) in the array window. ***NOTE:*** This value does not display when an account is being opened. Devices are not assigned to the account or sub-account until the account record has been saved and an account number assigned. *DISPLAY ONLY*
City	The city in which the sub-account customer resides. Defaults based on the zip code entered.
Country	The country in which the sub-account customer resides. Defaults based on zip code entered. Options are: • CAN • USA *DROP-DOWN LIST*
Name	The sub-account name. If the name is a proper name, the recommended entry is Last Name, First Name, and M.I. (if applicable).

Field Name	Description, Format, and Features
Req. Devices	The number of devices currently requested for the sub-account that is selected (highlighted) in the array window. ***NOTE:*** When opening a new account, a value will only display in this field when information has been entered on the Devices tab screen first. *DISPLAY ONLY*
State	The state or Canadian province in which the customer resides. Defaults based on the zip code entered. *DROP-DOWN LIST*
Status	The current status of the sub-account. Options are: • ACTIVE • CLOSE PEND • CLOSED • NEW • PENDING (DEFAULT when opening an account) • SUSPEND *DROP-DOWN LIST*
Sub-Account #	The identification number automatically assigned to the sub-account by VECTOR. Numbers are assigned sequentially as SubAccounts are added. ***NOTE:*** When opening a new account, this value displays when the sub-account record is selected (highlighted) in the array window. *DISPLAY ONLY*
Vehicles	The number of vehicles currently assigned to the sub-account that is selected (highlighted) in the array window. ***NOTE:*** When opening a new account, a value will only display in this field when information has been entered on the Vehicles tab screen first. *DISPLAY ONLY*
Zip Code	The postal zip code associated with the city and state (or Canadian province) in which the sub-account customer resides.
Command Buttons	
Add	Adds the sub-account information to the account. ***IMPORTANT!:*** Clicking this button does not save the information to the database. If you exit VECTOR before completing the entire "Open an Account" process, any data entered on this and subsequent Open Account sub-function tab screens will be lost and will need to be re-entered.
Clear	Clears the screen of address data entered or edited before saving the record.
Delete	Deletes the selected (highlighted) sub-account information displayed in the array window.
Update	Updates the selected (highlighted) sub-account record with the edits made.

ADD A SUB-ACCOUNT

SubAccounts can be added to a private, commercial, business, or non-revenue account when it is opened, or they can be added at a later time through the Account Maintenance function. The process to add a sub-account is the same for each account type, unless noted in the instructions below.

NOTE: Assigning SubAccounts when opening an account is not required but is recommended. SubAccounts can be added at any time through the Account Maintenance – SubAccounts tab screen.

NOTE: Some field values and characteristics may appear differently on your system than as described in the steps below based on the business rules configured for your agency. Please see your supervisor for more information.

To add a sub-account to an account, follow these steps:

NOTE: See the Field Descriptions: Open Account – SubAccounts section of this guide for a list of options for each drop-down list field unless otherwise noted. .

Step	Action
1	Complete the steps to enter demographics information. *REQUIRED*
2	Access the Open Account – SubAccounts tab screen.
3	Enter the name of the sub-account in the Name field. *REQUIRED*
4	A value of Pending displays in the Status drop-down field.
5	Select an option from the Address Type drop-down list.
6	Enter the street address for the sub-account in the Address fields.
7	Enter the zip code for the sub-account's address in the Zip Code fields The City, State, and Country fields default automatically based on the zip code entered.
	Click the Clear button to clear the address information and re-enter, if needed.
8	Click the Add button to add the sub-account record. The information added displays in the array window, and the screen resets so that another sub-account can be assigned.
9	Repeat steps 4-9 to add more SubAccounts, as needed. ***IMPORTANT!:*** Clicking the Add button does not save the information to the database. If you exit VECTOR before completing the entire "Open an Account" prpcess, any data entered on this and subsequent Open Account sub-function tab screens will be lost and will need to be re-entered.
10	Click the Replenish tab and follow the directions in the Set the Account Replenishment Process section of this guide to set the replenishment process.
	OR
11	Click the Vehicles tab and follow the directions in the Add Vehicles to an Account section of this guide to add at least one vehicle to the account. *REQUIRED*

UPDATE A SUB-ACCOUNT

Sub-account information that has been added on the Open Account – Sub-Account tab screen can be updated on this screen only as long as the new account has not been saved. Once the account record has been opened and saved to the database, updates to sub-account information can only be made through the Account Maintenance function. See the Account Maintenance – Sub-Account section of this guide for instructions on how to update a sub-account.

To update sub-account information before the account has been saved, follow these steps:

NOTE: See the Field Descriptions: Open Account – SubAccounts section of this guide for a list of options for each drop-down list field on this screen. .

Step	Action
1	With the un-opened account active on the Open Account screens, access the Open Account – Sub-Account tab screen.
2	Select (highlight) the sub-account to be updated in the array window. The Update command button becomes active.
3	Edit the information in any of the following fields, as needed: • Address • Address Type • City • Country • State • Zip Code
4	Click the Update command button to update the sub-account information.

IMPORTANT!: If you exit VECTOR before completing the entire "Open an Account" process, any information you update on this sub-function tab screen will be lost and will need to be re-entered.

FIND A SUB-ACCOUNT

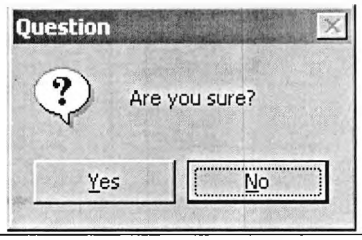
To view sub-account information entered for an account that has not yet been opened (saved), click the SubAccounts tab on the Open Account screen at any time during the "Open an Account" process.

To find sub-account information for an account that has been opened, you must first find the account that the sub-account is associated with. See the Find an Account section of this guide for instructions on how to find information about a customer account.

DELETE A SUB-ACCOUNT

Sub-account information that has been added on the Open Account – Sub-Account tab screen can be deleted through this screen only as long as the new account has not been opened (saved). Once the account record has been opened and saved to the database, SubAccounts can only be deleted through the Account Maintenance function. See the Account Maintenance – Sub-Account section of this guide for instructions on how to delete a saved sub-account.

To delete sub-account information before the account has been opened, follow these steps:

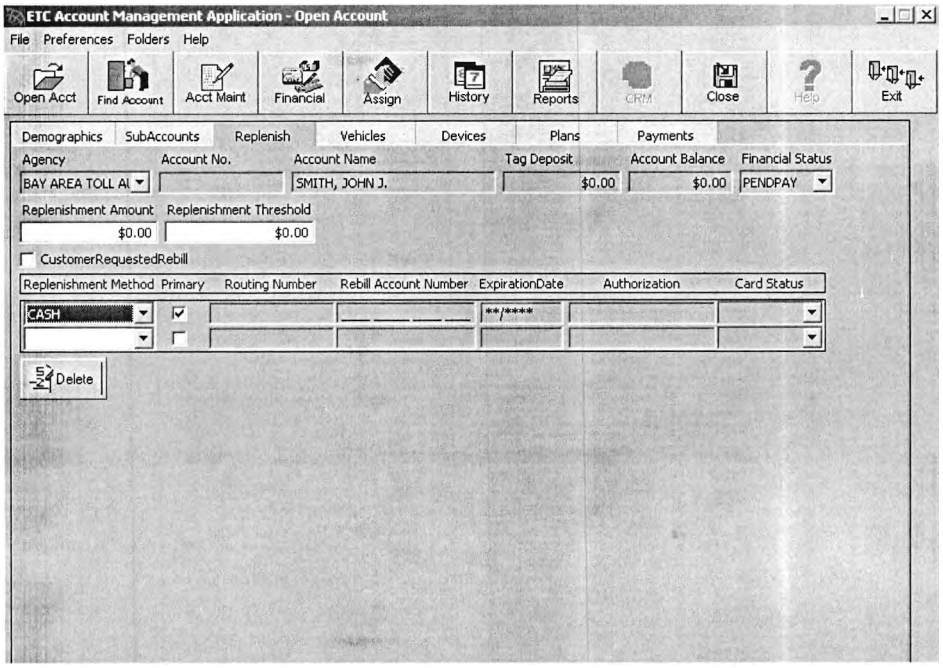
Step	Action
1	With the un-opened account active on the Open Account screens, access the Open Account – Sub-Account tab screen.
2	Select (highlight) the sub-account to be deleted in the array window. The Delete command button becomes active.
3	Click the Delete button to delete the sub-account information. The following dialog screen displays: 
4	Click *YES* to confirm deletion of the sub-account information. The sub-account is deleted from the array.
5	Click *NO* if you do not wish to delete the information at this time. The information remains unchanged and will be saved to the account when the Open an Account process is complete.

Open Account – Replenish Tab Screen

The Replenish tab on the Open Account screen is used to set the required properties for the replenishment of a customer's account funds when opening an account.

NOTE: Setting replenishment properties when opening an account is not required but is recommended. These properties can be added at any time through the Account Maintenance – Replenish tab screen.

This is an example of the Open Account – Replenish tab screen.



ACCESS OPEN ACCOUNT - REPLENISH

To access the Open Account - Replenish tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Open Acct button. The Open Account screen displays.
3	Click the Replenish tab. The Open Account – Replenish tab screen displays.

FIELD DESCRIPTIONS: OPEN ACCOUNT – REPLENISH

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Field Name	Description, Format, and Features
Account Balance	The funds remaining in the customer account. This field displays $0.00 when opening an account. *DISPLAY ONLY*
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private & Non-Revenue Accounts – First Name, Last Name, and M.I. • Commercial & Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. Since an account number is not assigned until the record is saved, this field is always empty when opening a new account. *DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
Authorization	The code received from the customer's bank authorizing the designated replenishment method. *DISPLAY ONLY*
Card Number	The account number of the credit card being used. ***NOTE:*** *REQUIRED* if AMEX, DISCOVER, MASTERCARD, or VISA is selected in the Replenishment Method field.
Card Status	The current status of the customer's credit card. *DISPLAY ONLY*
Customer Requested Rebill	Indicates that the customer wants to replenish their account outside of the normal replenishment process. ***EXAMPLE:*** The customer knows his usage is going to triple for some reason so he requests a replenishment outside the normal process. *CHECKBOX*
Expiration Date	The expiration date of the credit card being used. ***NOTE:*** *REQUIRED* if AMEX, DISCOVER, MASTERCARD, or VISA is selected in the Replenishment Method field.
Financial Status	The financial status of the customer's VECTOR account. *DISPLAY ONLY*

Field Name	Description, Format, and Features
Primary	Indicates that the selected value in the adjacent Replenishment Method field is the primary method of account fund replenishment. The DEFAULT is the first field. ***NOTE:*** Only one Primary field can be selected. *CHECKBOX*
Rebill Account Number	The customer's financial institution checking or savings account number. ***NOTE:*** *REQUIRED* if CHECKING or SAVINGS is selected in the ReplmntMethod field on the Demographics tab screen.
Replenishment Amount	The recommended amount that the customer should be billed when the balance on the account goes below the minimum replenishment threshold.
Replenishment Method	The primary method that will be used to replenish account funds. Defaults to the method selected on the Demographics screen but can be changed. Up to two methods can be defined. Options are: • AMEX • CASH • CHECK • CHECKING • DISCOVER • MASTERCARD • NREV • PO (not applicable to Private accounts) • SAVINGS • VISA *DROP-DOWN LIST*
Replenishment Threshold	The minimum account fund balance. Automatically populates based on the amount entered in the Replenishment Amount field and the option selected in the Replenishment Method field. This amount can be increased, but cannot exceed the amount entered in the Replenishment Amount field.
Routing Number	The financial institution's routing number for the customer's checking or savings account. ***NOTE:*** *REQUIRED* if CHECKING or SAVINGS is selected in the Replenishment Method field.
Tag Deposit	The amount due for all tags (devices) requested for the account. This value defaults from the Open Account – Payments tab screen and is based on the account plans set up on the Open Account – Plans tab screen. *DISPLAY ONLY*

Command Buttons	
Delete	Deletes the replenishment method entries in turn, and clears the related fields for re-entry.

SET ACCOUNT REPLENISHMENT PROPERTIES

Replenishment properties can be set for an account when it is opened, or they can be set at a later time through the Account Maintenance function. The process for setting these properties is the same for each account type.

NOTE: Setting replenishment properties when opening an account is not required but is recommended. These properties can be added at any time through the Account Maintenance – Replenish tab screen.
To set replenishment properties for an account, follow these steps:

NOTE: See the Field Descriptions: Open Account – Replenish section of this guide for a list of options for each drop-down list field unless otherwise noted. .

Step	Action
1	Complete the steps to enter demographics information. *REQUIRED*
2	Add sub-account information.
3	Access the Open Account – Replenish tab screen.
4	Enter the dollar amount of the replenishment in the Replenishment Amount field.
5	Tab to or click in the Replenishment Threshold field. It will automatically populate based on the amount entered in the Replenishment Amount field and the option selected in the Replenishment Method field. Change the value in the Replenishment Threshold field, if needed. ***NOTE:*** The amount entered cannot exceed the amount entered in the Replenishment Amount field.
6	Select Customer Requested Rebill to indicate that the customer wants to replenish their account outside of the normal replenishment process.
7	Select an option from the Replenishment Method drop-down list. *REQUIRED*
8	If Checking or Savings is selected, enter the customer's financial institution routing number for the customer's checking or savings account in the Routing Number field. *REQUIRED*
	Enter the customer's financial institution checking or savings account number in the Rebill Account Number field. *REQUIRED*
9	If AMEX, DISCOVER, MASTERCARD, or VISA are selected, the label of the Rebill Account Number field changes to Card Number. Enter the applicable credit card number and expiration date in the Card Number and Expiration Date fields. *REQUIRED*
10	Select a second Replenishment Method, if needed. If a credit card is selected as the second method, repeat step 10. ***NOTE:*** If a credit card is selected as the first Replenishment Method, only another credit card can be entered as the second replenishment method.
11	Select Primary to indicate which replenishment method is to be used first. The DEFAULT is the first method entered. *REQUIRED* ***NOTE:*** Only one Primary field can be selected.

Step	Action
12	Click the Delete button to delete the last Replenishment method entered and re-enter another method. ***NOTE:*** At least one replenishment method must be entered and identified as the primary method.
	IMPORTANT!: Setting replenishment properties on this screen does not save the information to the database. If you exit VECTOR before completing the entire "Open an Account" process, any data entered on this and subsequent Open Account sub-function tab screens will be lost and will need to be re-entered.
13	Click the Vehicles tab and follow the directions in the Add Vehicles to an Account section of this guide to add at least one vehicle to the account. ***REQUIRED***

UPDATE REPLENISHMENT PROPERTIES

An account's replenishment properties can be updated only through the Account Maintenance function. See the Account Maintenance - Replenish section of this guide for instructions on how to update replenishment properties.

DELETE REPLENISHMENT PROPERTIES

Replenishment properties can be deleted only through the Account Maintenance function. See the Account Maintenance - Replenish section of this guide for instructions on how to delete replenishment information.

FIND REPLENISHMENT PROPERTIES

To view replenishment information entered for an account that has not yet been opened (saved), click the Replenish tab on the Open Account screen at any time during the "Open an Account" process.

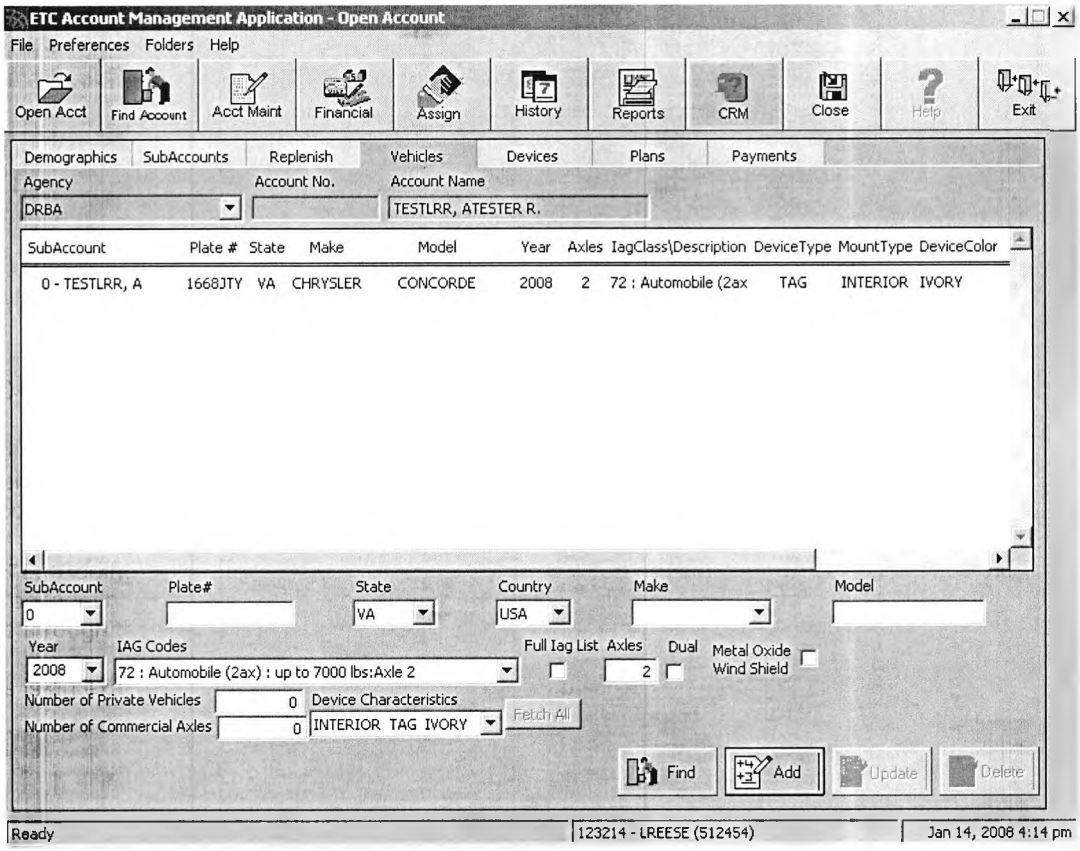
To find replenishment information for an account that has been opened, you must first find the customer account that the replenishment properties are associated with. See the Find an Account section of this guide for instructions on how to find information about a customer account.

Open Account – Vehicles Tab Screen

The Vehicles tab on the Open Account screen is used to add vehicles to the main customer account when it is first opened. If SubAccounts have been added to the account on the Open Account – Sub-Account tab screen, vehicles can be assigned to individual SubAccounts at this time.

NOTE: Adding at least one vehicle record is required when opening a new VECTOR account. Once the account has been opened, vehicles can be added, deleted, or their information updated at any time through the Account Maintenance – Vehicles tab screen.

This is an example of the Open Account - Vehicles tab screen.



ACCESS OPEN ACCOUNT - VEHICLES

To access the Open Account - Vehicles tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Open Acct button. The Open Account screen displays.
3	Click the Vehicles tab. The Open Account – Vehicles tab screen displays.

FIELD DESCRIPTIONS: OPEN ACCOUNT – VEHICLES

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

Field Name/	Description and Features
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private & Non-Revenue Accounts – First Name, Last Name, and M.I. • Commercial & Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. Since an account number is not assigned until the record is saved, this field is always empty when opening a new account. *DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
Axles	The number of axles associated with the vehicle selected in the IAG Codes field. *DISPLAY ONLY*
Country	The country in which the customer resides. Defaults based on zip code entered. Options are: • CAN • USA *DROP-DOWN LIST*
Device Characteristics	The type of device assigned to the vehicle for identification purposes. Once assigned, this device (also known as a tag or transponder) is attached to the vehicle and transmits information about the vehicle to VECTOR when the vehicle passes through the ETC lane at the agency site. *DROP-DOWN LIST*
Make	The name of the manufacturer of the vehicle. *DROP-DOWN LIST*
Model	The model of the vehicle selected in the Make field. ***EXAMPLE:*** Breeze, Bronco, Ram, Skylark
Number of Private Vehicles	The number of private vehicles assigned to the account.
Plate#	The state or Canadian province license plate number of the vehicle.
State	The state or Canadian province that has issued the license plate entered in the Plate# field. Defaults based on the address of the selected sub-account, but can be changed. *DROP-DOWN LIST*

Field Name	Description, Format, and Features
Year	The year in which the vehicle being added was manufactured. The DEFAULT is the current calendar year. Options are: • 1996 - 2005 *DROP-DOWN LIST*
Command Buttons	
Add	Adds the vehicle information to the account record. ***IMPORTANT!:*** Clicking this button does not save the information to the database. If you exit VECTOR before completing the entire "Open an Account" process, any data entered on this and subsequent Open Account sub-function tab screens will be lost and will need to be re-entered.
Delete	Deletes the selected (highlighted) vehicle information displayed in the array window.
Fetch All	Displays additional screens of data in the array screen.
Find	Locates the vehicle by plate number. Enter the license plate number of the vehicle in the Plate# field.
Update	Updates the selected (highlighted) vehicle record with the edits made.

ADD VEHICLES TO AN ACCOUNT

At least one vehicle must be added when opening an account in VECTOR. After the account record is saved, additional vehicles can be added through the Account Maintenance function if needed. The process for adding vehicle information is the same for each type of account unless noted in the instructions below.

To add a vehicle to an account, complete the following steps.

NOTE: See the Field Descriptions: Open Account – Vehicles section of this guide for a list of options for each drop-down list field unless otherwise noted. .

Step	Action
1	Complete the steps to enter demographics information. *REQUIRED*
2	Add sub-account information.
3	Set replenishment options.
4	Access the Open Account – Vehicles tab screen.
5	Select a Sub-Account number from the SubAccount drop-down list. The DEFAULT is zero (0).
6	Enter the vehicle's license plate number in the Plate# field. *REQUIRED*
7	Select the state in which the vehicle's license plate number is registered from the State drop-down list. The DEFAULT is the primary or sub-account customer's state as entered on the Open Account – Demographics or Open Account – Sub-Account tab screens, but can be changed.
8	Select an option from the Make drop-down list. *REQUIRED*
9	Enter the model of the vehicle in the Model field. The number of axles on the vehicle based on the model name entered defaults to the Axles field.
10	Select an option from the Year drop-down list.
11	Select an option from the Device Characteristics drop-down list. ***NOTE:*** The device selected in this field will default to the Open Account – Devices tab screen.

Step	Action
12	Click the Fetch All button to display a full list of devices in this field.
13	Click the Add button to add the vehicle to the account or sub-account (if applicable). The information added displays in the array, and the screen resets so that another vehicle can be assigned. ***IMPORTANT!:*** Clicking the Add button does not save the information to the database. If you exit VECTOR before completing the entire "Open an Account" process, any data entered on this and subsequent Open Account sub-function tab screens will be lost and will need to be re-entered.
14	Repeat steps 3-15 above to add additional vehicles, as needed.
15	Click the Devices tab and follow the directions in the Add Devices to an Account section of this guide to assign devices to the vehicles. *REQUIRED*

UPDATE VEHICLE INFORMATION

Vehicle information that has been added on the Open Account – Vehicles tab screen can be updated on this screen only as long as the new account has not been saved. Once the account record has been opened and saved to the database, updates to vehicle information can only be made through the Account Maintenance function. See the Account Maintenance – Vehicles section of this guide for instructions on how to update vehicle information.

To update vehicle information before the account has been saved, follow these steps:

NOTE: See the Field Descriptions: Open Account – Vehicles section of this guide for a list of options for each drop-down list field on this screen.

Step	Action
1	With the un-opened account active on the Open Account screens, access the Open Account – Vehicles tab screen.
2	Select (highlight) the vehicle information to be updated in the array window. The Update command button becomes active.
3	Edit the information in any of the following fields, as needed: • Country • CTOC/IAG codes • Make • Model • Plate# • State • SubAccount • Year
4	Click the Update command button to update the vehicle information.

IMPORTANT!: If you exit VECTOR before completing the entire "Open an Account" process, any information you update on this sub-function tab screen will be lost and will need to be re-entered.

FIND VEHICLE INFORMATION

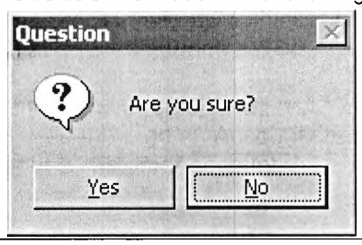
To view vehicle information entered for an account that has not yet been opened (saved), click the Vehicles tab on the Open Account screen at any time during the "Open an Account" process.

To find vehicle information for an account that has been opened, you must first find the account that the vehicle information is associated with. See the Find an Account section of this guide for instructions on how to find information about a customer account.

DELETE VEHICLE INFORMATION

Vehicles that have been added on the Open Account – Vehicles tab screen can be deleted through this screen only as long as the new account has not been opened (saved). Once the account record has been opened and saved to the database, vehicles can only be deleted through the Account Maintenance function. See the Account Maintenance – Vehicles section of this guide for instructions on how to delete vehicles from an opened account.

To delete vehicle information before the account has been opened, follow these steps:

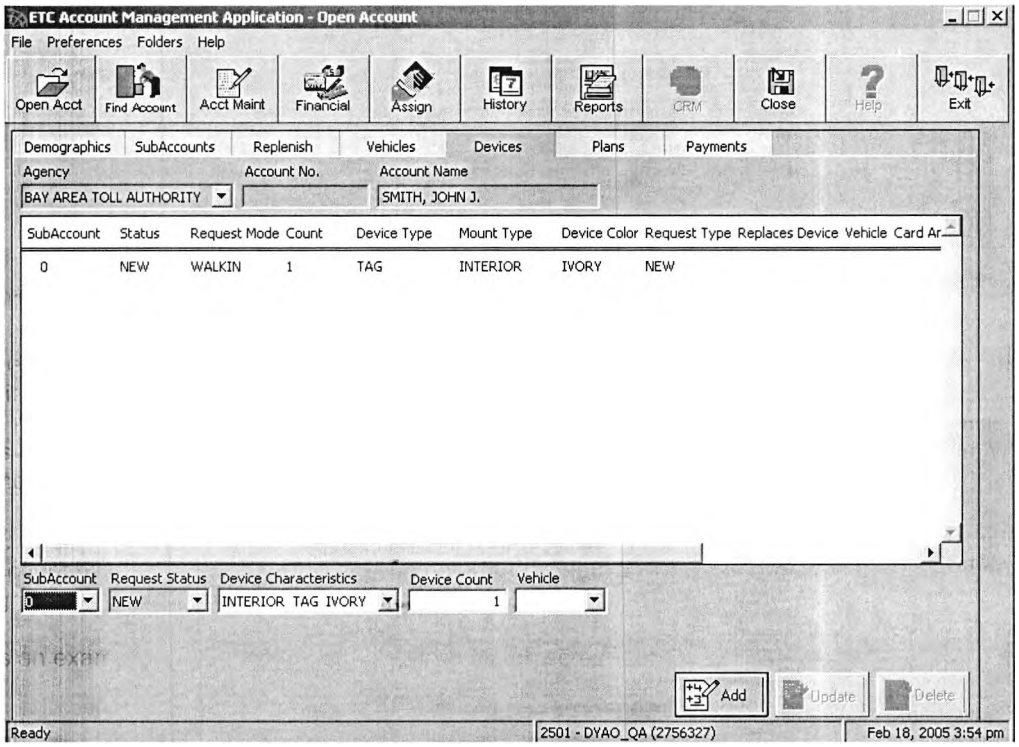
Step	Action
1	With the un-opened account active on the Open Account screens, access the Open Account – Vehicles tab screen.
2	Select (highlight) the vehicle information to be deleted in the array window. The Delete command button becomes active.
3	Click the Delete button to delete the vehicle information. The following dialog screen displays: 
4	Click *YES* to confirm deletion of the vehicle information. The vehicle is deleted from the array.
5	Click *No* if you do not wish to delete the information at this time. The information remains unchanged and will be saved to the account when the Open an Account process is complete.

Open Account – Devices Tab Screen

The Devices tab on the Open Account screen is used to request devices for a customer's account when it is first opened. A device (also known as a tag or transponder) is a piece of equipment attached to the inside or outside of the customer's vehicle. This device is read by VECTOR as the vehicle moves through the ETC lane. It sends identifying information about the account to the system, which logs the toll, updates the customer's account balance, etc.

NOTE: Making at least one device request is required when opening a new VECTOR account. Once the account has been opened, devices can be added, deleted, or their information updated at any time through the Account Maintenance – Devices tab screen.

This is an example of the Open Account - Devices tab screen.



ACCESS OPEN ACCOUNT - DEVICES

To access the Open Account - Devices tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon.
	The ETC Account Management Application function toolbar displays.
2	Click the Open Acct button. The Open Account screen displays.
3	Click the Devices tab. The Open Account – Devices tab screen displays.

FIELD DESCRIPTIONS: OPEN ACCOUNT – DEVICES

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

Field Name	Description and Features
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private & Non-Revenue Accounts – First Name, Last Name, and M.I. • Commercial & Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. Since an account number is not assigned until the record is saved, this field is always empty when opening a new account. *DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
Device Characteristics	The type of device requested. Once the request is approved, this device (also known as a tag or transponder) is attached to the vehicle and transmits information about the vehicle to VECTOR when the vehicle passes through the ETC lane at the agency site. *DROP-DOWN LIST*
Device Count	The number of devices requested for the selected (highlighted) vehicle.
Status	The status of the device request. A value of NEW displays until the account has been opened. *DISPLAY ONLY*
Sub-Account	The number of the selected (highlighted) sub-account to which the device is being assigned. Valid options will vary depending on the number of SubAccounts that are entered. The DEFAULT is zero (0). *DROP-DOWN LIST*
Vehicle	The license number of the vehicle to which the device is being assigned. Valid options will vary depending on the license numbers that have been entered in the Plate# field on the Open Account – Vehicles tab screen. *DROP-DOWN LIST*

Command Buttons	
Add	Adds the device request to the selected (highlighted) sub-account. ***IMPORTANT!:*** Clicking this button does not save the information to the database. If you exit VECTOR before completing the entire "Open an Account" process, any data entered on this and subsequent Open Account sub-function tab screens will be lost and will need to be re-entered.
Delete	Deletes the selected (highlighted) device request displayed in the array window.
Update	Updates the selected (highlighted) device request with the edits made.

REQUEST DEVICES

At least one device must be requested when opening an account in VECTOR. After the account record is saved, additional devices can be requested through the Account Maintenance function if needed. The process for requesting devices is the same for each type of account unless noted in the instructions below.

To request a device for an account, complete the following steps.

NOTE: See the Field Descriptions: Open Account – Devices section of this guide for a list of options for each drop-down list field unless otherwise noted. .

Step	Action
1	Complete the steps to enter demographics information. *REQUIRED*
2	Add sub-account information.
3	Set replenishment options.
4	Add at least one vehicle to the account. *REQUIRED*
5	Access the Open Account – Devices tab screen.
6	Select a Sub-Account number from the SubAccount drop-down list. The DEFAULT is zero (0). A value of NEW displays in the Request Status field.
7	Select an option from the Device Characteristics drop-down list.
8	Enter the number of devices of the type selected in the Device Characteristics field that are being requested in the Device Count field. The DEFAULT is 1.
9	Select the license plate number of the vehicle to which the device will be assigned from the Vehicle drop-down list, if applicable.
10	Click the Add button to add the device request to the account or sub-account (if applicable). The information added displays in the array, and the screen resets so that another device can be requested. ***IMPORTANT!:*** Clicking the Add button does not save the information to the database. If you exit VECTOR before completing the entire "Open an Account" process, any data entered on this and subsequent Open Account sub-function tab screens will be lost and will need to be re-entered.
11	Repeat steps 7-10 above to request additional devices, as needed.
12	Click the Plans tab and follow the directions in the Add Discount Plans section of this guide (if your agency has discount plans) to add a discount plan to the account. *REQUIRED*

UPDATE A DEVICE REQUEST

Devices that have been requested on the Open Account – Devices tab screen can be updated on this screen only as long as the new account has not been saved. Once the account record has been opened and saved to the database, updates to device request information can only be made through the Account Maintenance function. See the Account Maintenance – Devices section of this guide for instructions on how to update a device request.

To update a device request before the account has been saved, follow these steps:

NOTE: See the Field Descriptions: Open Account – Devices section of this guide for a list of options for each drop-down list field on this screen.

Step	Action
1	With the un-opened account active on the Open Account screens, access the Open Account – Devices tab screen.
2	Select (highlight) the device information to be updated in the array window. The Update command button becomes active.
3	Edit the information in any of the following fields, as needed: • Device Characteristics • Device Count • SubAccount • Vehicle
4	Click the Update command button to update the device information.

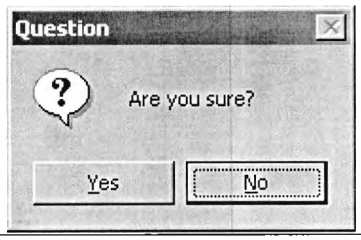
IMPORTANT!: If you exit VECTOR before completing the entire "Open an Account" process, any information you update on this sub-function tab screen will be lost and will need to be re-entered.

DELETE A REQUESTED DEVICE

Device requests that have been added on the Open Account – Devices tab screen can be deleted through this screen only as long as the new account has not been saved. Once the account record has been opened and saved to the database, device requests can only be deleted through the Account Maintenance function. See the Account Maintenance – Devices section of this guide for instructions on how to delete a saved device request.

To delete a device request before the account has been saved, follow these steps:

Step	Action
1	With the un-opened account active on the Open Account screens, access the Open Account – Devices tab screen.
2	Select (highlight) the device request to be deleted in the array window. The Delete command button becomes active.

Step	Action
3	Click the Delete button to delete the device request. The following dialog screen displays: 
4	Click ***Yes*** to confirm deletion of the device request. The request is deleted from the array.
5	Click ***No*** if you do not wish to delete the device request at this time. The request remains unchanged and will be saved to the account when the Open an Account process is complete.

Find Devices

To view devices that have been requested for an account that has not yet been opened (saved), click the Devices tab on the Open Account screen at any time during the "Open an Account" process.

To find a device that has been requested for an account that has been opened, you must first find the account that the device is associated with. See the Find an Account section of this guide for instructions on how to find information about a customer account.

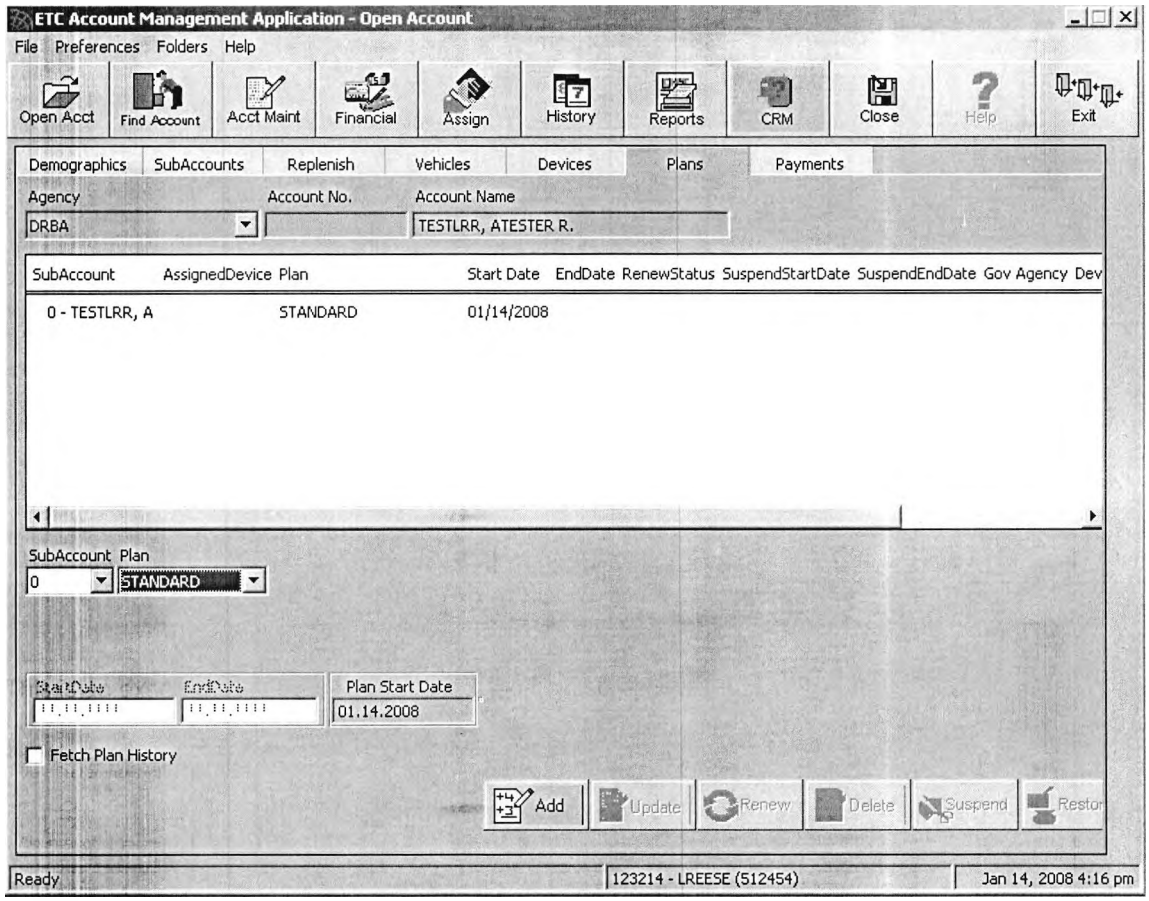
Open Account - Plans Tab Screen

The Plans tab on the Open Account screen is used to add discount payment plans to a customer's account. VECTOR provides the flexibility for setting up specific plans for specific account types, as well as plans that can be used by all account types.

Example: Private account plans are not available for business or commercial accounts.

Note: Adding at least one plan is required when opening a new VECTOR account. Once the account has been opened, plans can be added, deleted, or their information edited at any time through the Account Maintenance – Plans tab screen.

This is an example of the Open Account - Plans tab screen.



Access Open Account - Plans

To access the Open Account - Plans tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Open Acct button. The Open Account screen displays.
3	Click the Plans tab. The Open Account – Plans tab screen displays.

FIELD DESCRIPTIONS: OPEN ACCOUNT – PLANS

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Field Name	Description, Features and Format
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private & Non-Revenue Accounts – First Name, Last Name, and M.I. • Commercial & Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. Since an account number is not assigned until the record is saved, this field is always empty when opening a new account. *DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
Agency	The name of the agency the account is opened with. *DISPLAY ONLY*
AssignedDevices	A list of devices that have been assigned to the account. Displays only when specific account types/account plans are selected in the Plan field. *DROP-DOWN LIST*
Device Char	The type of device assigned to the vehicle for identification purposes. Once assigned, this device (also known as a tag or transponder) is attached to the vehicle and transmits information about the vehicle to VECTOR when the vehicle passes through the ETC lane at the agency site.
End Date	***NOTE:*** This field is inactive on the Open Account – Plans tab screen.
Fetch Plan History	***NOTE:*** This field is inactive on the Open Account – Plans tab screen.
Government Agencies	The name of the government agency that the account holder works with. ***NOTE:*** The values in this field are determined by the agency that is using VECTOR. *DROP-DOWN LIST*
CTOC/IAG Codes	A list of codes assigned by the VECTOR Inter-Agency Group (IAG) to individual makes and models of vehicles. *DROP-DOWN LIST*

Field Name	Description, Features and Format
Plan	The name of the plan. ***NOTE:*** The values in this field are determined by the agency that is using VECTOR. *DROP-DOWN LIST*
Plan Start Date	The date that the plan was started. Defaults to the current system date and cannot be edited. *DISPLAY ONLY*
Plaza Entry	The toll plaza most used by the customer for entry. This information coupled with the 'Plaza Exit" data will assist in selecting a plan type for the customer. *DROP-DOWN LIST*
Plaza Exit	The toll plaza most used by the customer for exiting. This information coupled with the "Plaza Entry" data will assist in selecting a plan type for the customer. *DROP-DOWN LIST*
Qty	The number of additional subaccounts requested by the customer. This field only displays if the plan type is NY12.
Start Date	***NOTE:*** This field is inactive on the Open Account – Plans tab screen.
Sub-Account	The sub-account to which the plan is being added. *DROP-DOWN LIST*
TripCount	The number of trips the customer is allowed to make each month under this plan. Applicable only to Private and Non-Revenue account types/plan types:
Command Buttons	
Add	Adds the plan information to the account record. ***IMPORTANT!:*** Clicking this button does not save the information to the database. If you exit VECTOR before completing the entire "Open an Account" process, any data entered on this and subsequent Open Account sub-function tab screens will be lost and will need to be re-entered.
Delete	Deletes the selected (highlighted) plan information displayed in the array window.
Update	Updates the selected (highlighted) vehicle record with the edits made.
Renew	***NOTE:*** This command button is inactive on the Open Account – Plans tab screen.
Restore	***NOTE:*** This command button is inactive on the Open Account – Plans tab screen.
Suspend	***NOTE:*** This command button is inactive on the Open Account – Plans tab screen.

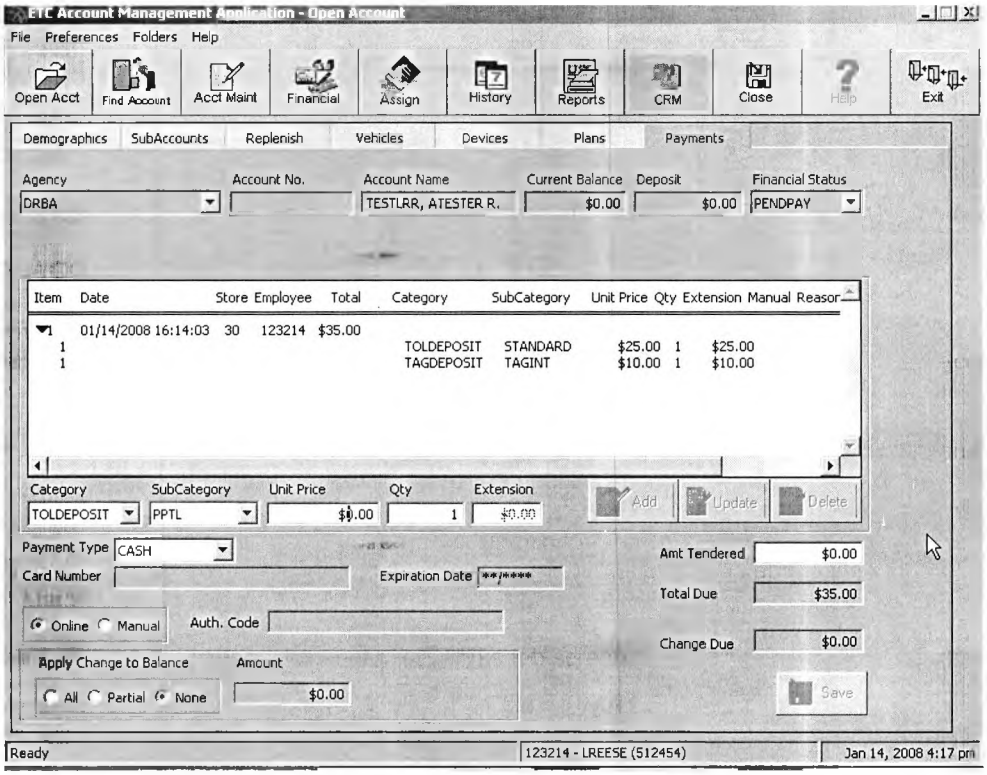
Open Account – Payments Tab Screen

The Payments tab on the Open Account screen is used to calculate the payment that is owed by the customer on their account. This calculation is based on selections made on previous Open Account screens.

EXAMPLE: Toll deposits (based on plans selected), tag deposits (based on vehicles added and devices requested), etc. are all included in the payment calculation.

NOTE: Adding at least one plan is required when opening a new VECTOR account. Once the account has been opened, plans can be added, deleted, or their information edited at any time through the Account Maintenance – Payments tab screen.

This is an example of the Open Account - Payments tab screen.



Access Open Account - Payments

To access the Open Account - Payments tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Open Acct button. The Open Account screen displays.
3	Click the Payments tab. The Open Account – Payments tab screen displays.

Field Descriptions: Open Account – Payments

Important!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Field Name	Description and Features
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private & Non-Revenue Accounts – First Name, Last Name, and M.I. • Commercial & Business Accounts – Company Name *Display Only*
Account No.	The identification number automatically assigned to the account by VECTOR. Since an account number is not assigned until the record is saved, this field is always empty when opening a new account. *Display Only*
Agency	The name of the business entity that is using VECTOR. *Display Only*
Amount	The amount of change that is being applied to the customer's account balance based on the following selection in the Apply Change to Balance fields: • All – Defaults to the value of the Change Due field and cannot be changed. • Partial – Defaults to zero (0) and can be changed. • None – Defaults to zero (0) and cannot be changed.
Amt Tendered	The amount received from the customer for payment on their account.
Apply Change to Balance - All	Indicates that all change from the customer's payment is to be applied to the account balance. *Radio Button*
Apply Change to Balance - None	Indicates that none of the change from the customer's payment is to be applied to the account balance. *Radio Button*
Apply Change to Balance - Partial	Indicates that part of the change from the customer's payment is to be applied to the account balance.

Field Name	Description and Features
	RADIO BUTTON
Auth. Code	The authorization code received from the customer's financial institution authorizing the manually authorized credit card or check payment. *DISPLAY ONLY*
Card Number	The account number of the credit card being used that corresponds to the value selected in the Payment Type field. Defaults from the Replenish tab screen, but can be changed. ***NOTE:*** *REQUIRED* if AMEX, DISCOVER, MASTERCARD, or VISA is selected in the Replenishment Method field.
Category	The payment category. *DISPLAY ONLY*
Change Due	The amount of any change due to the customer. Calculated based on the difference between the amount entered in the Amt Tendered field and the amount displayed in the Total Due field. *DISPLAY ONLY*
Current Balance	The current balance in the customer's VECTOR account. *DISPLAY ONLY*
Deposit	The total deposits made to the customer's account. *DISPLAY ONLY*
Expiration Date	The expiration date of the credit card being used that corresponds to the value selected in the Payment Type field. ***NOTE:*** *REQUIRED* if AMEX, DISCOVER, MASTERCARD, or VISA is selected in the Payment Type field.
Extension	Defaults to the sum of the value in the Unit Price field multiplied by the value in the Qty field. *DISPLAY ONLY*
Financial Status	The current financial status of the customer's VECTOR account. *DISPLAY ONLY*
Manual	Indicates that the authorization code for the customer's credit card or check payment is being entered manually. *RADIO BUTTON*
Online	Indicates that the authorization code for the customer's credit card payment is being entered electronically by an online connection. *RADIO BUTTON*
Payment Ref. Number	The customer's check number. Displays if CHECK is selected in the Payment Type field.
Payment Type	The type of payment being used by the customer. Defaults from the value selected in the Replenishment Method field on the Replenish tab screen, but can be changed. Options are: • AMEX • CASH (DEFAULT) • CHECK • CHECKING • DISCOVER

Field Name	Description and Features
	• MASTERCARD • NREV • PO (not applicable to Private accounts) • SAVINGS • VISA *DROP-DOWN LIST*
Qty	The number of devices the pre-paid toll payment amount is for.
Sub-Category	The sub category of the transaction category. For example, if the category is TOLDEPOSIT, the sub category can be PPTL. For post-paid accounts, (Commercial) and non-revenue accounts, this field is not active.
Total Due	The total amount due on the account. Automatically calculates based on the Unit Price and Qty values displayed in the array. *DISPLAY ONLY*
Unit Price	The price for each device unit. *DISPLAY ONLY*
Command Buttons	
Add	***NOTE:*** This command button is inactive on the Open Account – Payments tab screen.
Delete	***NOTE:*** This command button is inactive on the Open Account – Payments tab screen.
Save	***NOTE:*** This command button is inactive on the Open Account – Payments tab screen.
Update	***NOTE:*** This command button is inactive on the Open Account – Payments tab screen.

ADD PAYMENTS TO AN ACCOUNT

When a customer's account is created, an initial payment is calculated based on the plan and account type selections made on previous Open Account tab screens. Before the new account can be opened, the customer must make a payment to the account for the services, devices, etc. previously selected. The payment must equal the minimum total amount due but can be higher. Any change due can be applied to future fees, if desired. After the account record is saved, future payments are added through the Account Maintenance function.

The process for making payments varies depending on how the payment is made. The instructions below detail the process for each type of payment.

NOTE: See the Field Descriptions: Open Account – Payments section of this guide for a list of options for each drop-down list field unless otherwise noted. .

Credit Card Payments

To add credit card payments to an account, complete the following steps:

Step	Action
1	Complete the steps to enter demographics information. *REQUIRED*
2	Add sub-account information.
3	Set replenishment options.
4	Add at least one vehicle to the account. *REQUIRED*
5	Assign at least one device to the account. *REQUIRED*
6	Add at least one discount plan to the account. *REQUIRED*
7	Access the Open Account – Payments tab screen. *REQUIRED*
8	The devices, plans, etc. selected on previous Open Account tab screens display in the array under one line item (#1). Select (highlight) this line item. The total of the Unit Price column for the line item displays in the Total Due field. *REQUIRED*
9	Select a credit card option from the Payment Type field. The label of the adjacent field changes to Card Number and the Expiration Date field is enabled. *REQUIRED* ***NOTE:*** If a credit card option was previously selected in the Replenishment Method field on the Open Account – Replenish tab screen, the value selected will default to the Payment Type field. This option can be changed. If it is changed to an option other than a credit card, follow the steps to add a payment for that specific option.
10	Enter the credit card account number in the Card Number field. *REQUIRED*
11	Enter the date that the credit card expires in the Expiration Date field. *REQUIRED*
12	Select the Online or Manual field to indicate how the credit card payment is being made. The DEFAULT is Online.
	If Manual is selected, enter the authorization code received from the customer's bank in the Auth. Code field.
13	Enter the payment amount received from the customer in the Amt Tendered field. *REQUIRED* ***NOTE:*** The amount entered must be equal to or higher than the value in the Total Due field.
14	If the amount entered in the Amt Tendered field is higher than the total due, the overage amount (change) displays in the Apply Change to Balance - Amount field and the Apply Change to Balance - All field is selected and cannot be changed.
15	Follow the steps in the Complete the Open Account Process section of this guide to save the information and assign an account number. *REQUIRED*

Step	Action
IMPORTANT!: Completing the final steps in the Open an Account process saves the information entered on **all** of the Open Account tab screens and results with VECTOR assigning an account number for the information entered. **Do not** complete the final steps until you are sure you have entered all required information on all of the screens.	

Cash Payments

To add a cash payment to an account, complete the following steps:

Step	Action
1	Complete the steps to enter demographics information. *REQUIRED*
2	Add sub-account information.
3	Set replenishment options.
4	Add at least one vehicle to the account. *REQUIRED*
5	Assign at least one device to the account. *REQUIRED*
6	Add at least one discount plan to the account. *REQUIRED*
7	Access the Open Account – Payments tab screen. *REQUIRED*
8	The devices, plans, etc. selected on previous Open Account tab screens display in the array under one line item (#1). Select (highlight) this line item. The total of the Unit Price column for the line item displays in the Total Due field. *REQUIRED*
9	Select CASH from the Payment Type field. *REQUIRED* ***NOTE:*** If CASH was previously selected in the ReplmntMethod field on the Open Account – Demographics tab screen, or in the first Replenishment Method field on the Open Account – Replenish tab screen, it will default to the Payment Type field. This option can be changed. If it is changed to an option other than CASH, follow the steps to add a payment for that specific option.
10	Enter the payment amount received from the customer in the Amt Tendered field. *REQUIRED* ***NOTE:*** The amount entered must be equal to or higher than the value in the Total Due field.
11	If the amount entered in the Amt Tendered field is higher than the total due, the Apply Change to Balance - Amount field is disabled and displays the total overage (change) amount. Select one of the following options from the Apply Change to Balance fields to indicate how the change is to be applied: • Select Apply Change to Balance - All to indicate that all of the overage is to be applied to a future account balance. (The DEFAULT.) The Apply Change to Balance – Amount field remains unchanged, the Change Due field displays zero (0), and no change is given to the customer. • Select Apply Change to Balance - Partial to indicate that some of the overage is to be applied to a future account balance. Enter the partial overage amount in the enabled Apply Change to Balance - Amount field. The Change Due field automatically calculates and displays the change due the customer. • Select Apply Change to Balance – None to indicate that all of the overage is to be returned to the customer. The Apply Change to Balance – Amount field is disabled and displays a value of zero (0), and the Change Due field displays the total amount of the overage. All change is returned to the customer.
12	Follow the steps in the Complete the Open Account Process section of this guide to save the information and assign an account number. *REQUIRED*

Step	Action
IMPORTANT!: Completing the final steps in the Open an Account process saves the information entered on **all** of the Open Account tab screens and results with VECTOR assigning an account number for the information entered. **Do not** complete the final steps until you are sure you have entered all required information on all of the screens.	

Check Payments

To add a check payment to an account, complete the following steps:

Step	Action
1	Complete the steps to enter demographics information. *REQUIRED*
2	Add sub-account information.
3	Set replenishment options.
4	Add at least one vehicle to the account. *REQUIRED*
5	Assign at least one device to the account. *REQUIRED*
6	Add at least one discount plan to the account. *REQUIRED*
7	Access the Open Account – Payments tab screen. *REQUIRED*
8	The devices, plans, etc. selected on previous Open Account tab screens display in the array under one line item (#1). Select (highlight) this line item. The total of the Unit Price column for the line item displays in the Total Due field. *REQUIRED*
9	Select CHECK from the Payment Type field. *REQUIRED* ***NOTE:*** If CHECK was previously selected in the ReplmntMethod field on the Open Account – Demographics tab screen, or in the first Replenishment Method field on the Open Account – Replenish tab screen, it will default to the Payment Type field. This option can be changed. If it is changed to an option other than CHECK, follow the steps to add a payment for that specific option.
10	Enter the payment amount received from the customer in the Amt Tendered field. *REQUIRED* ***NOTE:*** The amount entered must be equal to or higher than the value in the Total Due field.
11	If the amount entered in the Amt Tendered field is higher than the total due, the Apply Change to Balance fields are disabled, the Apply Change to Balance – All field is selected, and the Apply Change to Balance – Amount field displays the total overage (change) amount. This amount will automatically be applied to any future payments.
12	Enter the customer's check number in the Payment Ref. Number field.
13	Follow the steps in the Complete the Open Account Process section of this guide to save the information and assign an account number. *REQUIRED*
IMPORTANT!: Completing the final steps in the Open an Account process saves the information entered on **all** of the Open Account tab screens and results with VECTOR assigning an account number for the information entered. **Do not** complete the final steps until you are sure you have entered all required information on all of the screens.	

Other Payment Types

Please see your supervisor for instructions on how to process other types of payments that are specific for your agency.

UPDATE PAYMENT INFORMATION

Payment information that has been added on the Open Account – Payments tab screen can be updated on this screen only as long as the new account has not been saved. Once the account record has been opened and saved to the database, updates to payment information can only be made through the Account Maintenance function. See the Account Maintenance – Payments section of this guide for instructions on how to update payment information.

To update payment information before the account has been saved, follow these steps:

NOTE: See the Field Descriptions: Open Account – Payments section of this guide for a list of options for each drop-down list field on this screen.

Step	Action
1	With the un-opened account active on the Open Account screens, access the Open Account – Payments tab screen.
2	Select (highlight) the line item to be updated in the array window.
3	Edit the information in any of the following fields, as needed: • Apply Change to Balance – All • Apply Change to Balance – Amount • Apply Change to Balance – None • Apply Change to Balance – Partial • Amt Tendered • Auth. Code • Card Number • Expiration Date • Manual • Online • Payment Type • Payment Ref. Number ***NOTE:*** Other fields on the screen may be editable based on the business rules configured for your system. Please see your supervisor for more information.
4	Follow the steps in the Complete the Open Account Process section of this guide to save the information and assign an account number.

IMPORTANT!: If you exit VECTOR before completing the entire "Open an Account" process, any information you update on this sub-function tab screen will be lost and will need to be re-entered.

FIND PAYMENT INFORMATION

To view payment information that has been added to an account that has not yet been opened (saved), click the Payments tab on the Open Account screen at any time during the "Open an Account" process.

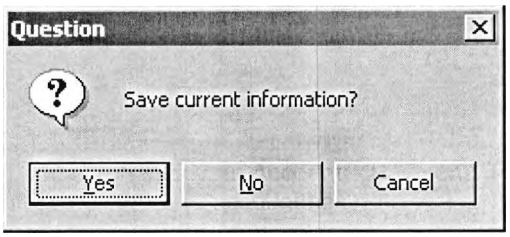
To find payment information that has been added to an account that has been opened, you must first find the account that the plan is associated with. See the Find an Account section of this guide for instructions on how to find information about a customer account.

DELETE PAYMENT INFORMATION

Payment information that has been added on the Open Account – Payments tab screen can be deleted through this screen only as long as the new account has not been saved. However, the account cannot be opened without adding vehicle information, requesting at least once device, and assigning at least one payment plan. All of this information will display in the Open Account – Payments tab screen array, so deleting payments on this screen essentially means starting the entire "Open an Account" process over.

Once the account record has been opened and saved to the database, payment information cannot be deleted. See the Account Maintenance – Payments section of this guide for more information.

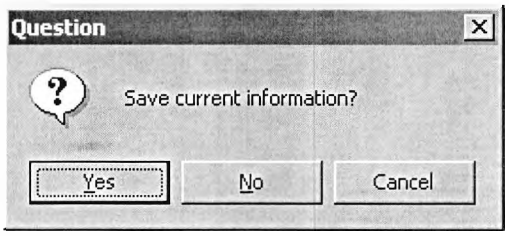
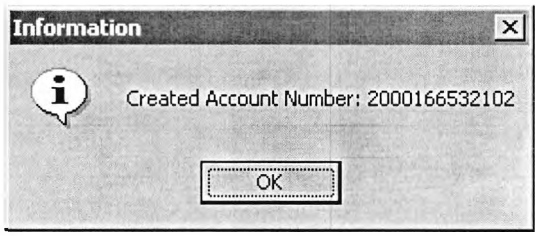
To delete payment information before the account has been saved, follow these steps:

Step	Action
1	With the un-opened account active on the Open Account screens, access the Open Account – Payments tab screen.
2	From the Open Account – Payments tab screen, click the Close command button on the Open Account toolbar. *REQUIRED*
3	The following dialog box displays: 
4	Click ***No***. The current payment information entered on the Open Account – Payments tab screen, as well as the current information entered on **all** other Open Account tab screens is deleted.

Complete the Open Account Process

Once all required information has been entered on the required Open Account tab screens (Demographics, Vehicles, Devices, Plans, and Payments), the record can be saved to the database and the new account opened.

Follow these steps to complete the Open Account process:

Step	Action
1	Review the information on each Open Account tab screen for accuracy and completeness.
2	From the Open Account – Payments tab screen, click the Close command button on the Open Account toolbar. *REQUIRED*
3	The following dialog box displays: 
4	Click ***YES*** to confirm that you want to save the information and open the account. VECTOR saves all of the information entered on **all** of the Open Account tab screens.
5	The following dialog box displays indicating that VECTOR has assigned a number to the newly opened account: 
6	Make a note of the new account number for future reference. *REQUIRED*
7	Click ***OK***. The Open Account function closes.
	OR
8	Click ***No*** if you do not wish to save the information. ***IMPORTANT!:*** Selecting ***No*** on the Save Current Information dialog box will delete **all** information entered on **all** Open Account tab screens. Do not select this option unless you are sure you want to start over completely.
	OR
9	Click ***CANCEL*** to add or change information on any of the Open Account tab screens. The information already entered remains unchanged.
10	When all information has been entered, complete steps 2-5 above to save the information and open the new account.

CONGRATULATONS! You have successfully opened a new VECTOR account.

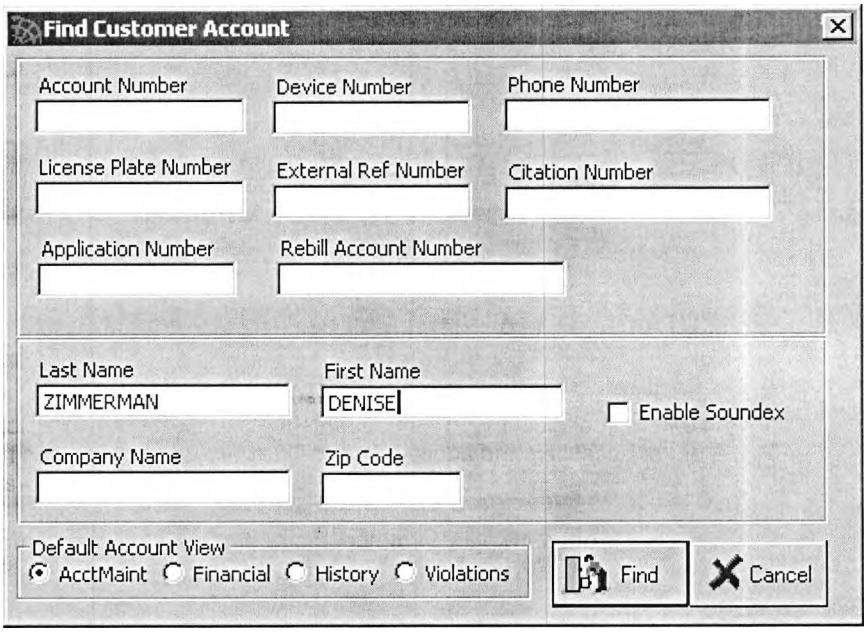
ETC Account Management - Find an Account

The Find Customer Account screen is used to access a customer's account record in order to answer customer inquiries, make changes to their account, record violations, make payments, and perform other account maintenance functions. (These functions are discussed in the Account Maintenance section of this guide.)

The Find Customer Account screen opens automatically when the

Find Customer Account Screen

This is an example of the Find Customer Account screen:



Access Find Customer Account Screen

To access the Find Customer Account screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Find Account button. The Find Customer Account screen displays.

FIELD DESCRIPTIONS: FIND CUSTOMER ACCOUNT

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Field Name	Description and Features
Account Number	The customer account number.
Device Number	The number of the device associated with the customer account.
Phone Number	The phone number of the primary contact on the customer account.
License Plate Number	The license plate number of a vehicle assigned to the customer account.
External Ref Number	This field is not used in this version of VECTOR.
Citation Number	The identification number of a violation associated with the customer account as entered on the Account Maintenance – Violations tab screen.
Application Number	The customer's VECTOR application number as entered on the Open Account – Demographics tab screen.
Rebill Account Number	The customer's financial institution checking or savings account number. ***NOTE:*** *REQUIRED* if CHECKING or SAVINGS is selected in the ReplmntMethod field.
Last Name	The last name of the primary contact on the customer account.
First Name	The first name of the primary contact on the customer account.
Company Name	The name of the company on the customer account.
Zip Code	The zip code of the primary address on the customer account. 5-9 characters
Enable Soundex	Activates the inquiry using Soundex. ***CHECKBOX***
Default Account View – AcctMaint	The account function you want to view when the account is location. This option will open the account in Account Maintenance. ***Radio Button***
Default Account View – Financial	The account function you want to view when the account is location. This option will open the account in Account Financial view. ***Radio Button***
Default Account View – History	The account function you want to view when the account is location. This option will open the account in Account History view. ***Radio Button***
Default Account View - Violations	The account function you want to view when the account is location. This option will open the account in the Violations view. ***Radio Button***

Command Buttons	
Find	Activates the search based on the criteria entered.
Cancel	Cancels the search and closes the screen.

FIND CUSTOMER ACCOUNT INFORMATION

To find and retrieve demographic, vehicular, and financial information on an account, complete the following steps:

Step	Action
1	Click the Find Account button on the ETC Account Management Application toolbar. The Find Customer Account screen displays. Cursor focus is in the Account Number field.
2	Enter customer search criteria in any of these fields: • Account Number • Device Number • Phone Number • License Plate Number • Citation Number • Application Number • Rebill Account Number ***NOTE:*** The more search information that is entered, the longer the search will take.
3	**OR** If you are unsure of the spelling of a customer's name, you can use Soundex to find their account using an approximate spelling of the company name or the primary contact's name. You enter the name the way it sounds, and VECTOR retrieves all the names in the database that sound like the name you are looking for. To find information using Soundex:
4	Click the Enable Soundex checkbox.
5	Enter customer search criteria in any of the following fields: • Last Name • First Name • Company Name ***NOTE:*** The more search information that is entered, the longer the search will take.
6	If you want to search by the customer's address zip code, enter the zip code and any zip code extension in the Zip Code field.
7	Click the appropriate radio button (AcctMaint, Financial, History, Violations) in the Default Account View field to select the type of information you want to display.
8	Click the Find button to execute the search.
9	The Find Customer Account List array screen opens with the information that matches the search criteria displayed.

Step	Action
	 NOTE: The view (AcctMaint, Financial, History, Violations) selected (highlighted) on the Find Customer Account screen is noted in the Default Account View field.
10	If necessary, click More to see additional rows of account information.
11	If desired, click Cancel to return to the Find Customer Account screen and execute a new search with different search criteria.
12	If the account you are searching for is listed on the Find Customer Account List screen, select (highlight) the applicable row and click Ok, or double-click the applicable row. The Account Maintenance screen displays.
13	See the next section for more information about the Account Maintenance screen.

Find Customer Account List

Agency	Account #	Last Name	First Name	City	Zip Code	Phone Number
	200000727...	BAGDON	ZACHARY	NEW HAVEN	06511	2036451064
	200000729...	BUSHA	ZINOBIA	ENFIELD	06082	4135265226
	200000755...	BYKOWSKI	ZDZISLAW	EAST BRUNSWICK	08816	2128934643
	200000791...	BUCHWALD	ZACH	NEW YORK	10014	2127611975
	200000904...	BASIC	ZELJKA	HOBOKEN	07030	2012323521
	200000913...	BUSTOS	ZINDY	BLOOMFIELD	07003	2015536905
	200000947...	BACCHUS	ZALEENA	NEWARK	07107	9089314110
	200000952...	BOSNJAK	ZVONIMIR	OLD BETHPAGE	11804	5167531125
	200000955...	BAJOR	ZDZISLAW	ROSELLE PARK	07204	9737512002
	200001084...	BASTAWROS	ZIZET	MANALAPAN	07726	2124428346
	200001169...	BASICA	ZELJKO	HASBROUCK H...	07604	2012884330
	200001183...	BOKE	ZELIYHA	CLIFTON	07011	9083981115
	200001212...	BAXTER	ZACHARY	TRENTON	08620	6094240100
	200001219...	BAXTER	ZOE	WHIPPANY	07981	9735497369
	200016254...	BAJGIER	ZBIGNIEW	HARRISON	07029	9734127672
	200016285...	BACIC	ZLATKO	PRINCETON JU...	08550	2129988435
	200016294...	BUSCH	ZAN	DERWOOD	20855	2403141500
	200016295...	BUSCH	ZAN	DERWOOD	20855	2403141500

Default Account View: AcctMaint / Financial / History

Ok | More | Cancel

ETC ACCOUNT MANAGEMENT – ACCOUNT MAINTENANCE

The ETC Account Maintenance function is used to edit or delete existing customer account information that has first been entered and saved on the Open Account tab screens. For maintenance purposes, customer information is grouped by these sub-functions on the Account Maintenance screen:

- Demographics
- SubAccounts
- Replenish
- Vehicles
- Device Request
- Device Maintenance
- Plans
- Notes
- Violations
- Payments

Clicking each sub-function tab opens the screen for that sub-function.

Access Account Maintenance Function

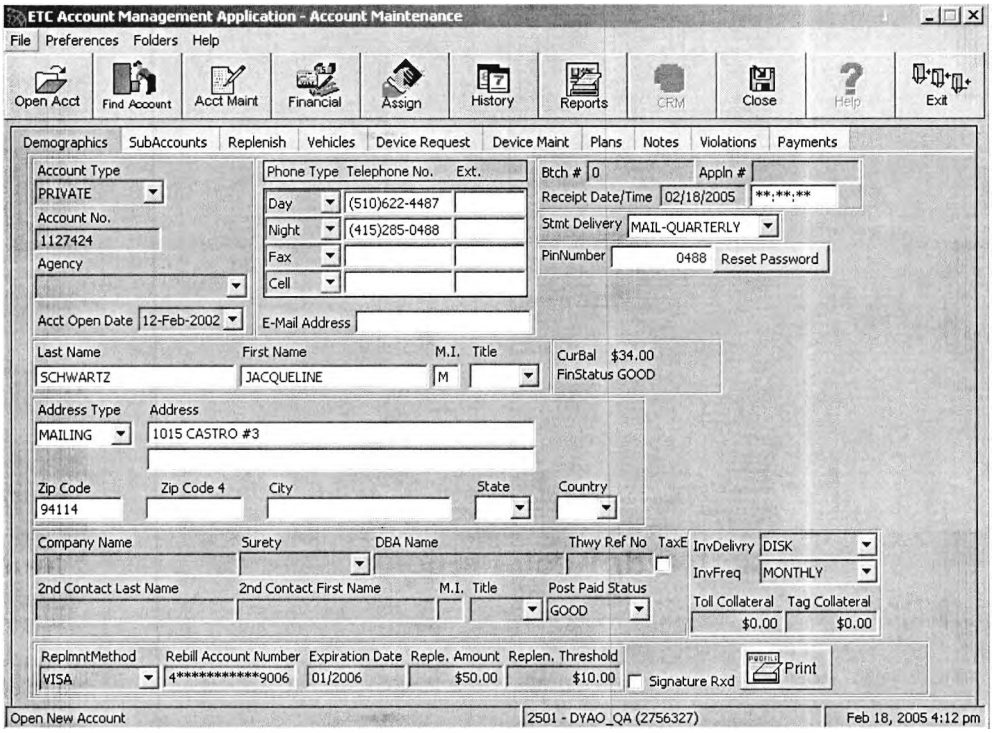
To access the ETC Account Management Account Maintenance function, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Acct Maint button. The Account Maintenance function and sub-function tabs display with screen focus on the Demographics tab.

The following sections describe the process for adding, editing, and deleting account information. An example of each Account Maintenance sub-function tab screen, field and command button descriptions, and instructions on how to use each sub-function are also included in this section.

Account Maintenance – Demographics Tab Screen

When you click the Acct Maintenance button on the ETC Account Management Application toolbar, the Account Maintenance screen displays. Screen focus is on the Demographics tab. This is an example of the Account Maintenance – Demographics tab screen:



Access Account Maintenance – Demographics

To access the Account Maintenance – Demographics tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Acct Maint or Find Account buttons. The Find Customer Account screen displays.
3	Follow the steps outlined in the "Find Customer Account Information" section of this guide to search for and retrieve the account you want to work with. The Account Maintenance screen displays with focus on the Demographics tab screen.

FIELD DESCRIPTIONS: ACCOUNT MAINTENANCE – DEMOGRAPHICS

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Field Name	Description and Features
Account No.	The customer account number. Defaults from the Account No. field on the Open Account – Demographics tab screen. *DISPLAY ONLY*
Account Type	The type of customer account. Defaults from the Account Type field on the Open Account – Demographics tab screen. *DISPLAY ONLY*
Acct Open Date	The date on which the account was first opened. Defaults from the Acct Open Date field on the Open Account – Demographics tab screen. 11 characters *DISPLAY ONLY*
Address	The primary customer's street address of residence.
Address Type	The type of address for the account. Options are: • BILLING • MAILING (DEFAULT) • RESIDENT • SHIPPING • VIOLADDR *DROP-DOWN LIST*
Agency	Defaults from the Agency field on the Open Account – Demographics tab screen. *DISPLAY ONLY*
Appln #	The number of the customer application. Defaults from the Appin # field on the Open Account – Demographics tab screen. *DISPLAY ONLY*
Btch #	The batch number that the customer's application was part of. Defaults from the Btch # field on the Open Account – Demographics tab screen. *DISPLAY ONLY*
City	The primary customer's city of residence. Defaults to the city associated with the zip code entered in the Zip Code field.
Company Name	The name of the company on the customer account. Defaults from the Company Name field on the Open Account – Demographics tab screen. *DISPLAY ONLY*
Country	The primary customer's country of residence. The DEFAULT is USA. Options are: USA Canada *DROP-DOWN LIST*
Credit Card	Defaults from the Company Name field on the Open Account – Demographics tab

Field Name	Description and Features
Number	screen. *DISPLAY ONLY*
CurBal	The total current balance on the customer's account. *DISPLAY ONLY*
DBA Name	The name the customer uses for business. DBA = Doing Business As *DISPLAY ONLY*
E-Mail Address	The customer's email address.
Expiration Date	Defaults from the Company Name field on the Open Account – Demographics tab screen. *DISPLAY ONLY*
Ext.	The telephone number extension for the account holder.
FinStatus	The financial status of the customer account. *DISPLAY ONLY*
First Name	The first name of the primary contact on the customer account.
InvDelivry	The delivery method of the invoice. *DISPLAY ONLY*
InvFreq	The delivery frequency of the invoice. *DISPLAY ONLY*
Last Name	The last name of the primary contact on the customer account.
M.I.	The middle initial of the primary contact on the customer account.
Phone Type	The type of telephone number for the customer.
PinNumber	A 4-digit number supplied by the customer when opening an account used to access and monitor their account online.
Post Paid Status	The Post Paid Status of a new account should always be Good. *DISPLAY ONLY*
Rebill Account Number	The customer's financial institution checking or savings account number. ***NOTE:*** *REQUIRED* if CHECKING or SAVINGS is selected in the ReplmntMethod field.
Receipt Date/Time	The date and time that the account was opened. Defaults from the Receipt Date/Time fields on the Open Account – Demographics screen.
Reple. Amount	The replenishment amount established by the account type and usage of the account. *DISPLAY ONLY*
Replen. Threshold	The minimum account balance before the customer account must be replenished. *DISPLAY ONLY*
ReplmntMethod	Defaults from the Company Name field on the Open Account – Demographics tab screen. Replenishment methods can be cash, check, or credit card. *DISPLAY ONLY*

Field Name	Description, Format, and Features
2nd Contact M.I.	The middle initial of the second contact on the customer account. Defaults from the 2nd Contact M.I. field on the Open Account – Demographics tab screen. *DISPLAY ONLY*
[2nd Contact] Title	The title of the second contact on the customer account. Defaults from the [2nd Contact] Title field on the Open Account – Demographics tab screen. *DISPLAY ONLY*
2nd Contact First Name	The first name of the second contact on the customer account. Defaults from the 2nd Contact First Name field on the Open Account – Demographics tab screen. *DISPLAY ONLY*
2nd Contact Last Name	The name of the second contact on the customer account. Defaults from the 2nd Contact Last Name field on the Open Account – Demographics tab screen. *DISPLAY ONLY*
Signature Rxd	The signature received checkbox. Select this box if a signature is received at the time of a credit card payment. *CHECKBOX*
State	The state or Canadian province in which the customer resides. Defaults based on the zip code entered in the Zip Code field. *DROP-DOWN LIST*
Stmt Delivery	The statement delivery schedule and method. Options are: • Mail Monthly • Mail Bi-Monthly • Email Monthly • Email Bi-Monthly
Surety	The type of collateral used by the customer to guarantee the account. This option is only available for business and non-revenue accounts. *DISPLAY ONLY*
Tag Collateral	The amount that the company must post as collateral for tags. *DISPLAY ONLY*
TaxExmt	Indicates whether or not the customer is a tax-exempt entity. *CHECKBOX*
Telephone No.	The customer's cellular phone number. *DISPLAY ONLY*
Thwy Ref No.	The identification number of the toll road. ***NOTE:*** Reserved for New York customer use only. *DISPLAY ONLY*
Title	The title of the primary contact on the customer account. *DROP-DOWN LIST*
Toll Collateral	The amount that the company wants to post as collateral for tolls.

Field Name	Description, Format, and Features
	DISPLAY ONLY
Zip Code	The zip code of the primary address on the customer account. 5 characters - *REQUIRED*
Zip Code 4	The four-character zip code extension of the primary address on the customer account. 4 characters
Command Buttons	
Print	The Print command formats and submits a letter to the customer for verification purposes to accompany any walk-in or telephone transaction made by the customer.
Reset Password	Resets the customers online pin number. Enter the new pin and select the Reset Password button.

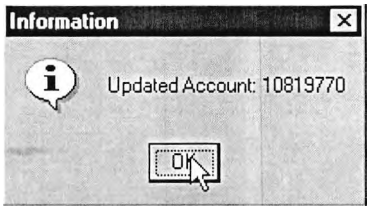
UPDATE ACCOUNT DEMOGRAPHIC INFORMATION

The Account Maintenance – Demographics tab screen is used to edit customer account information. In this screen you can add or change the following customer information:

- Address type
- E-mail address
- Mailing address
- Name
- Password reset
- Personal Identification Number (PIN) change
- Statement delivery method and frequency
- Tax exempt status
- Telephone numbers
- Signature required status

When you save the edits made, the account record is updated in the database. To edit customer account information, follow these steps:

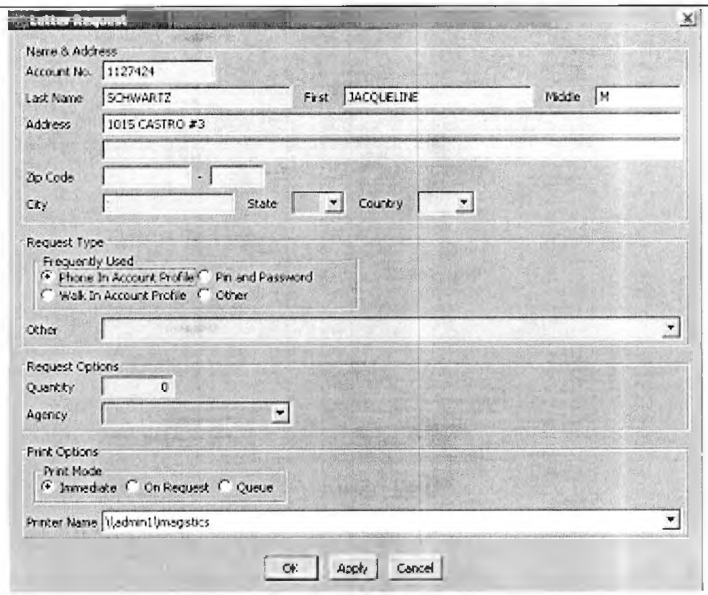
Step	Action
1	Click the Acct Maintenance button on the ETC Account Management Application toolbar. The Account Maintenance screen with applicable sub-function tabs displays. Screen focus is on the Demographics tab, and cursor focus is in the first Telephone No. field. ***NOTE:*** Skip this step if the screen has been opened through the Find Account function.

Step	Action
2	Click in or tab to the field(s) you want to edit. Follow the steps outlined in the Open Account section of this guide to add or change data in the fields. The following fields are editable: • Telephone No. • Ext. • E-Mail Address • Receipt Time • Stmt Delivery • PinNumber • Last Name • First Name • M.I. • Title • Address Type • Address • Zip Code • Zip Code 4 • City • State • Country • TaxExmt • Signature Rxd
3	Click the Close button and the Update dialog box opens.
4	Click YES to update (save) the record. The dialog box closes and the following information screen displays: 
5	If necessary, log the number of the account that was updated.
6	Click Ok to close the information screen. The Information and the Account Maintenance screens close. **OR**
7	Click No to continue making edits to the record. The dialog box closes and focus returns to the Account Maintenance screen. The edits made to the record remain but the record has not been updated. **OR**
8	Click Cancel to ignore or undo the changes and return to the record.

PRINT ACCOUNT PROFILE LETTERS

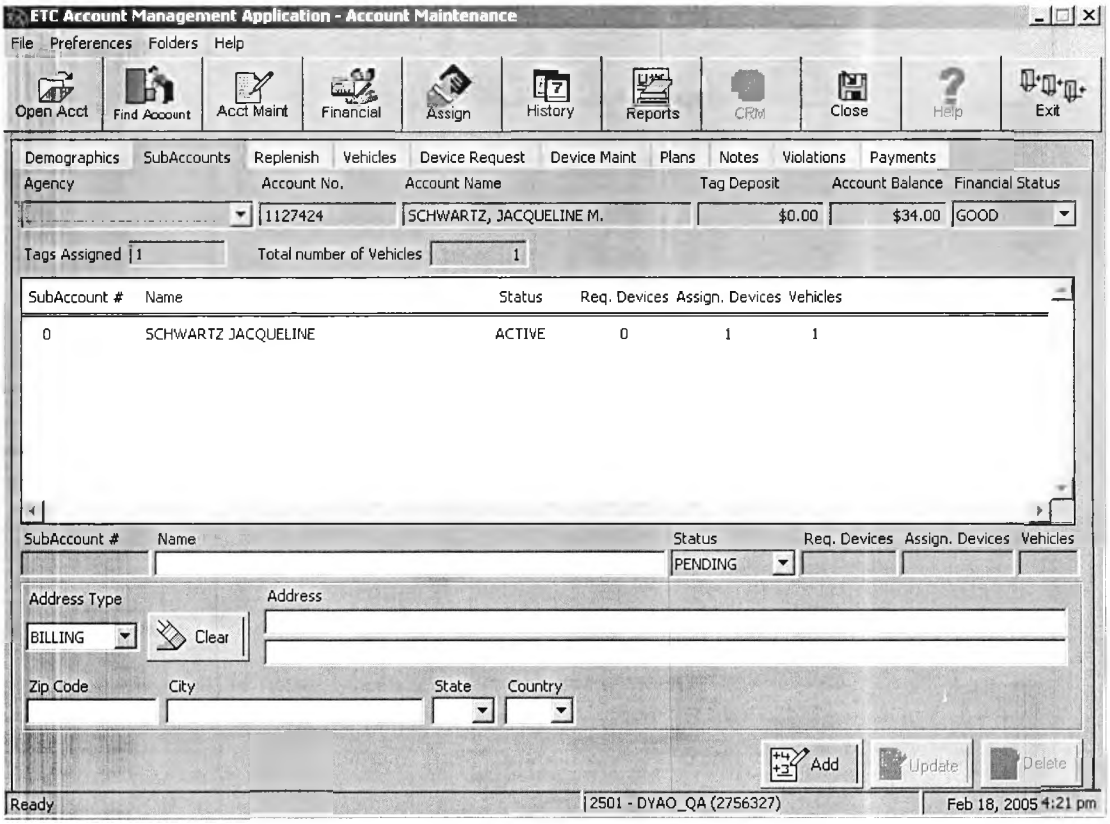
To print a profile letter for the account, complete the following steps:

Step	Action
1	Access the Account Maintenance – Demographics tab screen.
2	Click the Print button to generate an immediate request to print an account profile letter. The Letter Request screen displays.
3	When you select the following radio buttons in the Request Type field - Frequently Used field: Walk In Account Profile, Phone In Account Profile, Other You are given a selection of Print Options, including *Immediate, On Request,* and *Queue.*

Step	Action
	
4	Click the *OK* button to print and return to the Demographics tab screen.
5	Click the *Close* button in the Demographics tab screen to exit the function.

Account Maintenance - SubAccounts Tab Screen

The SubAccounts tab on the Account Maintenance screen is used to add a sub-account to an existing account. This is an example of the Account Maintenance – SubAccounts tab screen:



ACCESS ACCOUNT MAINTENANCE - SUBACCOUNTS

To access the Account Maintenance – SubAccounts tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Acct Maint or Find Account buttons. The Find Customer Account screen displays.
3	Follow the steps outlined in the "Find Customer Account Information" section of this guide to search for and retrieve the account you want to work with. The Account Maintenance screen displays.
4	Click the SubAccounts tab. The Account Maintenance – SubAccounts tab screen and its field's display.

FIELD DESCRIPTIONS: ACCOUNT MAINTENANCE – SUBACCOUNTS

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

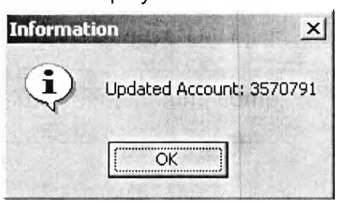
Field Name	Description and Features
Account Balance	The funds remaining in the customer account. *DISPLAY ONLY*
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private & Non-Revenue Accounts – First Name, Last Name, and M.I. • Commercial & Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. *DISPLAY ONLY*
Address	The subaccount customer's street address of residence.
Address Type	The type of address for the account. Options are: • BILLING • MAILING (DEFAULT) • RESIDENT • SHIPPING • VIOLADDR
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
Assign. Devices	The number of devices assigned to the selected subaccount. *DISPLAY ONLY*
City	The city of residence for the subaccount. Defaults to the city associated with the zip code entered in the Zip Code field.
Country	The country in which the customer resides. Defaults based on zip code entered. Options are: • CAN • USA *DROP-DOWN LIST*
Financial Status	The financial status of the customer's VECTOR account. *DISPLAY ONLY*

Field Name	Description, Format, and Features
Req. Devices	The number of devices currently requested for the sub-account that is selected (highlighted) in the array window. ***NOTE:*** When opening a new account, a value will only display in this field when information has been entered on the Devices tab screen first. *DISPLAY ONLY*
State	The state or Canadian province in which the customer resides. Defaults based on the zip code entered in the Zip Code field. *DROP-DOWN LIST*
Status	The current status of the sub-account. Options are: • ACTIVE • CLOSE PEND • CLOSED • NEW • PENDING (DEFAULT when opening an account) • SUSPEND *DISPLAY ONLY*
SubAccount #	The accounts listed for one account number. For example, an account holder can purchase multiple tags for multiple vehicles for commercial or business use. Each vehicle, including the original, would be registered under one account number as a subaccount. A main account can have an unlimited number of SubAccounts. These accounts contain more specific information, such as individual user names, vehicles, devices, discount plans, and payment options. *DISPLAY ONLY*
Tag Deposit	The amount due for all tags (devices) requested for the account. This value defaults from the Open Account – Payments tab screen and is based on the account plans set up on the Open Account – Plans tab screen. *DISPLAY ONLY*
Tags Assigned	The number of tags assigned to an account. *DISPLAY ONLY*
Total number of vehicles	Number of vehicles listed on the account. *DISPLAY ONLY*
Vehicles	The number of vehicles currently assigned to the sub-account that is selected (highlighted) in the array window. ***NOTE:*** When opening a new account, a value will only display in this field when information has been entered on the Vehicles tab screen first. *DISPLAY ONLY*
Zip Code	Enter the zip code for the sub-account's address in the Zip Code field. The City, State, and Country fields default automatically based on the zip code entered.

Command Buttons	
Add	Adds additional subaccounts to the account record. ***IMPORTANT!:*** Clicking this button does not save the information to the database. If you exit VECTOR before completing the entire "Open an Account" process, any data entered on this and subsequent Open Account sub-function tab screens will be lost and will need to be re-entered.
Clear	
Delete	Deletes the selected (highlighted) vehicle information displayed in the array window.
Update	

ADD A SUBACCOUNT TO AN EXISTING ACCOUNT

To add a new sub-account to an existing customer account, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Acct Maint or Find Account buttons. The Find Customer Account screen displays.
	Information entered on the Demographics tab screen defaults to the Agency, Account No., and Account Name fields. Information on SubAccounts that have already been assigned display in the array screen.
3	Enter the name of the sub-account in the Name field.
4	In the Name field, enter the name of the individual that holds the sub-account. Click the drop-down arrow in the Address Type field and select the appropriate type of address. Click the Address field and enter the address of the individual holding the sub-account. Click the Zip Code field and enter the zip code of the address. The City and State fields populate automatically. Click the drop-down arrow in the Country field and select the country. Click the *Update* button at the bottom of the screen to add the information. The white section of the screen automatically populates. Click the *Close* button. You are asked if you want to "Save Current Information?" Click the ***YES*** button. The following screen displays:  Click the OK button. You are returned to the ETC Account Management toolbar.
5	A value of PENDING displays in the Status drop-down field.
6	Select an option from the Address Type drop-down list. select the type of address for the sub-account. The DEFAULT value is MAILING. Verify that the billing address is the same as the mailing address or obtain the correct billing address at this time.
7	Enter the street address for the sub-account in the Address fields.
8	Enter the zip code and any zip code extension for the sub-account's address in the Zip Code and Zip Code 4 fields. The City, State, and Country fields default automatically based on the zip code entered. ***NOTE:*** Click the Clear button to clear data entered in the address fields and start again.

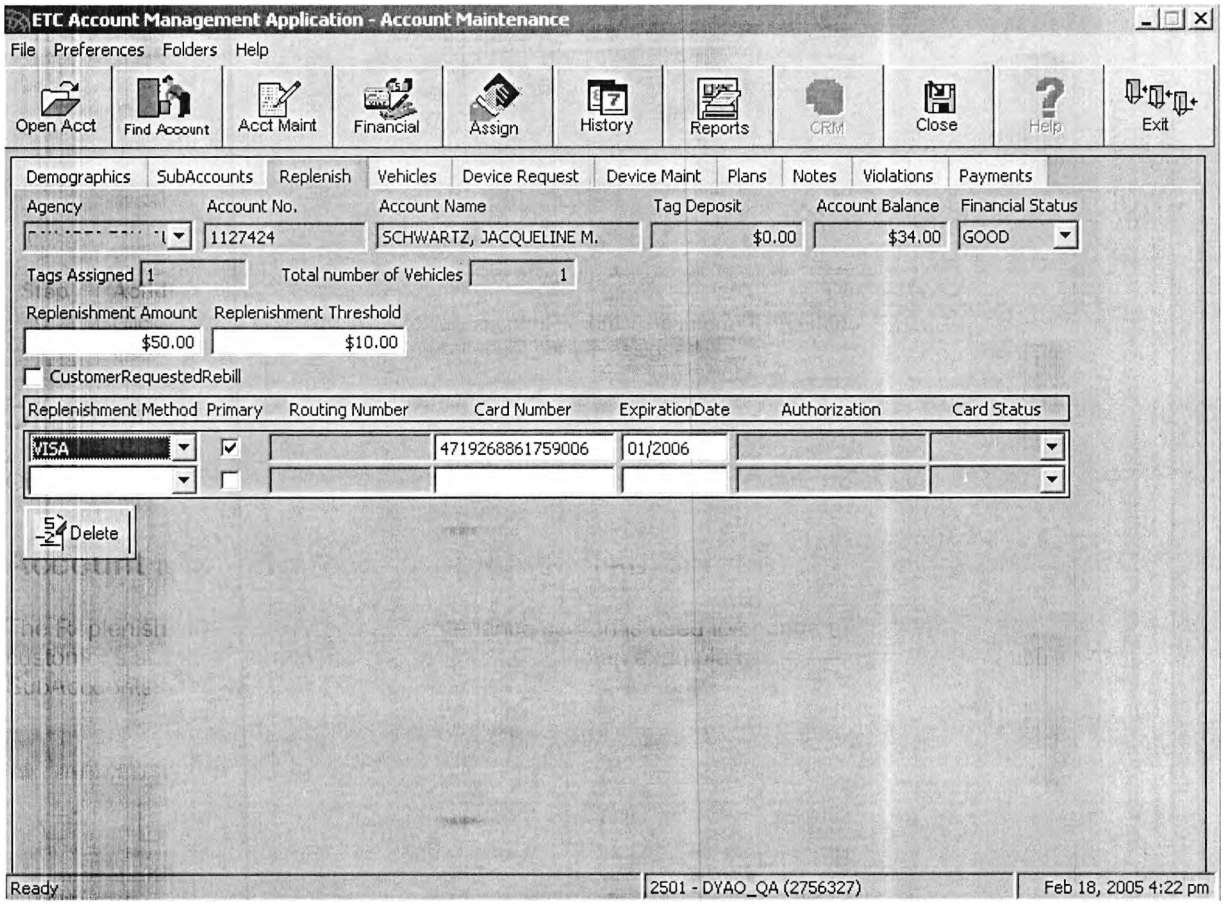
Step	Action
9	Click the Add button to add the sub-account record. The information added displays in the array, and the screen resets so that another account can be assigned.

DELETE A SUB-ACCOUNT

Once a sub-account record has been saved to the database, it cannot be deleted.

Account Maintenance – Replenish Tab Screen

The Replenish tab on the Account Maintenance screen is used to change the properties of a customer's account method of replenishment. This is an example of the Account Maintenance – SubAccounts tab screen:



ACCESS ACCOUNT MAINTENANCE - REPLENISH

To access the Account Maintenance - Replenish tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Acct Maint or Find Account buttons. The Find Customer Account screen displays.

Step	Action
3	Follow the steps outlined in the "Find Customer Account Information" section of this guide to search for and retrieve the account you want to work with. The Account Maintenance screen displays.
4	Click the Replenish tab. The Account Maintenance - Replenish tab screen and its field's display.

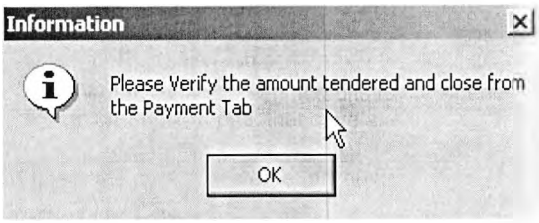
FIELD DESCRIPTIONS: ACCOUNT MAINTENANCE – REPLENISH

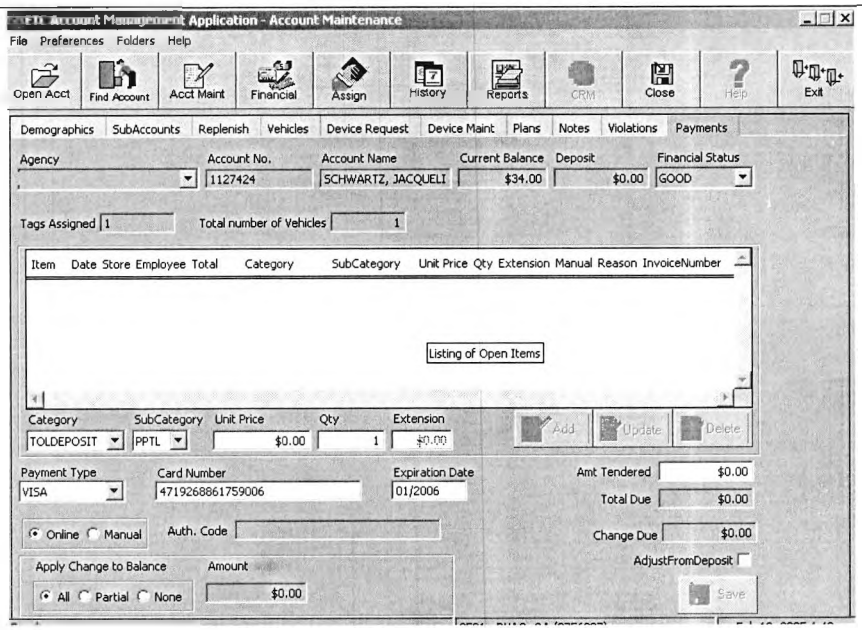
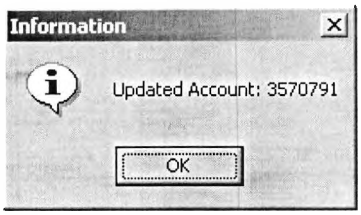
IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

Field Name	Description and Features
Account Balance	The funds remaining in the customer account. *DISPLAY ONLY*
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private & Non-Revenue Accounts – First Name, Last Name, and M.I. • Commercial & Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. *DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
Financial Status	The financial status of the customer's VECTOR account. *DISPLAY ONLY*
Option Opt-In	Enables the uses of the tag (device) for non-toll services such as restaurants, parking, etc. (At present, only customers of New York E-ZPass have the option of opting-in or opting-out of non-toll accounts.) ***Radio Button***
Option Opt-Out	Disables the use of the tag (device) for non-toll services such as restaurants,,parking, etc. (At present, only customers of New York E-ZPass have the option of opting-in or opting-out of non-toll accounts.) ***Radio Button***
Tag Deposit	The amount due for all tags (devices) requested for the account. This value defaults from the Open Account – Payments tab screen and is based on the account plans set up on the Open Account – Plans tab screen. *DISPLAY ONLY*
Command Buttons	
Update	

CHANGE AN ACCOUNT REPLENISHMENT METHOD

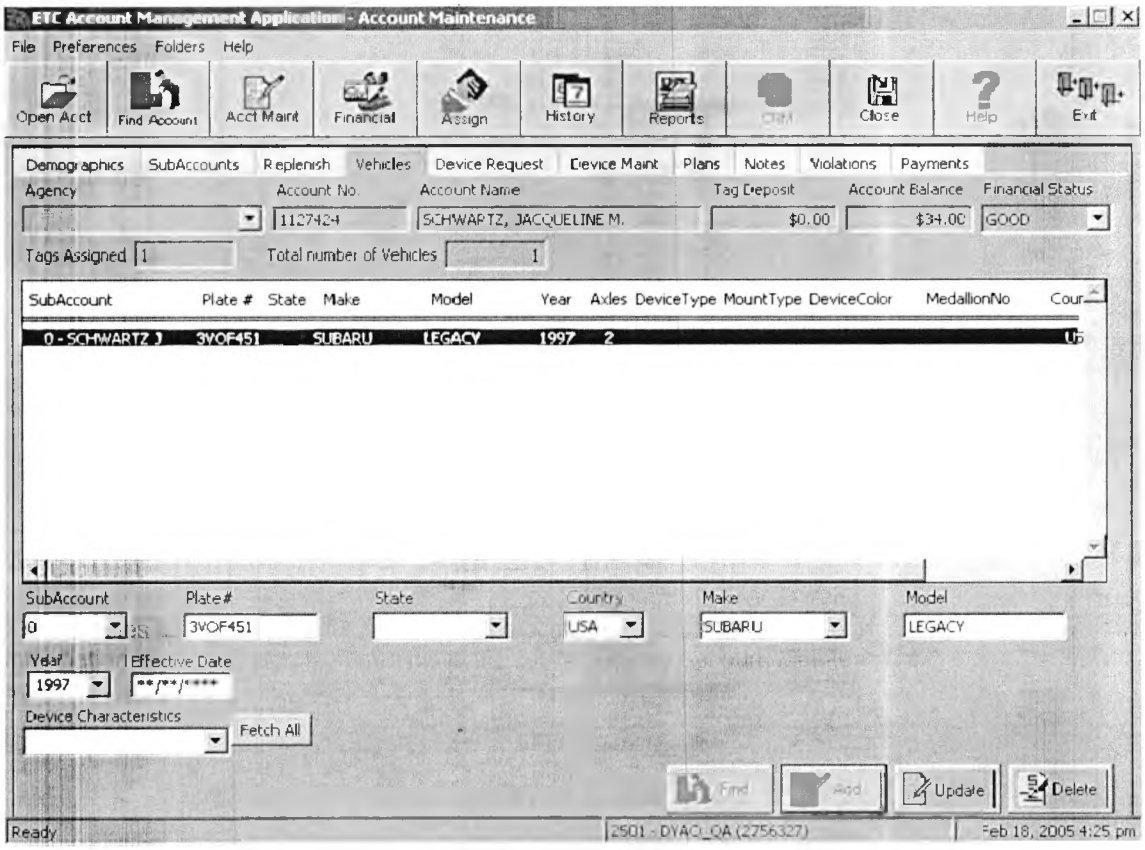
To change the method used to replenish a customer account, complete the following steps:

Step	Action
1	Access the Account Maintenance - Replenish tab screen.
2	Information entered on the Demographics tab screen defaults to the Agency, Account No., and Account Name fields. Information on SubAccounts that have already been assigned displays in the array screen.
3	After you have verified that this is the correct customer account: Verify that the customer wants to change their method of replenishment. The Replenishment Amount field displays the recommended amount the customer should be billed when the balance on the account goes below the minimum replenishment threshold. The Replenishment Threshold field is automatically populated based upon the amount in the Replenishment Amount field. Select an option from the Replenishment Method drop-down list. select the replenishment method. ***NOTE:*** These fields turn from gray to white when a payment method other than cash is selected (highlighted). If credit card is selected (highlighted), enter the credit card number in the Rebill Account Number field. Enter the expiration date on the new credit card in the ExpirationDate field. Check the Primary box, to indicate the primary source for replenishment. Click the *Close* button. The following pop up button displays:  Click OK. Click the Payments tab. The Payments tab screen displays.

Step	Action
	 Click the Close button. You are asked if you want to "Save Current Information?" Click the YES button. The following screen displays:  Click the OK button. You are returned to the ETC Account Management toolbar.
4	A value of PENDING displays in the Status drop-down field.
5	Select an option from the Address Type drop-down list. select the type of address for the sub-account. The DEFAULT value is MAILING. Verify that the billing address is the same as the mailing address or obtain the correct billing address at this time.
6	Enter the street address for the sub-account in the Address fields.
7	Enter the zip code and any zip code extension for the sub-account's address in the Zip Code and Zip Code 4 fields. The City, State, and Country fields default automatically based on the zip code entered. ***NOTE:*** Click the Clear button to clear data entered in the address fields and start again.
8	Click the Add button to add the sub-account record. The information added displays in the array, and the screen resets so that another account can be assigned.

Account Maintenance – Vehicles Tab Screen

The Vehicles tab on the Account Maintenance screen is used to add, edit, or delete vehicle information to an existing account. This is an example of the Account Maintenance – Vehicles tab screen:



Access Account Maintenance – Vehicles

To access the Account Maintenance – Vehicles tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Acct Maint or Find Account buttons. The Find Customer Account screen displays.
3	Follow the steps outlined in the "Find Customer Account Information" section of this guide to search for and retrieve the account you want to work with. The Account Maintenance screen displays.
4	Click the Vehicles tab. The Account Maintenance - Vehicles tab screen and its field's display.

FIELD DESCRIPTIONS: ACCOUNT MAINTENANCE – VEHICLES

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

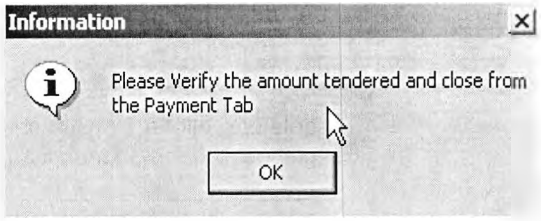
Fields are listed in alphanumeric order, not the order they appear on screen.

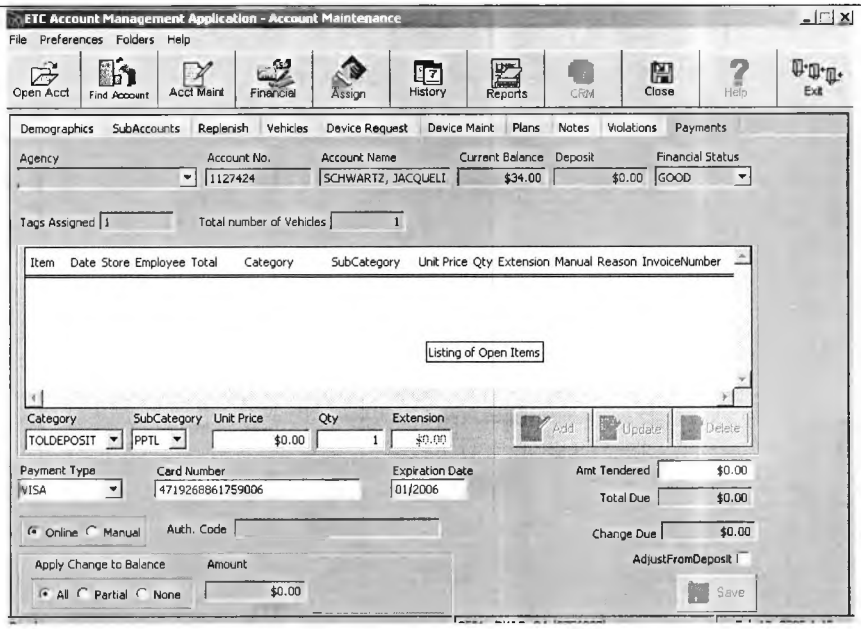
Field Name	Description and Features
Account Balance	The funds remaining in the customer account. *DISPLAY ONLY*
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private Accounts – First Name, Last Name, and M.I. • Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. *DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
Axles	The number of axles associated with the vehicle selected in the CTOC/IAG Codes field. *DISPLAY ONLY*
Country	The country in which the customer resides. Defaults based on zip code entered. Options are: • CAN • USA *DROP-DOWN LIST*
Device Characteristics	The type of device assigned to the vehicle for identification purposes. Once assigned, this device (also known as a tag or transponder) is attached to the vehicle and transmits information about the vehicle to VECTOR when the vehicle passes through the ETC lane at the agency site. Displays only when the following account type/plan type is selected in the Plan field: Private, Business
Financial Status	The financial status of the customer's VECTOR account. *DISPLAY ONLY*
CTOC/IAG Codes	A list of codes assigned by the VECTOR Inter-Agency Group (IAG) to individual makes and models of vehicles. *DROP-DOWN LIST*
Make	The name of the manufacturer of the vehicle. *DROP-DOWN LIST*

Field Name	Description and Features
Model	The model of the vehicle selected in the Make field. ***EXAMPLE:*** Breeze, Bronco, Ram, Skylark
Number of Commercial Axles	The number of axles associated with the vehicle selected in the CTOC/IAG Codes field.
Number of Private Vehicles	The number of axles associated with the vehicle selected in the IAG Codes field.
Plate#	The license plate number of the vehicle.
State	The state or Canadian province in which the customer resides. Defaults based on the zip code entered. ***DROP-DOWN LIST***
SubAccount	The accounts listed under one account number. For example, an account holder can purchase multiple tags for multiple vehicles for family members. Each vehicle, including the original, would be registered under one account number as a subaccount. ***DROP-DOWN LIST***
Tag Deposit	The amount due for all tags (devices) requested for the account. This value defaults from the Open Account – Payments tab screen and is based on the account plans set up on the Open Account – Plans tab screen. ***DISPLAY ONLY***
Tags Assigned	The number of tags assigned to an account ***DISPLAY ONLY***
Total Number of Vehicles	The accumulative number of vehicles ***DISPLAY ONLY***
Year	The year in which the selected vehicle was manufactured ***DROP-DOWN LIST***
Command Buttons	
Add	Adds additional vehicles to the account record. ***IMPORTANT!:*** Clicking this button does not save the information to the database. If you exit VECTOR before completing the entire "Open an Account" process, any data entered on this and subsequent Open Account sub-function tab screens will be lost and will need to be re-entered.
Delete	Deletes the selected (highlighted) vehicle information displayed in the array window.
Fetch All	Displays additional screens of data in the array screen.
Find	Finds the selected account
Update	Updates the selected account

ADD A VEHICLE

To add a vehicle to an account, complete the following steps:
Verify that this is the customer's account before proceeding.

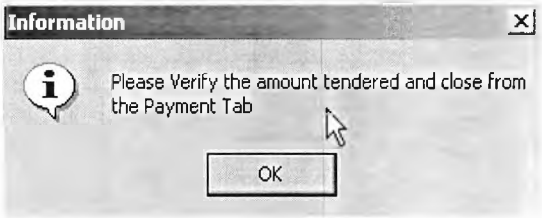
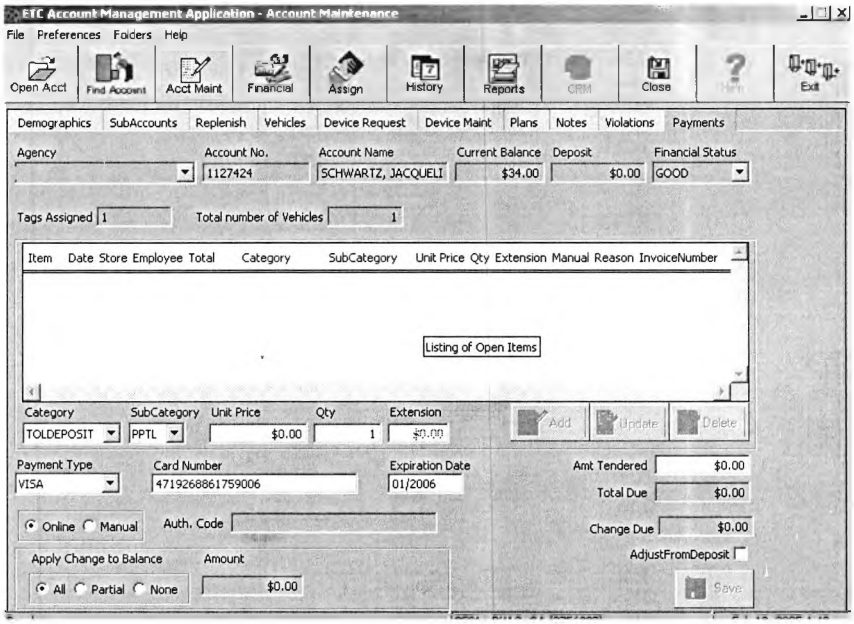
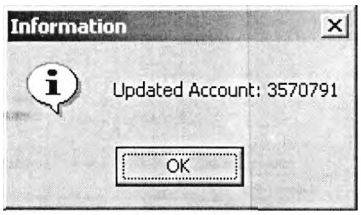
Step	Action
1	Access the Account Maintenance - Vehicles tab screen.
2	Information entered on the Demographics tab screen defaults to the Agency, Account No., Account Name, Tag Deposit, Account Balance, and Financial Status fields.
3	Select an option from the SubAccount drop-down list. select the sub-account to which the vehicle is to be added. In the Plate # field, enter the new vehicle license plate information. Click the drop-down arrow in the State field and select the state in which the vehicle is registered. Click the drop-down arrow in the Country field and select the country in which the vehicle is registered. Click the drop-down arrow in the Make field and choose the vehicle make from the drop-down list. Enter the model of the vehicle in the Model field. Click the drop-down arrow in the Year field and choose the vehicle year from the drop-down list. Click the drop-down arrow in the CTOC/IAG Codes field and select the appropriate code from the Codes drop-down list. When you are done adding the vehicle information, click the Add button on the bottom of the screen. Click the *Close* button. The following pop up button displays.  Click OK. Click the Payments tab. The Payments tab screen displays.

Step	Action
	 Click the Close button. The following pop up displays. Click the OK button. You are returned to the ETC Account Management toolbar.

EDIT VEHICLE INFORMATION

To edit vehicle information complete the following steps:

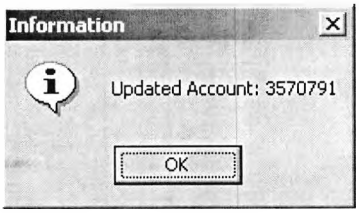
Step	Action
1	Follow the steps outlined in the "Find Customer Account Information" section of this guide to search for and retrieve the account you want to work with.
2	Click the Vehicles tab. The Account Maintenance – Vehicles tab screen and its field's display.
3	Find the vehicle in the white portion of the screen and click it to highlight it. To update vehicle information, make the appropriate changes to the vehicle information fields (for example, license plate information). Click the Update button. Click the Close button. The following pop up button displays.

Step	Action
	 Click OK. Click the Payments tab. The Payments tab screen displays.  Click the Close button. The following pop up displays:  Click the OK button. You are returned to the ETC Account Management toolbar.

Proprietary Data

DELETE VEHICLE INFORMATION

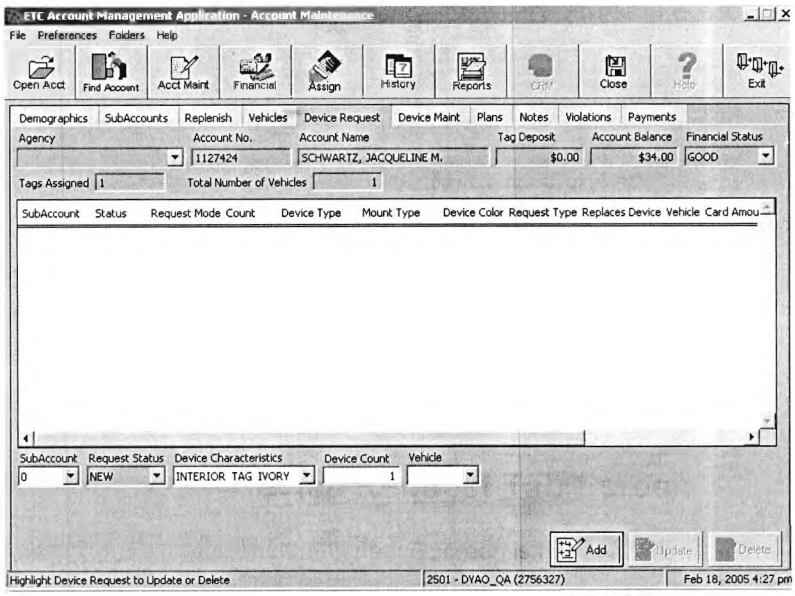
To delete vehicle information complete the following steps:

Step	Action
1	Follow the steps outlined in the "Find Customer Account Information" section of this guide to search for and retrieve the account you want to work with.
2	Click the Vehicles tab. The Account Maintenance – Vehicles tab screen and its field's display.
3	Find the vehicle in the white portion of the screen and click it to highlight it. To delete this vehicle, click the Delete button. Click the Close button. The following pop up displays:  Click the OK button. You are returned to the ETC Account Management toolbar.

Account Maintenance – Device Request Tab Screen

The Device Request tab on the Account Maintenance screen is used to request that a new device be added to an existing customer account.

NOTE: Not all CSRs are authorized to request devices. Speak to your supervisor before executing this function.



ACCESS ACCOUNT MAINTENANCE – DEVICE REQUEST

To access the Account Maintenance – Device Request tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Acct Maint or Find Account buttons. The Find Customer Account screen displays.
3	Follow the steps outlined in the "Find Customer Account Information" section of this guide to search for and retrieve the account you want to work with. The Account Maintenance screen displays.
4	Click the Device Request tab. The Account Maintenance – Device Request screen and its field's display.

FIELD DESCRIPTIONS: ACCOUNT MAINTENANCE – DEVICE REQUEST

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

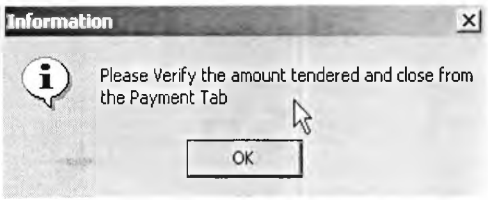
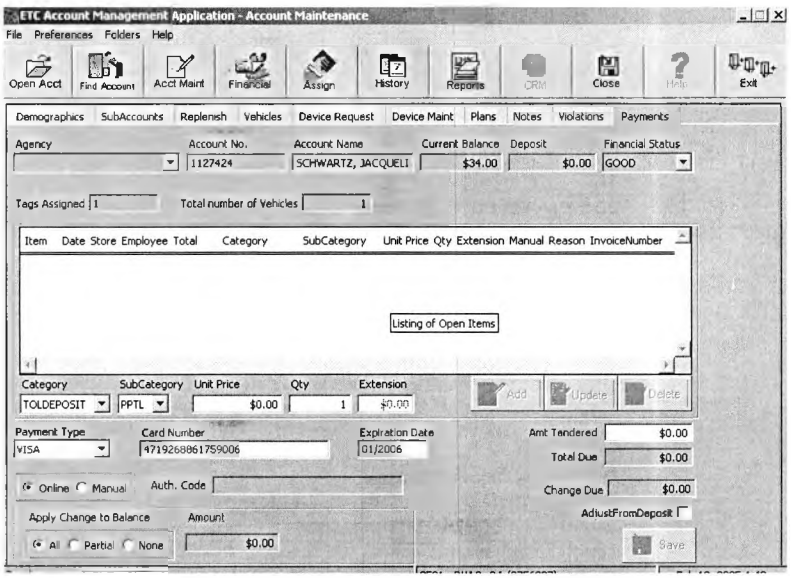
Fields are listed in alphanumeric order, not the order they appear on screen.

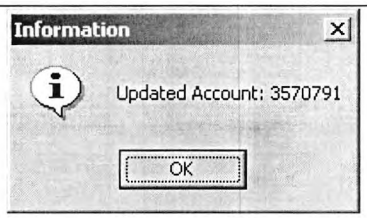
Field Name	Description and Features
Account Balance	The funds remaining in the customer account. *DISPLAY ONLY*
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private Accounts – First Name, Last Name, and M.I. • Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. *DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
Device Characteristics	The type of device assigned to the vehicle for identification purposes. Once assigned, this device (also known as a tag or transponder) is attached to the vehicle and transmits information about the vehicle to VECTOR when the vehicle passes through the ETC lane at the agency site. Displays only when the following account type/plan type is selected in the Plan field: Private, Commercial, Business *DROP-DOWN LIST*
Device Count	The number of devices requested for the subaccount.
Financial Status	The financial status of the customer's VECTOR account. *DISPLAY ONLY*

Field Name	Description, Format, and Features
CTOC/IAG Codes	A list of codes assigned by the VECTOR CTOC/IAG to individual makes and models of vehicles. *DROP-DOWN LIST*
Request Status	The status of the device request. Available options are: • New • Paid *DISPLAY ONLY*
SubAccount	The accounts listed under one account number. For example, an account holder can purchase multiple tags for multiple vehicles for family members. Each vehicle, including the original, would be registered under one account number as a subaccount. *DROP-DOWN LIST*
Tag Deposit	The amount due for all tags (devices) requested for the account. This value defaults from the Open Account – Payments tab screen and is based on the account plans set up on the Open Account – Plans tab screen. *DISPLAY ONLY*
Tags Assigned	The number of tags assigned to an account *DISPLAY ONLY*
Total number of Vehicles	*DISPLAY ONLY*
Vehicle	The number of vehicles currently assigned to the sub-account that is selected (highlighted) in the array window. *DROP-DOWN LIST*
Command Buttons	
Add	Adds the device request to the account record. ***IMPORTANT!:*** Clicking this button does not save the information to the database. If you exit VECTOR before completing the entire "Open an Account" process, any data entered on this and subsequent Open Account sub-function tab screens will be lost and will need to be re-entered.
Delete	Deletes the selected (highlighted) vehicle information displayed in the array window.
Update	

REQUEST A NEW DEVICE

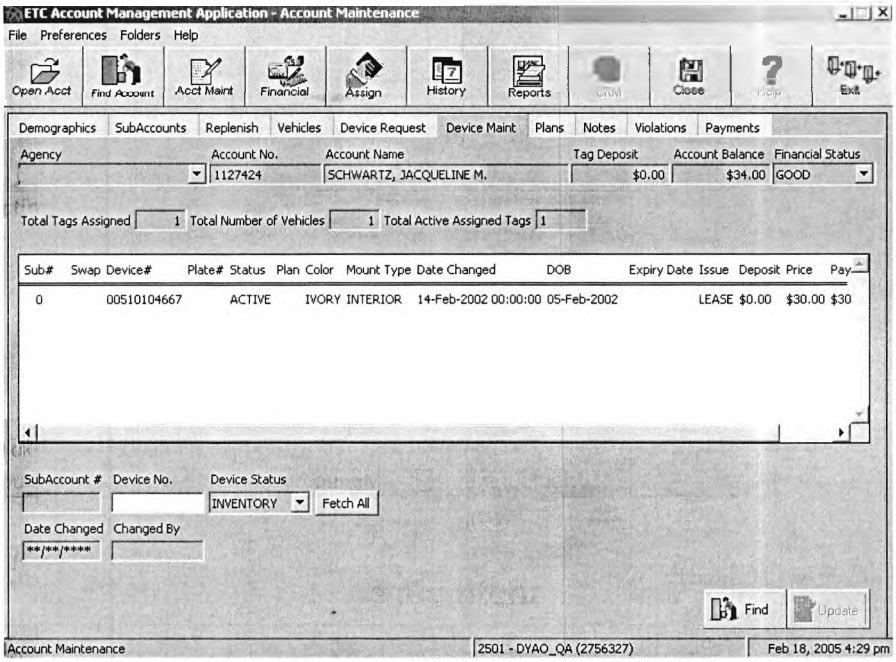
To request a new device to be added to the customer account, complete the following steps:

Step	Action
1	Access the Account Maintenance – Device Request tab screen.
2	Select an option from the SubAccount drop-down list. Select the sub-account to which the device is to be added.
3	Click the drop-down arrow in the Device Characteristics field and select the new device type from the list. Enter the number of devices the customer is requesting in the Device Count field. Click the drop-down arrow in the Vehicle field and select the appropriate vehicle from the drop-down list. Check the IAG codes in the IAG Codes field and change to the correct code as needed. Click Add. The white section of the screen populates. Click the Close button. The following pop up button displays:  Click OK. Click the Payments tab. The Payments tab screen displays.  Click the Close button. The following pop up displays:

Step	Action
	 Click the OK button. You are returned to the ETC Account Management toolbar.

Account Maintenance - Device Maintenance Tab Screen

Use this function when you need to change the status of a device. From the Account Maintenance screen click the Device Maintenance tab and the following screen displays.



ACCESS ACCOUNT MAINTENANCE – DEVICE MAINTENANCE

To access the Account Maintenance – Device Maintenance tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Acct Maint or Find Account buttons. The Find Customer Account screen displays.
3	Follow the steps outlined in the "Find Customer Account Information" section of this guide to search for and retrieve the account you want to work with. The Account Maintenance screen displays.
4	Click the Device Maint tab. The Account Maintenance – Device Maintenance screen and its field's display.

FIELD DESCRIPTIONS: ACCOUNT MAINTENANCE – DEVICE MAINT

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

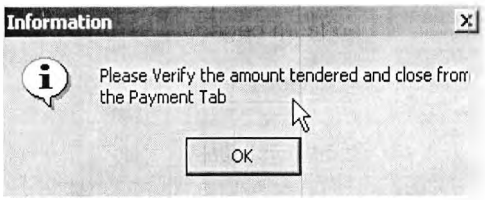
Fields are listed in alphanumeric order, not the order they appear on screen.

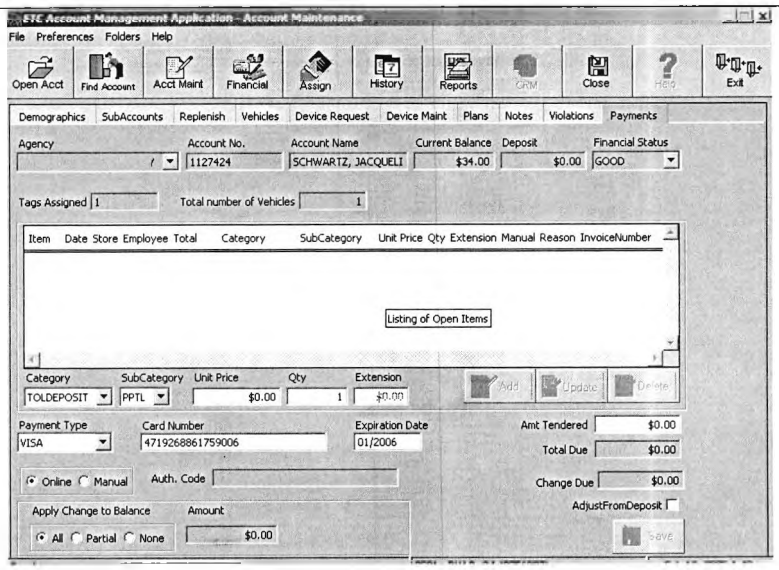
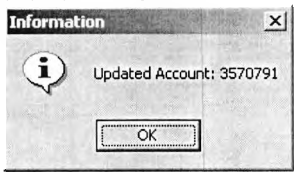
Field Name	Description and Features
Account Balance	The funds remaining in the customer account. *DISPLAY ONLY*
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private & Non-Revenue Accounts – First Name, Last Name, and M.I. • Commercial & Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. *DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
Changed By	The employee identification number that made the most recent changes to the account. This identification number is populated by the employee login id. *DISPLAY ONLY*
Date Changed	The date the device status changed. *DISPLAY ONLY*
Device No.	The number assigned to the device by the manufacturer. *DISPLAY ONLY*
Device Status	*DISPLAY ONLY*
Financial Status	The financial status of the customer's VECTOR account. *DISPLAY ONLY*
CTOC/IAG Codes	A list of codes assigned by the VECTOR CTOC/IAG to individual makes and models of vehicles. *DISPLAY ONLY*
SubAccount #	The sub-account number for which the device is being requested. Defaults from the SubAccount field. *DISPLAY ONLY*
Tag Deposit	The amount due for all tags (devices) requested for the account. This value defaults from the Open Account – Payments tab screen and is based on the account plans set up on the Open Account – Plans tab screen. *DISPLAY ONLY*

Field Name	Description and Features
Total Active Assigned Tags	*DISPLAY ONLY*
Total number of Vehicles	The numbe of vehicles assigned to an account. *DISPLAY ONLY*
Total Tags Assigned	The number of tags assigned to an account *DISPLAY ONLY*
Command Buttons	
Fetch All	Displays additional screens of data in the array screen
Find	Displays information on the selected account
Update	Updates the selected account

DEACTIVATE A DEVICE

A device that has been lost, stolen, defective, or damaged must be deactivated. To deactivate a device, complete the following steps:

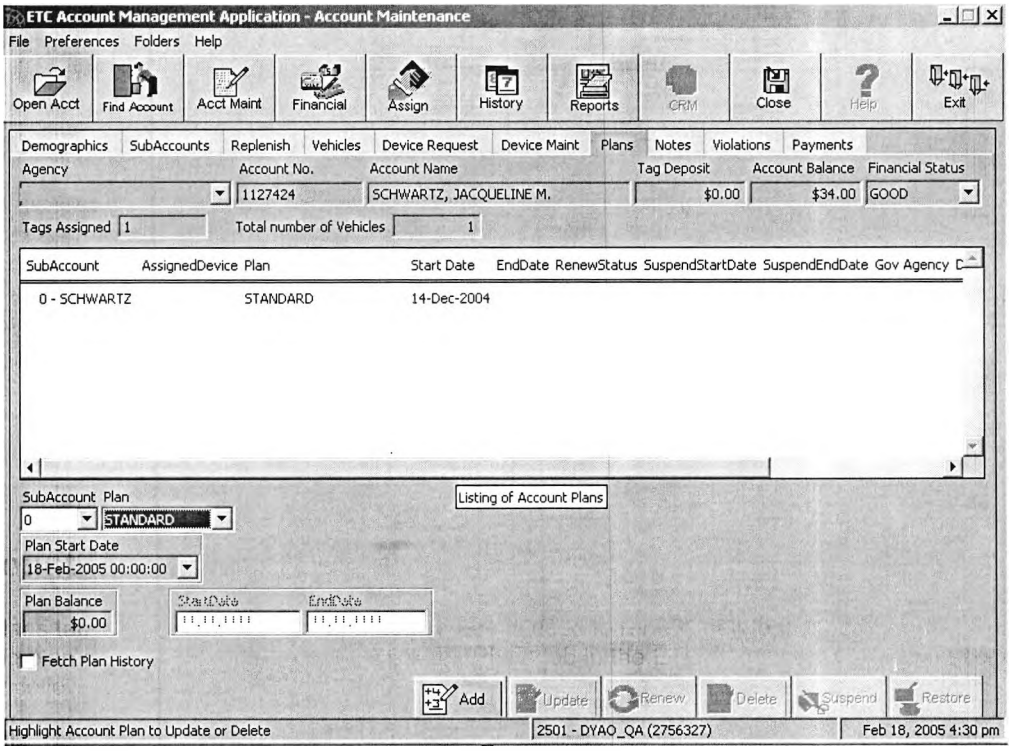
Step	Action
1	Access the Account Maintenance – Device Maintenance tab screen.
2	Highlight the tag you wish to de-activate (click the line in the white section that has the device listed). ***NOTE:*** Once selected (highlighted), the device number displays in the Device No. field, and the Device Status field changes to white. Click the drop-down arrow in the Device Status field and change the status. Phone CSRs are allowed to change the status to lost or stolen. Click the *Update* button at the bottom right of the screen (the Update button becomes enabled, once a device is selected (highlighted)). A prompt displays and asks if you would like to request a new device. If you are a walk-in CSR, you may select YES. A phone-in CSR can request a new device if the account has a replenishment method of credit card.
3	***IMPORTANT!:*** The expired, lost, stolen, and returned status should be used cautiously. Once a tag is placed in this status, it becomes invalid in the lanes. Click the Close button. The following pop up button displays.  Click OK. Click the Payments tab. The Payments tab screen displays.

Step	Action
	 Click the Close button. The following pop up displays:  Click the OK button. You are returned to the ETC Account Management toolbar.

Proprietary Data

Account Maintenance – Plans Tab Screen

The Plans tab on the Account Maintenance screen is used to renew, delete, suspend or restore an existing plan on a customer's account. Click the Plans tab in the ETC Account Management screen to get the following screen.



ACCESS ACCOUNT MAINTENANCE - PLANS

To access the Account Maintenance - Plans tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Acct Maint or Find Account buttons. The Find Customer Account screen displays.
3	Follow the steps outlined in the "Find Customer Account Information" section of this guide to search for and retrieve the account you want to work with. The Account Maintenance screen displays.
4	Click the Plans tab. The Account Maintenance – Plans tab screen and its field's display.

FIELD DESCRIPTIONS: ACCOUNT MAINTENANCE – PLANS

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

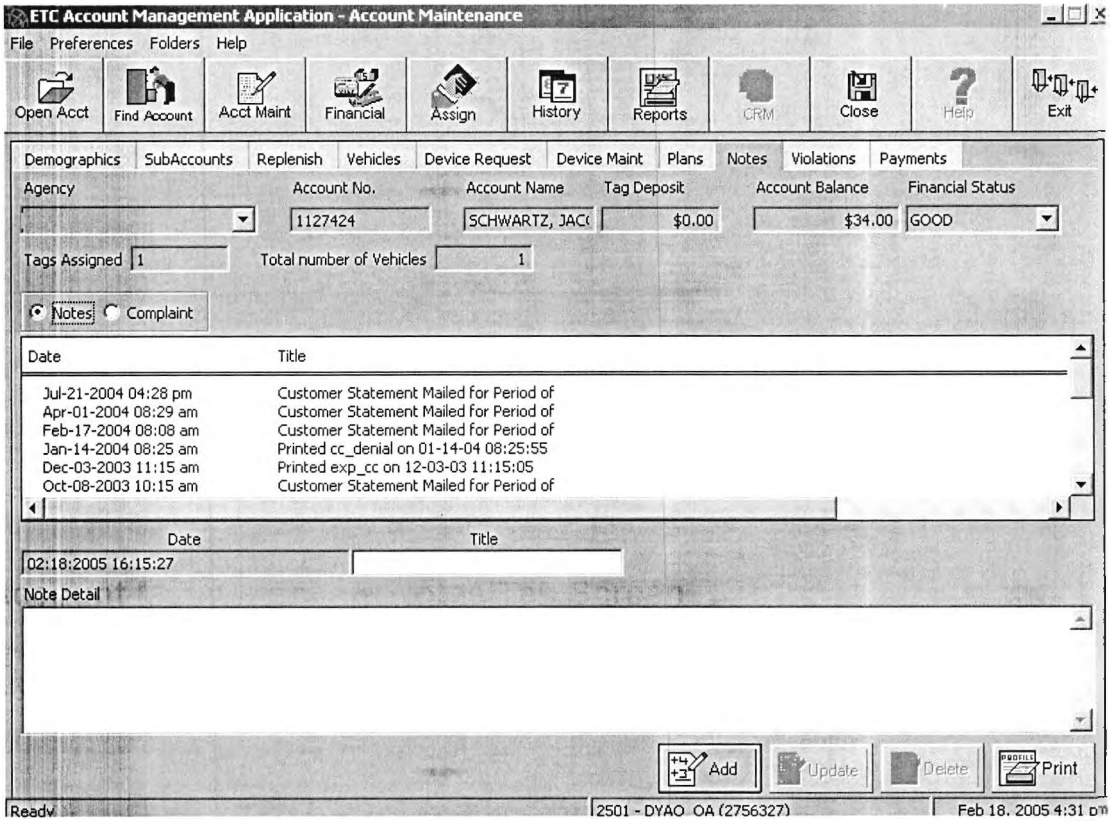
Fields are listed in alphanumeric order, not the order they appear on screen.

Field Name	Description and Features
Account Balance	The funds remaining in the customer account. *DISPLAY ONLY*
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private Accounts – First Name, Last Name, and M.I. • Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. *DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
End Date	The Suspend end date. For example, when a customer is going on vacation and will not be using their tag, the customer can suspend the account while not in use. The account will be reactivated on the suspension end date.
Fetch Plan History	Displays the detailed account plan history and the suspension history detail of the selected plan. *CHECKBOX*
CTOC/IAG Codes	A list of codes assigned by the VECTOR CTOC/IAG to individual makes and models of vehicles.
Financial Status	The financial status of the customer's VECTOR account. *DISPLAY ONLY*
Plan	*DROP-DOWN LIST*
Plan Balance	The account balance associated with the selected plan. *DISPLAY ONLY*
Start Date	The *Suspend* start date. For example, when a customer is going on vacation and will not be using their tag, the customer can suspend the account while not in use. The start date is the first day of an account suspension. The account will be reactivated on the suspension end date.
SubAccount	The accounts listed under one account number. For example, an account holder can purchase multiple tags for multiple vehicles for family members. Each vehicle would be registered under one account as a subaccount. *DROP-DOWN LIST*

Field Name	Description, Format, and Features
Tag Deposit	The amount due for all tags (devices) requested for the account. This value defaults from the Open Account – Payments tab screen and is based on the account plans set up on the Open Account – Plans tab screen. *DISPLAY ONLY*
Tags Assigned	*DISPLAY ONLY*
Total number of Vehicles	The total number of vehicles listed on this account. This count includes vehicles on all subaccounts. *DISPLAY ONLY*
Command Buttons	
Add	Adds additional plan types to the account record. ***IMPORTANT!:*** Clicking this button does not save the information to the database. If you exit VECTOR before completing the entire "Open an Account" process, any data entered on this and subsequent Account Maintenance sub-function tab screens will be lost and will need to be re-entered.
Delete	Deletes the selected (highlighted) vehicle information displayed in the array window.
Renew	Renews the plan for the account.
Restore	Restores a plan after suspension.
Suspend	Suspends a plan for an account.
Update	Updates plan information.

Account Maintenance – Notes Tab Screen

To review any notes associated with an account, click the *Notes* tab at the top of the screen. Any notes associated with the account appear in the top white area of the screen.



Access Account Maintenance - Notes

To access the Account Maintenance - Notes tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Acct Maint or Find Account buttons. The Find Customer Account screen displays.
3	Follow the steps outlined in the "Find Customer Account Information" section of this guide to search for and retrieve the account you want to work with. The Account Maintenance screen displays.
4	Click the Notes tab. The Account Maintenance – Notes screen and its field's display.

FIELD DESCRIPTIONS: ACCOUNT MAINTENANCE – NOTES

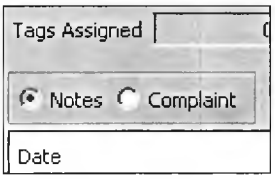
IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

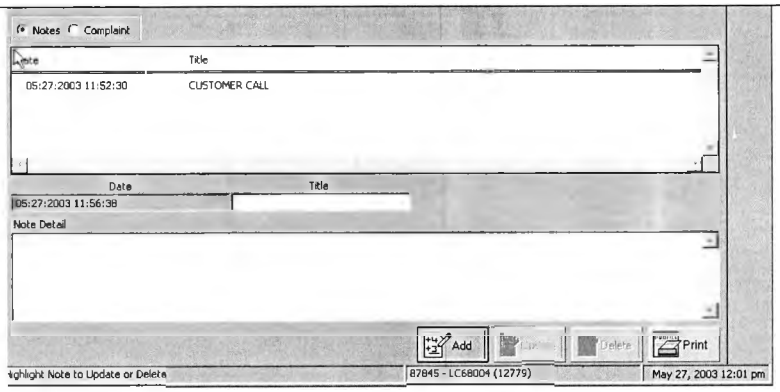
Field Name	Description and Features
Account Balance	The funds remaining in the customer account. *DISPLAY ONLY*
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private Accounts – First Name, Last Name, and M.I. • Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. *DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
Financial Status	The financial status of the customer's VECTOR account. *DISPLAY ONLY*
Tag Deposit	The amount due for all tags (devices) requested for the account. This value defaults from the Open Account – Payments tab screen and is based on the account plans set up on the Open Account – Plans tab screen. *DISPLAY ONLY*
Tags Assigned	*DISPLAY ONLY*
Total number of Vehicles	*DISPLAY ONLY*
Date	The date that the note was added. Defaults to the current system date and time. *DISPLAY ONLY*
NOTE SECTION:	
Notes	Click to add notes to an account. *RADIO BUTTON*
Note Detail	The detail text of the note.
Title	A short descriptive title for the note.

COMPLAINT SECTION:	
Complaint	Click to add a complaint to an account. *RADIO BUTTON*
Category	The type of complaint. *DROP-DOWN LIST*
Date	The date that the complaint was added. Defaults to the current system date and time. *DISPLAY ONLY*
Complaint/ Resolution	Detail text describing the complaint and its resolution.
Status	The status of the complaint. *DROP-DOWN LIST*
Command Buttons	
Add	Adds a note to the account.
Add Resolution	Adds a complaint resolution.
Delete	Deletes the selected (highlighted) note from the account.
Print	Prints the selected (highlighted) note detail.
Update	Updates any note, complaint, or resolution to the account.

ADD A NOTE TO AN ACCOUNT

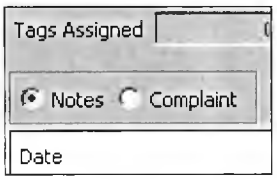
To add a note, complete the following steps:

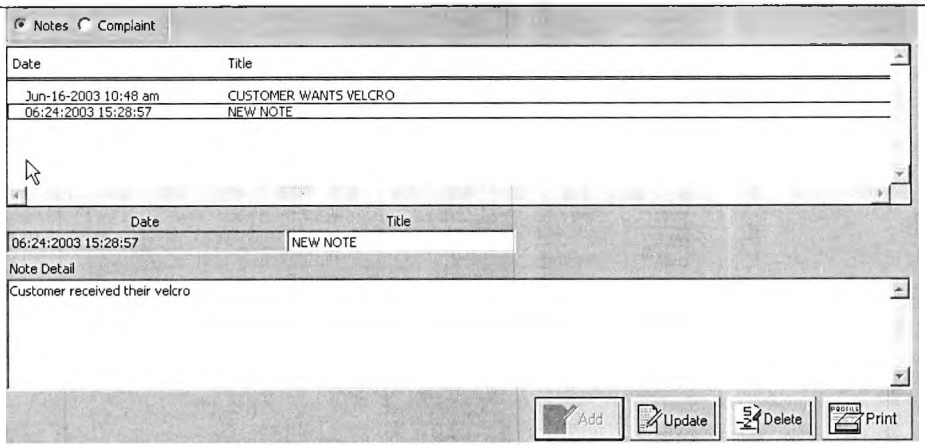
Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Acct Maint or Find Account buttons. The Find Customer Account screen displays.
3	Follow the steps outlined in the "Find Customer Account Information" section of this guide to search for and retrieve the account you want to work with. The Account Maintenance screen displays.
4	Click the Notes tab. The Account Maintenance – Notes screen and its field's display.
5	Select an option from the radio buttons. Options are: Notes or Complaint
6	Click the Notes radio button.  Click in the Title field and enter the title you are giving your note detail.

Step	Action
	 Click the white area under the Notes Detail field and enter the note text. Click the Add button at the bottom of the screen to add this note to the account history.
7	Notes will appear in the white note section sorted by date.

Review a Note

To review a note, complete the following steps:

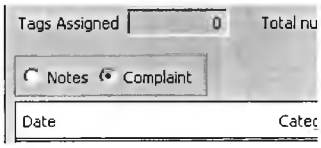
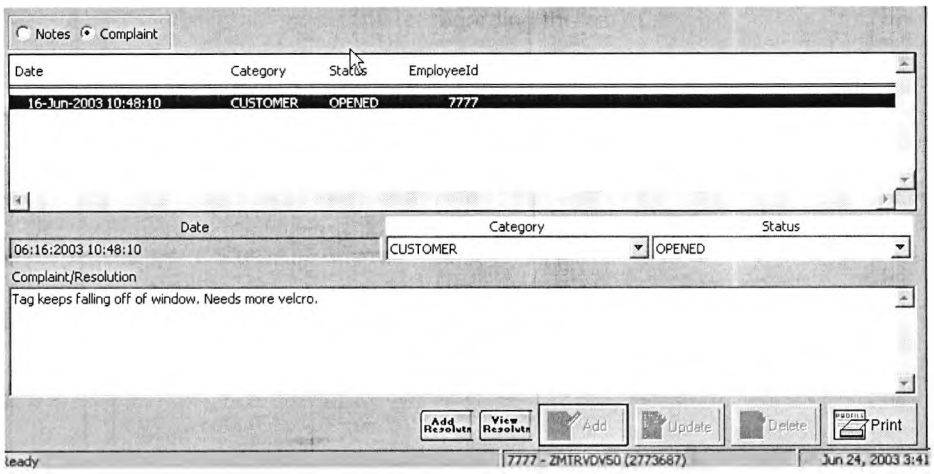
Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Acct Maint or Find Account buttons. The Find Customer Account screen displays.
3	Follow the steps outlined in the "Find Customer Account Information" section of this guide to search for and retrieve the account you want to work with. The Account Maintenance screen displays.
4	Click the Notes tab. The Account Maintenance – Notes screen and its field's display.
5	Select an option from the radio buttons. Options are: Notes or Complaint
6	Click the Notes radio button. 
7	If you just wish to review a note, click the appropriate row in the top white area of the screen and the full note displays in the bottom white screen "Notes Detail" section.

Step	Action
	 Click the Close button at the top of the screen. You are prompted to save your changes, click the OK button. A pop-up box displays telling you the account has been updated.

Proprietary Data

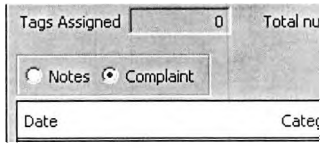
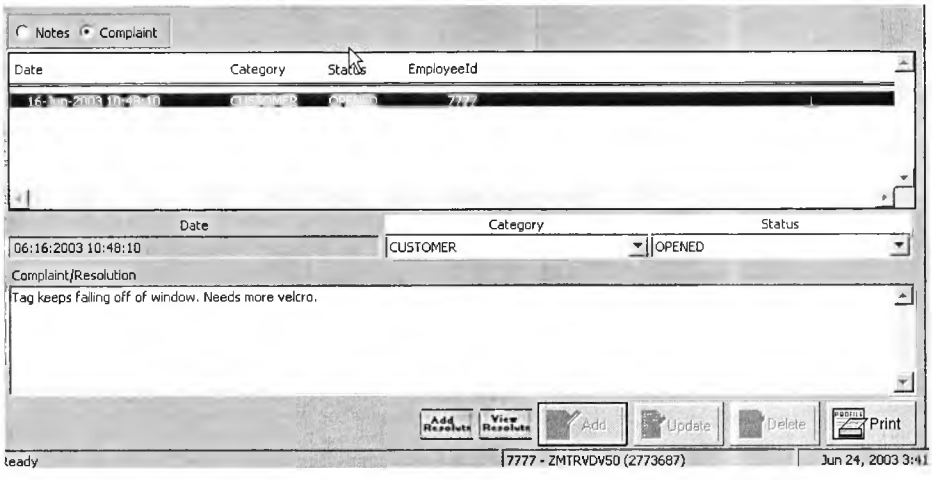
RECORD A COMPLAINT

To log complaints and resolutions associated with an account, click the *Notes* tab at the top of the screen. Any complaints or resolutions associated with the account appear in the top white area of the screen. If you need to add a complaint or resolution regarding the account, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Acct Maint or Find Account buttons. The Find Customer Account screen displays.
3	Follow the steps outlined in the "Find Customer Account Information" section of this guide to search for and retrieve the account you want to work with. The Account Maintenance screen displays.
4	Click the Notes tab. The Account Maintenance – Notes screen and its field's display.
5	Select an option from the radio buttons. Options are: Notes or Complaint
6	Click the Complaint radio button  Select an option from the Category drop-down list. Select an option from the Status drop-down list. In the Complaint/Resolution field, log the type of complaint that is being issued and type the resolution when it occurs.  Click the Add button.

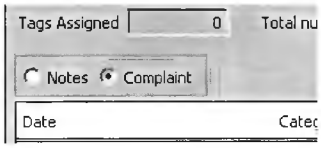
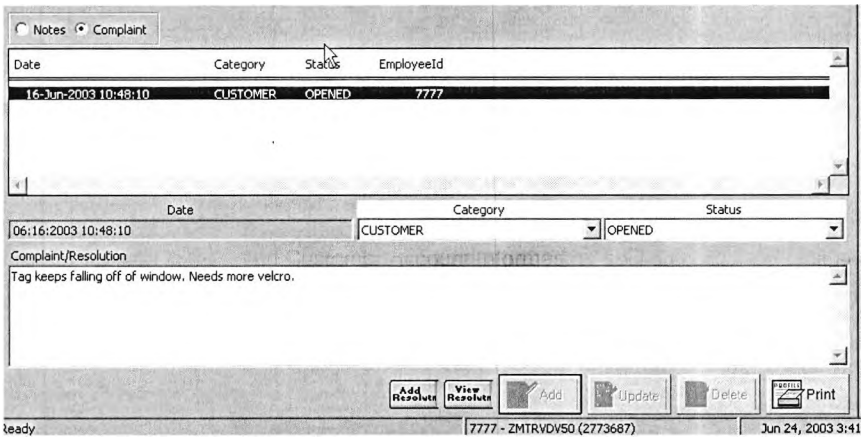
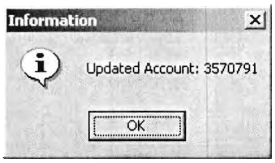
REVIEW COMPLAINT RESOLUTION

To review the resolution to a complaint, click the *View Resolution* button and complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Acct Maint or Find Account buttons. The Find Customer Account screen displays.
3	Follow the steps outlined in the "Find Customer Account Information" section of this guide to search for and retrieve the account you want to work with. The Account Maintenance screen displays.
4	Click the Notes tab. The Account Maintenance – Notes screen and its field's display.
5	Select an option from the radio buttons. Options are: Notes or Complaint
6	Click the Complaint radio button  Select an option from the Category drop-down list. Select an option from the Status drop-down list. Select the complaint you want to view the resolution for.  Click the View Resolution button.

PRINT A COMPLAINT

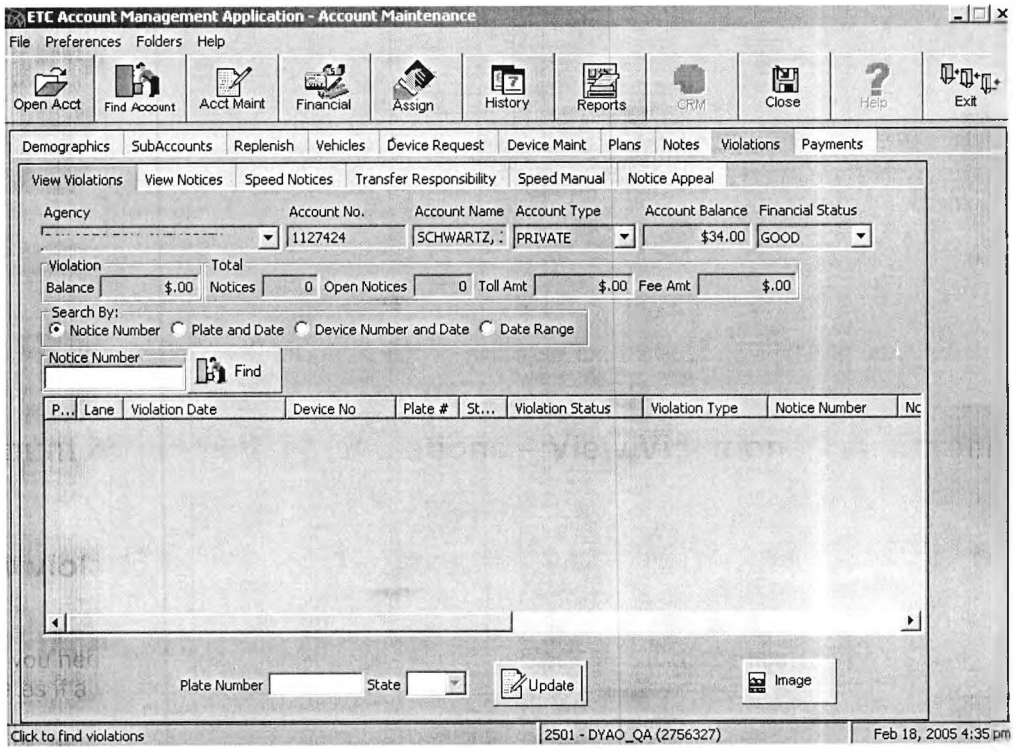
To print a complaint, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Acct Maint or Find Account buttons. The Find Customer Account screen displays.
3	Follow the steps outlined in the "Find Customer Account Information" section of this guide to search for and retrieve the account you want to work with. The Account Maintenance screen displays.
4	Click the Notes tab. The Account Maintenance – Notes screen and its field's display.
5	Select an option from the radio buttons. Options are: Notes or Complaint
6	Click the Complaint radio button  Select an option from the Category drop-down list. Select an option from the Status drop-down list. Select the complaint you want to print.  Click the Print button.
7	Click the Close button at the top of the screen. You are prompted to save your changes, click the OK button. A pop-up box displays telling you the account has been updated. 

Account Maintenance – Violations – View Violations Tab Screen

View violations

When you need to view the violations on an account, click the Violations tab. This screen only populates if a violation has occurred.



ACCESS ACCOUNT MAINTENANCE – VIOLATIONS – VIEW VIOLATIONS

To access the Account Maintenance – Violations – View Violations tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Acct Maint or Find Account buttons. The Find Customer Account screen displays.
3	Follow the steps outlined in the "Find Customer Account Information" section of this guide to search for and retrieve the account you want to work with. The Account Maintenance screen displays.
4	Click the Violations tab. The Account Maintenance – View Violations screen and its field's display.

FIELD DESCRIPTIONS: ACCOUNT MAINTENANCE – VIOLATIONS - VIEW VIOLATIONS

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Field Name	Description and Features
Account Balance	The funds remaining in the customer account. *DISPLAY ONLY*
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private Accounts – First Name, Last Name, and M.I. • Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. *DISPLAY ONLY*
Account Type	The type of customer account. Defaults from the Account Type field on the Open Account – Demographics tab screen. *DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
Financial Status	The financial status of the customer's VECTOR account. *DISPLAY ONLY*
Violation Balance	The outstanding amount owed by the customer for violations. *DISPLAY ONLY*
Total Notices	The total number of notices for the account. *DISPLAY ONLY*
Open Notices	The number of notices with an open status. *DISPLAY ONLY*
Toll Amt	The toll amount due. *DISPLAY ONLY*
Fee Amt	The administrative fee assessed. *DISPLAY ONLY*
Search By:	
Notice Number	*THE NOTICE NUMBER OF THE VIOLATION.* *RADIO BUTTON*

Field Name	Description and Features
Plate and Date	The license plate number of the vehicle in violation and the date the violation occurred. *RADIO BUTTON*
Device Number and Date	The device number and date of issuance to search on.
Date Range	The range of dates for violation occurrences. *RADIO BUTTON*
Notice Number	The number of the violation notice to search on.
Plate and Date	The license plate number and date of issuance to search on.
State	The state or Canadian province in which the customer resides. Defaults based on the zip code entered. *DROP-DOWN LIST*
Command Buttons	
Find	Finds and retrieves the desired records based on the search criteria entered.
Image	Displays the violation image
Update	Updates the screen and database when saved

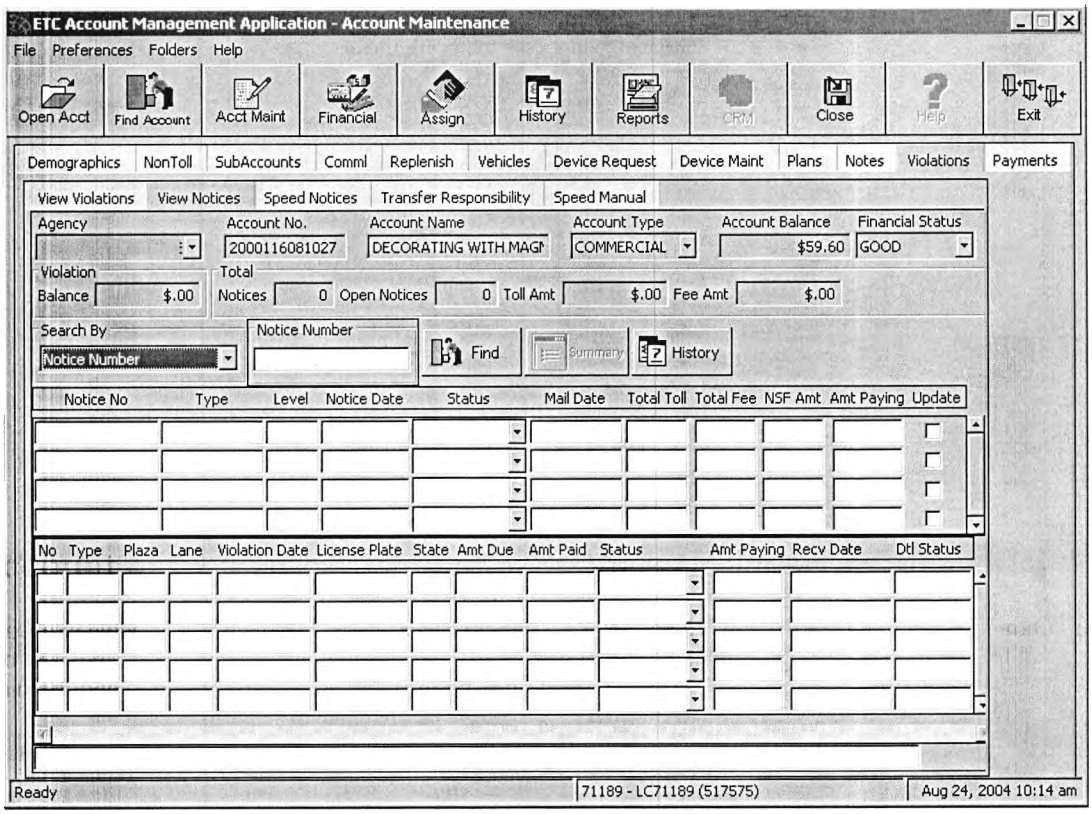
VIEW VIOLATIONS

To view violations, complete the following steps:

Step	Action
1	Access the Account Maintenance – Violations tab screen.
2	In the Beginning and Ending field, you enter a range for the Date and Time the violation occurred. Click the Find button. The violations on the account appear on the screen.

Account Maintenance – Violations – View Notices Tab Screen

The View Notices tab on the Account Maintenance – Violations tab screen is used to view a summary and detail history of violation notices logged to an account. This is an example of the Account Maintenance – Violations – View Notices tab screen:



Access Account Maintenance – Violations – View Notices

To access the Account Maintenance – Violations – View Notices tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Acct Maint or Find Account buttons. The Find Customer Account screen displays.
3	Follow the steps outlined in the "Find Customer Account Information" section of this guide to search for and retrieve the account you want to work with. The Account Maintenance screen displays.
4	Click the Violations tab. The Account Maintenance – View Violations screen displays.
5	Click the View Notices tab. The Account Maintenance – Violations – View Notices screen displays.

FIELD DESCRIPTIONS: ACCOUNT MAINTENANCE – VIOLATIONS – VIEW NOTICES

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Field Name	Description and Features
Account Balance	The funds remaining in the customer account. *DISPLAY ONLY*
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private Accounts – First Name, Last Name, and M.I. • Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. *DISPLAY ONLY*
Account Type	The type of customer account. Defaults from the Account Type field on the Open Account – Demographics tab screen. *DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
Fee Amt	The administrative fee assessed. *DISPLAY ONLY*
Financial Status	The financial status of the customer's VECTOR account. *DISPLAY ONLY*
Notice Number	The number from the notice mailed to customer. *DISPLAY ONLY*
Open Notices	Listing of all notices not paid or resolved. *DISPLAY ONLY*
Search By	Search criteria. *DROP-DOWN LIST*
Toll Amt	The amount of the toll. *DISPLAY ONLY*
Total Notices	The total number of violation notices. *DISPLAY ONLY*

Field Name	Description and Features
Violation Balance	The amount due for violations. *DISPLAY ONLY*
Command Buttons	
Find	Finds and retrieves the desired records based on the search criteria entered.
History	Displays the violation history for the account.
Summary	Displays a summary of violation information.

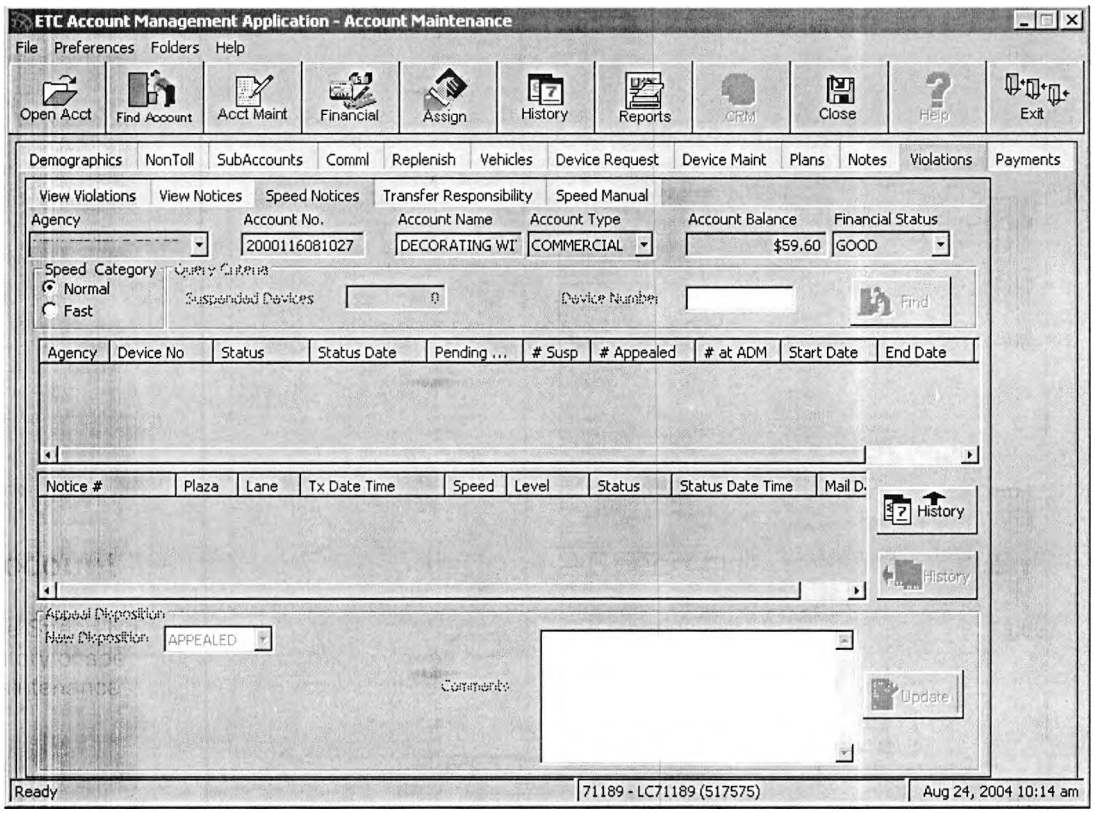
VIEW NOTICE HISTORY

To view notice history, complete the following steps:

Step	Action
1	Access the Account Maintenance – Violations – View Notices tab screen.
2	Select the search criteria from the Search By drop down field.
3	Type the notice number in the Notice Number field if you selected Notice Number as the search criteria. Click the Find button.
4	The record for the account displays on the screen.
5	Click the History button to see notice history.

Account Maintenance – Violations – Speed Notices Tab Screen

The Speed Notices tab on the Account Maintenance – Violations tab screen is used to view a detail history of speeding violation notices logged to an account. This is an example of the Account Maintenance – Violations – Speed Notices tab screen:



Access Account Maintenance – Violations – Speed Notices

To access the Account Maintenance – Violations – Speed Notices tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Acct Maint or Find Account buttons. The Find Customer Account screen displays.
3	Follow the steps outlined in the "Find Customer Account Information" section of this guide to search for and retrieve the account you want to work with. The Account Maintenance screen displays.
4	Click the Violations tab. The Account Maintenance – View Violations screen displays.
5	Click the Speed Notices tab. The Account Maintenance – Violations – Speed Notices screen displays.

FIELD DESCRIPTIONS: ACCOUNT MAINTENANCE – VIOLATIONS – SPEED NOTICES

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

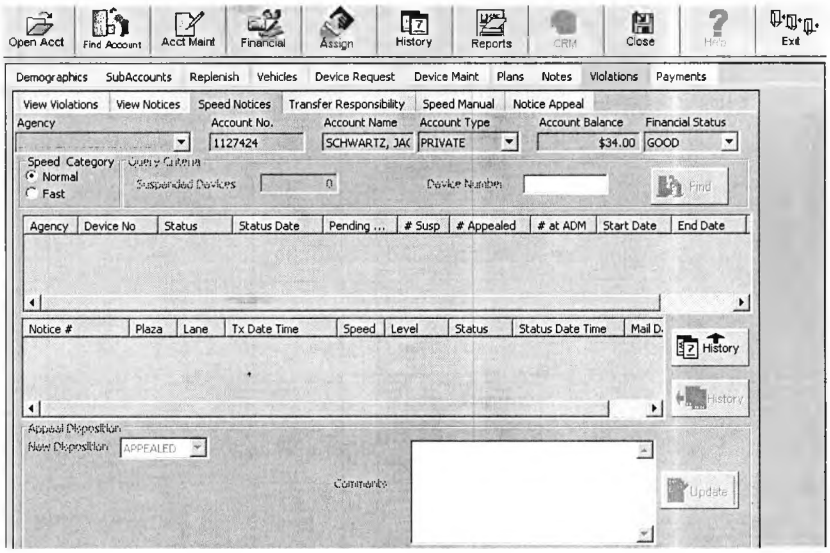
Fields are listed in alphanumeric order, not the order they appear on screen.

Field Name	Description and Features
Account Balance	The funds remaining in the customer account. *DISPLAY ONLY*
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private Accounts – First Name, Last Name, and M.I. • Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. *DISPLAY ONLY*
Account Type	The type of customer account. Defaults from the Account Type field on the Open Account – Demographics tab screen. *DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR.
Financial Status	The financial status of the customer's VECTOR account. *DISPLAY ONLY*
Speed Category:	
Fast	High speed lane speed limit. *RADIO BUTTON*
Normal	Normal speed lane speed limit. *RADIO BUTTON*
Query Criteria:	
Device Number	To search by device number.
Suspended Devices	To search by suspended devices.
Appeal Disposition:	
Comments	Display area for comments.
New Disposition	Selection area for changing a violation disposition. *DROP-DOWN LIST*

Command Buttons	
Find	Finds and retrieves the desired records based on the search criteria entered.
History	Displays the Speed Status History screen.
Update	Updates account information.

VIEW A SPEED NOTICE

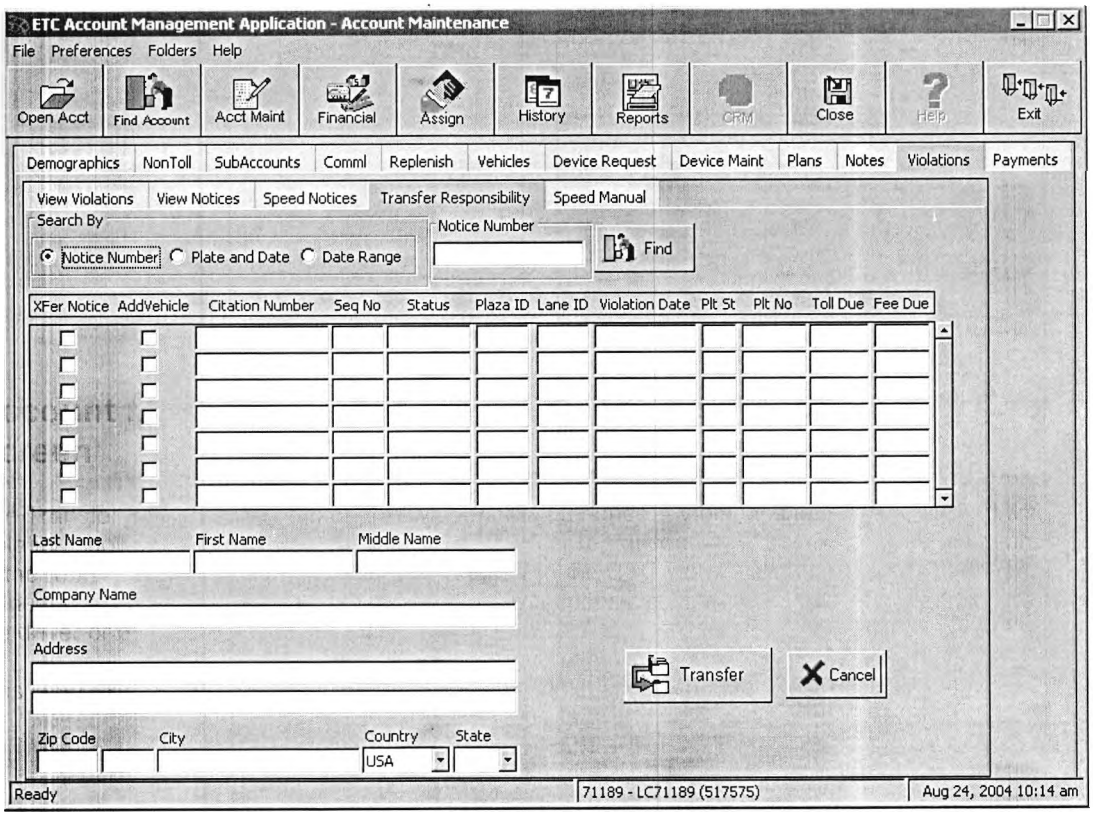
To view speed notices, complete the following steps:

Step	Action
1	Access the Account Maintenance – Violations – Speed Notices tab screen.
2	The screen will populate with the account information for the account you have previously accessed.
3	Click the appropriate Speed Category radio button (normal or high-speed/fast lane). ***NOTE:*** In Speed Category, Normal and Fast refer to the type of lane through which the vehicle has passed. The exact definition of the speed range for these lanes is defined by your agency. Normal is the default set by VECTOR.  If you click Normal, the above screen displays. Click the Find button and the top gray area of the screen fills in if there is a notice. If you click the row containing the notice you are looking for, the bottom gray screen automatically populates with details. If you click the History button with the up arrow, a screen showing notice history displays. If you click the History button with the left pointing arrow, a screen showing you the history of appeals. If you click a detail that is open in the bottom screen then you can change the New Disposition field to Appealed or other (using the drop-down list). Enter your comments. Click the Update button.

Account Maintenance – Violations - Transfer Responsibility Tab Screen

The Transfer Responsibility tab on the Account Maintenance – Violations tab screen is used when the violation shows up under the name of a leasing or car rental company. In this case the violation is sent to the rental or leasing company and they return it to the CSC with information about the driver or owner. The violations clerk must then transfer the responsibility for the violation from the company to the driver or owner of the vehicle.

This is an example of the Account Maintenance – Violations – Transfer Responsibility tab screen:



ACCESS ACCOUNT MAINTENANCE – VIOLATIONS – TRANSFER RESPONSIBILITY

To access the Account Maintenance – Violations – Transfer Responsibility tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Acct Maint or Find Account buttons. The Find Customer Account screen displays.
3	Follow the steps outlined in the "Find Customer Account Information" section of this guide to search for and retrieve the account you want to work with. The Account Maintenance screen displays.
4	Click the Violations tab. The Account Maintenance – View Violations screen displays.

Step	Action
5	Click the Transfer Responsibility tab. The Account Maintenance – Violations – Transfer Responsibility screen displays.

FIELD DESCRIPTIONS: ACCOUNT MAINTENANCE – VIOLATIONS – TRANSFER RESPONSIBILITY

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Field Name	Description and Features
Zip Code Extension	Enter the code extension for the sub-account's address in the Zip Code 4 field. The City, State, and Country fields default automatically based on the zip code entered.
Address	The address of the customer or primary contact person.
City	The city of the customer or primary contact person.
Company Name	The company name of the customer or primary contact person.
Country	Available options are: • USA • CANADA *DROP-DOWN LIST*
First Name	The first name of the customer or primary contact person.
Last Name	The Last name of the customer or primary contact person.
Middle Name	The middle name of the customer or primary contact person.
Notice Number	The number of the violation notice for which responsibility will be transferred.
State	The state or Canadian province in which the customer resides. Defaults based on the zip code entered. *DROP-DOWN LIST*
Zip Code	Enter the zip code and any zip code extension for the sub-account's address in the Zip Code and Zip Code 4 fields. The City, State, and Country fields default automatically based on the zip code entered.
Search By:	
Date Range	A range of dates to be searched. *RADIO BUTTON*
Notice Number	The notice number to search for. *RADIO BUTTON*
Plate and Date	The plate number and date to search for. *RADIO BUTTON*

Command Buttons	
Cancel	Cancels the transfer transaction.
Find	Finds and retrieves notice number information based on the search criteria.
Transfer	Activates the transfer of responsibility for the violation.

TRANSFER RESPONSIBILITY FOR A VIOLATION

To transfer responsibility for a violation, complete the following steps:

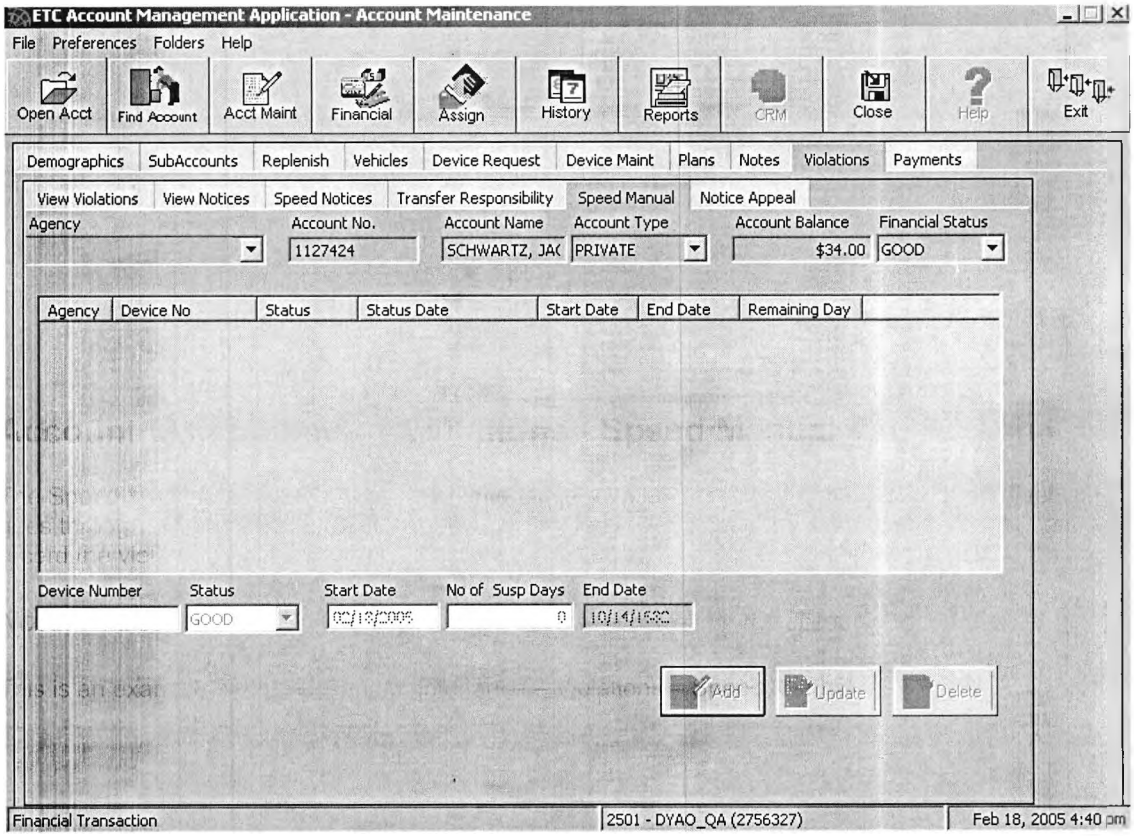
Step	Action
1	The violations clerk receives a batch of violations with a date range on them. Access the Account Maintenance – Violations – Transfer Responsibility tab screen.
2	Click the Date Range radio button and Enter the Beginning Date and Ending Date of the violations. Click the Find button and the white section of the screen populates. For each citation number row for which you need to transfer responsibility, click in the Xfer Notice checkbox. Do not click the AddVehicle checkbox. Enter the Last Name, First Name, Middle Name, Address, Zip Code, and City in those fields at the bottom of the screen. Click the drop-down arrow in the Country field and select the correct country. Click the drop-down arrow in the State field and select the correct state. Click the Transfer button for each citation when done. Click the Cancel button if you select the wrong citation. Click the Close button at the top of the screen. You are prompted to save your changes, click the OK button. A pop-up box displays telling you the account has been updated. Click OK. Click the Payments tab to complete the plan assignment if there is not enough money in the account to pay for the selected (highlighted) plan.

Account Maintenance – Violations - Speed Manual Tab Screen

The Speed Manual tab on the Account Maintenance – Violations tab screen is used when a vehicle goes through a high-speed lane at a speed higher than the limit, and the system in the lane used to record the violation is not working.

NOTE: The screen is populated only if a violation has occurred on the account.

This is an example of the Account Maintenance – Violations – Speed Manual tab screen:



Access Account Maintenance – Violations – Speed Manual

To access the Account Maintenance – Violations – Speed Manual tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Acct Maint or Find Account buttons. The Find Customer Account screen displays.
3	Follow the steps outlined in the "Find Customer Account Information" section of this guide to search for and retrieve the account you want to work with. The Account Maintenance screen displays.
4	Click the Violations tab. The Account Maintenance – View Violations screen displays.
5	Click the Speed Manual tab. The Account Maintenance – Violations – Speed Manual screen displays.

Field Descriptions: Account Maintenance – Violations – Speed Manual

Important!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

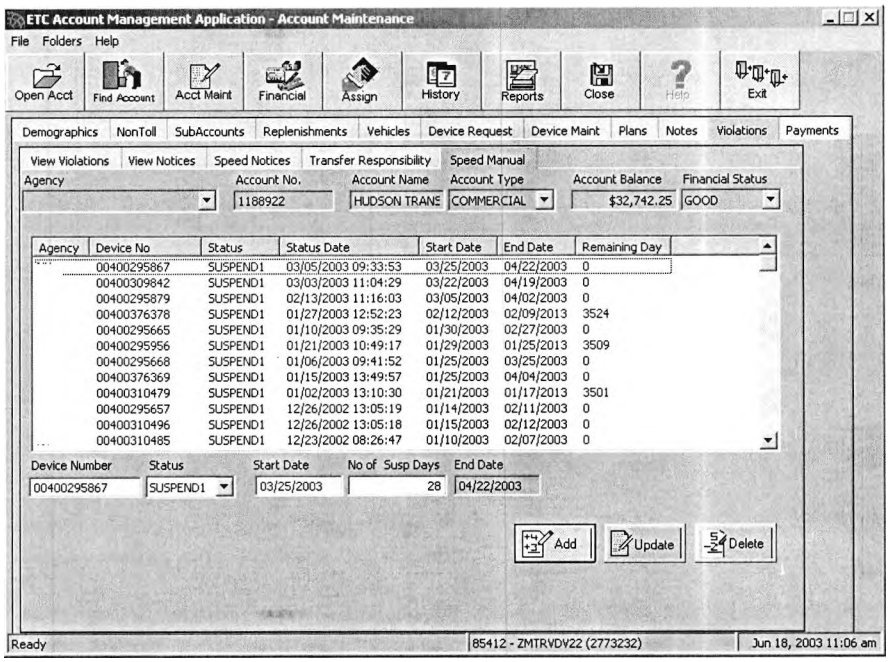
Fields are listed in alphanumeric order, not the order they appear on screen.

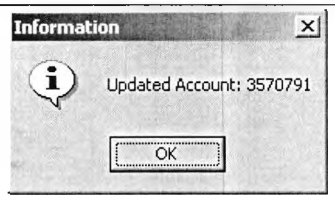
Field Name	Description and Features
Account Balance	The funds remaining in the customer account. *Display Only*
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private Accounts – First Name, Last Name, and M.I. • Business Accounts – Company Name *Display Only*
Account No.	The identification number automatically assigned to the account by VECTOR. *Display Only*
Account Type	The type of customer account. Defaults from the Account Type field on the Open Account – Demographics tab screen. *Display Only*
Agency	The name of the business entity that is using VECTOR. *Display Only*
Financial Status	The financial status of the customer's VECTOR account. *Display Only*

Command Buttons	
Add	Adds the manual speed violation to the account record
Delete	Deletes the selected (highlighted) information displayed in the array window
Update	Updates the account with newly created information (not always saved until you close the sub function).

UPDATE A SPEED CITATION

To update a speed citation, complete the following steps:

Step	Action
1	Access the Account Maintenance – Violations – Speed Manual tab screen.
2	Double-click the violation you want to view. The following screen displays, which includes the device number.  Double-click the row of the citation you want to update. The device number will populate in the Device Number field. Select GOOD from the Status drop-down list. Enter current date in the Start Date field. Enter the number of suspension days in the No of Susp Days field. Click Update. The newly added Speed citation is updated. Click Close. The records are saved. You are prompted to save your changes, click the *OK* button. A pop-up box telling you the account has been updated. ***NOTE:*** You cannot delete a record once it has been saved.

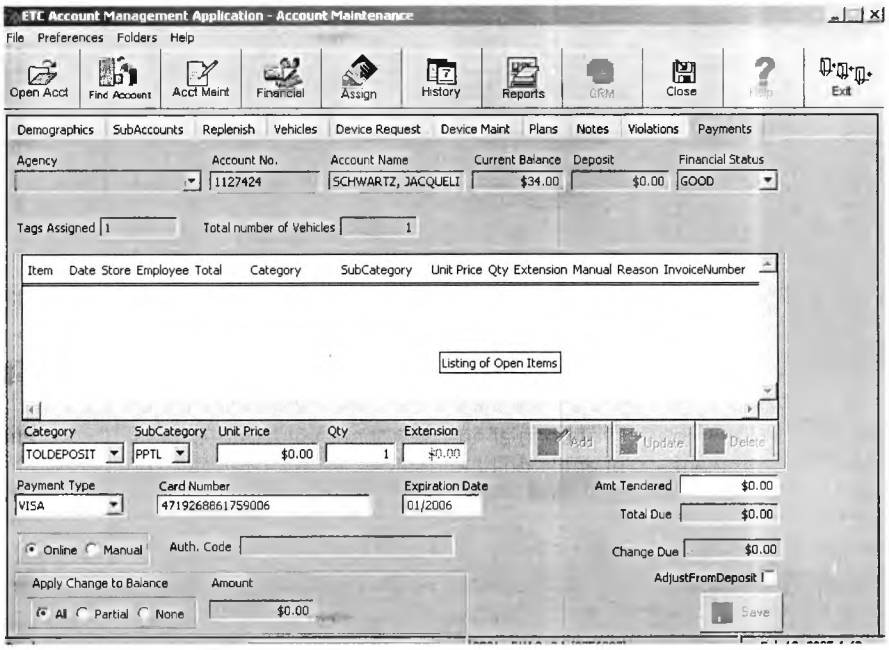
Step	Action
	 Click the OK button to return to the ETC Account Management screen.

Account Maintenance – Payments Tab Screen

The Payments tab on the Account Maintenance screen is used to enter payments for various transactions, such as requesting additional devices, adding plans to an account, or receiving additional payments of any type. The screen automatically populates with any related open items listed in the array.

NOTE: VECTOR automatically invokes the Payments tab screen from numerous locations in the software when a payment is necessary to complete an action.

This is an example of the Account Maintenance – Payments tab screen:



ACCESS ACCOUNT MAINTENANCE - PAYMENTS

FIELD DESCRIPTIONS: ACCOUNT MAINTENANCE – PAYMENTS

IMPORTANT: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

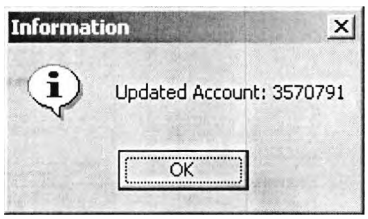
Fields are listed in alphanumeric order, not the order they appear on screen.

Field Name	Description and Features
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private Accounts – First Name, Last Name, and M.I. • Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. *DISPLAY ONLY*
Adjust From Deposit	Used when the amount should be paid from the deposit amount. *CHECKBOX*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
Amt. Tendered	The payment amount received from the customer.
Auth. Code	The authorization code received from the credit card company for payment.
Card Number	The account number of the credit card being used.
Category	The type of payment being made. *DROP-DOWN LIST*
Change Due	Amount Tendered minus Total Due. *DISPLAY ONLY*
Current Balance	The current account balance. *DISPLAY ONLY*
Expiration Date	The date the credit card expires. *DISPLAY ONLY*
Extension	The unit price times the quantity. *DISPLAY ONLY*
Financial Status	The financial status of the customer's VECTOR account. *DISPLAY ONLY*

Field Name	Description and Features
Manual	Payment method. *RADIO BUTTON*
Online	Payment method. *RADIO BUTTON*
Payment Type	Method of payment. *DROP-DOWN LIST*
Qty	Enter number of tags the amount covers.
SubCategory	Sub category for payment category. **EXAMPLE**: The main category could be a toll deposit with a sub category of pre pay toll. *DROP-DOWN LIST*
Tags Assigned	The number of tags assigned to the account holder. *DISPLAY ONLY*
Total Due	Quantity times the Unit Price. *DISPLAY ONLY*
Total number of Vehicles	Number of vehicles on the account. *DISPLAY ONLY*
Unit Price	Enter the number of items the deposit covers.
Apply Change to Balance:	
All	To apply all change to the account balance. *RADIO BUTTON*
None	To apply none of the change to the account balance. *RADIO BUTTON*
Partial	To apply some of the change to the account balance. *RADIO BUTTON*
Command Buttons	
Add	Adds the payments to the account record
Delete	Deletes the selected (highlighted) information displayed in the array window
Update	Updates the account with newly created information (not always saved until you close the subfunction).
Save	Saves the information to the account record.

APPLY A PAYMENT TO AN OPEN ITEM

To apply a payment to an open item, complete the following steps:

Step	Action
1	Access the Account Maintenance – Payments tab screen.
2	Click the Amount Tendered field and enter the amount of the payment. Click the drop-down arrow in the Payment Type field and select the method of payment. For walk-in customers paying cash, if the amount tendered is greater than the total due, click the radio button indicating the amount of the payment to be applied to the account balance: *All*, *Partial*, *None* in the Apply Change to Balance field. For walk-in customers paying cash, click *Partial* to add the amount the customer would like to apply to the Amount field, and the Change Due field automatically reduces by that amount. If paying by credit card, enter the correct credit card number, the expiration date and an authorization code. Click the *Close* button at the top of the screen. You are prompted to save your changes, click the OK button. A pop-up box displays telling you the account has been updated.  Click the OK button and return to the ETC Account Management screen.

ETC Account Management - Financial

The ETC Financial function is used to manage financial activity for an account. This financial activity is organized into four sub-function groups through which you can:

- Make payments
- Manage reversals
- Manage disbursements (refunds)
- Make adjustments

Each subfunction is identified by a tab on the Financial screen. Clicking each sub-function tab opens the screen for that sub-function.

Access the Financial Function

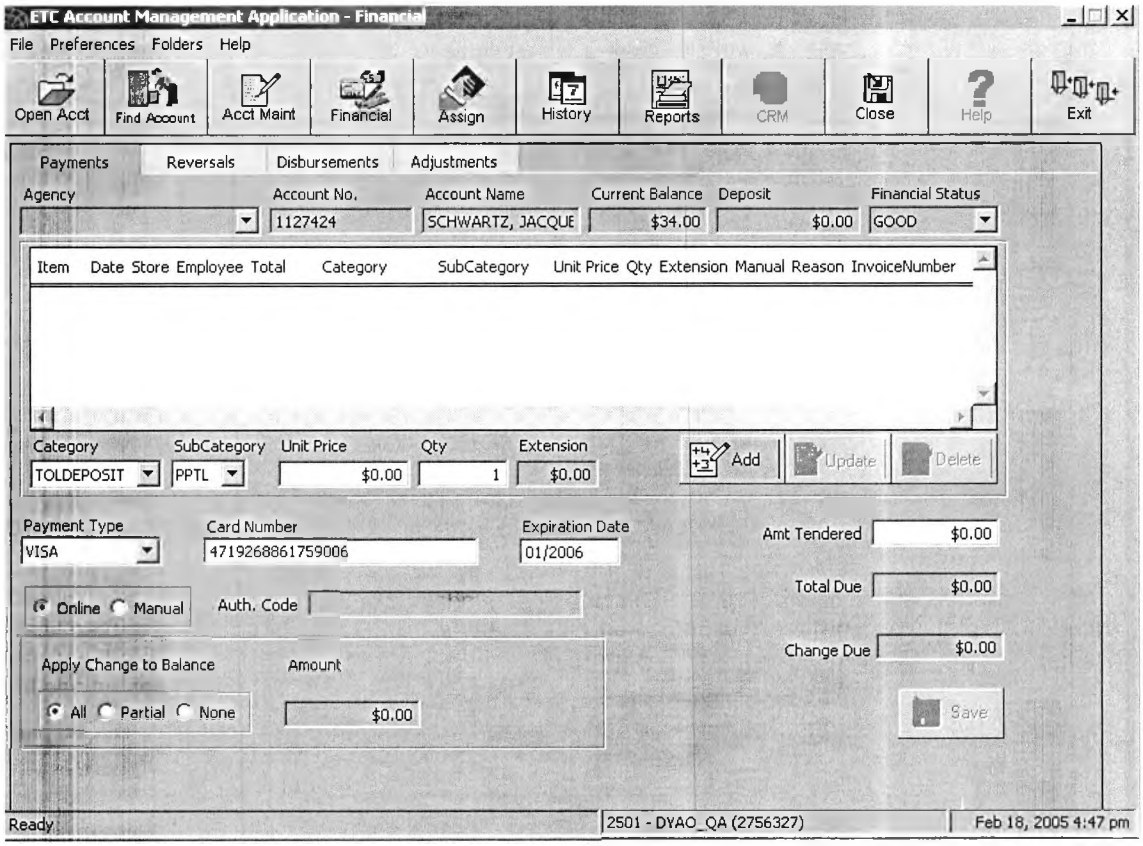
To access the ETC Account Management Financial function, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Financial button. The Financial function and sub-function tabs display. Screen focus is on the Payments tab.

The following sections describe the process for managing financial activity on an account. An example of each Financial sub-function tab screen, field and command button descriptions, and instructions on how to use each sub-function are also included in this section.

Financial - Payments Tab Screen

This is the screen used to enter replenishment information. Replenishments can be made by cash, credit card or check. Credit card replenishments are often automatic and reoccur when the account reaches the replenishment threshold. This automatic replenishment is established at account setup but can be added at any time.



ACCESS FINANCIAL – PAYMENTS

To access the Financial – Payments tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Financial button. The Financial function and sub-function tabs display. Screen focus is on the Payments tab.

FIELD DESCRIPTIONS: FINANCIAL – PAYMENTS

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

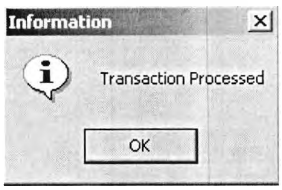
Fields are listed in alphanumeric order, not the order they appear on screen.

Field Name	Description and Features
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private Accounts – First Name, Last Name, and M.I. • Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. *DISPLAY ONLY*
Adjust From Deposit	Used when the amount should be paid from the deposit amount. *CHECKBOX*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
Amount	The payment amount received from the customer.
Amt. Tendered	The payment amount received from the customer.
Auth. Code	The code received from a credit card company authorizing payment.
Card Number	The credit card number used for payment by the customer.
Category	The type of payment assigned to this customer. Payment types are determined by the account type. *DROP-DOWN LIST*
Change Due	Amount Tendered minus Total Due.
Current Balance	The current account balance. *DISPLAY ONLY*
Expiration Date	Credit Card expiration date.
Extension	The unit price times the quantity.

Field Name	Description and Features
	DISPLAY ONLY
Financial Status	The financial status of the customer's VECTOR account. *DISPLAY ONLY*
Manual	Payment method. *RADIO BUTTON*
Online	Payment method. *RADIO BUTTON*
Payment Type	Method of payment. *DROP-DOWN LIST*
Qty	Enter number of tags the amount covers.
SubCategory	Sub category for payment category. **EXAMPLE**: The main category could be a toll deposit with a sub category of pre pay toll. *DROP-DOWN LIST*
Tags Assigned	The number of tags assigned to the account holder. *DISPLAY ONLY*
Total Due	Unit price times the quantity. *DISPLAY ONLY*
Unit Price	The amount charged for each tag unit.
Apply Change to Balance:	
All	To apply all change to the account balance. *RADIO BUTTON*
None	To apply none of the change to the account balance. *RADIO BUTTON*
Partial	To apply some of the change to the account balance. *RADIO BUTTON*
Command Buttons	
Add	Adds the payments to the account record
Delete	Deletes the selected (highlighted) information displayed in the array window
Update	Updates the account with newly created information (not always saved until you close the subfunction).
Save	Saves the information to the account record.

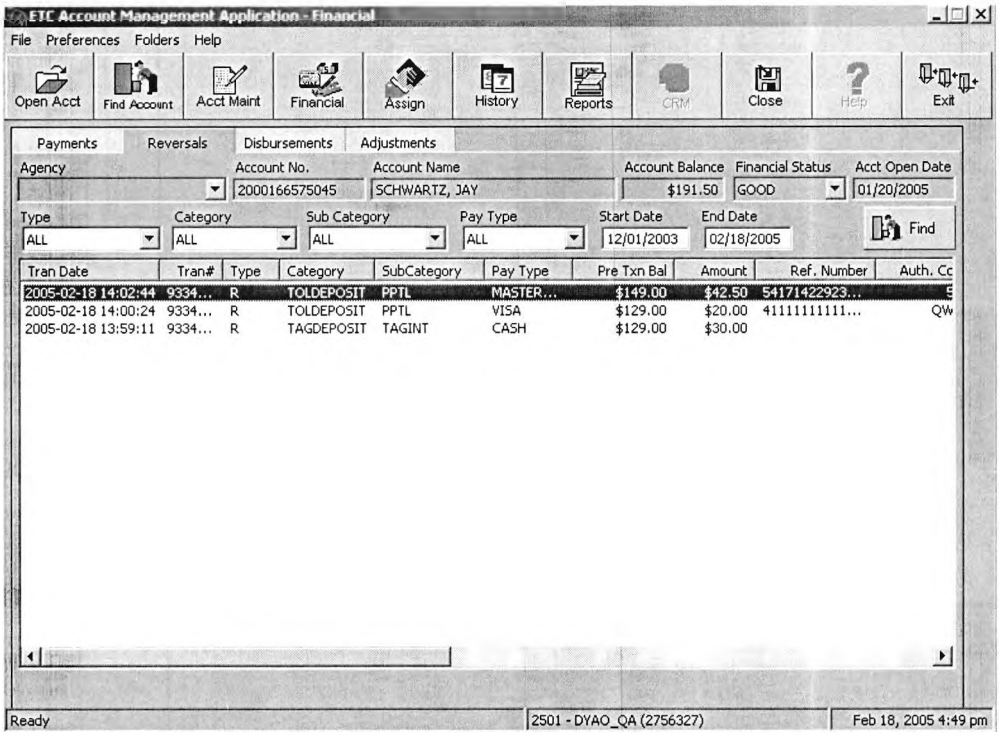
REPLENISH AN ACCOUNT

To replenish an account, complete the following steps:

Step	Action
1	Access the Financial – Payments tab screen.
2	Click the Unit Price field and enter the replenishment amount. Click the Qty field and enter the quantity. Click the Amount Tendered field and enter the amount of the payment. The Payment Type field defaults to credit card. If the customer is paying by check or cash, click the down arrow in the Payment Type field and select the appropriate payment type from the drop-down list. For walk-in customers paying cash, if the amount tendered is greater than the total due, click the radio button indicating the amount of the payment to be applied to the account balance, choose either All, Partial, None of the Apply Change to Balance radio buttons. For walk-in customers paying cash, click Partial and add the amount the customer would like to apply to the Amount field, and the Change Due field automatically reduces by that amount. Enter the correct credit card number, expiration date and an authorization code. When done, click the *Save* button at the bottom of the screen and the following pop-up box displays.  Click the OK button in this screen and return to the *Payments* tab. Click the Close button at the top of the screen and when prompted, select ***YES*** to save all. You are returned to the ETC Account Management toolbar.

Financial – Reversals Tab Screen

When you need to reverse a recorded payment, click the Reversal tab in the main financial screen and the following screen displays.



Important ***NOTE:*** A transaction can only be reversed on the day it occurred. Otherwise, the adjust button is highlighted.

ACCESS FINANCIAL – REVERSALS

To access the Financial – Reversals tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Financial button. The Financial function and sub-function tabs display. Screen focus is on the Payments tab.
3	Click on the Reversals tab.

FIELD DESCRIPTIONS: FINANCIAL – REVERSALS

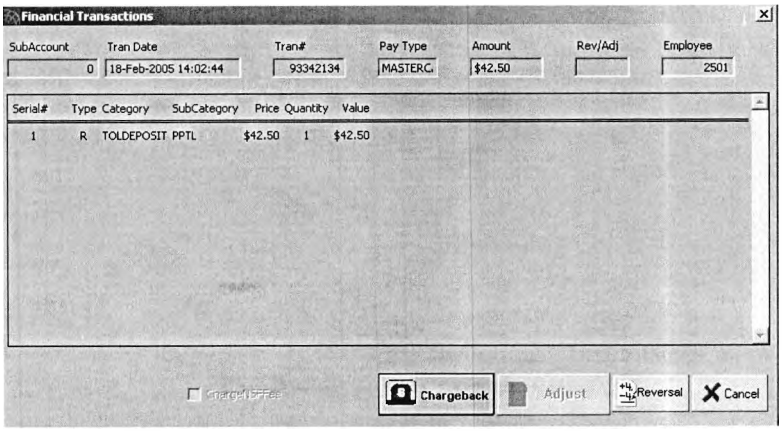
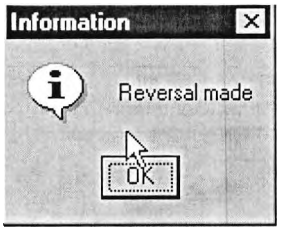
IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Field Name	Description and Features
Account Balance	The funds remaining in the customer account. *DISPLAY ONLY*
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private Accounts – First Name, Last Name, and M.I. • Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. *DISPLAY ONLY*
Acct Open Date	The date that the account is opened. Defaults to the current system date and cannot be edited. *DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
Category	The category of the payment reversal. *DROP-DOWN LIST*
End Date	The ending date range for the reversal.
Financial Status	The financial status of the customer's VECTOR account. *DISPLAY ONLY*
Pay Type	The type of payment to be reversed. *DROP-DOWN LIST*
Start Date	The starting date range for the reversal.
Sub Category	The sub category for the payment type being reversed. *DROP-DOWN LIST*
Type	The reversal type. *DROP-DOWN LIST*
Command Buttons	
Find	Finds and retrieves the desired records based on the search criteria entered.

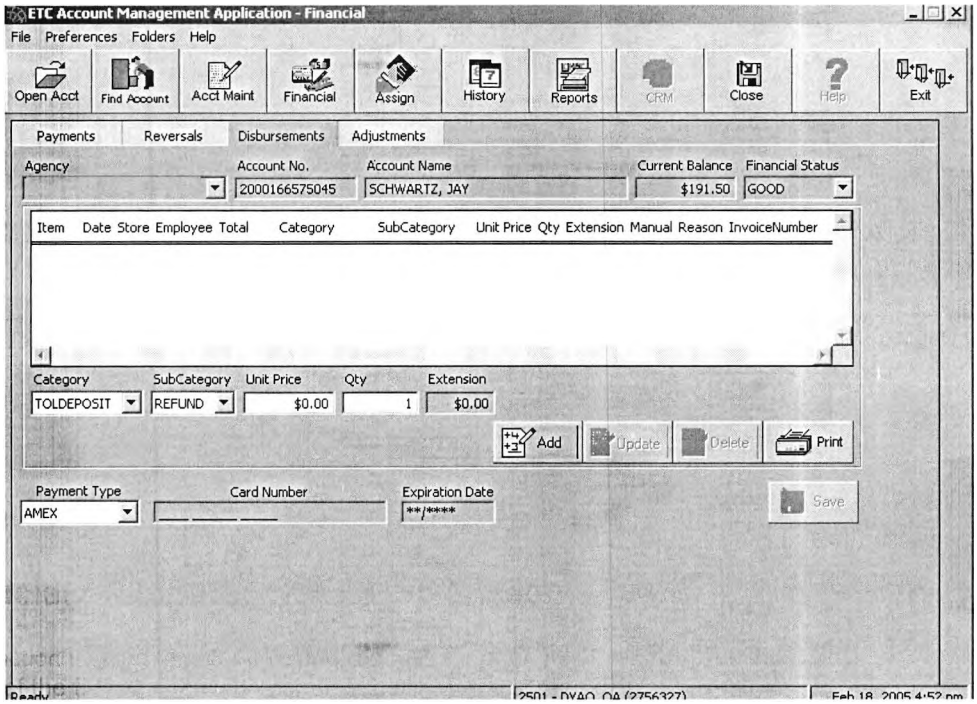
REVERSE A PAYMENT

To reverse a payment, complete the following steps:

Step	Action
1	Access the Financial - Reversals tab screen.
2	All recent payments for the account appear in the white section of this screen. To reverse a payment, double-click the appropriate row to select the payment you want to reverse. The following reversal pop-up screen displays.  Click the Reversal button to complete the reversal. The following confirmation message displays and you go back to the original Reversal screen. Verify that the account balance has been adjusted. 

Financial – Disbursements Tab Screen

This function is used to enter a refund request. To open this function, click the *Disbursements* tab at the top of the financial main screen and the following screen displays.



Access Financial – Disbursements

To access the Financial – Disbursements tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Financial button. The Financial function and sub-function tabs display. Screen focus is on the Payments tab.
3	Click on the Disbursements tab.

FIELD DESCRIPTIONS: FINANCIAL – DISBURSEMENTS

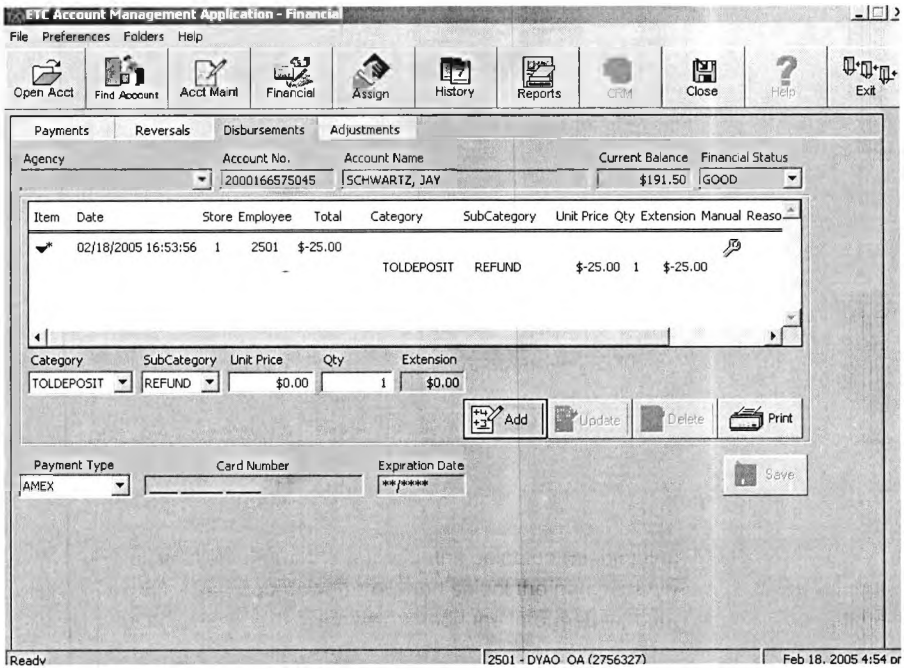
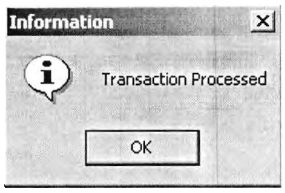
IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Field Name	Description and Features
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private Accounts – First Name, Last Name, and M.I. • Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. *DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
Card Number	The account number of the credit card being used.
Category	The category for which the money is being disbursed. *DROP-DOWN LIST*
Current Balance	The current balance on the account. *DISPLAY ONLY*
Expiration Date	The expiration date of the credit card being used.
Extension	Unit price times quantity. *DISPLAY ONLY*
Financial Status	The financial status of the customer's VECTOR account. *DISPLAY ONLY*
Payment Type	The method of payment. *DROP-DOWN LIST*
Qty	The number of units the amount is being disbursed for.
Sub Category	The sub category for which the money is being disbursed. *DROP-DOWN LIST*
Unit Price	Price per unit being paid for.
Command Buttons	
Add	Adds the disbursement information to the account record
Delete	Deletes the selected (highlighted) information displayed in the array window
Print	Prints the disbursement report.
Save	Saves the information to the account record.
Update	Updates the account with disbursement information.
Find	Finds and retrieves the desired records based on the search criteria entered.

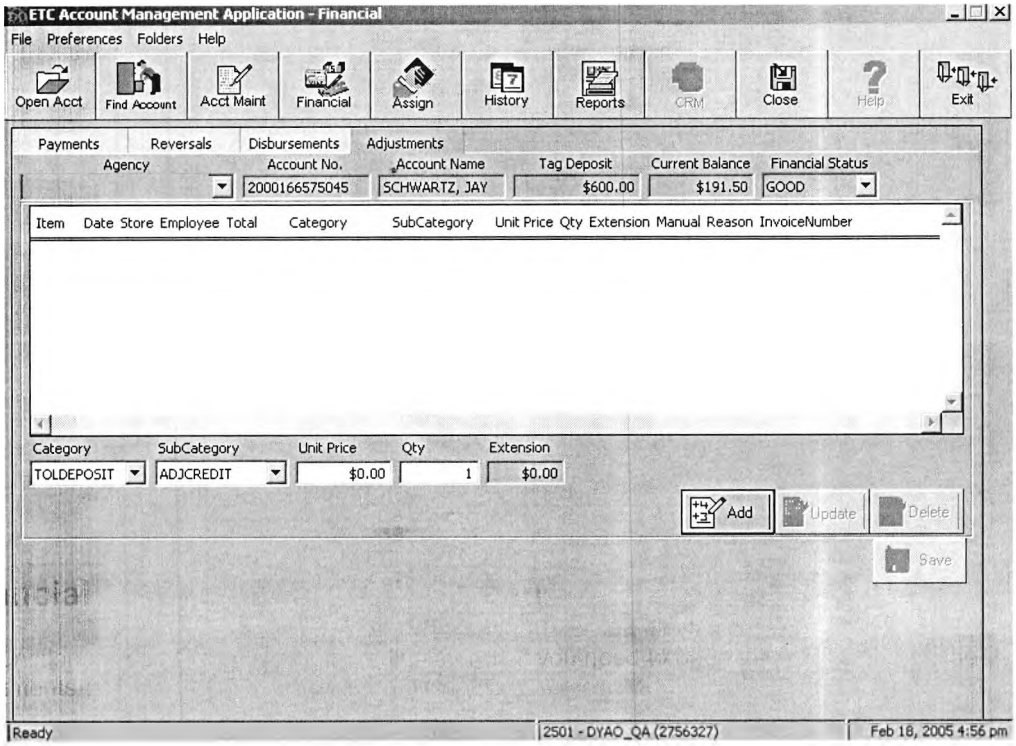
MAKE DISBURSEMENTS TO AN ACCOUNT

To make a disbursement to an account, complete the following steps:

Step	Action
1	Click the Financial button on the ETC Account Management Application toolbar. The Financial screen displays. Cursor focus is in the Payments Tab.
2	Click the Disbursements tab folder. The Disbursements screen displays.
3	Click the drop-down arrow in the Category field and select a category. Click the drop-down arrow in the SubCategory field and select the appropriate sub category (if applicable). Click in the Unit Price field and enter the price for the selected (highlighted) category. Click the Payment Type field drop-down arrow and select the payment type. Click the *Add* button below the Extension field to add the information to the white section of the screen. The completed screen displays after you click the Add button.  Highlight the item in the white section of the screen and click the *Save* button towards the bottom of the screen. The Transaction Processed pop-up box displays. Press the *OK* button.  Click the Close button in the toolbar if done. You are returned to the ETC Account Management toolbar screen.

Financial – Adjustments Tab Screen

This function is used to make account adjustments. If you need to open this function, click the Adjustments tab and the following screen displays.



Access Financial – Adjustments

To access the Financial – Adjustments tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Financial button. The Financial function and sub-function tabs display. Screen focus is on the Payments tab.
3	Click on the Adjustments tab.

FIELD DESCRIPTIONS: FINANCIAL – ADJUSTMENTS

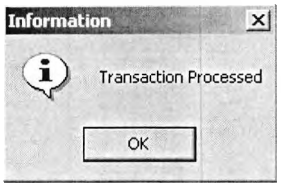
IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Field Name	Description and Features
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private Accounts – First Name, Last Name, and M.I. • Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. *DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
Category	The category of the payment to be adjusted. *DROP-DOWN LIST*
Current Balance	The current account balance. *DISPLAY ONLY*
Extension	Unit price times quantity. *DISPLAY ONLY*
Financial Status	The financial status of the customer's VECTOR account. *DISPLAY ONLY*
Qty	The number of items the adjustment is being made on.
SubCategory	The sub category of the payment being adjusted. *DROP-DOWN LIST*
Tag Deposit	The amount due for all tags (devices) requested for the account. This value defaults from the Open Account – Payments tab screen and is based on the account plans set up on the Open Account – Plans tab screen. *DISPLAY ONLY*
Unit Price	The price for each unit being adjusted.
Command Buttons	
Add	Adds the adjustment information to the account record
Delete	Deletes the selected (highlighted) information displayed in the array window
Save	Saves the adjustment information to the account record.
Update	Updates the account with newly created information (not always saved until you close the subfunction).

MAKE AN ADJUSTMENT

To make an adjustment, complete the following steps:

Step	Action
1	Click the drop-down arrow in the Category field and select the appropriate category. Click the drop-down arrow in the SubCategory field and select the appropriate sub category (if applicable). Click the Unit Price field and enter the price for the selected (highlighted) category (if this does not populate with the price automatically). Click the Qty field and enter the quantity of the category to be adjusted. Highlight the item in the white section of the screen and click the Save button towards the bottom of the screen. The Transaction Processed pop-up box displays. Click the OK button.  Click the Close button at the top of the screen. You are prompted to save your changes, click the OK button. A pop-up box displays telling you the account has been updated. Click the *OK* button and return to the ETC Account Management screen.

ETC Account Management – Assign Devices

The ETC Assign function is used to assign a device (also called a transponder or tag) to an account after it has been requested. It is also used to report a lost or stolen device. This function is organized into four sub-function groups through which you can:

- Assign devices
- View device information
- Return devices
- Control swapping of devices

Each sub-function is identified by a tab on the Assign screen. Clicking each sub-function tab opens the screen for that sub-function.

Note: A device must have been previously requested through the Open Account or Account Maintenance functions before it can be assigned to an account. Refer to those sections of this guide for more information on requesting a device.

Access the Assign Function

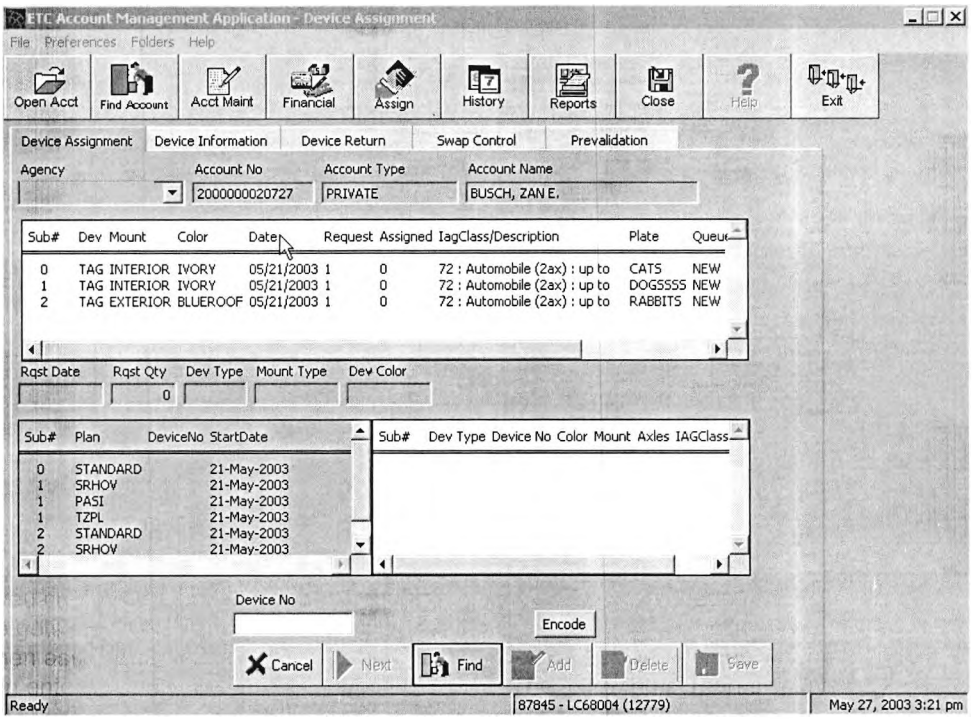
To access the ETC Account Management Assign function, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Assign button. The Assign function and sub-function tabs display with screen focus on the Device Assignment tab.

The following sections describe the process for managing device activity on an account. An example of each Assign sub-function tab screen, field and command button descriptions, and instructions on how to use each sub-function are also included in this section.

Assign – Device Assignment Tab Screen

Before you can assign a device to an account, a device should have been requested The request for a device gets processed and a box of devices is assigned to you. A specific device ID and transponder unit is then assigned to a specific account. Click the *Device Assignment* tab when a pending request has been entered and you want to assign the device. The following screen displays:



ACCESS ASSIGN – DEVICE ASSIGNMENT

To access the Assign – Device Assignment tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Assign button. The Assign screen displays.

FIELD DESCRIPTIONS: ASSIGN – DEVICE ASSIGNMENT

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

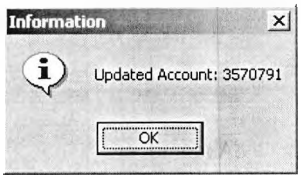
Fields are listed in alphanumeric order, not the order they appear on screen.

Field Name	Description and Features
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private Accounts – First Name, Last Name, and M.I. • Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. *DISPLAY ONLY*
Account Type	The type of customer account. Defaults from the Account Type field on the Open Account – Demographics tab screen. *DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
Dev Color	The color of the device assigned to the vehicle. Defaults from the Device Characteristics field. *DISPLAY ONLY*
Dev Type	The type of device assigned to the vehicle. Defaults from the Device Characteristics field. *DISPLAY ONLY*
Device No.	The number assigned to the device by the manufacturer. *DISPLAY ONLY*
Device Start Date	The date the device was activated. *DISPLAY ONLY*
Mount Type	The type of mounting for the device requested, interior or exterior. Defaults from the Device Characteristics field. *DISPLAY ONLY*
Rqst Date	The date the device was requested. *DISPLAY ONLY*
Rqst Qty	The number of devices requested. *DISPLAY ONLY*
Command Buttons	
Add	Adds the device information to the account record
Cancel	Cancels the device assignment process.

Field Name	Description and Features
Delete	Deletes the selected (highlighted) information displayed in the array window
Encode	Used to activate a device.
Find	Calls the Find Account screen.
Next	To go to the next device in the box of tags.
Save	Saves the device assignment information to the account record.
Update	Updates the account with newly created information (not always saved until you close the subfunction).

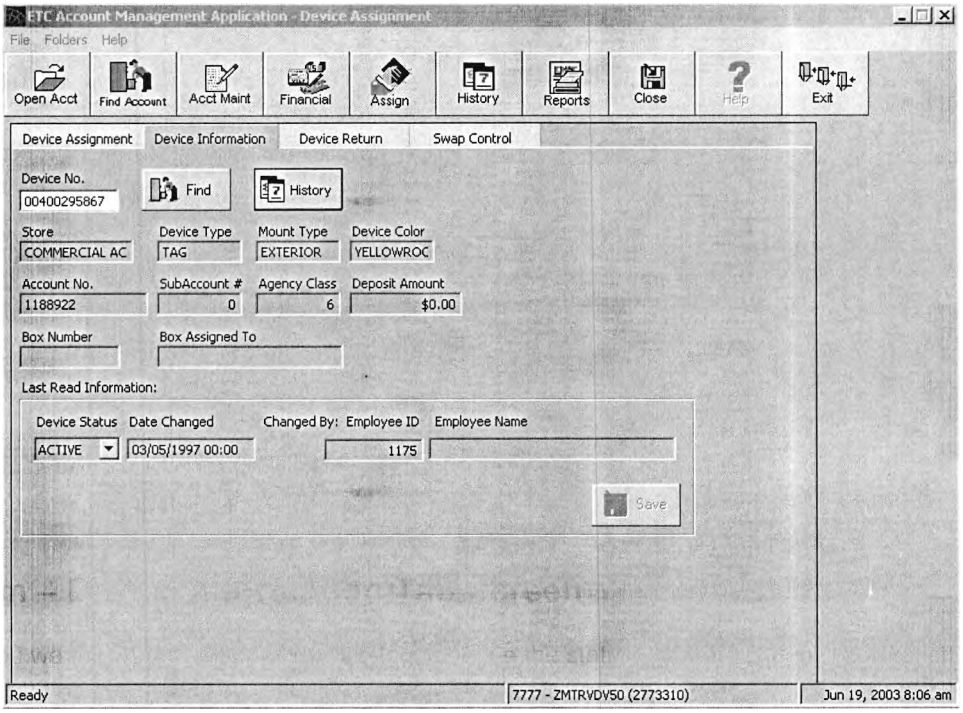
ASSIGN A NEW DEVICE

To assign a device, complete the following steps:

Step	Action
3	Click the Assign button on the ETC Account Management Application toolbar. The Device Assignment screen displays.
4	The Device Assignment tab opens as the default.
5	Click the Find button at the bottom of the screen and the find account/customer screen opens. Complete the search criteria in this screen to pull up the account to which you are assigning the device. The screen above redisplays with the white section of the screen populated. In the white section of the screen, highlight the pending request to which you are assigning a device. Enter the barcode number or scan the barcode that is on the device and the Device No field populates. ***NOTE:*** The device request must match with the agency and device type/color of the physical device being assigned. Click the Add button at the bottom of the screen. Click the Save button at the bottom of the screen and a pop-up box displays, which says, "Device is Assigned." Click the OK button in this box. Click the Close button at the top of the screen. You are prompted to save your changes, click the OK button. A pop-up box displays telling you the account has been updated.  Click the OK button and return to the ETC Account Management screen.

Assign – Device Information Tab Screen

When you want to verify assigned devices and change the status, click the Device Information tab and the following screen displays.



ACCESS ASSIGN – DEVICE INFORMATION

To access the Assign – Device Information tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Assign button. The Assign screen displays.
3	Click the Device Information tab. The Assign – Device Information tab screen displays.

FIELD DESCRIPTIONS: ASSIGN – DEVICE INFORMATION

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

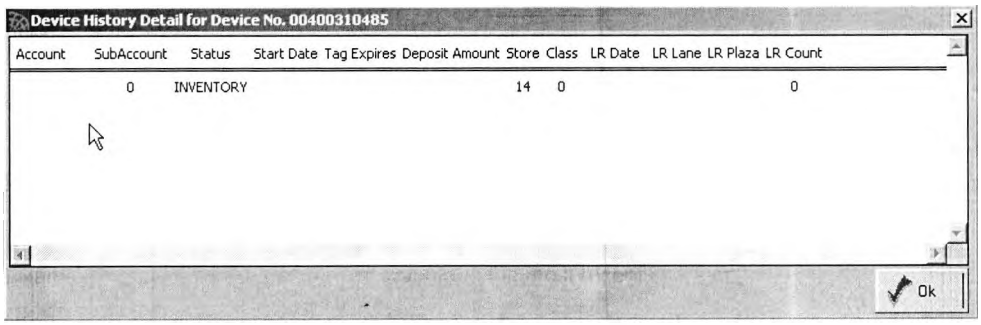
Fields are listed in alphanumeric order, not the order they appear on screen.

Field Name	Description and Features
Device No.	The number assigned to the device by the manufacturer. *DISPLAY ONLY*
Store	The identification number of the agency location where the new account is opened. *DISPLAY ONLY*
Device Type	The type of device assigned to the vehicle. Defaults from the Device Characteristics field. *DISPLAY ONLY*
Mount Type	The type of mounting for the device requested, interior or exterior. Defaults from the Device Characteristics field. *DISPLAY ONLY*
Device Color	The color of the device assigned to the vehicle. Defaults from the Device Characteristics field. *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. *DISPLAY ONLY*
SubAccount #	The subaccount listed for the selected device. *DISPLAY ONLY*
Agency Class	The CTOC/IAG class for the device as designated by the agency. *DROP-DOWN LIST*
Deposit Amount	The dollar amount the customer placed on the account for the device. *DISPLAY ONLY*
Box Number	The number from the box of devices. *DISPLAY ONLY*
Box Assigned To	Employee the box has been assigned to. *DISPLAY ONLY*
Last Read Information	Information about the last time the device was read. *DISPLAY ONLY*
Device Status	The status of the device. *DISPLAY ONLY*

Field Name	Description and Features
Date Changed	The date the device status changed. *DISPLAY ONLY*
Changed By: Employee ID	The employee identification number that made the most recent changes to the account. This identification number is populated by the employee login id. *DISPLAY ONLY*
Employee Name	The name of the employee that made the most recent changes to the device. *DISPLAY ONLY*

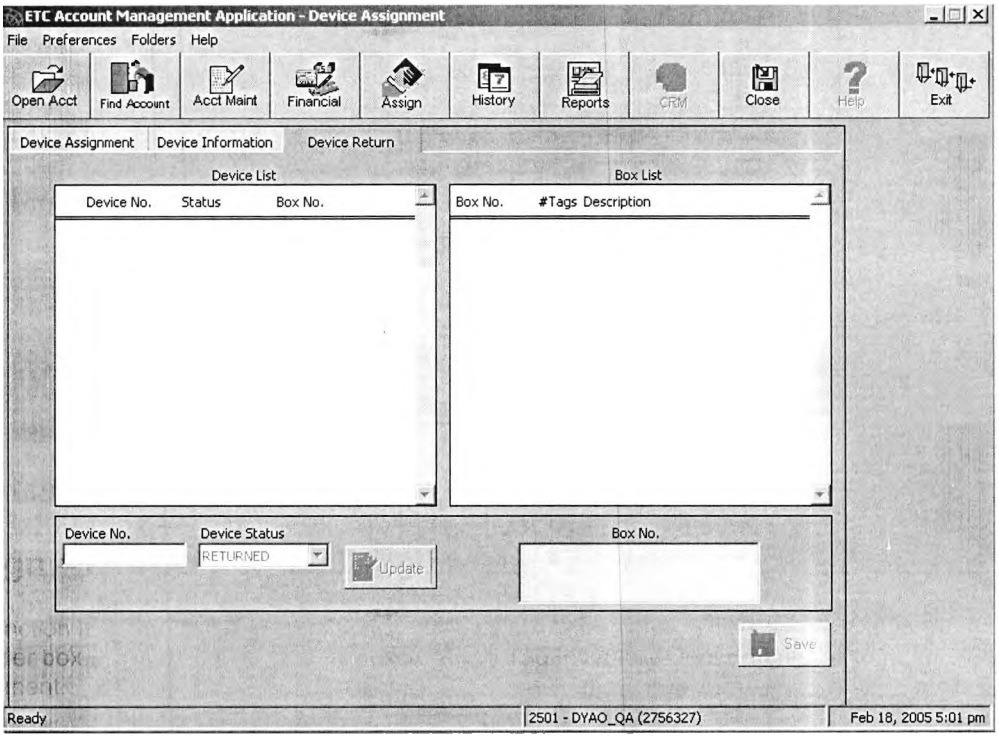
View Device Information

To view device information, complete the following steps:

Step	Action
1	From the Device Information tab. The Assign – Device Information tab screen is still displaying.
2	Click the Device No. field and enter the number of the device you wish to verify. Click the Find button and the screen populates with the information. Click the History button and information concerning the history of the device displays.  Click OK and this will return you to the previous Device Information screen. Click the Close button in the toolbar when you are done. Click No to exit without saving.
3	

Assign – Device Return Tab Screen

This function is the first step in creating inventory out of returned tags. This function is referred to as "straggler box." This screen is primarily used by the Tag Inventory Department and the Tag Swap Department.



Access Assign – Device Return

To access the Assign – Device Return tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Assign button. The Assign screen displays.
3	Click the Device Return tab. The Assign – Device Return tab screen displays.

FIELD DESCRIPTIONS: ASSIGN – DEVICE RETURN

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Field Name	Description and Features
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private Accounts – First Name, Last Name, and M.I. • Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. *DISPLAY ONLY*
Account Type	The type of customer account. Defaults from the Account Type field on the Open Account – Demographics tab screen. *DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
Dev Color	The color of the tag. *DISPLAY ONLY*
Dev Type	The type of device assigned to the vehicle. Defaults from the Device Characteristics field. *DISPLAY ONLY*
Device No.	The number assigned to the device by the manufacturer. *DISPLAY ONLY*
Device Start Date	The date the device became active. *DROP-DOWN LIST*
Mount Type	The type of mounting for the device requested, interior or exterior. Defaults from the Device Characteristics field. *DISPLAY ONLY*

Return a Device

Enter the number of the device that is being returned into the Device No. field.
Select an option from the Device Status drop-down list. Select the status you want to use.
Click Update. The white portion of the screen is automatically populated.
Click Save.

ETC ACCOUNT MANAGEMENT – HISTORY

The ETC History function is used to view historical information about various activities on an account. Account history can also be printed for a permanent hard-copy record. This function is organized into seven sub-function groups through which you can view an account's:

- Financial history,
- Non-financial history,
- Toll history,
- Consolidated Tab
- Device history Tab

Each sub-function is identified by a tab on the History screen. Clicking each sub-function tab opens the screen for that sub-function.

Access the History Function

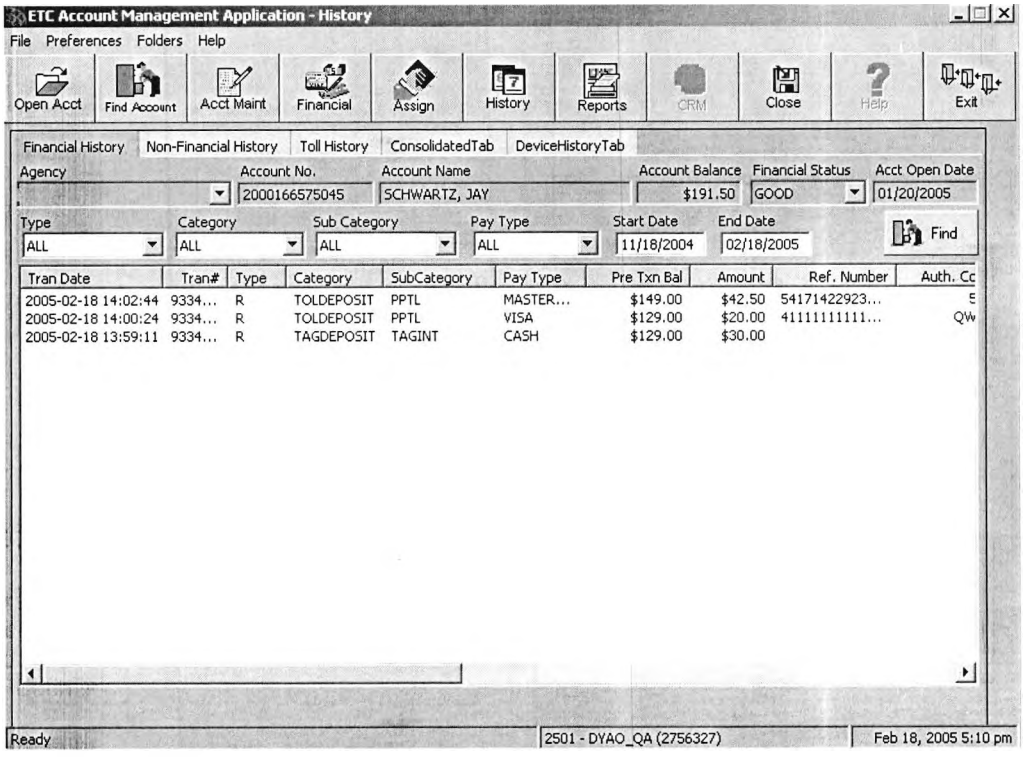
To access the ETC Account Management History function, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the History button. The History function and sub-function tabs display.

The following sections describe the process for viewing a history of account activity. An example of each History sub-function tab screen, field and command button descriptions, and instructions on how to use each sub-function are also included in this section.

History - Financial History Tab Screen

The first tab that opens when you select *History* is the Financial History tab. This tab displays payments, credits, and debits. If you are looking for a specific time frame, you change the Start Date or End Date and select a maximum 18-month range, then click the *Find* button to the right of those fields. Each line shows specific transactions.



Access History – Financial History

To access the History – Financial History tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the Find Accounts button. The Find Customer Account screen displays.
3	Follow the steps outlined in the "Find Customer Account Information" section of this guide to search for and retrieve the account you want to work with.
4	Click the History button. The History screen displays with screen focus on the Financial History tab.

FIELD DESCRIPTIONS: HISTORY – FINANCIAL HISTORY

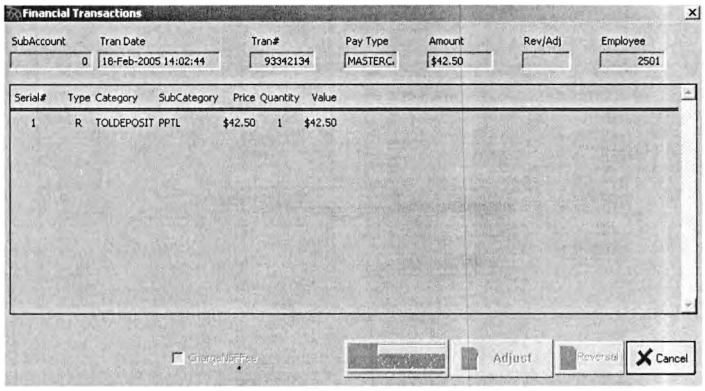
IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Field Name	Description and Features
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private Accounts – First Name, Last Name, and M.I. • Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. *DISPLAY ONLY*
Account Balance	*THE CURRENT BALANCE ON THE ACCOUNT.* *DISPLAY ONLY*
Acct. Open Date	The date the account was opened. *DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
Financial Status	*THE CURRENT FINANCIAL STATUS OF THE ACCOUNT.* *DISPLAY ONLY*
Category	The financial category of the account. *DROP-DOWN LIST*
End Date	The end date in the date range you are viewing history on.
Pay Type	The method of payments on the account. *DROP-DOWN LIST*
Start Date	The start date in the date range you are viewing history on.
Sub Category	the sub category for the financial payment type on the account. *DROP-DOWN LIST*
Type	*THE TYPE OF TRANSACTIONS.* *DROP-DOWN LIST*

VIEW FINANCIAL HISTORY ON AN ACCOUNT

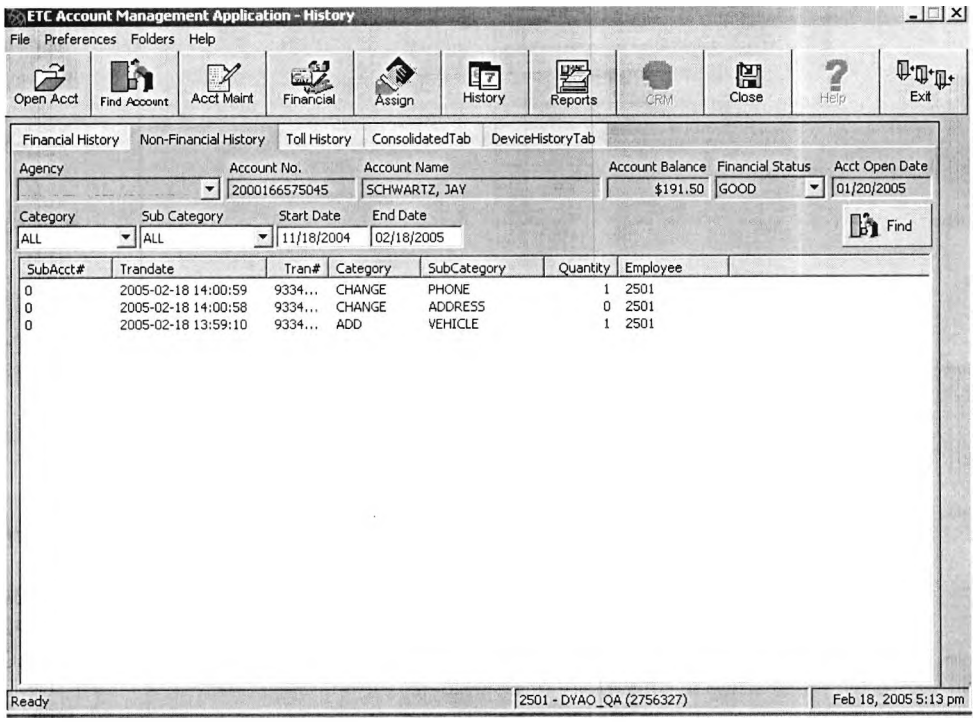
If you want to see additional information (such as adjustments made to the account) double-click the rows in the white section of the screen and the following screen displays.



If there were reversals, adjustments or non-sufficient funds (NSF) fees related to the account, they appear in this screen.
Click the *Cancel* button when you are done viewing this screen and return to the Financial History screen.
Click the *Close* button at the top of the screen when done viewing history.

History - Non-Financial History Tab Screen

The Non-Financial History tab displays transactions that do not have an associated cost. Any changes to an account, display here. If you are looking for a specific time frame you can change the Start Date or End Date and select a maximum 18-month range, and then click the *Find* button to the right of those fields. The following summary screen displays with the white section of the screen populated.



ACCESS HISTORY – NON-FINANCIAL HISTORY

To access the History – Non-Financial History tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the History button. The History screen displays with screen focus on the Financial History tab.
3	Click the Non-Financial History tab. The Non-Financial History tab screen displays.

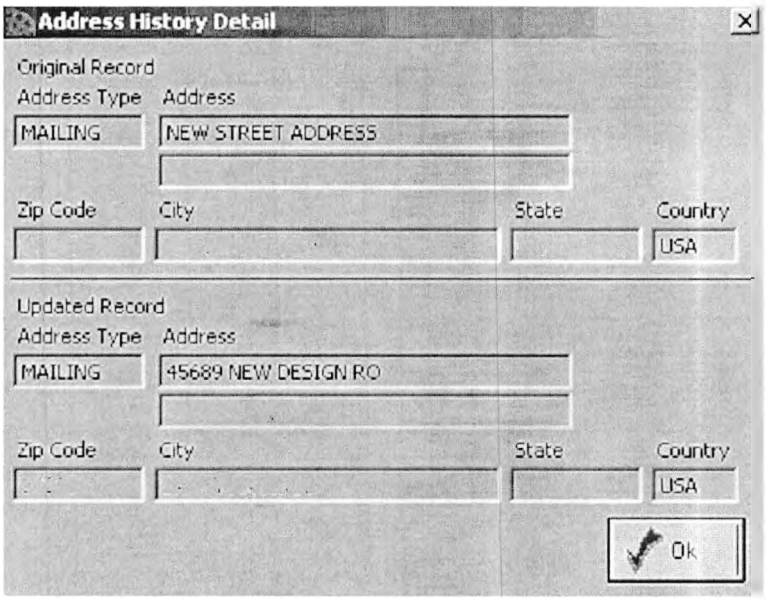
FIELD DESCRIPTIONS: HISTORY – NON-FINANCIAL HISTORY

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

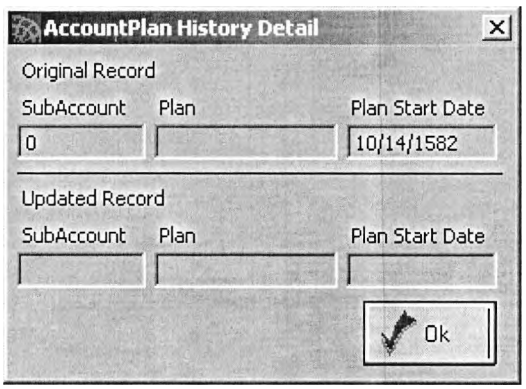
Fields are listed in alphanumeric order, not the order they appear on screen.

Field Name	Description and Features
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private Accounts – First Name, Last Name, and M.I. • Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. *DISPLAY ONLY*
Account Balance	The balance on the account. *DISPLAY ONLY*
Acct. Open Date	The date the account was opened. *DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
Financial Status	The financial status of the account. *DISPLAY ONLY*
Category	The payment categories on the account. *DROP-DOWN LIST*
End Date	The end date of the date range for viewing history.
Start Date	The start date of the date range for viewing history.
Sub Category	The sub category for the category payment type. *DROP-DOWN LIST*

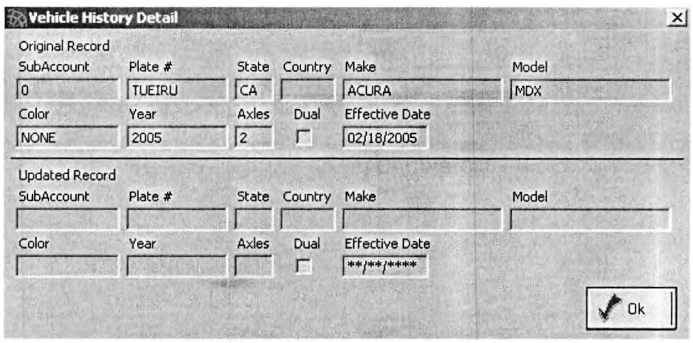
The following detailed information screen displays if you double-click a row that contains the subcategory Address.



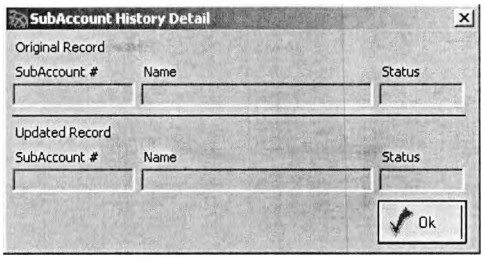
The following detail information screen displays if you double-click a row which contains subcategory ACCTPLANS.



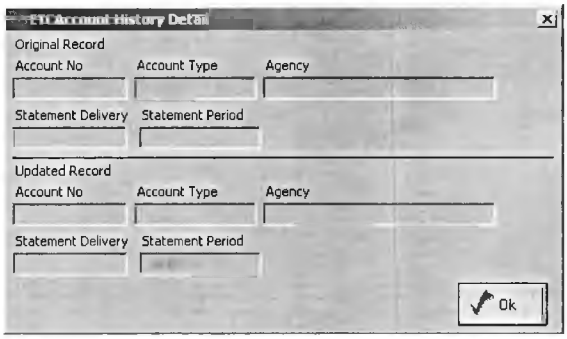
If you double-click a row, which contains subcategory Vehicle, the following detail information screen displays.



If you double-click a row, which contains subcategory SubAccount, the following detail information screen displays:



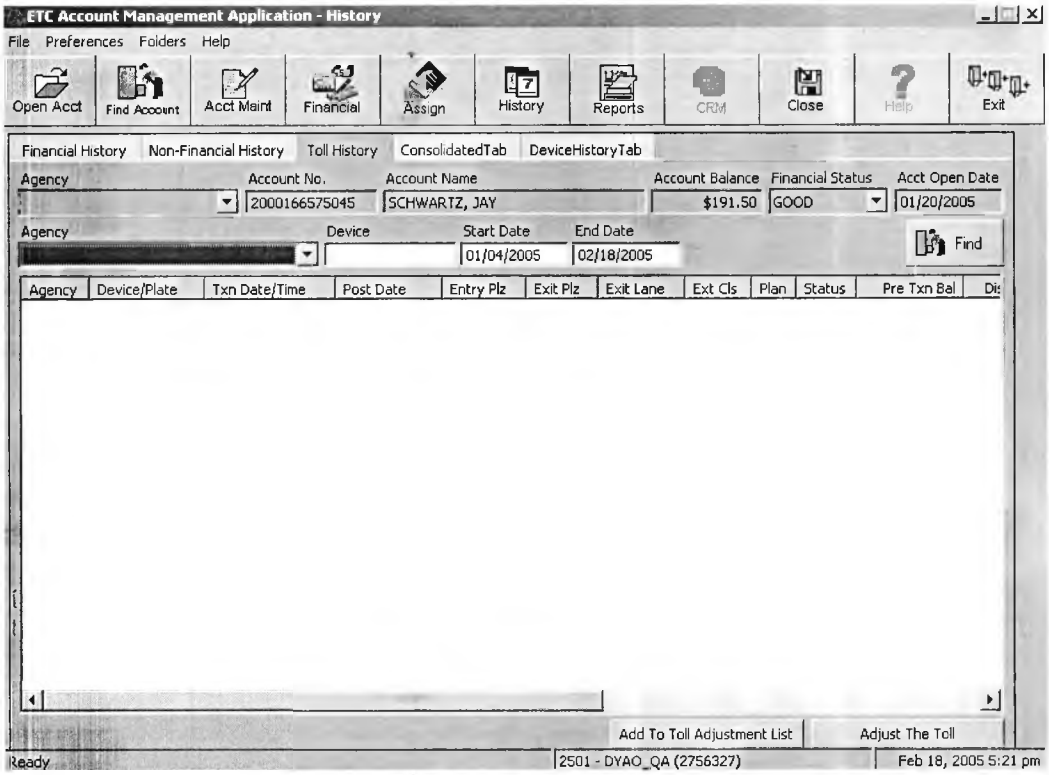
If you double-click a row, which contains subcategory ETCACCOUNT, the following detail information screen displays.



Clicking the OK button on any of the detail screens returns you to the non-financial history summary screen. Click the Close button at the top of the screen when done viewing history and return to the ETC Account Management toolbar.

History – Toll History Tab Screen

This tab displays all tolls posted to an account. If you are looking for a specific time frame, you can change the Start Date or End Date, select a maximum six-month range, and then click the Find button to the right of those fields. The Toll History summary screen displays with the white section of the screen populated.



ACCESS HISTORY – TOLL HISTORY

To access the History – Toll History tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the History button. The History screen displays with screen focus on the Financial History tab.
3	Click the Toll History tab. The Toll History tab screen displays.

FIELD DESCRIPTIONS: HISTORY – TOLL HISTORY

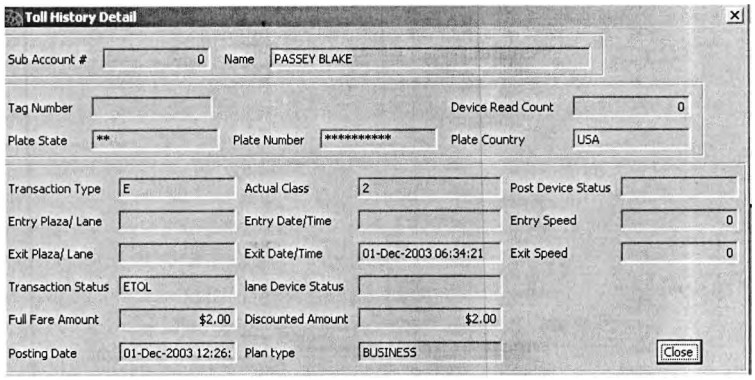
IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Field Name	Description and Features
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private Accounts – First Name, Last Name, and M.I. • Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. *DISPLAY ONLY*
Account Balance	The balance on the account. *DISPLAY ONLY*
Acct. Open Date	The date the account was opened. *DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
Financial Status	The financial status of the account. *DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR. *DROP-DOWN LIST*
End Date	The end date in the date range for viewing history.
Device	The device number.
Start Date	The start date in the date range for viewing history.

If you are looking for a particular tag number associated with the account, you can enter the tag number in the Device field and click the Find button. The horizontal scroll bar at the bottom of the screen indicates there is more information to the right of the screen. The vertical scrollbar at the right of the screen indicates there are more records than can fit on the screen.

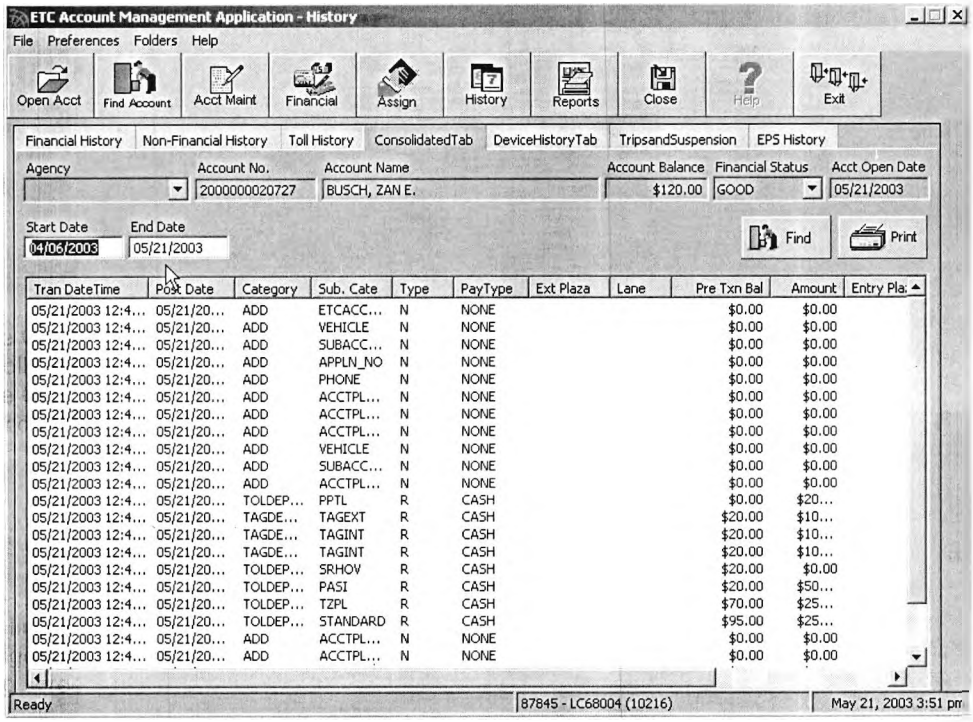
If you want to see detailed information regarding a particular transaction, double-click the row that contains the transaction (in the white section of the screen) and the following screen displays.



Click the Close button at the bottom of the screen when you are done reviewing the detail and return to the Toll History summary screen.
Click the Close button at the top of the screen when you are done viewing history and return to the ETC Account Management main screen.

History – Consolidated Tab Screen

This tab displays Financial, Non-Financial and Toll History combined into one. If you are looking for a specific time frame, you can change the Start Date or End Date, select a maximum six-month range (this range is set by VECTOR), and then click the Find button to the right of those fields and the following screen displays.



ACCESS HISTORY – CONSOLIDATED

To access the History – Consolidated tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the History button. The History screen displays with screen focus on the Financial History tab.
3	Click the Consolidated tab. The Consolidated tab screen displays.

FIELD DESCRIPTIONS: HISTORY – CONSOLIDATED

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

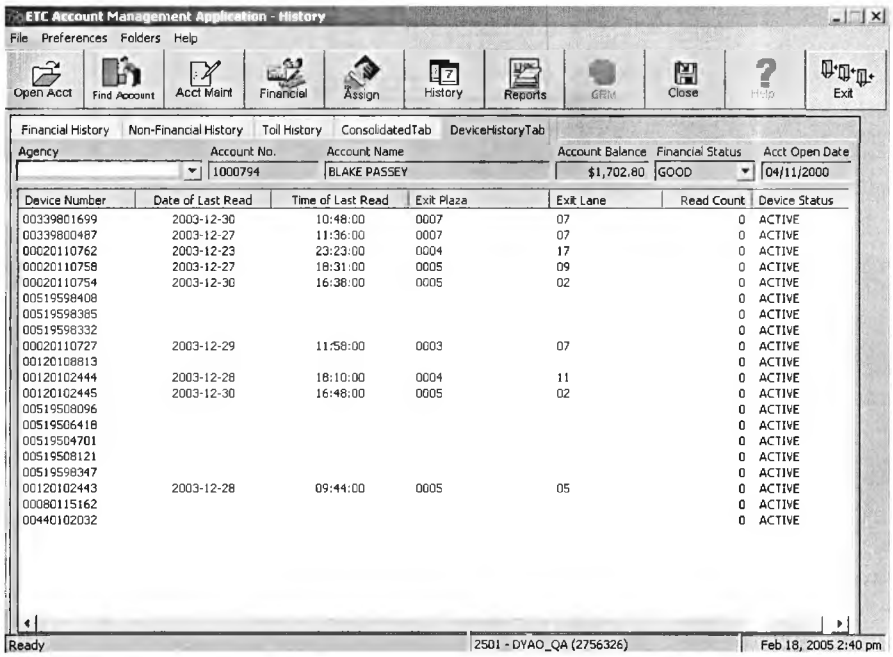
Fields are listed in alphanumeric order, not the order they appear on screen.

Field Name	Description and Features
Account Balance	Balance on the account. *DISPLAY ONLY*
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private Accounts – First Name, Last Name, and M.I. • Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. *DISPLAY ONLY*
Acct. Open Date	Date the account was opened. *DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
Financial Status	The financial status of the account. *DISPLAY ONLY*
End Date	The end date in the date range for viewing history.
Start Date	The start date in the date range for viewing history.

If you want a permanent record of the combined history, click the Print button to the right of the Find button and the screen display prints.

History – Device History Tab Screen

The Device History tab displays information on the last time the tag was read as well as the device status.



ACCESS HISTORY – DEVICE HISTORY

To access the History – Device History tab screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the History button. The History screen displays with screen focus on the Financial History tab.
3	Click the Device History tab. The Device History tab screen displays.

FIELD DESCRIPTIONS: HISTORY – DEVICE HISTORY

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

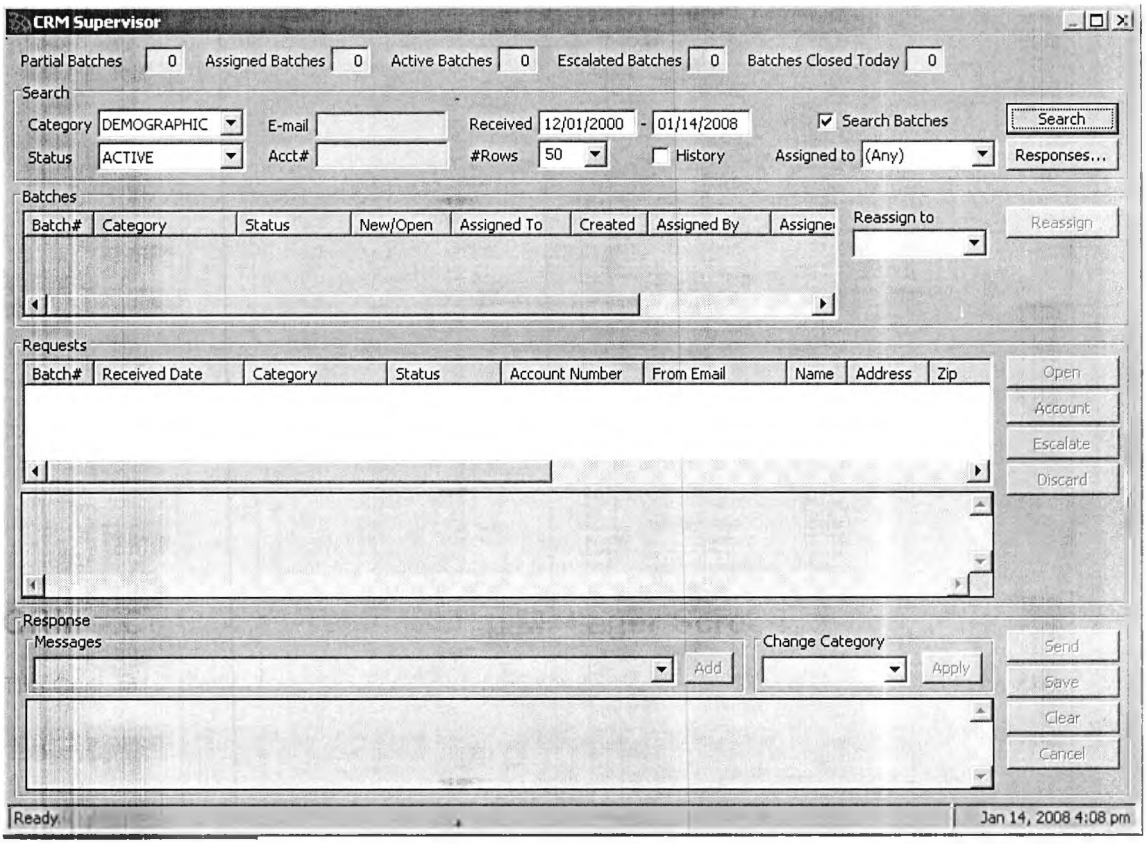
Field Name	Description and Features
Account Balance	Balance on the account. *DISPLAY ONLY*
Account Name	The primary customer's name defaults from the Demographics tab screen fields as follows: • Private Accounts – First Name, Last Name, and M.I. • Business Accounts – Company Name *DISPLAY ONLY*
Account No.	The identification number automatically assigned to the account by VECTOR. *DISPLAY ONLY*
Acct. Open Date	Date the account was opened. *DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR. *DISPLAY ONLY*
End Date	The end date in the date range for viewing history.
Financial Status	The financial status of the account. *DISPLAY ONLY*
Start Date	The start date in the date range for viewing history.

ETC ACCOUNT MANAGEMENT – REPORTS

For information about and instructions on how to use the VECTOR report system, refer to Chapter 8 of this guide.

CRM – Customer Relationship Manager Screen

The Customer Relationship Manager screen displays information on the status of batch processing.



ACCESS CRM– CRM SUPERVISOR

To access the CRM – CRM Supervisor screen, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the ETC Account Management icon. The ETC Account Management Application function toolbar displays.
2	Click the CRM button. The CRM Supervisor screen displays. The screen displays in 4 major sections: The Search section at the top for entering search criteria The Batches section where the results of the search are displayed The Requests section where the information about the batch is displayed The Response Messages section where any responses will display. Also used to create a response.

FIELD DESCRIPTIONS: CRM – CRM SUPERVISOR

IMPORTANT!: Since agencies can configure VECTOR business rules in a variety of ways and at different times, some fields, field characteristics, and options may appear differently on your system than as described in this guide. Please see your supervisor for more information.

Fields are listed in order, based on the section of the screen they relate to.

Field Name	Description and Features – Search Section
Category	Category of batch items to search for. ***DROP DOWN LIST***
Status	The status of the batch to search for (e.g. open, closed, etc.) ***DROP DOWN LIST***
E-Mail	The email address associated with certain selection criteria. ***DISPLAY ONLY***
Received	Start and end date for batches to be queried. ***FILL IN FIELD***
# Rows	The number of rows to display. ***DROP DOWN LIST***
History	Whether or not history will display. ***CHECK BOX***
Search Batches	Whether or not batches will be searched. ***CHECK BOX***
Assigned To	The name of the CSR the batch or correspondence was assigned to. ***DROP DOWN LIST***

Field Name	Description and Features – Batches Section
Batch #	***DISPLAY ONLY***
Category	***DISPLAY ONLY***
Status	***DISPLAY ONLY***
New/Open	***DISPLAY ONLY***
Assigned To	***DISPLAY ONLY***
Created	***DISPLAY ONLY***
Assigned By	***DISPLAY ONLY***
Reassign To	Used to assign a batch to another staff member once a record has been selected. ***DROP DOWN LIST***

Field Name	Description and Features – Requests Section
Batch #	***DISPLAY ONLY***
Received Date	***DISPLAY ONLY***
Category	***DISPLAY ONLY***
Status	***DISPLAY ONLY***
Account Number	***DISPLAY ONLY***
From Email	***DISPLAY ONLY***
Name	***DISPLAY ONLY***
Address	***DISPLAY ONLY***

Zip	*DISPLAY ONLY*

Field Name	Description and Features – Response Section
Messages	*DROP DOWN LIST*
Change Category	*DROP DOWN LIST*

CRM SUPERVISOR FUNCTIONS

To perform CRM Supervisor functions, complete the following steps:

Step	Action
1	Click the CRM button on the ETC Account Management Application toolbar. The CRM Supervisor screen displays.
2	Click on the drop-down arrow in the **Category** field and select the type of search to be conducted.
3	Click on the drop-down arrow in the **Status** field and select the status for the search to be conducted.
4	Click in the **Received** start date field and key in the beginning date for the search.
5	Click in the **Received** end date field and key in the ending date for the search.
6	Change the number of rows to be displayed if desired.
7	Check the **History** field check box if history is to be displayed.
8	Leave the **Search Batches** field checked if searching for batches.
9	Click on the drop-down arrow in the **Assigned To** field and select the appropriate search criteria.
10	Click on the Search button to populate the rest of the screen.
11	If you want to reassign a batch click on the row for the batch to be reassigned and then click on the drop-down arrow in the **Reassign To** field at the right of the screen to select staff to reassign the batch to and click the Reassign button on the right.
12	The Requests section of the screen allows you to highlight a record and Open it, Escalate it, Discard it or see Account information.
13	The Response section of the screen allows for a reply to requests be sent. Click the drop-down arrow in the **Messages** field and select a message from the list.
14	Click on the Add button to the right of the field to add the message to the screen area below the field.
15	Click on the drop –down button in the **Change Category** field if you want to change the category for the message.
16	Click the Send button to the right to send the message to the batch selected above.
17	Click the Save button to save the message with the batch.
18	Click the Clear button to delete the message.
19	Click the Cancel button to cancel the response.
20	Click the close button on the far right of the toolbar when done. This will return you to the Account Management Toolbar.
21	Click the Exit icon on the toolbar to exit the function and return to the main VECTOR screen.

CHAPTER 4 - ADDITIONAL SYSTEM FUNCTIONS

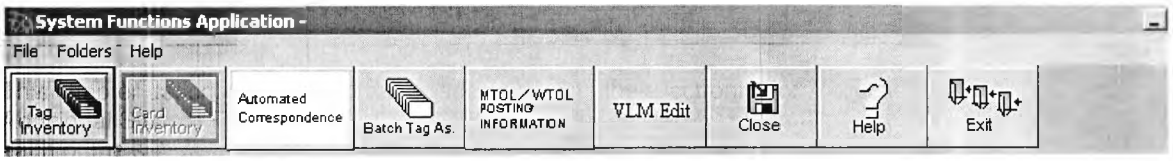
This chapter describes the processes associated with the Electronic Toll Collection (ETC) Additional System Functions subsystem. It also includes step-by-step instructions on how to use each of the subsystem functions.

SUBSYSTEM FUNCTIONS

The ETC Additional System Functions subsystem is organized by functions that are used for tag inventory, automated correspondence and batch tag assignments. With the ETC Additional System Functions subsystem, you can perform specific functions such as:

- Maintain Tag inventory
- Generate Automated correspondence
- Create Batch tag assignments

The functions are represented by buttons on the ETC Additional System Functions Application toolbar. The toolbar also includes buttons used to close function screens, open online help, and exit the VECTOR Application entirely. To initiate each function, click the corresponding button on the toolbar.

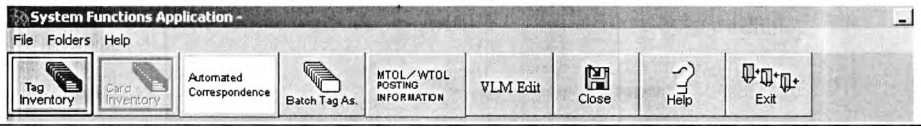


SUB-FUNCTIONS

Each function within the ETC Additional System Functions subsystem is managed through sub-function screens that are opened from tabs located under the toolbar. The sub-function tabs that display vary depending on which main function was selected (highlighted).

ACCESS THE SUBSYSTEM

To access the ETC Additional System Functions subsystem, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the Additional System Functions icon.
	The ETC Additional System Functions toolbar displays. 

ETC ADDITIONAL SYSTEM FUNCTIONS – TAG INVENTORY

The ETC Tag Inventory function is used to capture and receive purchase orders, check in or out boxes of tags, ship and receive tags and place straggler tags in a box. Clicking each sub-function tab opens the screen for that sub-function. The five sub-functions are:

- Capture a purchase order
- Receive a purchase order
- Check in or out boxes of tags
- Ship and receive tags
- Place straggler tags in a box

ACCESS THE TAG INVENTORY FUNCTION

To access the ETC Additional System Functions Tag Inventory function, complete the following steps:

Step	Action
1	From the VECTOR main menu screen click the ETC Additional System Functions icon. The Tag Inventory Application toolbar displays.
2	Click the Tag Inventory button. The Tag Inventory function and sub-function tabs display. Screen focus is on the Purchase Order Capture tab.

FIELD DESCRIPTIONS: TAG INVENTORY – PURCHASE ORDER CAPTURE

IMPORTANT!: Since agencies can configure VECTOR in a variety of ways and at different times, some fields, field characteristics and options may appear differently on your system than as described in this guide. Please see your Supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Tag Inventory – Purchase Order Capture/Add	
Field Name	**Description, Format, and Features**
Order No.	A unique order number for this purchase order.
Agency	The name of the business entity that submitted the purchase order. *DROP DOWN LIST*
Ship To Location	*DROP DOWN LIST*
Status	*DROP DOWN LIST*
PO Type	*DROP DOWN LIST*
Total Ordered	*DISPLAY ONLY*
Order Amount	*DISPLAY ONLY*
Total Received	*Display Only*
User	*Display Only*
Order Date	*DISPLAY ONLY*

PURCHASE ORDER CAPTURE/ADD

To add a purchase order, complete the following steps:

Step	**Action**
1.	Access the Tag Inventory – Purchase Order Capture tab screen.
2.	Enter a unique order number in the Order No. field.
3.	Click the drop-down arrow in the Agency field and select the appropriate agency from the list.
4.	Click the drop-down arrow in the Ship To Location field and select the appropriate ship to location from the list.
5.	Leave the Status field as New.
6.	Click the drop-down arrow in the PO Type field and select the appropriate PO type from the list.

Step	Action
7.	Click the Add button at the bottom of the screen and the purchase order appears in the white section of the screen at the end of the list.
8.	Highlight the new purchase order in the white section of the screen and the *Edit* button (located above the **Order No.** field) becomes enabled.
9.	Click the *Edit* button and the following screen appears:
10.	Click the drop-down arrow in the **Model Number** field and select the appropriate model from the list.
11.	Click the **Quantity** field and enter the quantity of tags (usually in multiples of 50).
12.	Leave the Status selection at new.
13.	Click the **Start Device Nbr.** field and enter the next available 11-digit number. Press the Tab key on the keyboard to automatically populate the **End Device Nbr.** field (calculated based on starting number and quantity of tags).
14.	Click the drop-down arrow in the Tag Type Bit 1 field and select the appropriate type from the list.

Step	Action
15.	Click the drop-down arrow in the **Tag Type Bit 2 & 3** field and select the appropriate type from the list.
16.	Leave the *Commissioned* radio button selection at the default *Yes*.
17.	Click the drop-down arrow in the **Vehicle Class** field and select the appropriate class from the list.
18.	Click the drop-down arrow in the **Revenue Type** field and select the appropriate revenue type from the list.
19.	Click the *Add* button at the bottom of the screen and the white section of the screen populates with the information.
20.	Click the *OK* button at the bottom of the screen.
21.	Highlight the line item in the white section of the screen and click the *Update* button at the bottom of the screen.
22.	Click the *Save* button at the bottom of the screen.
23.	A message box pops up with the "Saved Information Successfully" message on it.
24.	Click the *OK* button on the box and return to the Purchase Order Capture screen.

ACCESS THE TAG INVENTORY – PURCHASE ORDER RECEIVE FUNCTION

To access the ETC Additional System Functions Tag Inventory function, complete the following steps:

Step	Action
1	From the VECTOR main menu screen click the ETC Additional System Functions icon. The Tag Inventory Application toolbar displays.
2	Click the Tag Inventory button. The Tag Inventory function and sub-function tabs display. Screen focus is on the Purchase Order Capture tab.
3	Click the Purchase Order Receive tab to activate the Purchase Order Receive function.

FIELD DESCRIPTIONS: TAG INVENTORY – PURCHASE ORDER RECEIVE

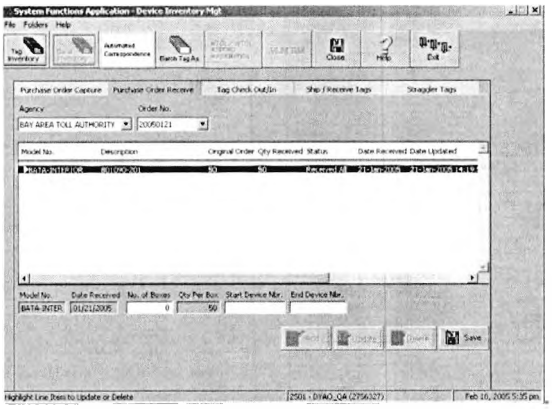
IMPORTANT!: Since agencies can configure VECTOR in a variety of ways and at different times, some fields, field characteristics and options may appear differently on your system than as described in this guide. Please see your Supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

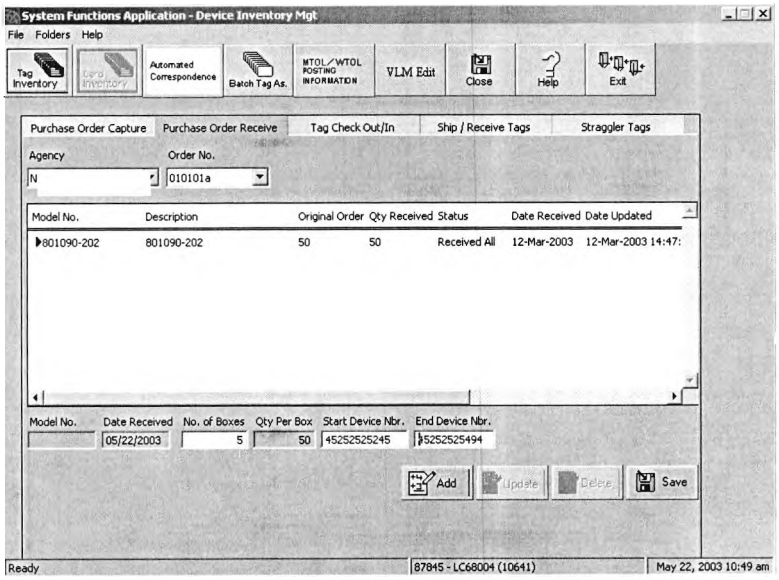
Tag Inventory – Purchase Order Capture/Add	
Field Name	**Description, Format, and Features**
Agency	The name of the business entity that is using VECTOR. *DROP DOWN LIST*
Date Received	*DISPLAY ONLY*
End Device No.	The last device number received as part of the purchase order.
Status	*DROP DOWN LIST*
Ship To Location	*DROP DOWN LIST*
Total Ordered	*DISPLAY ONLY*
Status	*DISPLAY ONLY*

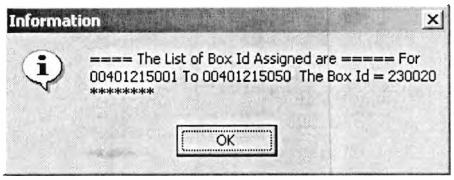
PURCHASE ORDER RECEIVE

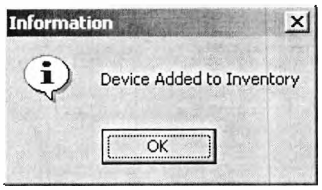
To receive a purchase order, complete the following steps:

Field Name	**Description, Format, and Features**
1.	Access the Tag Inventory – Purchase Order Receive tab screen The following screen displays: 
2.	Click the down arrow in the **Agency** field and select the agency.

Field Name	Description, Format, and Features
3.	From the drop-down menu in the **Order No.** field and select the order number. The white section of the screen populates with the requested data. The following screen displays:
4.	Enter the number of boxes of devices you have received in the **No. of Boxes** field.
5.	Click the **Start Device Nbr.** field and enter the starting device number. The **End Device Nbr.** field will automatically populate with the end number.
6.	Click the *Add* button at the bottom right of the screen.
7.	Highlight the record in the white section of the screen and click the *Save* button at the bottom right of the screen. The following message box pops up. Note that the number of box Ids should equal the number of boxes.
8.	7. Click the *OK* button in this box and the following message appears.
9.	Click the *OK* button in this box and return to the Purchase Order Receive screen.

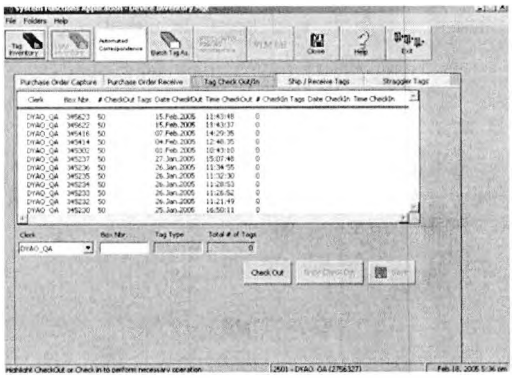






ACCESS THE TAG INVENTORY FUNCTION

To access the ETC Additional System Functions Tag Inventory function, complete the following steps:

Step	Action
1	From the VECTOR main menu screen click the ETC Additional System Functions icon. The Tag Inventory Application toolbar displays.
2	Click the Tag Inventory button. The Tag Inventory function and sub-function tabs display. Screen focus is on the Purchase Order Capture tab.
3	Click the Tag Check Out/In tab to activate the Tag Check Out/In function. The following screen displays: 

FIELD DESCRIPTIONS: TAG INVENTORY – TAG CHECK OUT/IN

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Fields are listed in alphanumeric order, not the order they appear on screen.

Tag Inventory – Purchase Order Capture/Add	
Field Name	**Description, Format, and Features**
Box Nbr.	The box number that appears on the label of the box containing the devices.
Clerk	*DROP DOWN LIST*
Tag Type	***DISPLAY ONLY***
Total # of Tags	***DISPLAY ONLY***

TAG CHECK OUT

To check out a tag, complete the following steps:

Field Name	Description, Format, and Features
1.	Make sure the clerk number in the Clerk Number field is correct. If not, select the correct number from the Drop Down List.
2.	Enter a box number in the **Box Nbr.** field. This is the box number that appears on the label of the box containing the devices.
3.	After completing the box number field, click the *Check Out* button at the bottom right of the screen. If you need to start over again, click the *Undo Check Out* button at the bottom right of the screen.
4.	When you are done, click the *Save* button at the bottom right of the screen and a "Transaction Saved" message box appears.
5.	Click the *OK* button in the box.

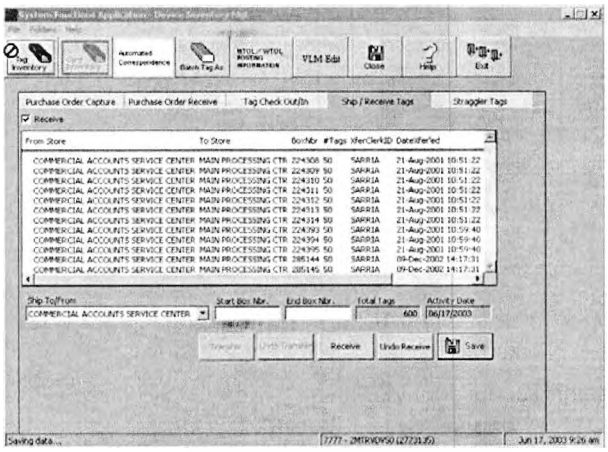
TAG CHECK IN

To check in a tag, complete the following steps:

Field Name	Description, Format, and Features
1.	Highlight the transaction in the white section of the screen and click the *Checkin* button at the bottom of the screen.
2.	Click the *Save* button at the bottom of the screen.
3.	A **Transaction Saved** message box appears.
4.	Click the *OK* button in the box.
5.	You are returned to the Tag Check In/Out screen.

ACCESS THE TAG INVENTORY FUNCTION

To access the ETC Additional System Functions Tag Inventory function, complete the following steps:

Step	Action
1	From the VECTOR main menu screen click the ETC Additional System Functions icon. The Tag Inventory Application toolbar displays.
2	Click the Tag Inventory button. The Tag Inventory function and sub-function tabs display. Screen focus is on the Purchase Order Capture tab.
3	Click the Ship/Receive Tags tab to activate the Ship/Receive Tags function. The following screen displays: 

FIELD DESCRIPTIONS: TAG INVENTORY – SHIP/RECEIVE TAGS

IMPORTANT!: Since agencies can configure VECTOR in a variety of ways and at different times, some fields, field characteristics and options may appear differently on your system than as described in this guide. Please see your Supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Tag Inventory – Purchase Order Capture/Add	
Field Name	**Description, Format, and Features**
Activity Date	*DISPLAY ONLY*
End Box Nbr.	
Ship To/From	*DROP DOWN LIST*
Start Box Nbr.	
Total Tags	*DISPLAY ONLY*

TO RECEIVE TAGS

To receive tags, complete the following steps:

Field Name	Description, Format, and Features
1.	Select the sending location from the **Ship To/From** drop-down list at the bottom left of the screen.
2.	Click the *Receive* check box at the upper left of the screen.
3.	Enter the starting and ending box number in the **Start Box Nbr.** and **End Box Nbr.** fields at the bottom of the screen.
4.	Check the **Total Tags** and **Activity Date** fields.
5.	Click the *Receive* button at the bottom of the screen. If you make a mistake or choose not to complete the transfer at this time, click the *Undo Receive* button, at the bottom of the screen.
6.	Click the *Save* button at the bottom of the screen when done.

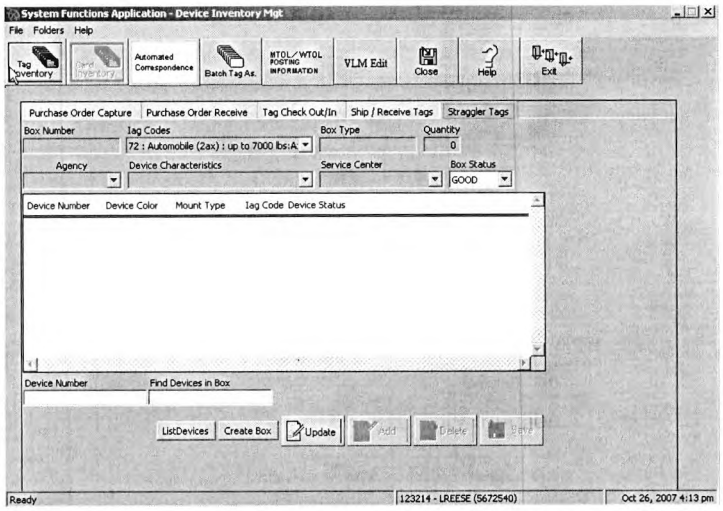
TO SHIP TAGS

To ship tags, complete the following steps:

Field Name	Description, Format, and Features
1.	Select the shipped from location from the **Ship To/From** drop-down list at the bottom left of the screen.
2.	Enter the starting and ending box number in the **Start Box Nbr**. and **End Box Nbr.** fields at the bottom of the screen.
3.	Check the **Total Tags** and **Activity Date** fields.
4.	Click the *Transfer* button at the bottom of the screen. If you make a mistake or choose not to complete the transfer at this time, click the *Undo Transfer* button at the bottom of the screen.
5.	Click the *Save* button at the bottom of the screen when done.

ACCESS THE TAG INVENTORY FUNCTION

To access the ETC Additional System Functions Tag Inventory function, complete the following steps:

Step	Action
4	From the VECTOR main menu screen click the ETC Additional System Functions icon. The Tag Inventory Application toolbar displays.
5	Click the Tag Inventory button. The Tag Inventory function and sub-function tabs display. Screen focus is on the Purchase Order Capture tab.
6	Click the Straggler Tags tab to activate the Straggler Tags function. The following screen displays: 

FIELD DESCRIPTIONS: TAG INVENTORY – STRAGGLER TAGS

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Fields are listed in alphanumeric order, not the order they appear on screen.

Tag Inventory – Purchase Order Capture/Add	
Field Name	**Description, Format, and Features**
Box Number	*DISPLAY ONLY*
IAG Codes	*DROP DOWN LIST*
Box Type.	*DISPLAY ONLY*
Quantity	*DISPLAY ONLY*
Agency	The name of the business entity that is using VECTOR. *DROP DOWN LIST*

Tag Inventory – Purchase Order Capture/Add	
Field Name	**Description, Format, and Features**
Device Characteristics	*DROP DOWN LIST*
Service Center	*DROP DOWN LIST*
Box Status	*DROP DOWN LIST*
Device Number	Entry Field
Find Devices in Box	Entry Field

TO CREATE A STRAGGLER TAG BOX

To create a straggler tag box, complete the following steps:

Field Name	Description, Format, and Features
1.	Click the drop-down arrow in the **Agency** field and select the appropriate agency from the list.
2.	Click the drop-down arrow in the **Device Characteristics** field and select the appropriate characteristics from the list.
3.	Click the drop-down arrow in the **Service Center** field and select the appropriate service center from the list.
4.	Click the *Create Box* button at the bottom of the screen (the **Box Number** field automatically populates). The **Box Type** field at the top of the screen now says **Straggler**.
5.	Click in the **Device Number** field and enter the number of the first device you are adding to the box.
6.	Click the *Add* button at the bottom of the screen. Continue entering device numbers until you have entered all the stragglers.
7.	Click the *Save* button at the bottom of the screen when you are done.
8.	A message box appears with the message "Tags Saved Successfully."
9.	Click the *OK* button in this box and return to the Straggler Tags screen.
10.	Click the *Close* button at the top of the screen and you are asked if you want to save your transactions.
11.	Click the *Yes* button on the question box and return to the System Functions toolbar, or, while on this screen to verify devices in a box, follow the directions below.

TO VERIFY DEVICES IN THE BOX

To check in a tag, complete the following steps:

Field Name	Description, Format, and Features
1.	Enter the box number in the **Find Devices in Box** field.
2.	Click ListDevices.

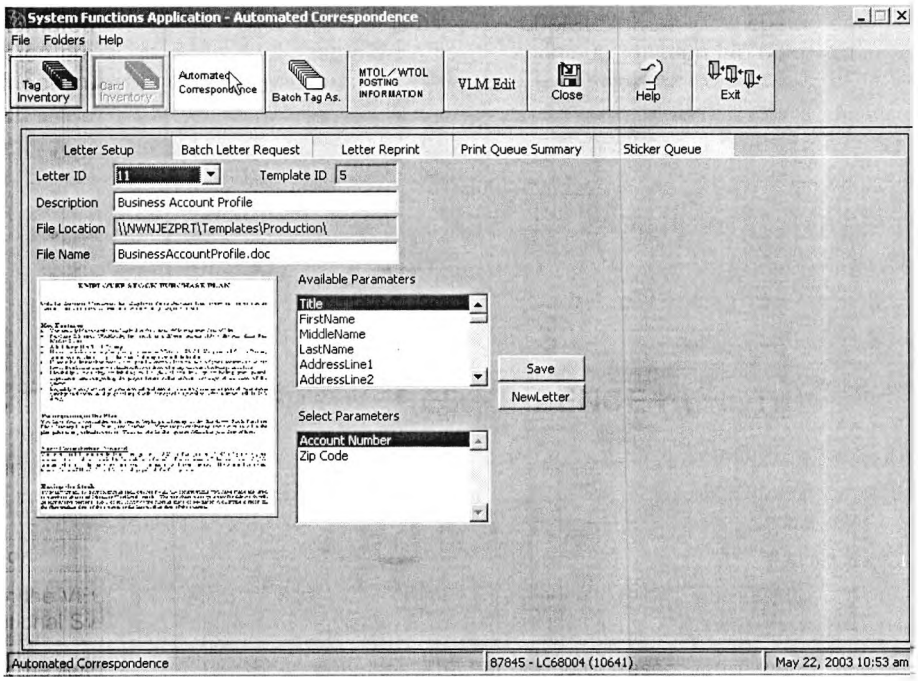
ETC Additional System Functions – Automated Correspondence

The ETC Automated Correspondence function is used to generate letters to all customers, groups of customers or any individual customer. Clicking each sub-function tab opens the screen for that sub-function. The five sub-functions are:

- Letter Setup
- Batch Letter Request
- Letter Reprint
- Print Queue Summary
- Sticker Queue

Access the Automated Correspondence Function

To access the ETC Additional System Functions Automated Correspondence function, complete the following steps:

Step	Action
1	From the VECTOR main menu screen click the ETC Additional System Functions icon. The Additional System Functions toolbar displays.
2	Click the Automated Correspondence button. The Automated Correspondence function and sub-function tabs display. 

FIELD DESCRIPTIONS: AUTOMATED CORRESPONDENCE – LETTER SETUP

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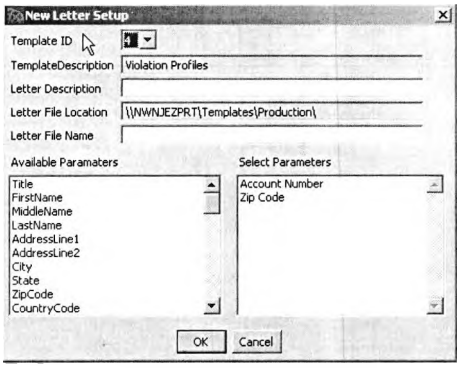
Fields are listed in alphanumeric order, not the order they appear on screen.

Tag Inventory – Purchase Order Capture/Add	
Field Name	**Description, Format, and Features**
Available Parameters	*LIST*
Description	*FILL IN*
File Location	*DISPLAY ONLY*
File Name	*FILL IN*
Letter ID	*DROP DOWN LIST*
Select Parameters	*LIST*
Template ID	*DISPLAY ONLY*

LETTER SETUP

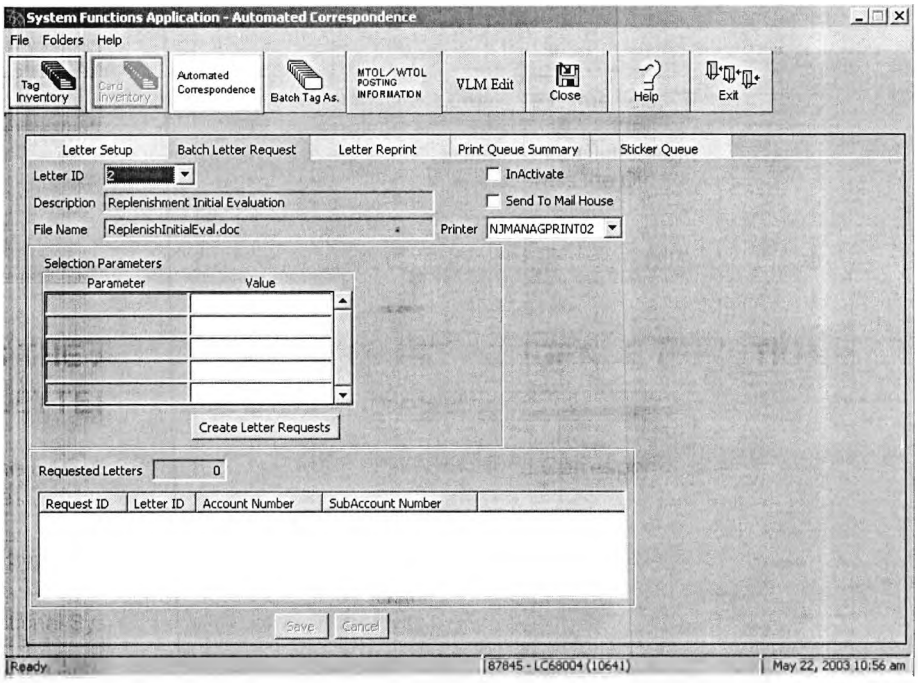
To set up letters, complete the following steps:

Field Name	**Description, Format, and Features**
1.	From the **Letter ID** field drop-down menu, select the number of the letter type, which you want to send.
2.	The **Descriptions**, **File Location**, and **File Name** fields automatically populates.
3.	Click the *NewLetter* button. The following screen appears: 
4.	Select the **Template ID** from the drop-down list in this field.
5.	The **Template Description** and **Letter File Location** fields automatically populate.

Field Name	Description, Format, and Features
6.	The **Template Description** and **Letter File Location** fields automatically populate.
7.	Enter the name of the letter in the **Letter File Name** field.
8.	Highlight the parameters you want included in the letter from the list in the *Available Parameters* box. To select more than one, press the Ctrl key on your keyboard and then click the item with your mouse.
9.	Click the *OK* button. Your letter will be generated at your local printer.

ACCESS THE AUTOMATED CORRESPONDENCE FUNCTION-BATCH LETTER REQUEST

To access the ETC Additional System Functions Automated Correspondence function – Batch Letter Request, complete the following steps:

Step	Action
1	From the VECTOR main menu screen click the ETC Additional System Functions icon. The Additional System Functions toolbar displays.
2	Click the Automated Correspondence button. The Automated Correspondence function and sub-function tabs display. Click the Batch Letter Request tab and the following screen displays: 

FIELD DESCRIPTIONS: AUTOMATED CORRESPONDENCE – BATCH LETTER REQUEST

IMPORTANT!: Since agencies can configure VECTOR in a variety of ways and at different times, some fields, field characteristics and options may appear differently on your system than as described in this guide. Please see your Supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Tag Inventory – Purchase Order Capture/Add	
Field Name	**Description, Format, and Features**
Account Number	
Description	*DISPLAY ONLY*
File Name	*DISPLAY ONLY*
Inactive	*CHECK BOX*
Letter ID	*DROP DOWN LIST*
Printer	*DROP DOWN LIST*
Requested Letters	*DISPLAY ONLY*
Send To Mail House	*CHECK BOX*
Zip Code	

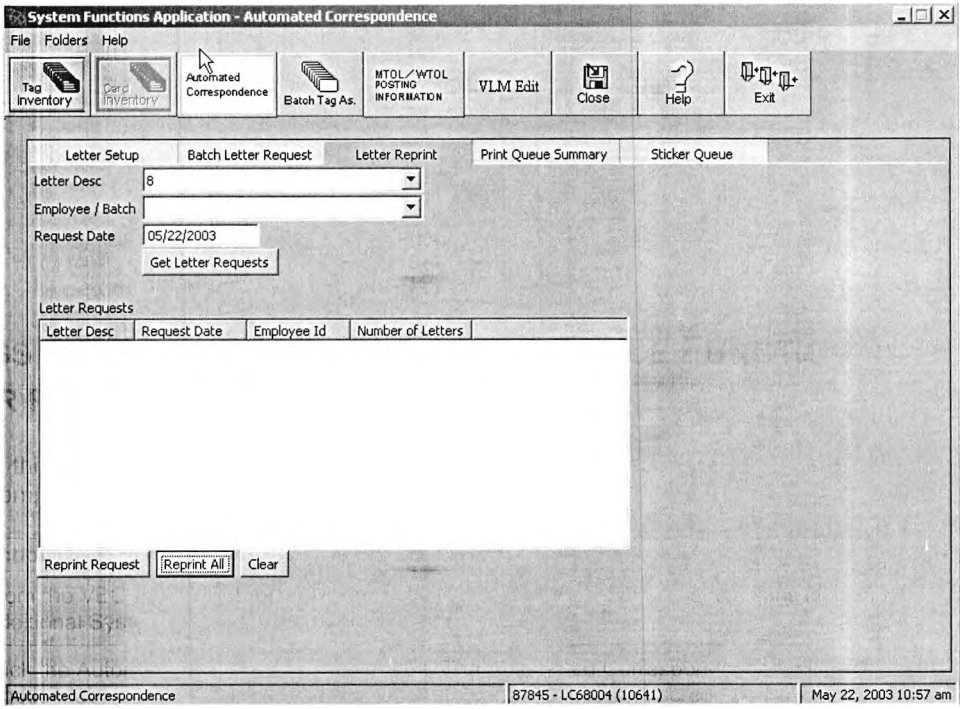
TO REQUEST BATCH LETTERS

To request batch letters, complete the following steps:

Field Name	**Description, Format, and Features**
1.	In the **Letter ID** drop-down list, select the ID for the type of letter you want to send.
2.	The description of the letter automatically populates the **Description** field.
3.	The name of the file automatically populates the **File Name** field.
4.	Once this information has been selected, the **Selection Parameters** fields populate automatically. Select the parameters and values that you require from this list.
5.	Check the **InActivate** box if you want deactivate the letter.
6.	Check the **Send To Mail House** box, if you want the letter printed and sent out from the mail house.
7.	If you want to print the letters, select the printer from the **Printer** drop-down list.

ACCESS THE AUTOMATED CORRESPONDENCE FUNCTION-LETTER REPRINT

To access the ETC Additional System Functions Automated Correspondence function –Letter Reprint, complete the following steps:

Step	Action
3	From the VECTOR main menu screen click the ETC Additional System Functions icon. The Additional System Functions toolbar displays.
4	Click the Automated Correspondence button. The Automated Correspondence function and sub-function tabs display. Click the Letter Reprint tab and the following screen displays: 

FIELD DESCRIPTIONS: AUTOMATED CORRESPONDENCE – LETTER REPRINT

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Fields are listed in alphanumeric order, not the order they appear on screen.

Tag Inventory – Purchase Order Capture/Add	
Field Name	**Description, Format, and Features**
Employee/Batch	*DROP DOWN LIST*
Letter Desc	*DROP DOWN LIST*
Request Date	*FILL IN*

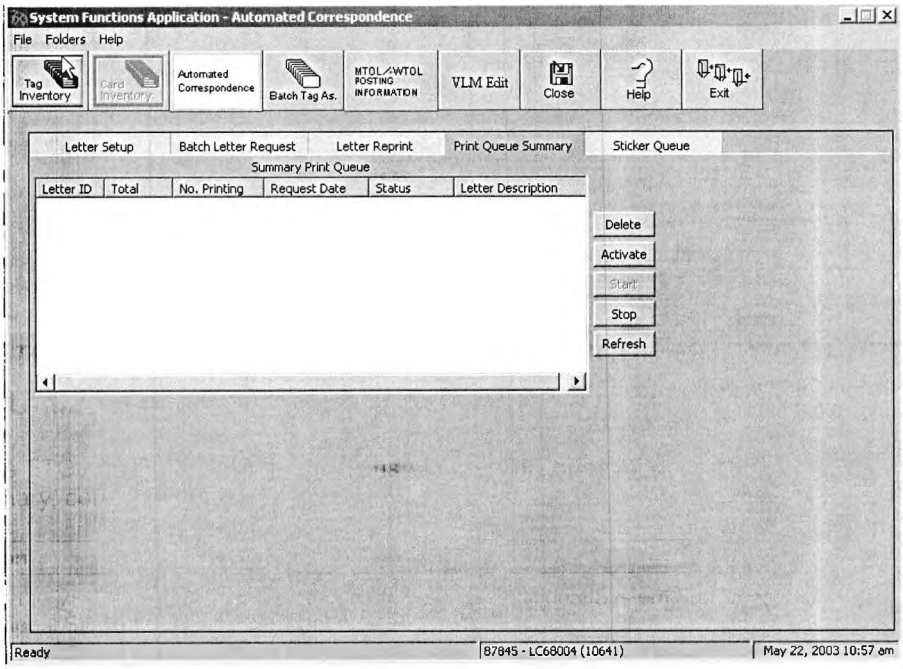
LETTER REPRINT

To reprint letters, complete the following steps:

Field Name	**Description, Format, and Features**
1.	Choose the letter number from the **Letter Desc** drop-down list.
2.	Choose the employee number or batch number in the **Employee/Batch** drop-down list.
3.	Enter the request date in the **Request Date** field.
4.	Click the *Get Letter Requests* button.
5.	The **Letter Requests** field populates automatically.
6.	Click the *Reprint Request* button to select a specific letter to reprint.
7.	Click the *Reprint All* button to reprint all the letters in the list.
8.	Click the *Clear* button to clear the field.

ACCESS THE AUTOMATED CORRESPONDENCE FUNCTION- PRINT QUEUE SUMMARY

To access the ETC Additional System Functions Automated Correspondence function –Print Queue Summary, complete the following steps:

Step	Action
1	From the VECTOR main menu screen click the ETC Additional System Functions icon. The Additional System Functions toolbar displays.
2	Click the Automated Correspondence button. The Automated Correspondence function and sub-function tabs display. Click the Print Queue Summary tab and the following screen displays: 

FIELD DESCRIPTIONS: AUTOMATED CORRESPONDENCE – PRINT QUEUE SUMMARY

IMPORTANT!: Since agencies can configure VECTOR in a variety of ways and at different times, some fields, field characteristics and options may appear differently on your system than as described in this guide. Please see your Supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Tag Inventory – Purchase Order Capture/Add	
Field Name	**Description, Format, and Features**
Letter Description	*DISPLAY*
Letter ID	*DISPLAY*
No. Printing	*DISPLAY*
Request Date	*DISPLAY*
Status	*DISPLAY*
Total	*DISPLAY*

PRINT QUEUE SUMMARY

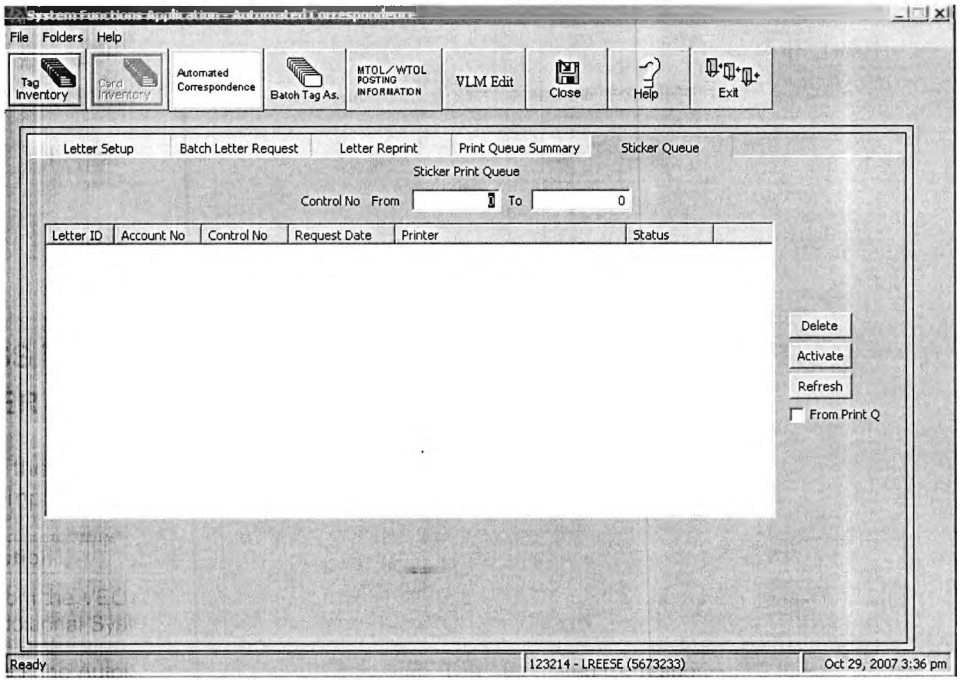
To see a summary of all correspondence queued to print, complete the following steps:

Field Name	**Description, Format, and Features**
1.	Click the *Activate* button to list all the active letters in the queue (these are letters that have been created, but not printed).
2.	Click the *Refresh* button to list the current active letters in the queue.
3.	Click the *Delete* button to delete the letters in the queue.
4.	Click the *Stop* button to stop the action.

ACCESS THE AUTOMATED CORRESPONDENCE FUNCTION-STICKER QUEUE

To access the ETC Additional System Functions Automated Correspondence function –Sticker Queue, complete the following steps:

Step	Action
3	From the VECTOR main menu screen click the ETC Additional System Functions icon. The Additional System Functions toolbar displays.
4	Click the Automated Correspondence button. The Automated Correspondence function and sub-function tabs display. Click the Sticker Queue tab and the following screen displays:



FIELD DESCRIPTIONS: AUTOMATED CORRESPONDENCE – PRINT QUEUE SUMMARY

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Fields are listed in alphanumeric order, not the order they appear on screen.

Tag Inventory – Purchase Order Capture/Add	
Field Name	**Description, Format, and Features**
Account No.	*DISPLAY*
Control No. From	*FILL IN FIELD*
Control No. To	*FILL IN FIELD*
Control No.	*DISPLAY*
Letter ID	*DISPLAY*
Printer	*DISPLAY*
Request Date	*DISPLAY*
Status	*DISPLAY*

STICKER QUEUE

To see a list of all stickers queued to print, complete the following steps:

Field Name	**Description, Format, and Features**
1	Click in the check box next to From Print Q to see a list of stickers ready to be printed.
2	Click the *Activate* button to list all the active stickers in the queue (these are stickers that have been created, but not printed).
3	Click the *Refresh* button to list the current active stickers in the queue.
4	Click the *Delete* button to delete the stickers in the queue.

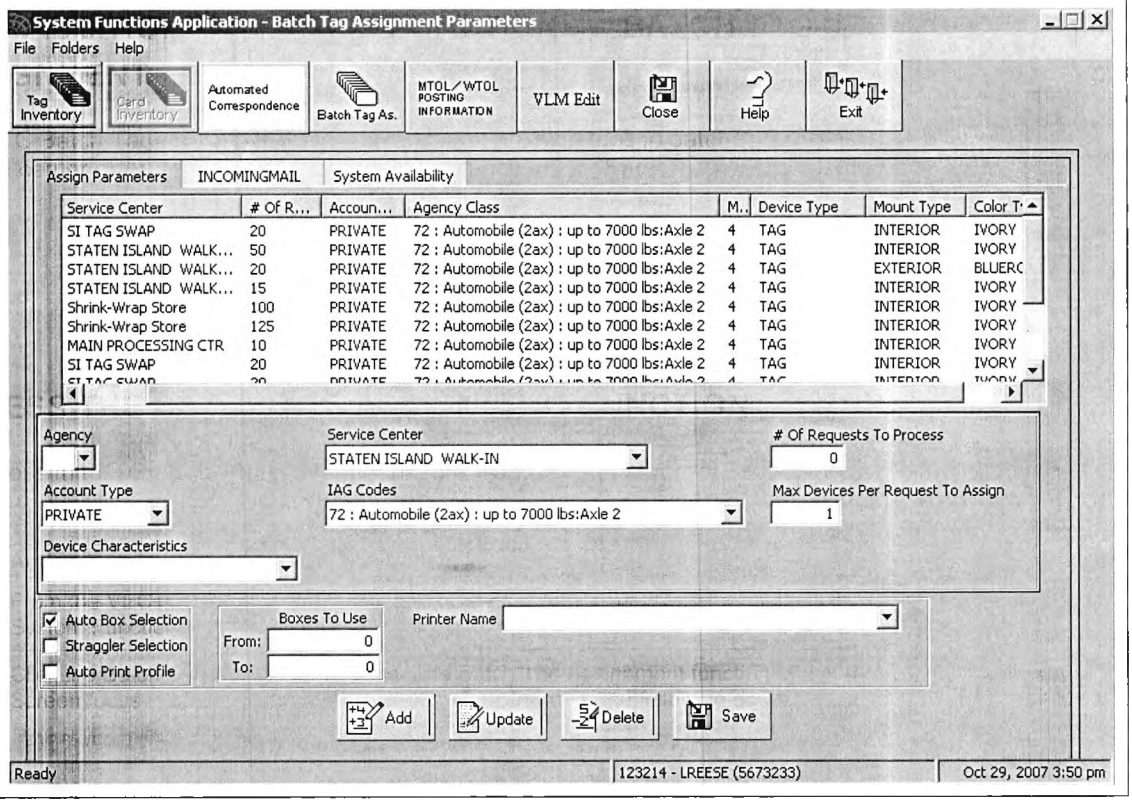
ETC ADDITIONAL SYSTEM FUNCTIONS – BATCH TAG ASSIGNMENT

The ETC Batch Tag Assignment function is used to assign tags in batches for transfer to a service center or other location. The three sub-functions for Batch Tag Assignment are:

- Assign Parameters
- Incoming Mail
- System Availability

ACCESS THE BATCH TAG ASSIGNMENT FUNCTION

To access the ETC Additional System Functions Tag Inventory function, complete the following steps:

Step	Action
1	From the VECTOR main menu screen click the ETC Additional System Functions icon. The Additional System Functions toolbar displays.
2	Click the Batch Tag Assignment button. The Batch Tag Assignment function and sub-function tabs display. Screen focus is on the Assign Parameters tab as shown in the following screen: 

FIELD DESCRIPTIONS: BATCH TAG ASSIGNMENT – ASSIGN PARAMETERS

IMPORTANT!: Since agencies can configure VECTOR in a variety of ways and at different times, some fields, field characteristics and options may appear differently on your system than as described in this guide. Please see your Supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Tag Inventory – Purchase Order Capture/Add	
Field Name	**Description, Format, and Features**
Account Type	*DROP DOWN LIST*
Agency	*DROP DOWN LIST*
Auto Box Selection	***CHECK BOX***
Auto Print Profile	***CHECK BOX***
Boxes To Use (From)	Key in the first box number you are using
Boxes To Use (To)	Key in the last box number you are using
Device Characteristics	*DROP DOWN LIST*
IAG Codes	*DROP DOWN LIST*
Max Devices Per Request To Assign	Key in the maximum number of devices to request to assign at one time
# Of Request To Process	Key in the number of requests to process
Printer Name	*DROP DOWN LIST*
Service Center	*DROP DOWN LIST*
Straggler Selection	***CHECK BOX***

ASSIGN PARAMETERS

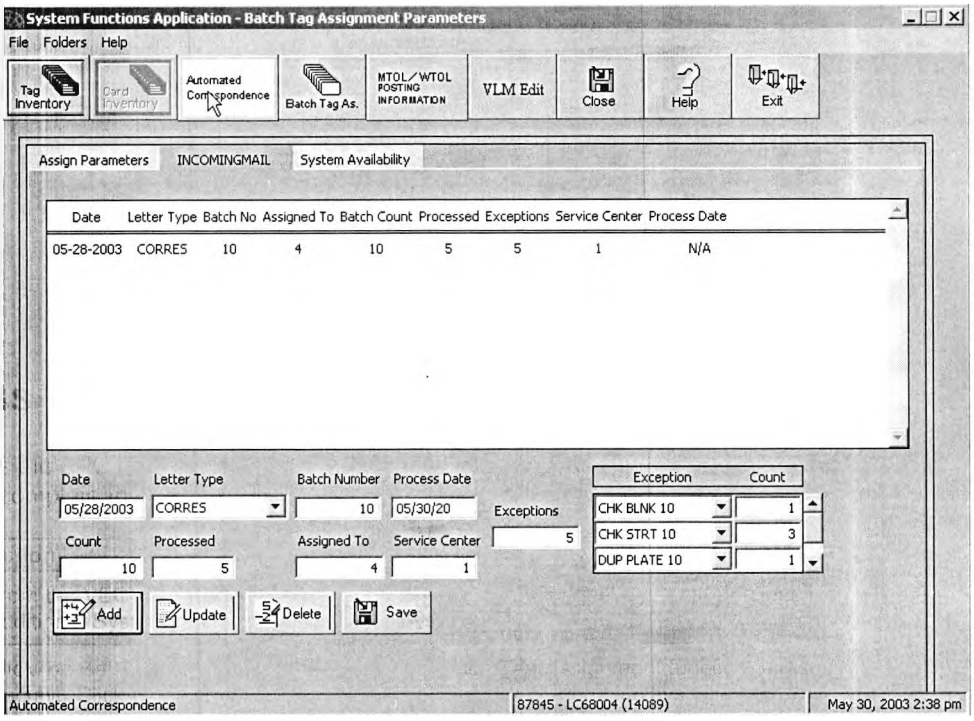
To assign parameters for a batch tag assignment, complete the following steps:

Field Name	Description, Format, and Features
1.	Click the drop-down arrow in the **Agency** field and select the agency to which you are assigning tags.
2.	Click the drop-down arrow in the **Service Center** field and select the appropriate store.
3.	Click the **# of Request To Process** field and enter the quantity of tags you are expected to allocate into the system (for example, two boxes equal 100 tags).
4.	Click the drop-down arrow in the **Account Type** field and select the appropriate account type.
5.	Click in the **Max Devices Per Request To Assign** field and indicate the maximum tag count to be assigned to an account type. However, if the request is for a business account, your maximum device per request to assign field is the same amount with the quantity of tags you are entering. (For example, tag request is for 50 devices, the allocated amount needs to be the same, but private accounts are limited to only four tags per account).
6.	Click the **Device Characteristics** field and select the appropriate tag type.
7.	Uncheck the **Auto Box Selection** field so that you can manually allocate the range of boxes to use.
8.	Click the **From** and **To** fields in the **Boxes To Use** section and enter the beginning and ending box numbers.
9.	Click the drop-down arrow in the **Printer Name** field and select your printer from the list.
10.	Click the *Add* button.
11.	Click the *Save* button to complete the batch tag assignment process.
12.	After the batch tag assignment runs successfully, profiles generate with the appropriate tag and box numbers. Proceed to match the profiles with the tags.

ACCESS THE INCOMING MAIL FUNCTION

To access the ETC Additional System Functions Batch Tag Assignments – Incoming Mail function, complete the following steps:

Step	Action
1	From the VECTOR main menu screen click the ETC Additional System Functions icon. The Additional System Functions toolbar displays.
2	Click the Batch Tag Assignment button. The Batch Tag Assignment function and sub-function tabs display. Click the Incoming Mail tab and the following screen displays:



FIELD DESCRIPTIONS: BATCH TAG ASSIGNMENT – INCOMING MAIL

IMPORTANT!: Since agencies can configure VECTOR in a variety of ways and at different times, some fields, field characteristics and options may appear differently on your system than as described in this guide. Please see your Supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Tag Inventory – Purchase Order Capture/Add	
Field Name	**Description, Format, and Features**
Assigned To	Number assigned for processing
Batch Number	Number assigned to the batch
Count (left side of screen)	Number of items in the batch
Count (right side of screen)	Number of items per exception type
Date	Request Date
Exception	Type of exception that prevented correspondence from being processed
Exceptions	Total number of exceptions in the batch
Letter Type	Type of letter received
Process Date	Date correspondence was processed
Processed	Total number of items processed in the batch
Service Center	Code identifying the service center receiving the batch

INCOMING MAIL

To track incoming mail and processing status, complete the following steps:

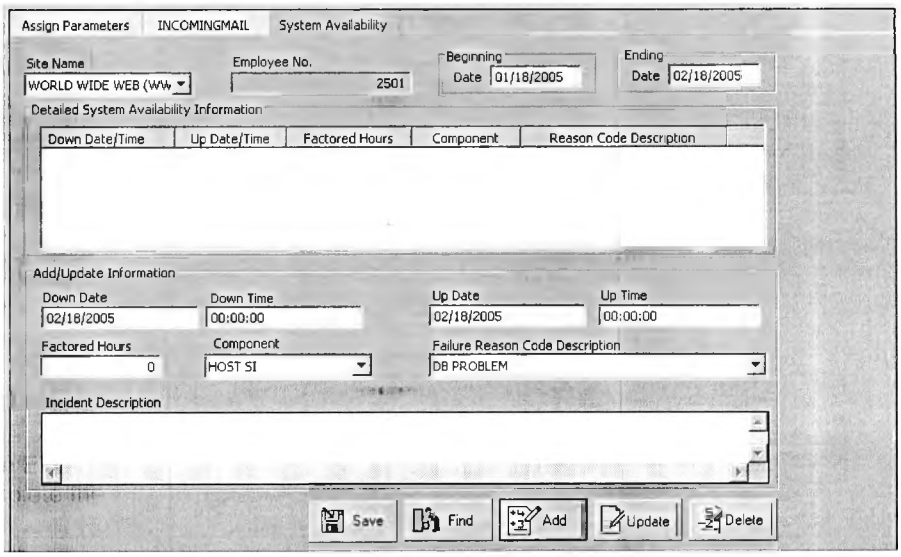
Field Name	Description, Format, and Features
1.	Click the **Date** field and enter the request date.
2.	Select the type of correspondence you want from the **Letter Type** drop-down list.
3.	Enter the batch number in the **Batch Number** field.
4.	Enter the date in the **Process Date** field.
5.	The **Count** field lists the number of letters that have come into the center.
6.	The **Process** field lists the number of letters that have been processed.
7.	Enter the number of the service center, which is receiving the incoming mail.

Note: An exception is a request that could not be processed due to varying reasons, including some of the following: duplicate license plate number, the check that was sent in was blank or not signed, or there was not a sufficient address on the letter.

ACCESS THE SYSTEM AVAILABILITY FUNCTION

To access the ETC Additional System Functions Batch Tag Assignments – System Availability function, complete the following steps:

Step	Action
3	From the VECTOR main menu screen click the ETC Additional System Functions icon. The Additional System Functions toolbar displays.
4	Click the Batch Tag Assignment button. The Batch Tag Assignment function and sub-function tabs display. Click the System Availability tab and the following screen displays:



FIELD DESCRIPTIONS: BATCH TAG ASSIGNMENT – SYSTEM AVAILABILITY

IMPORTANT!: Since agencies can configure VECTOR in a variety of ways and at different times, some fields, field characteristics and options may appear differently on your system than as described in this guide. Please see your Supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Tag Inventory – Purchase Order Capture/Add	
Field Name	**Description, Format, and Features**
Beginning Date	The starting date for reviewing system status
Component	Name of the component that failed
Down Date	The date the component failed
Down Time	The time the component failed
Employee Number	The employee ID number of the person logged in
Ending Date	The end date for reviewing system status
Factored Hours	The total number of hours the component/system was down
Failure Reason Code/Description	Reason for the failure
Incident Description	Text block to enter free style text describing the incident
Site Name	The location you want to view or report system status on
Up Date	The date the component/system was brought back up
Up Time	The time the component/system was brought back up

VIEWING SYSTEM AVAILABILITY

To view system availability, complete the following steps:

Field Name	**Description, Format, and Features**
1.	Click the drop-down menu in the **Site Name** list to choose the site where the system is down.
2.	Type in the incident beginning and end date into the fields labeled **Beginning** and **Ending**.
3.	A **Detailed System Availability Information** list appears in the white section of the screen.

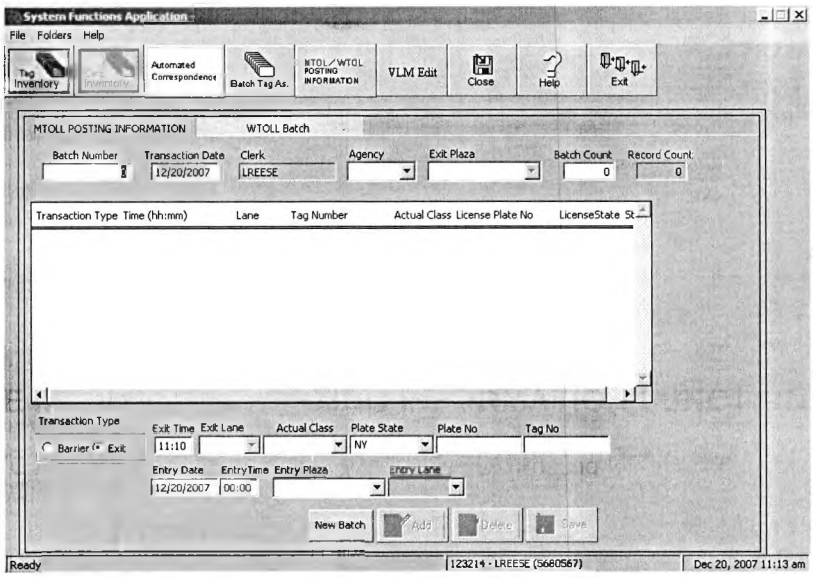
ADDING/UPDATING SYSTEM AVAILABILITY INFORMATION

To add or update system availability information, complete the following steps:

Field Name	Description, Format, and Features
1.	Enter the date and time the system went down in the fields labeled **Down Date** and **Down Time**.
2.	Enter the date and time the system came back up in the fields labeled **Up Date** and **Up Time**.
3.	Enter the number of hours the system was down in the field labeled **Factored Hours**.
4.	Click the drop-down menu in the **Component** list to choose the part of the system that was down.
5.	Click the drop-down menu in the **Failure Reason Code Description** list to choose describe the reason the system went down.
6.	In the **Incident Description** field, enter description of the problem that occurred.
7.	Click the *Save* button to save the information.
8.	Click the *Add* button to add the information to the information field.
9.	Click the *Find* button to find an incident.
10.	Click the *Update* button to get the most current list of issues.
11.	Click the *Delete* button to delete an item.

ACCESS THE MTOL/WTOL POSTING INFORMATION FUNCTION

To access the ETC Additional System Functions MTOL/WTOL Posting Information function, complete the following steps:

Step	Action
1	From the VECTOR main menu screen click the ETC Additional System Functions icon. The Additional System Functions toolbar displays.
2	Click the MTOL/WTOL Posting Information button. The MTOL/WTOL Posting Information function and sub-function tabs display with the MTOL tab in the foreground. 

FIELD DESCRIPTIONS: MTOL/WTOL POSTING INFORMATION – MTOL POSTING INFORMATION

IMPORTANT!: Since agencies can configure VECTOR in a variety of ways and at different times, some fields, field characteristics and options may appear differently on your system than as described in this guide. Please see your Supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

MTOL/WTOL Posting Information – MTOL Posting Information	
Field Name	**Description, Format, and Features**
Actual Class	Valid classes for vehicles. *DROP DOWN LIST*
Agency	The name of the agency responsible for the toll road. *DROP DOWN LIST*

MTOL/WTOL Posting Information – MTOL Posting Information	
Field Name	**Description, Format, and Features**
Barrier	Selected if this is a barrier toll road. *RADIO BUTTON*
Batch Number	The number of the batch this record will be added to. *DISPLAY ONLY*
Batch Count	The number of batches being created. *DISPLAY ONLY*
Clerk	The ID of the clerk that posted the information. *DISPLAY ONLY*
Entry Date	The date the vehicle entered the lane. *FILL IN FIELD*
Entry Lane	The lane the vehicle entered. Not selectable if not a barrier toll road. *DROP DOWN LIST*
Entry Plaza	The Plaza for the lane entered. *DROP DOWN LIST*
Entry Time	The time the vehicle entered the lane. *FILL IN FIELD*
Exit	Selected if this is not a barrier toll road. *RADIO BUTTON*
Exit Lane	The lane the vehicle exited. *DROP DOWN LIST*
Exit Plaza	The Plaza for the lane the vehicle exited. *DROP DOWN LIST*
Exit Time	The time the vehicle exited the lane. *FILL IN FIELD*
Plate No.	The license plate numer of the vehicle. *FILL IN FIELD*
Plate State	The state that issued the license plate. *DROP DOWN LIST*
Record Count	The number of recoreds added to a particular batch. *DISPLAY ONLY*
Tag No.	The number on the transponder. *FILL IN FIELD*

MTOL/WTOL Posting Information – MTOL Posting Information	
Field Name	**Description, Format, and Features**
Transaction Date	The date of the transaction. *FILL IN FIELD*

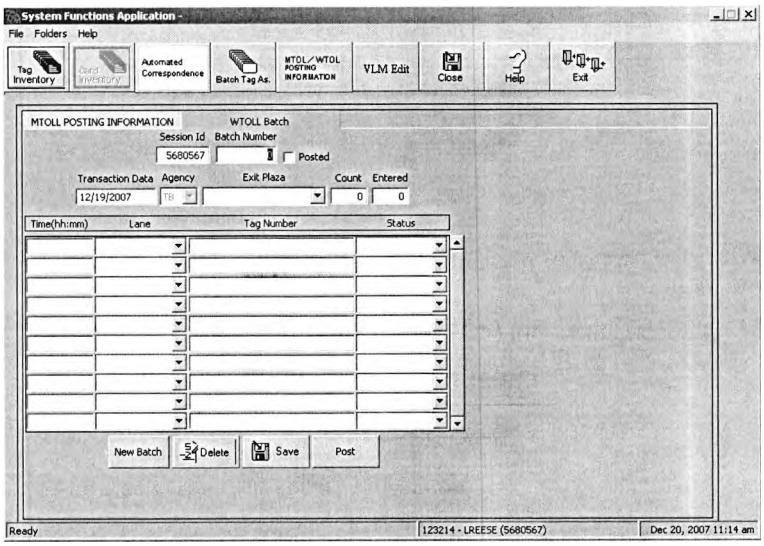
MTOL POSTING INFORMATION – ADDING A NEW BATCH

To create a new batch of Manual Tolls (MTOL) for posting, complete the following steps.

Field Name	Description, Format, and Features
1.	Click the *New Batch* button at the bottom of the screen. A pop up box will appear to inform you this is a new batch and the **Batch Number** field will populate with the batch number.
2.	Click in the **Transaction Date** field and type in the date of the transactions to be posted. The date must be earlier than the date you are creating the batch.
3.	Click the drop-down arrow in the **Agency** field and select the appropriate agency from the list.
4.	Click the drop-down arrow in the **Exit Plaza** field and select the appropriate Plaza from the list.
5.	Click on the appropriate radio button for **Barrier** or **Exit** to select the type of exit at the lane.
6.	Click in the **Exit Time** field and key in the time the vehicle exited the lane.
7.	Click the drop-down arrow in the **Exit Lane** field and select the appropriate lane from the list.
8.	Click the drop-down arrow in the **Actual Class** field and select the appropriate vehicle class from the list.
9.	Click the drop-down arrow in the **Plate State** field and select the appropriate State from the list.
10.	Click in the **Plate No** field and key in the license plate number of the vehicle.
11.	Click in the **Tag No** field and key in the transponder number for the vehicle.
12.	If the Exit radio button is selected the entry fields that follow are grayed out and not selectable.
13.	Click on the *Add* button at the bottom of the screen and the record will be added to the batch.
14.	When you are done entering all records for a batch, click on the *Save* button at the bottom of the screen to save the batch.
15.	Click the *Close* button in the top toolbar to exit the MTOL function. Click on the *Exit* button in the top toolbar to return to the main VECTOR screen.

MTOL/WTOL POSTING INFORMATION –POSTING A BATCH

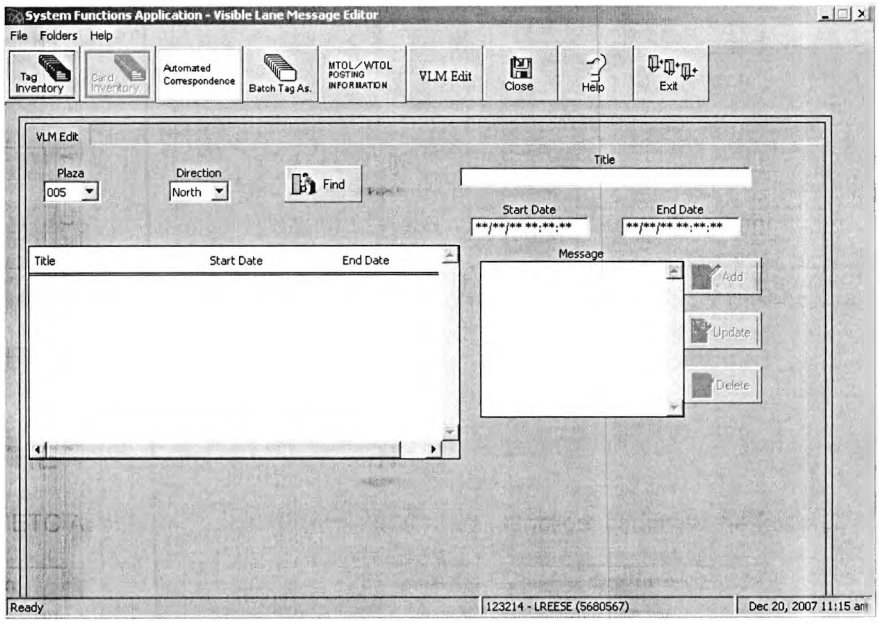
To post a new or existing batch of Manual/Wave Tolls (MTOL/WTOL) for posting, complete the following steps.

Field Name	Description, Format, and Features
1.	Click the WTOL Batch tab and the following screen will appear. The **Session ID** field will automatically populate. Click in the **Transaction Data** field and key in the date of the transactions to be posted. Click on the drop-down arrow in the **Agency** field and select the appropriate agency. Click the drop-down arrow in the **Exit Plaza** field and select the appropriate plaza. To create a new batch to be posted click the New Batch button at the bottom of the screen to create a new batch. A pop up box will appear to inform you this is a new batch and the **Batch Number** field will populate with the batch number. To post an existing batch key in the batch number in the Batch Number field and the white area of the screen will populate with an existing batch that has not been posted. 
2.	When creating a new batch you must complete the white area of the screen by completing the following steps. Click in the **Transaction Data** field and type in the date of the transactions to be posted. The date must be earlier than the date you are creating the batch.
3.	Click in the **Time (hh:mm)** field and type in the time of the transactions to be posted.
4.	Click the drop-down arrow in the **Lane** field and select the appropriate lane from the list.
5.	Click the **Tag Number** field and type in the appropriate Tag number.
6.	Click on the drop-down arrow in the **Status** field and select the appropriate tag status from the list.
7.	Repeat steps 2-6 until all entries have been completed.
8.	If you have included a record by mistake highlight the record row and click the Delete button at the bottom of the screen.
9.	Click the Save button at the bottom of the screen to save the batch.

Field Name	Description, Format, and Features
10.	Click the Post button at the bottom of the screen to post the transactions. The Posted check box at the top of the screen will automatically check when the batch has been posted.
11.	Click the *Close* button in the top toolbar to exit the MTOL/WTOL function. Click on the *Exit* button in the top toolbar to return to the main VECTOR screen.

ACCESS THE VLM EDIT FUNCTION

To access the ETC Additional System Functions VLM Edit function, complete the following steps:

Step	Action
1	From the VECTOR main menu screen click the ETC Additional System Functions icon. The Additional System Functions toolbar displays.
2	Click the VLM Edit button. The VLM Edit function tab displays as follows. 

FIELD DESCRIPTIONS: VLM EDIT

IMPORTANT!: Since agencies can configure VECTOR in a variety of ways and at different times, some fields, field characteristics and options may appear differently on your system than as described in this guide. Please see your Supervisor for more information.

The VLM (Virtual Lane Monitor) Edit screen allows authorized personnel to change message displays for a Plaza.

Fields are listed in alphanumeric order, not the order they appear on screen.

MTOL/WTOL Posting Information – MTOL Posting Information	
Field Name	**Description, Format, and Features**
Direction	The direction (e.g. North or South) the message should display facing. *DROP DOWN LIST*
End Date	The date the message should stop displaying. *FILL IN FIELD*
End Date	White area of the screen. Displays end date information from the fill in field.
Message	The message to be displayed. *FILL IN FIELD*
Plaza	The Plaza where the message will be displayed. *DROP DOWN LIST*
Start Date	The date the message should start displaying. *FILL IN FIELD*
Start Date	White area of the screen. Displays the date information from the fill in field.
Title	The title of the message. *FILL IN FIELD*
Title	White area of the screen. Displays the title information from the fill in field.

VLM EDIT – CREATING/DISPLAYING A MESSAGE

To create or display a message, complete the following steps.

Field Name	Description, Format, and Features
1.	Click the drop-down arrow in the **Plaza** field and select the appropriate plaza.
2.	Click the drop-down arrow in the **Direction** field and select the appropriate direction.
3.	Click the Find button to generate a list of previous messages for the plaza. The white area of the screen will populate with previous messages.
4.	To display one of the previous messages click on the row of the message.
5.	Click in the **Start Date** field and key in the date the message should start appearing.
6.	Click in the **End Date** field and key in the date the message should stop appearing.
7.	Click on the Update button on the right side of the screen. The message will appear on the specified start date.
8.	To create a new message, follow steps 1 and 2 above.
9.	Click in the Title field and type in the title of the message.

Field Name	Description, Format, and Features
10.	Click in the **Start Date** field and key in the date the message should start appearing.
11.	Click in the **End Date** field and key in the date the message should stop appearing.
12.	Click in the **Message** field and type in the message that will appear.
13.	Click the Add button on the right side of the screen to add the message to the display queue.
14.	Click the *Close* button in the top toolbar to exit the VLLM Edit function. You will be prompted to save your entry Click on the *Exit* button in the top toolbar to return to the main VECTOR screen.
15.	

CHAPTER 5 - VIOLATIONS

This chapter describes the processes associated with the Electronic Toll Collection (ETC) Violations subsystem. It also includes step-by-step instructions on how to use each of the subsystem functions.

Subsystem functions

The ETC Violations subsystem is organized by functions that are used for facilitating the review and processing of violations. With the ETC Violations subsystem, you can perform specific functions such as:

- Image Review
- Assign batches of images to violation imaging clerks
- Find violation transactions
- Identify Violators
- Generate reports
- Process Notices
- Perform System Configuration

The functions are represented by buttons on the ETC Violations Application toolbar. The toolbar also includes buttons used to close function screens, open online help, and exit the VECTOR Application entirely. To initiate each function, click the corresponding button on the toolbar.

VIOLATION TYPES

VECTOR can process four types of violations:

1. Toll evasion
2. Class Mismatch (CLMM)
3. Speed violation
4. Lane exception warnings

Proprietary Data

Toll evasion

A toll evasion occurs when a vehicle passes through dedicated ETC lane or mixed-mode lane without paying the toll.

Class mismatch

CLMM violations are ETC transactions where the class of the vehicle detected by the AVC equipment does not match the class indicated by the device.

Speed violations

A speed violation occurs when a customer exceeds the speed threshold designated by the agency.

Lane exception warning

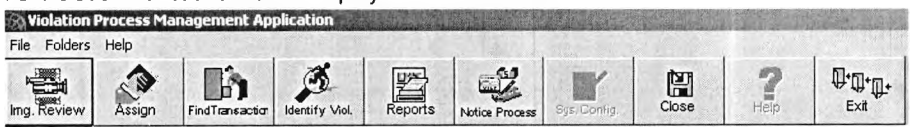
A lane exception violation occurs when a customer uses the wrong class of vehicle in a lane which has been demarcated during a specific time of the day for use by a restricted set of vehicle types (for example, a bus-only lane).

SUB-FUNCTIONS

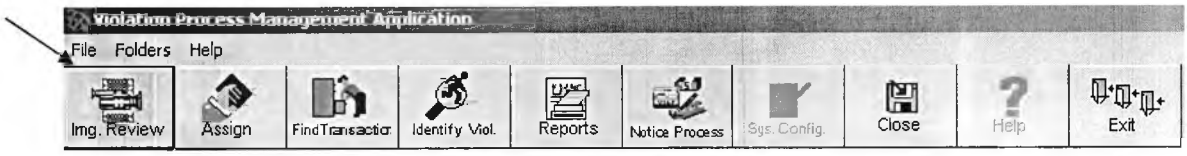
Each function within the ETC Violations subsystem is managed through sub-function screens that are opened from tabs located under the toolbar. The sub-function tabs that display vary depending on which main function was selected (highlighted).

Access The Subsystem

To access the ETC Violations subsystem, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the Violation icon.
	The ETC Violation Functions toolbar displays. 

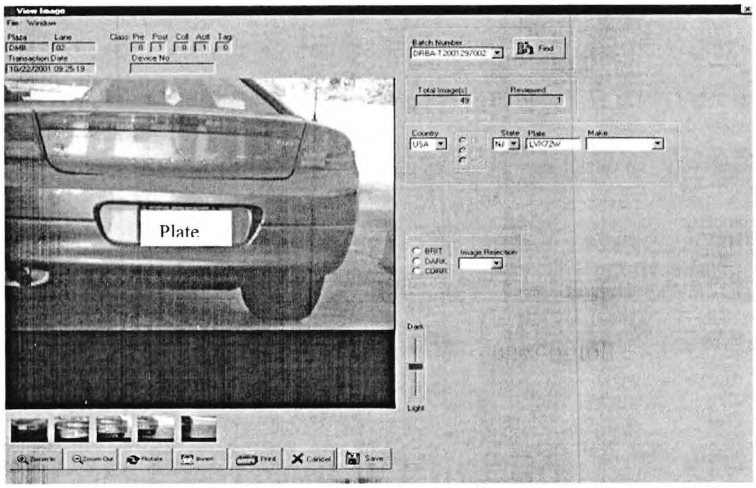
ETC Violation Functions – Image Review



The ETC Image Review function is used to process batches of toll evasion and class mismatch images.

Access the Image Review Function

To access the ETC Violation Image Review function, complete the following steps:

Step	Action
2	From the VECTOR main menu screen click the ETC Violation icon. The Violation Application toolbar displays.
3	Click the Img. Review button. The View Image screen displays. 

Proprietary Data

Field Descriptions: Violation – Image Review

IMPORTANT!: Since agencies can configure VECTOR in a variety of ways and at different times, some fields, field characteristics and options may appear differently on your system than as described in this guide. Please see your Supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

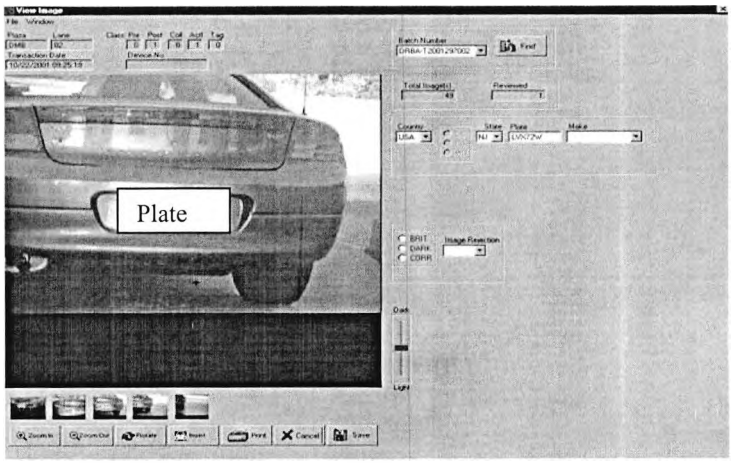
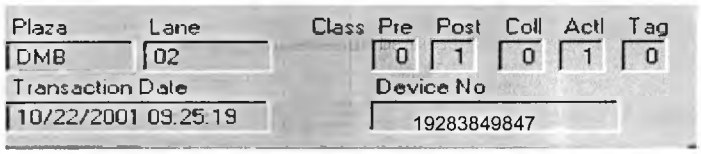
Violations – Image Review	
Field Name	**Description, Format, and Features**
Actl	Identifies the final classification of the vehicle by the lane equipment after all information has been gathered. *DISPLAY ONLY*
Batch Number	Displays the number of the batch being reviewed. Another batch can be selected by clicking on the drop-down arrow in this field. *DROP DOWN LIST*
BRIT	Image is too bright. *RADIO BUTTON*
Class Pre	The lane does a preliminary classification of the vehicle as it enters the lane. *DISPLAY ONLY*
Coll	Identifies the manual or override classification made by the toll collector *DISPLAY ONLY*
CORR	Image is corrupted. *RADIO BUTTON*
DARK	Image is too dark. *RADIO BUTTON*
Dark/Light Bar	Controls the darkness or lightness of the image. *SCROLL BAR*
Device No	The Mark IV tag number of the sensed tag (blank if no tag sensed). *DISPLAY ONLY*
Image Rejection	Code for rejecting the image. *DROP DOWN LIST*
Lane	The lane where the violation occurred. *DISPLAY ONLY*
Make	The make of the vehicle. *DROP DOWN LIST*
Plate	The license plate number from the image gets keyed in here.
Plaza	The plaza where the violation occurred. *DISPLAY ONLY*

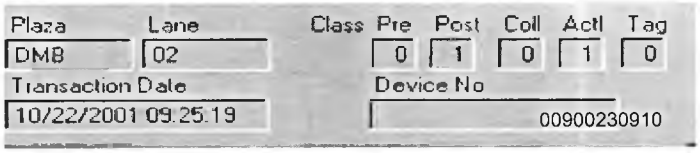
Violations – Image Review	
Field Name	**Description, Format, and Features**
Post	The lane classification of the vehicle as it crossed the lane. *DISPLAY ONLY*
Reviewed	The number of items in the batch that have already been reviewed. *DISPLAY ONLY*
State	The state that issued the plate in the image. ***RADIO BUTTON*** and ***DROP DOWN LIST***
Total Images	The number of images in the batch. *DISPLAY ONLY*
Transaction Date	The date and time that the violation took place. *DISPLAY ONLY*

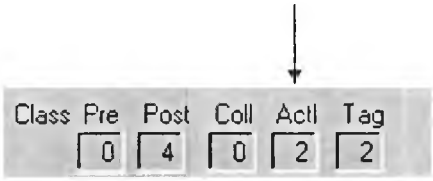
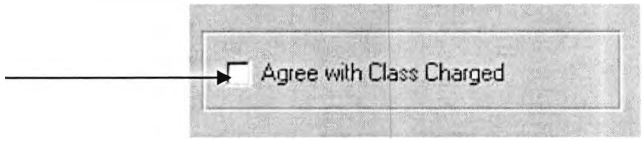
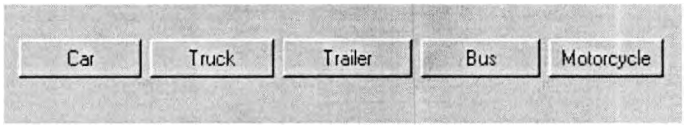
IMAGE REVIEW

To process toll evasion violation image batches, complete the following steps:

Step	Action
1.	Access the Violation – Image Review screen.
2.	From the Batch Number drop down menu, select the number for the batch of images that have been assigned to you and click *Find*.
3.	The screen that appears depends on whether the image batch you have selected is for a toll evasion or class mismatch violation. There are no image review screens for speed violations and lane exception warnings.

Step	Action
4.	**Toll Evasion** The toll evasion screen displays for toll evasion batches. 
5.	The following fields populate automatically when a toll evasion image batch is selected: 
6.	If the **Country** field default is incorrect, click the drop-down arrow in the **Country** field and select the correct country from the drop-down list.
7.	Click the appropriate *State* radio button. If the state on the plate is not on a radio button, then click the drop-down arrow in the **State** field and select the correct state from the drop-down list. Once you select a state from the list, the radio buttons are grayed out.
8.	Click in the **Plate** field and key in the plate number as it appears on the image. **Important Note:** After you have entered the plate number into the plate field, you must press the tab key on your keyboard to blank out the **Plate** field, and then enter the plate number again.
9.	If the image is acceptable, click the *Save* button at the bottom of the screen and the next group of images will appear.
10.	If the image is not acceptable, you can use the Dark/Light scroll bar at the right of the image and the buttons beneath the image, to adjust the contrast, until you can see the image of the plate clearly and obtain the information you need.

Step	Action
11.	If the image is not acceptable, you can also select another image in the group to review from among the ones available (the smaller images below the large image) to see if the plate is readable on the alternate image. When you click on one of the smaller images, it will expand and replace the large image and the previous large image will reduce and appear next to the other small images.
12.	1. If, after trying to improve the picture and/or trying another picture, the plate still cannot be read; a. Click the radio button, in the middle of the screen, which corresponds to the problem with the picture (*BRIT*: when the image is too bright, *DARK*: when the image is too dark, *CORR*: if the image is corrupted). b. If these three items are not the problem with the image, click the Image Rejection drop down box, and select the item that most closely describes the problem with the picture.
13.	Click the *Save* button to move on to the next image group. **Note:** The *Print* button allows you to print the image. The *Cancel* button allows you to stop reviewing the current image.
14.	**Class Mismatch** The class mismatch screen displays for toll evasion batches. The following fields populate automatically: 

Step	Action
15.	Look at the class of the vehicle in the picture and see if it matches the class listed in the **Actl** box (this represents the actual class of the vehicle as detected by the lane equipment). Inspect other images in the batch (the reduced size images below the main image) as needed to properly identify the vehicle class. 
16.	If the vehicle class indicated in the picture matches that in Actl category, check the box next to **Agree with Class Charged** and skip to step 7 to complete processing of this image group.  **Important Note:** If the vehicle in the picture does not agree with the classification listed in the **Actl** box, do not check this box.
17.	If the vehicle in the picture does not agree with the classification listed in the **Actl** box. DO NOT check the **Agree with Class Charged** box. Instead, click the vehicle type button that matches the vehicle in the picture: 
18.	If the image is not acceptable, use the Dark/Light scroll bar at the right of the image and the buttons beneath the image to adjust the contrast until you can see the vehicle classification clearly and obtain the information you need.
19.	If the image is not acceptable, you can also select another image in the group to review from among the ones available (the smaller images below the large image) to see if the vehicle classification can be determined from alternate images. When you click on one of the smaller images, it will expand and replace the large image and the previous large image will reduce and appear next to the other small images.

Step	Action
20.	If, after trying to improve the picture and/or trying another picture, the vehicle class still cannot be determined; a. Click the radio button in the middle of the screen, which corresponds to the problem with the picture (for example, *BRIT*: when the image is too bright, *DARK*: when the image is too dark, *CORR*: if the image is corrupted). b. If these three items are not the problem with the image, click the **Image Rejection** drop down box, and select the item that most closely describes the problem with the picture.
21.	Click the *Save* button to move on to the next assigned image group.

Adjusting the image quality

The buttons at the bottom left of the screen allow you to manipulate the image for maximum viewing to determine if the image is viewable. These buttons are:

- *Zoom In* – allows you to enlarge a section of the image to read it.
- *Zoom Out* – allows you to reduce an image to see more of the picture.
- *Rotate* – allows you to flip an image for easier reading.
- *Invert* – allows you to reverse the black and white areas of an image

Dark/Light scroll bar

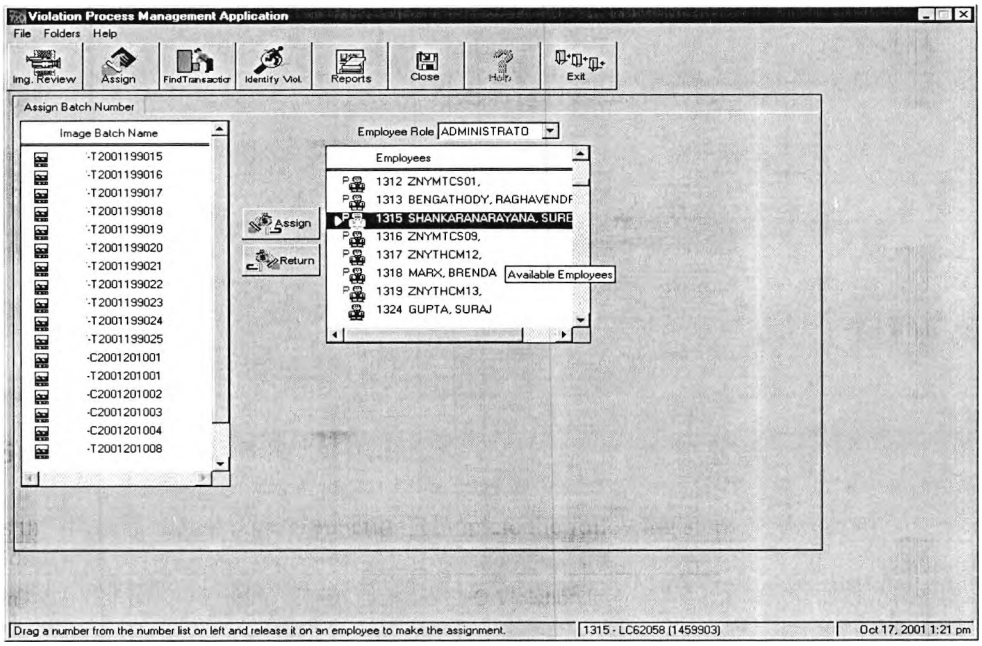
The Dark/Light scrolling bar on the right, allows you to adjust the darkness of the image. To make it darker, you push the bar up. To make the image lighter, you scroll the bar down.

ETC Violation Functions – Assign Batches

The ETC Assign function is used by supervisors to assign batches of images to violation imaging clerks.

Access the Assign Function

To access the ETC Violation Assign function, complete the following steps:

Step	Action
1	From the VECTOR main menu screen click the ETC Violation icon. The Violation Application toolbar displays.
2	Click the Assign button. The Assign Batch Number screen displays. 

Field Descriptions: Violation – Assign Batches

IMPORTANT!: Since agencies can configure VECTOR in a variety of ways and at different times, some fields, field characteristics and options may appear differently on your system than as described in this guide. Please see your Supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Violations – Image Review	
Field Name	**Description, Format, and Features**
Employee Role	Identifies the role the logged in employee has been assigned. ***DROP DOWN LIST***
Employees	List of violation clerks.
Image Batch Name	List of names of the image batches.

Assign Batches

To Assign Batches, complete the following steps:

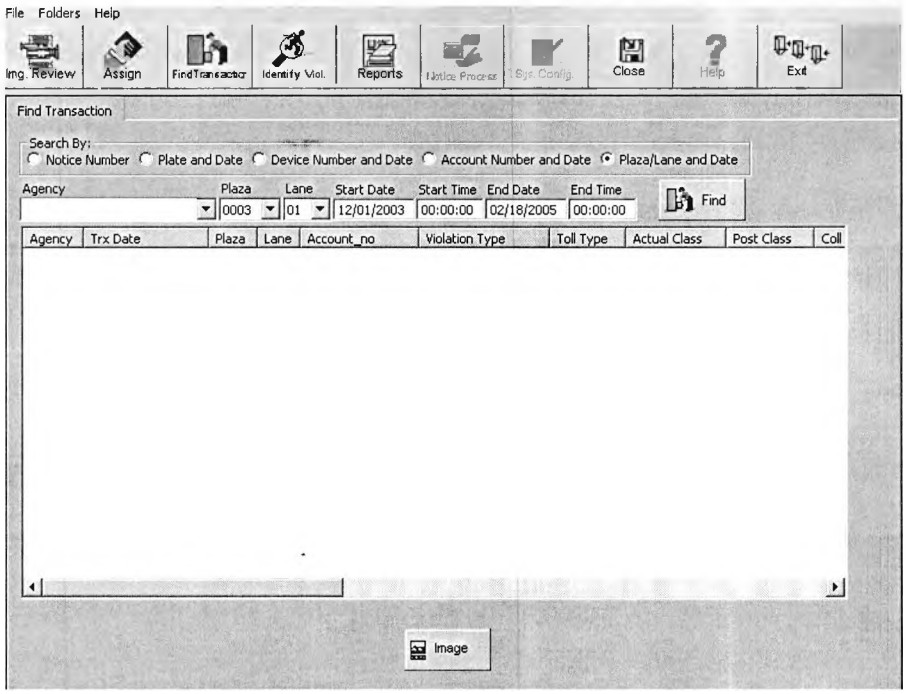
Step	**Action**
1.	Access the Violation – Assign screen.
2.	Verify that the **Employee Role** field is populated with Administrator.
3.	Click the Employee ID in the right white section of the screen.
4.	Click the Batch number being assigned in the left white section of the screen.
5.	Click the *Assign* button in the middle to assign the batch to the employee.
6.	Click the *Return* button in the middle if you are taking an assigned batch away from a clerk to be assigned to another individual.
7.	Click the *Close* button at the top of the screen when you have finished assigning all the batches for the shift.

ETC Violation Functions – Find Transaction

The ETC Find Transaction function is used to review specific violation transactions.

Access Find Transaction

To access the ETC Violation Find Transaction function, complete the following steps:

Step	Action
1	From the VECTOR main menu screen click the ETC Violation icon. The Violation Application toolbar displays.
2	Click the Find Transaction button. The Find Transaction screen displays. 

Field Descriptions: Violation – Find Transaction

IMPORTANT!: Since agencies can configure VECTOR in a variety of ways and at different times, some fields, field characteristics and options may appear differently on your system than as described in this guide. Please see your Supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Violations – Image Review	
Field Name	**Description, Format, and Features**
Account Number and Date	Search criteria field. ***RADIO BUTTON***
Agency	Search criteria field. ***DROP DOWN LIST***
Device Number and Date	Search criteria field. ***RADIO BUTTON***
End Date	Search criteria field. ***FILL IN***
End Time	Search criteria field. ***FILL IN***
Lane	Search criteria field. ***DROP DOWN LIST***
Notice Number	Search criteria field. ***RADIO BUTTON***
Plate and Date	Search criteria field. ***RADIO BUTTON***
Plaza/Lane and Date	Search criteria field. ***RADIO BUTTON***
Plaza	Search criteria field. ***DROP DOWN LIST***
Start Date	Search criteria field. ***FILL IN***
Start Time	Search criteria field. ***FILL IN***

Find Transaction

To Find Transactions, complete the following steps:

Step	Action
1.	Access the Violation – Find Transaction screen.
2.	Click the radio button at the top of the screen for the search parameter you want to use. (Notice Number, Plate and Date, Device Number and Date, Account Number and Date or Plaza/Lane and Date).
3.	Click the name of the agency, from the drop-down menu in the Agency field.
4.	Click the plaza name from the drop-down menu in the Plaza field.
5.	Click the lane number from the drop-down menu in the Lane field.
6.	Click the Start Date field and enter the date for which you are searching.
7.	Click the Start Time field and enter the time parameter.
8.	Click the End Date field and enter the date for which you are searching.
9.	Click the End Time field and enter the time parameter.
10.	Click the Find button – this screen could take some time to load.
11.	Click the row of the transaction for which you are looking.

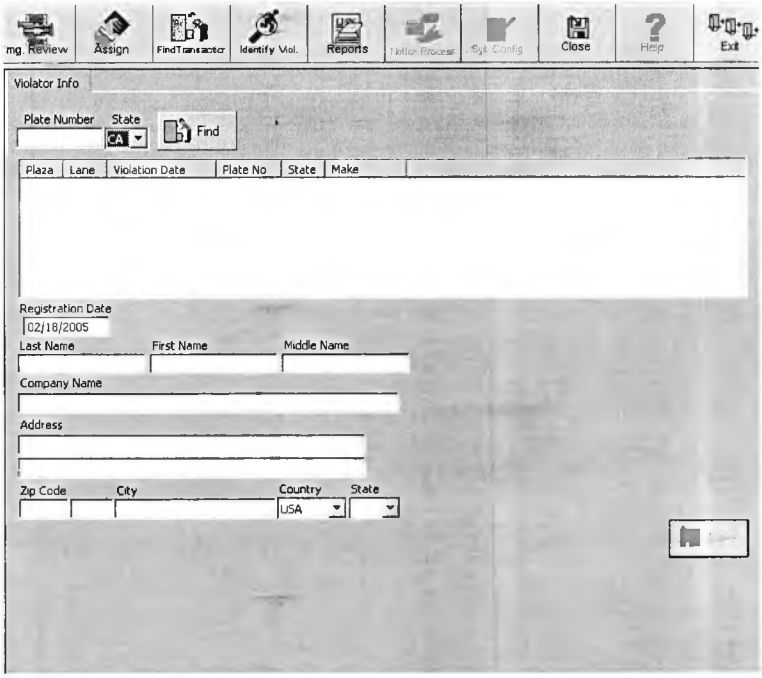
ETC Violation Functions – Identify Violator

The ETC Identify Violator function is used to enter or find information about a violator.

Access Identify Violator

To access the ETC Identify Violator function, complete the following steps:

Step	Action
3	From the VECTOR main menu screen click the ETC Violation icon. The Violation Application toolbar displays.
4	Click the Identify Viol. button. The Violator Information screen displays.



Field Descriptions: Violation – Identify Violator

IMPORTANT!: Since agencies can configure VECTOR in a variety of ways and at different times, some fields, field characteristics and options may appear differently on your system than as described in this guide. Please see your Supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Violations – Image Review	
Field Name	**Description, Format, and Features**
Address	Edit field. ***FILL IN***
City	Edit field. ***FILL IN***
Company Name	Edit field. ***FILL IN***

Violations – Image Review	
Field Name	**Description, Format, and Features**
Country	Edit field. ***DROP DOWN LIST***
First Name	Edit field. ***FILL IN***
Last Name	Edit field. ***FILL IN***
Middle Name	Edit field. ***FILL IN***
Plate Number	Search criteria field. ***FILL IN***
Registration Date	Edit field. ***FILL IN***
State	Search criteria field at top of screen. ***DROP DOWN LIST***
State	Edit field at bottom right of screen. ***DROP DOWN LIST***
Zip Code	Edit field. ***FILL IN***

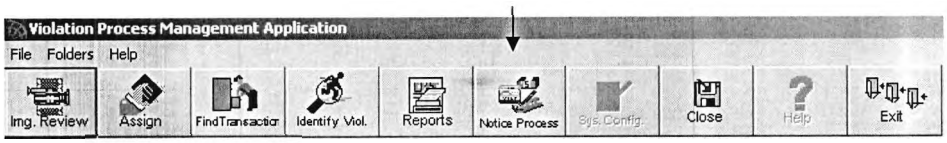
Identify Violator

To Find Violators and edit information, complete the following steps:

Step	Action
1.	Access the Violation – Identify Violator screen.
2.	Click the Plate Number field and enter the plate number for which you are looking.
3.	Click the drop-down arrow in the State field and select the appropriate state.
4.	Click the Find button and the white section of the screen will populate.
5.	You are able to review the current information. If the information is correct you may close the function. **If the information needs to be edited, perform the following steps:**
6.	Click the Plate Number field and enter the plate number you are looking for.
7.	Click the drop-down arrow in the State field and select the appropriate state.
8.	Click the Find button and the white section of the screen populates.
9.	Click the Registration Date field and enter the correct registration date.
10.	Click the Last Name field and enter the correct last name.

Step	Action
11.	Click the First Name field and enter the correct first name.
12.	Click the Middle Name field and enter the correct middle name.
13.	Click the Company Name field and enter the correct company name (if applicable).
14.	Click the Address field and enter the correct address.
15.	Click the Zip Code field and enter the correct zip code.
16.	Click the City field and enter the correct city.
17.	Click the drop-down arrow in the Country field and select the correct country.
18.	Click the down arrow in the State drop down list and select the correct state.
19.	Click the *Save* button at the bottom of the screen and answer *Yes* when asked if you want to save the information.
20.	You are returned to the Violator Information screen. Click the *Close* button at the top of the screen when done and you are returned to the Violations toolbar.

ETC Violation Functions – Notice Process



The ETC Notice Process function is used for notice dismissal, transfer of responsibility and processing notice batch check payments.

Access Notice Process

To access the ETC Notice Process function, complete the following steps:

Step	Action
1	From the VECTOR main menu screen click the ETC Violation icon. The Violation Application toolbar displays.

Step	Action
2	Click the notice process. button. The Notice Process screen displays with the Notice Dismissal tab open.

Field Descriptions: Violation – Notice Process

IMPORTANT!: Since agencies can configure VECTOR in a variety of ways and at different times, some fields, field characteristics and options may appear differently on your system than as described in this guide. Please see your Supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Violations – Notice Process	
Field Name	**Description, Format, and Features**
Account Number	Customer account number *DISPLAY /EDIT*
Batch No.	If processing batch violations, this field will populate. *DISPLAY ONLY*
Citation Level	The level assigned by business rule processing. *DISPLAY /EDIT*
Citation Status	The status of the citation. *DISPLAY /EDIT*
Device Number	The tag number for the citation. *DISPLAY /EDIT*
Dismissal Status	The status of the dismissal. *DROP DOWN LIST*

Violations – Notice Process	
Field Name	**Description, Format, and Features**
Fee Amount	The fee as calculated based on citation level, number of citations and citation status. *DISPLAY ONLY*
Notice Number	The number on the notice. *FILL IN FIELD*
Notice Number	In the white area of the screen. *DISPLAY /EDIT*
Penalty	The amount of any penalty payment due. *DISPLAY ONLY*
Plate Number	The license plate number of the vehicle incurring the citation. *DISPLAY ONLY*
Plate State	The license plate state of the vehicle incurring the citation. *DISPLAY ONLY*
Serial No.	The serial number of the device. *DISPLAY ONLY*
Toll Amount	The amount of the toll to be charged. *DISPLAY ONLY*

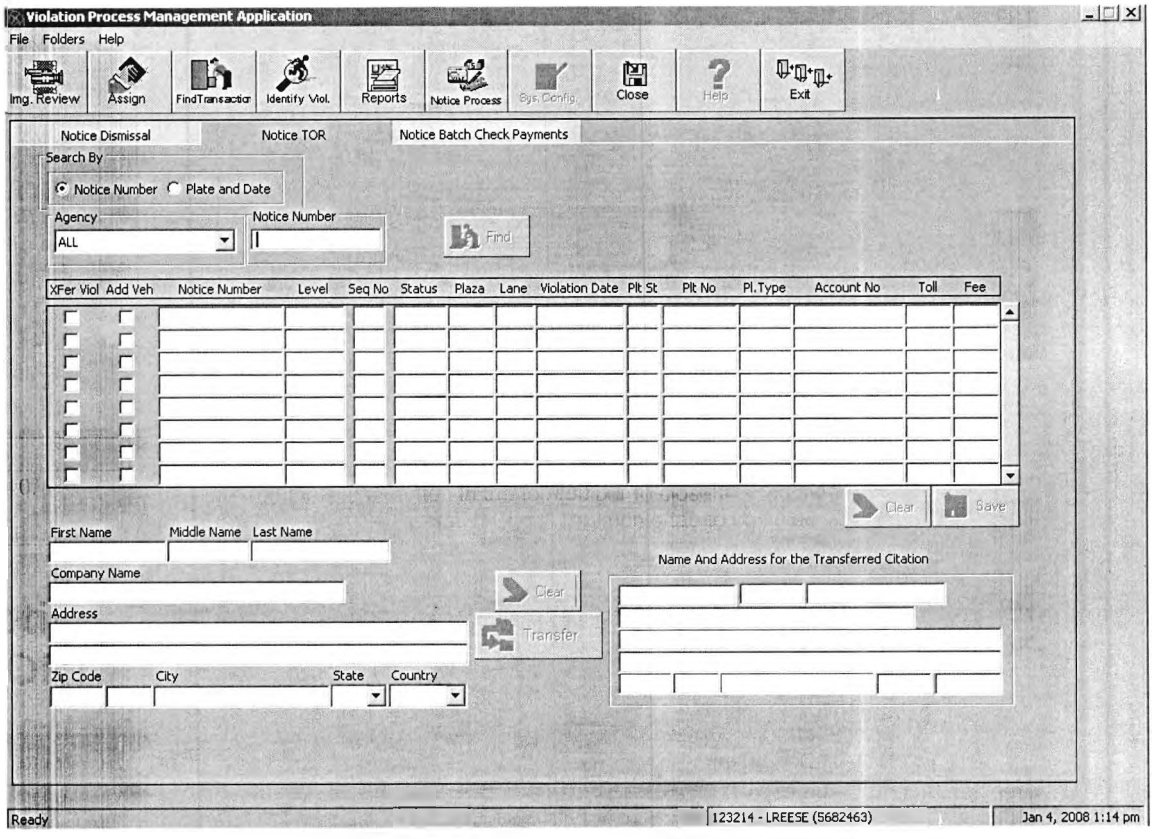
Notice Process – Notice Dismissal

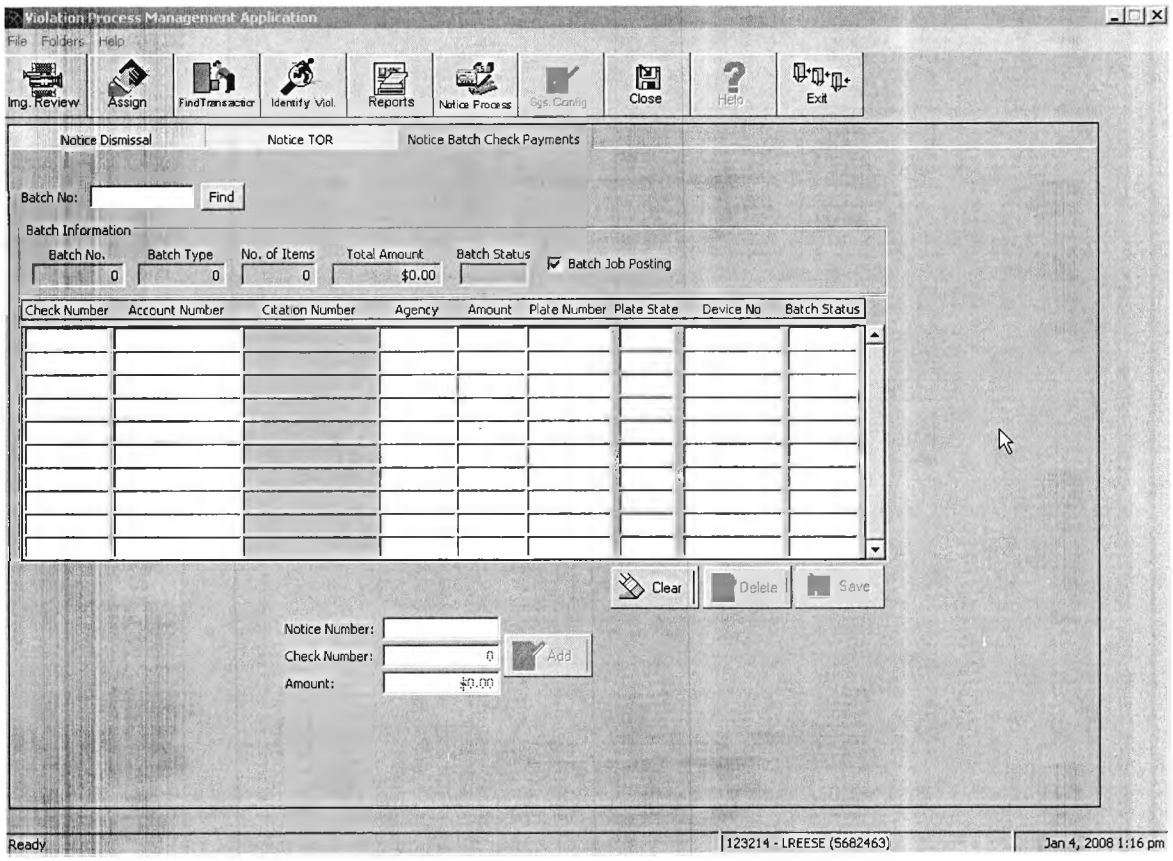
To Dismiss notices and edit information, complete the following steps:

Step	Action
1.	Access the Violation – Notice Process screen and the screen will open with the Dismissal tab active..
2.	If you are conducting batch processing the screen will be populated with all notices in a batch. You may click in any editable field and correct information that may be incorrect. When edits are done click on the Save button at the bottom right of the screen.
3.	To add a notice, click in the **Notice Number** field at the bottom left of the screen and type in the new notice number.
4.	Click on the Add button next to the Notice Number field at the bottom left of the screen.
5.	The top part of the screen will display the information for the notice number keyed in.
6.	Repeat steps 2-4 until all notices have been added/corrected.
7.	To remove a record from the top part of the screen, click on the row containing the record and click the Delete button at the bottom right of the screen.
8.	To remove information in any field, click in the field to be corrected, click the Clear button at the bottom right of the screen and type in the correct information.
9.	When edits or additions are done click on the Save button at the bottom right of the screen. You will be prompted to Save your work.

Step	Action
10.	Click on the Close button in the top toolbar to close this function or click on the Notice TOR tab or the Notice Batch Check Payments tab to continue working in this function.

Notice Process – Notice Transfer of Responsibility (TOR)





Reports

Reports are discussed in detail in Chapter 8, Reports, of this guide.

Exit violations

When you are done in the Violations section of VECTOR, make sure you have no open screens. This is accomplished by clicking the *Close* button at the top of the screen while any screen is visible. Click the *Exit* button to return to the main VECTOR window.

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CHAPTER 6 - HOST REVENUE RECONCILIATION

This chapter describes the processes associated with the Electronic Toll Collection (ETC) Host Revenue Reconciliation subsystem. It also includes step-by-step instructions on how to use each of the subsystem functions.

The Host Revenue Reconciliation function is used by all departments at the CSC that handle funds, as well as toll collectors at the plazas. The function is used to end the tour of duty each day.

Subsystem Functions

The ETC Host/Revenue Reconciliation subsystem is organized by functions that are used for facilitating the end of tour of duty process. With the ETC Host/Revenue Reconciliation subsystem, you can perform specific functions such as:

- Deposits
- Revenue Bags
- Adjustments
- Find Transactions
- Generate reports

The functions are represented by buttons on the ETC Host/Revenue Reconciliation Application toolbar. The toolbar also includes buttons used to close function screens, open online help, and exit the VECTOR Application entirely. To initiate each function, click the corresponding button on the toolbar.

Sub-Functions

Each function within the ETC Host/Revenue Reconciliation subsystem is managed through sub-function screens that are opened from tabs located under the toolbar. The sub-function tabs that display vary depending on which main function was selected (highlighted).

Proprietary Data

Access The Subsystem

To access the ETC Host/Revenue Reconciliation subsystem, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the Host/Revenue Reconciliation icon.
2	The ETC Host/Revenue Reconciliation Functions toolbar displays.

ETC Host/Revenue Reconciliation Functions – Deposits

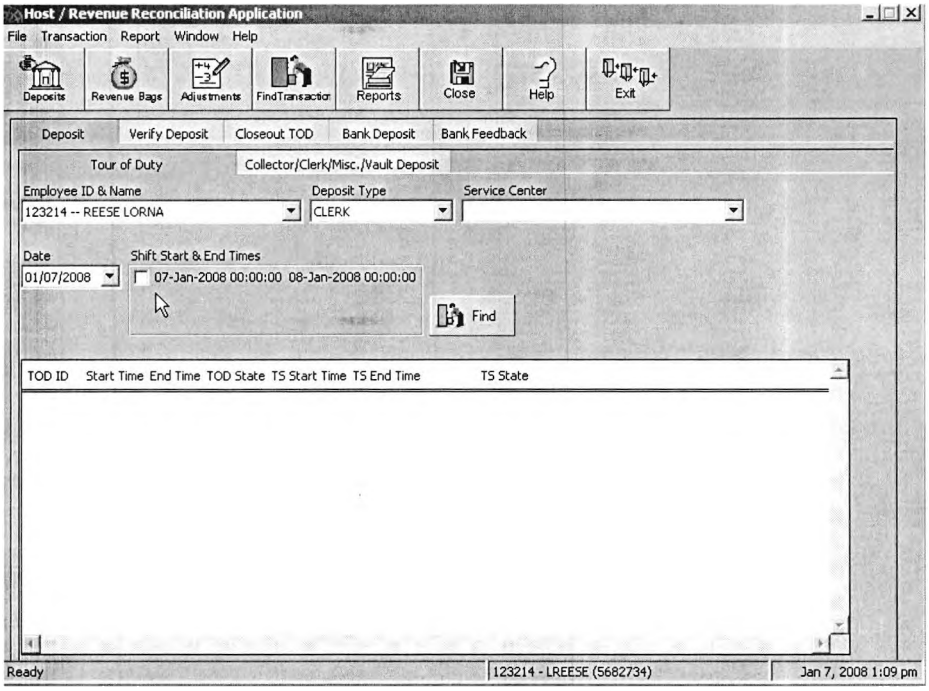
The ETC Deposits function is used by all departments at the CSC to close out shifts (end tour of duty).

Access the Deposits Function

To access the ETC Host/Revenue Reconciliation function, complete the following steps:

Step	Action
1	From the VECTOR main menu screen click the ETC Host/Revenue Reconciliation icon. The Host/Revenue Reconciliation Application toolbar displays.

Step	Action
2	Click the Deposits button. The Deposits screen displays with the focus on the Deposit, Tour of Duty tab.



Field Descriptions: Host/Revenue Reconciliation –Deposits

IMPORTANT!: Since agencies can configure VECTOR in a variety of ways and at different times, some fields, field characteristics and options may appear differently on your system than as described in this guide. Please see your Supervisor for more information.

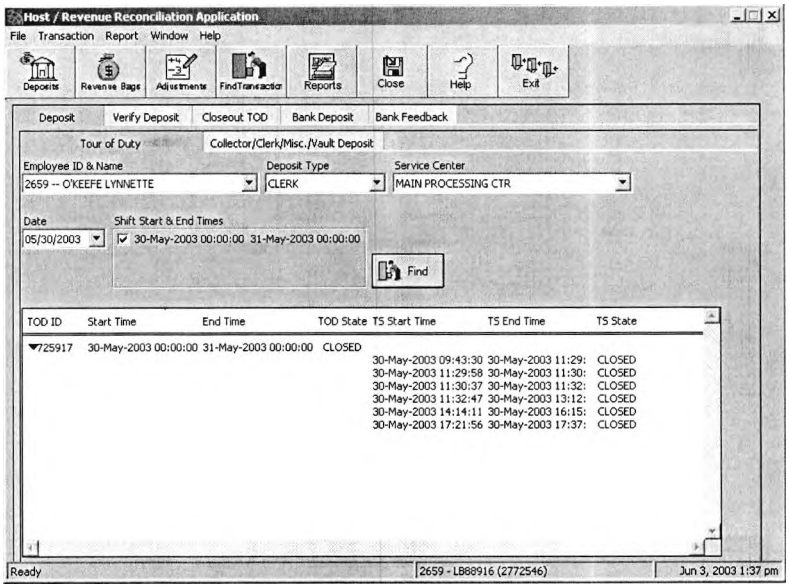
Fields are listed in alphanumeric order, not the order they appear on screen.

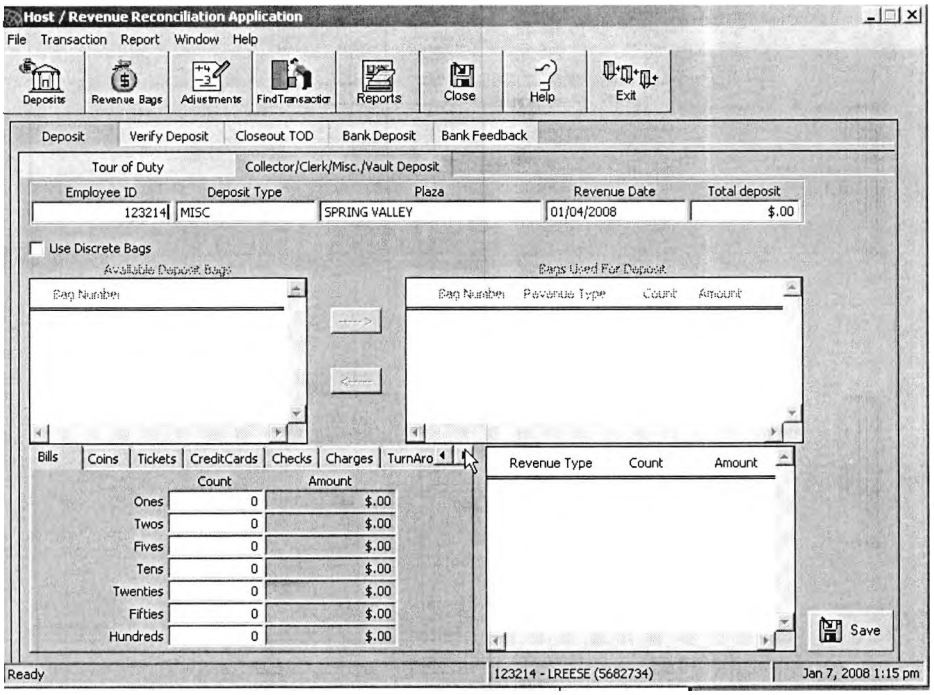
Host/Revenue Reconciliation - Deposits	
Field Name	**Description, Format, and Features**
Date	The date for the end of tour of duty. ***DROP DOWN LIST***
Deposit Type	The type of deposit (e.g. clerk, toll collector). ***DROP DOWN LIST***
Employee ID & Name	List of shift employees. ***DROP DOWN LIST***

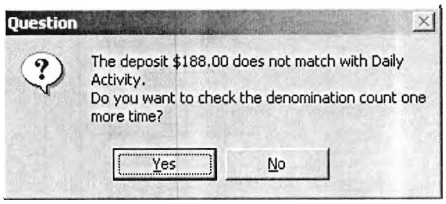
Host/Revenue Reconciliation - Deposits	
Field Name	**Description, Format, and Features**
Service Center	Name of the service center. ***DROP DOWN LIST***
Shift Start & End Times	The shift time. ***CHECK BOX***

Deposits

To make deposits, complete the following steps:

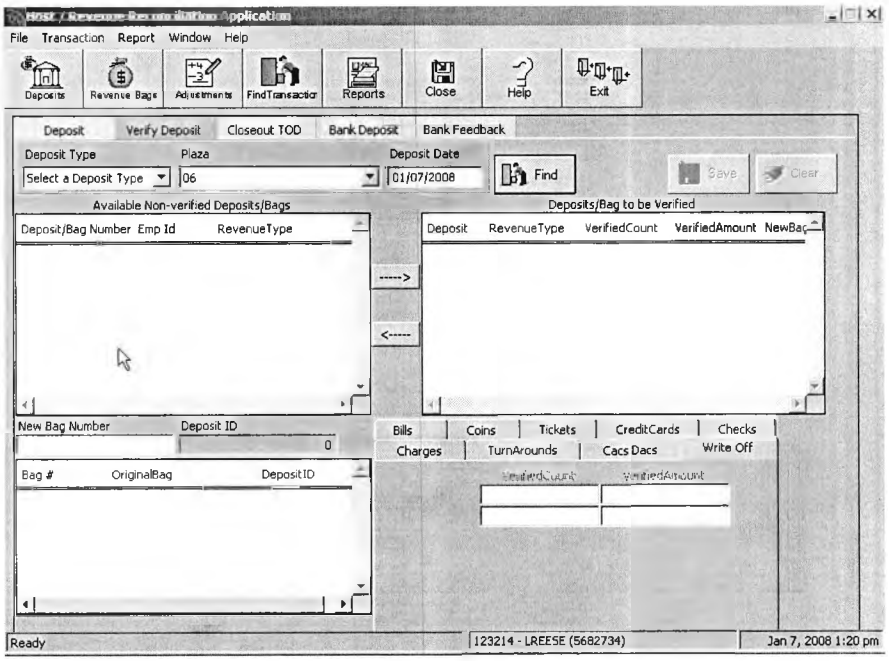
Step	Action
1.	Access the Host/Revenue Reconciliation – Deposits screen.
2.	The Tour of Duty tab is active under the Deposit tab. The data for the clerk that is logged in appears in the white section of the screen. 
3.	The Deposit Type field automatically shows the correct employee type. This field automatically defaults to the name of the employee who is logged into VECTOR.
4.	Click the drop-down arrow in the Service Center field and select the appropriate service center/plaza if necessary.
5.	Click the drop-down arrow in the Date field and select the correct date (if the default is incorrect).
6.	Click the checkbox in the Shift Start & End Times field, for the appropriate shift worked.

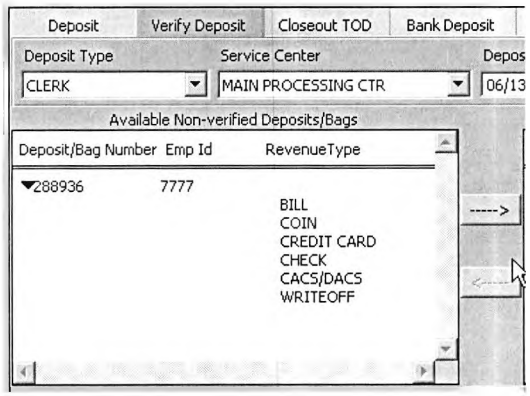
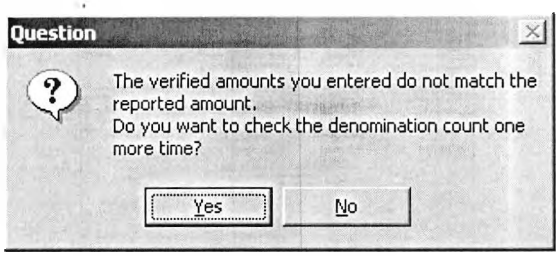
Step	Action
7.	Click the Collector/Clerk/Misc./Vault Deposit tab to continue.  When this screen appears, the following fields automatically populate: Employee ID, Deposit Type, Plaza, and Revenue Date. The Total Deposit field populates when all the deposits have been entered at the bottom of the screen and saved.
8.	Click the Use Discrete Bags field if each depositor has their own assigned deposit bag. Not all service centers use this field.
9.	If there is no assigned bag, then select a bag from the Available Deposit Bags field and click the right arrow key to move the bag to the Bags Used For Deposit field.
10.	Click the tabs for each type of deposit (bottom left of the screen) and enter the Count for each.
11.	The Amount fields next to each field, automatically calculate when the counts have been entered.
12.	A summary appears on the right side of the screen in the white area.

Step	Action
13.	Click the Save button when done. The system compares the amount entered with the transactions saved in the database. If the amount does not reconcile, the following pop up box appears:  This allows for the correction of errors you may have made when entering the deposit information.
14.	When the last deposit is completed, click the Close button in the top toolbar to exit the Deposit function.

Verifying Deposits

The supervisor is responsible for verifying the deposits for their department or plaza at the end of shift. To verify deposits, complete the following steps:

Step	Action
1.	Access the Host/Revenue Reconciliation – Deposits screen.
2.	Click on the Verify Deposit tab on the Deposit screen. The Verify Deposit screen displays. 
3.	Click the drop-down arrow in the Deposit Type field and select the appropriate deposit type.

Step	Action
4.	Select the plaza and deposit date.
5.	Click the Find button to the right of the screen. The upper left white section of the screen populates with the employee deposit numbers. 
6.	Click the deposit information in the left white section of the screen and click the right pointing arrow to move the information to the right white section of the screen.
7.	Click each of the Denomination or Paytype tabs and enter the count for each to verify the previous entry.
8.	Click the Save button at the upper right of the screen when you have completed verifying the deposits.
9.	The supervisor has one opportunity to correct errors made during data entry. The following pop up appears before the screen closes: 

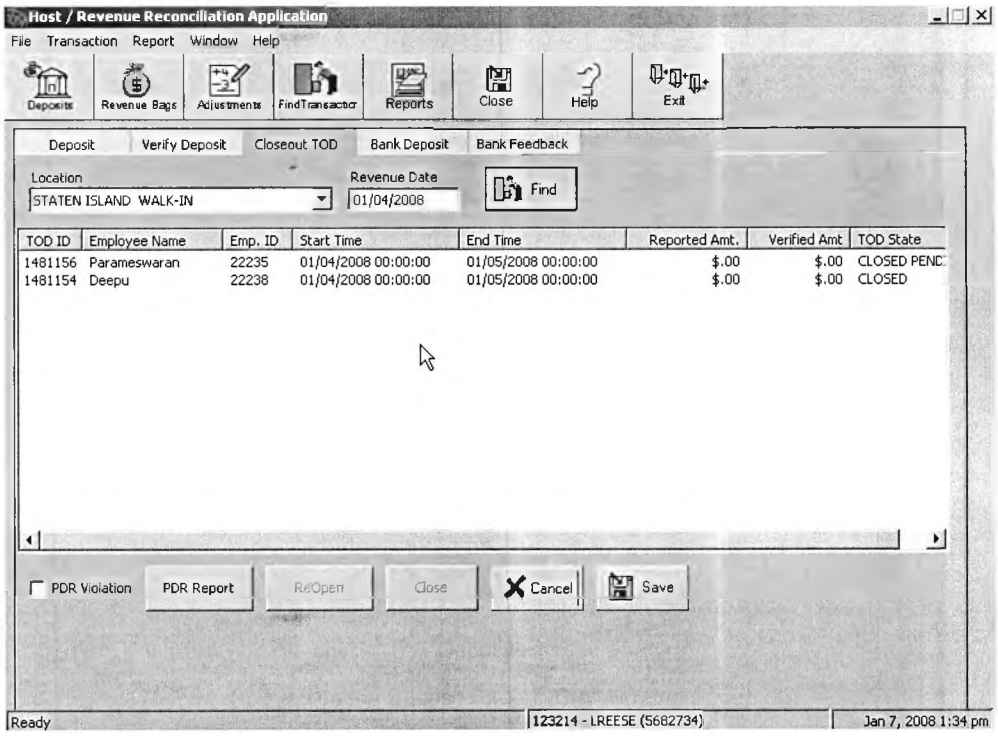
Step	Action
10.	Once the correction is entered, the display window shows the variance between the clerk and the supervisor.
11.	Click the Close button in the top toolbar when done for the shift.

A C S
Proprietary Data

Closeout Tour Of Duty

This function is used by the work leader/supervisor to close out the Tour of Duty. If deposits do not match, the work leader or supervisor indicates a "no match," then prints out a Payment Daily Summary (PDR) report and sends it to the finance department. The PDR report shows a list of all financial transactions and the next day the work leader or supervisor and the employee will investigate the discrepancy and resolve the "no match". To close out the Tour of Duty, complete the following steps.

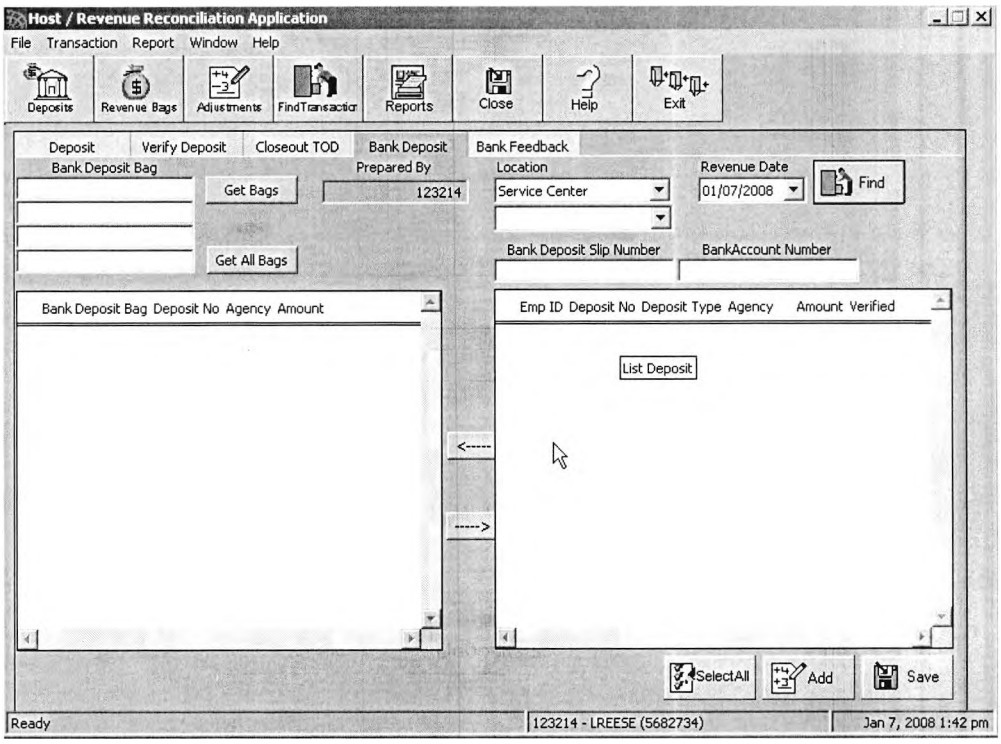
Note: This screen is also used to closeout TOD for employees who do not "match". All employees must have their TODs closed out for the previous day, before being able to log in for the current day.

Step	Action
1.	Access the Host/Revenue Reconciliation – Deposits screen.
2.	Click on the Closeout TOD tab on the Deposit screen. The following screen displays. 
3.	Click the drop-down arrow in the Location field and select the appropriate location.
4.	The Revenue Date field automatically populates with the current date.
5.	Click the Find button and the white screen automatically populates.
6.	Click the row that has a "no match" between Reported Amt. and Verified Amt.
7.	To find an error, click the Reopen button at the bottom of the screen and the deposit summary screen opens so you can see which tab has the no match count.
8.	Click the Close button when you have reviewed the deposit.

Step	Action
9.	Click the checkbox if this is a PDR Violation. Not all service centers use this field.
10.	Click the PDR Report button when done.
11.	Click the Save button to save the information and print the PDR Report.

Bank Deposit

This function is used by the deposit clerks in preparing the bank deposits..To prepare bank deposits, complete the following steps.

Step	Action
1.	Access the Host/Revenue Reconciliation – Deposits screen.
2.	Click on the Bank Deposit tab on the Deposit screen. The following screen displays.  The Prepared By and Revenue Date fields populate automatically. The Location and Revenue Date fields can be modified but the Prepared By field is not editable.
3.	Click the drop-down arrow in the Service Center field and select the appropriate service center from the list.
4.	Click the drop-down arrow in the Revenue Date field and select the appropriate work date from the list. If the current date is correct, go to the next step.

Step	Action
5.	Click the Find button at the right side of the screen. The clerk number appears with cash and check amounts for each agency in the right white section of the screen.
6.	Deposit Bag numbers appear in the left white section of the screen.
7.	Highlight the clerk information on the right, the bag number on the left, and click the left pointing arrow to move the clerk information to a deposit bag. You cannot mix agencies in a deposit bag. Each agency must have it's own deposit bag.
8.	Click the Bank Deposit Slip Number field and enter the number of the deposit slip.
9.	Click the BankAccount Number field and enter the bank account number.
10.	If you are depositing all the bags that appear in the left section of the screen, click the Select All button at the bottom of the screen, then click the right pointing arrow to move them all to the right side of the screen.
11.	Click the Add button at the bottom of the screen.
12.	Click the Save button at the bottom of the screen. The deposit is ready for review by the bank deposit clerk.

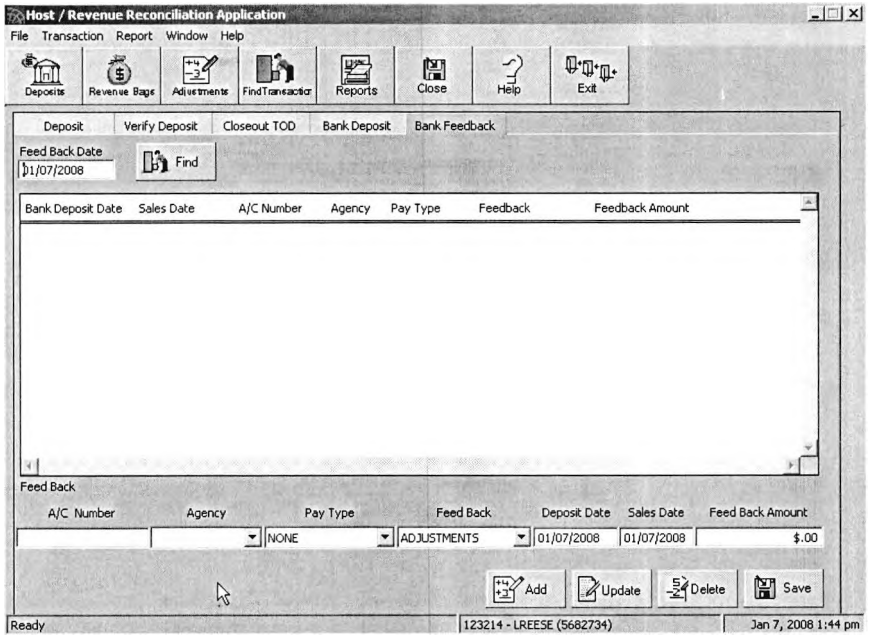
Bank Feedback

When a deposit is made, the bank deposit clerk verifies the information received, and sends this feedback to the deposit clerk. To prepare bank feedback, complete the following steps.

Step	Action
1.	Access the Host/Revenue Reconciliation – Deposits screen.

Proprietary Data

Step	Action
2.	Click on the Bank Feedback tab on the Deposit screen. The following screen displays.
3.	The Feedback Date field is populated automatically, but can be changed if necessary.
4.	Click the Find button to see a list of all deposits that have no feedback associated with them.
5.	Click the A/C Number field and enter the account number from the deposit slip.
6.	Click the drop-down arrow in the Agency field and select the appropriate agency.
7.	Click the drop-down arrow in the Pay Type field and select the appropriate pay type.
8.	Click the drop-down arrow in the Feed Back field and select the appropriate feedback from the list.
9.	The Deposit Date and Sales Date fields populates automatically, but can be changed if necessary.
10.	Click the Feed Back Amount field and enter the amount of the feedback (if adjustments were made, the feedback amount and amount on the deposit slip may not always match).
11.	Click the Add button and the white section of the screen populates with the information you entered.
12.	If there needs to be a change to the feedback, click the row that contains the information in the white section of the screen, then click the appropriate field for the change you are making. Make the change and click the Update or Delete buttons.
13.	Click the Save button to save the information and prepare the feedback for the deposit clerk to review.
14.	Click the Close button at the top of the screen to exit the deposit function.

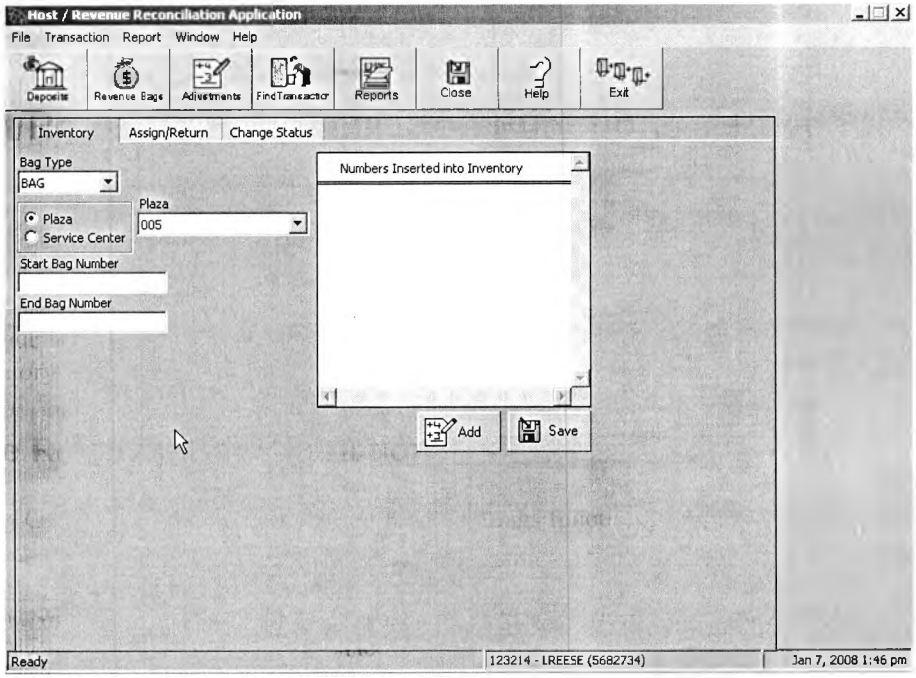


ETC Host/Revenue Reconciliation Functions – Revenue Bags

The ETC Revenue Bags function is used by deposit clerks at the CSC to conduct financial reconciliation bag types into inventory.

Access the Revenue Bags Function

To access the ETC Host/Revenue Reconciliation Revenue Bags function, complete the following steps:

Step	Action
1	From the VECTOR main menu screen click the ETC Host/Revenue Reconciliation icon. The Host/Revenue Reconciliation Application toolbar displays.
2	Click the Revenue Bags icon and the Inventory screen displays. 

Proprietary Data

Field Descriptions: Host/Revenue Reconciliation –Revenue Bags/Inventory

IMPORTANT!: Since agencies can configure VECTOR in a variety of ways and at different times, some fields, field characteristics and options may appear differently on your system than as described in this guide. Please see your Supervisor for more information.

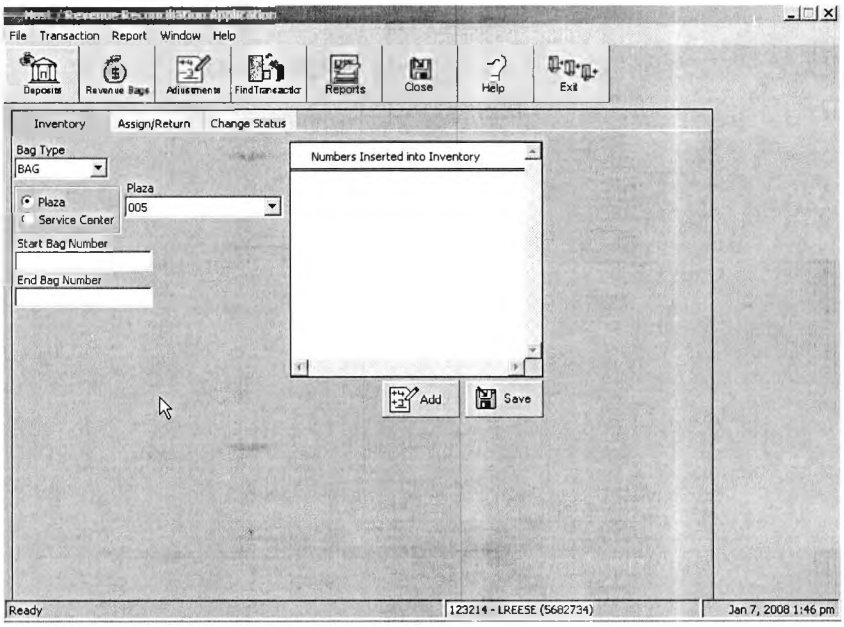
Fields are listed in alphanumeric order, not the order they appear on screen.

Host/Revenue Reconciliation – Revenue Bags/Inventory	
Field Name	**Description, Format, and Features**
Bag Type	The type of bag to be put into inventory. ***DROP DOWN LIST***
End Bag Number	The number of the last bag to be put into inventory. ***FILL IN***
Plaza	Radio Button to select if at a plaza. ***RADIO BUTTON***
Plaza	The plaza number or name. ***DROP DOWN LIST***
Service Center	Radio Button to select if at a service center. ***RADIO BUTTON***
Start Bag Number	The number of the first bag to be put into inventory. ***FILL IN***

Placing Bags Into Inventory

To perform revenue bag inventory functions, complete the following steps:

Step	Action
1.	Access the Host/Revenue Reconciliation – Revenue Bags screen.

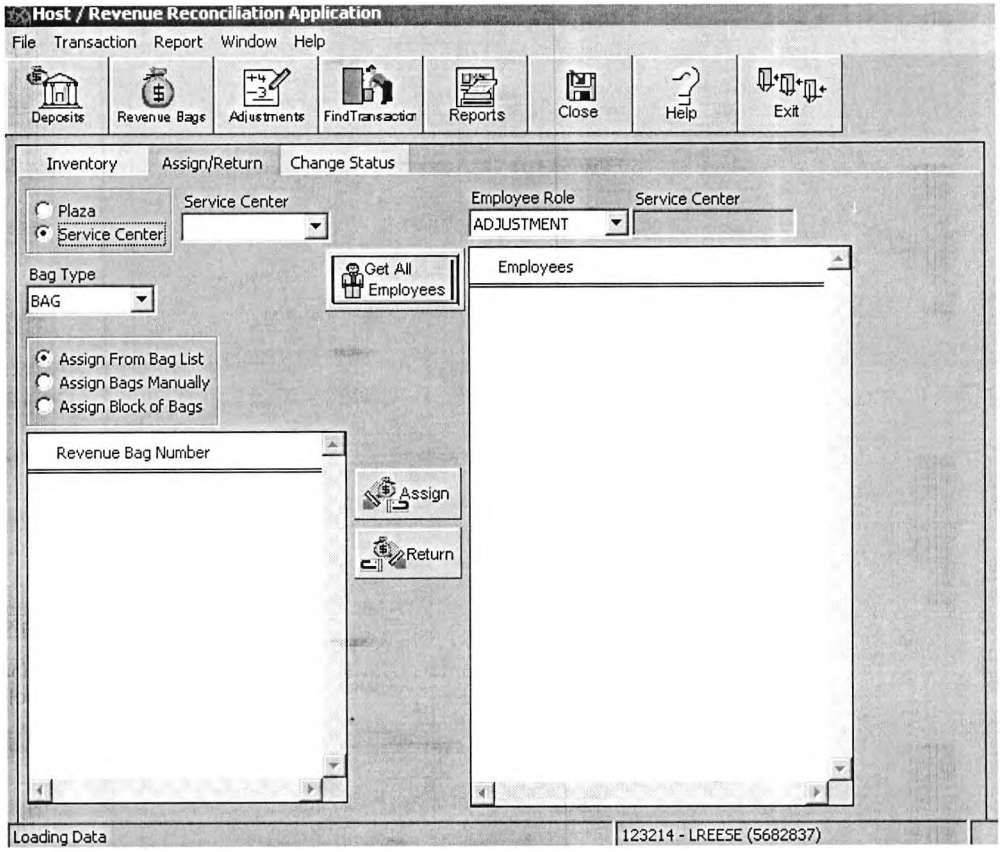
Step	Action
2.	The Inventory tab is active.and the following screen displays. 
3.	Click the drop-down arrow in the **Bag Type** field and select the bag type from the list.
4.	Click the Radio Button next to **plaza** or **service center** based on the correct location.
5.	Click the drop-down arrow in the **Plaza** field and select the correct location from the list.
6.	Click the **Start Bag Number** field and enter the bag number in for the first bag to be put into inventory.
7.	Click the **End Bag Number** field and enter the bag number in for the last bag to be put into inventory.
8.	Click on the Add button at the bottom right of the screen to add the bag to inventory.
9.	Click the Save button at the right of the screen to save the transaction.

Access the Revenue Bags Assign/Return Function

To access the ETC Host/Revenue Reconciliation Revenue Bags Assign/Return function, complete the following steps:

Step	Action
1	From the VECTOR main menu screen click the ETC Host/Revenue Reconciliation icon. The Host/Revenue Reconciliation Application toolbar displays.

Step	Action
2	Click the Revenue Bags icon and the Inventory screen displays. Click the Assign/Return tab and the following screen displays.



Field Descriptions: Host/Revenue Reconciliation –Assign/Return Bags

IMPORTANT!: Since agencies can configure VECTOR in a variety of ways and at different times, some fields, field characteristics and options may appear differently on your system than as described in this guide. Please see your Supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Host/Revenue Reconciliation – Revenue Bags/Assign//Return	
Field Name	**Description, Format, and Features**
Assign Bags Manually	Allows for individual assignment of bags. ***RADIO BUTTON***
Assign Block of Bags	Allows for assignment of bags from a block of bags. ***RADIO BUTTON***

Host/Revenue Reconciliation – Revenue Bags/Assign//Return	
Field Name	**Description, Format, and Features**
Assign From Bag List	Allows for assignment of bags from a list of bags. ***RADIO BUTTON***
Bag Type	The type of bag to be put into inventory. ***DROP DOWN LIST***
Employee Role	Allows for the selection of employee role from a list. ***DROP DOWN LIST***
Plaza	Radio Button to select if at a plaza. ***RADIO BUTTON***
Service Center	Radio Button to select if at a service center. ***RADIO BUTTON***
Service Center	List of service centers or plazas depending on radio button selected. ***DROP DOWN LIST***

Assigning/Returning Bags Into Inventory

To perform revenue bag assign/return functions, complete the following steps:

Step	Action
1.	Access the Host/Revenue Reconciliation – Revenue Bags screen. The screen displays with the Inventory Tab active. Click on the Assign/Return tab to make that the active screen.
2.	Click the Radio Button next to **plaza** or **service center** based on the correct location.
3.	Click the drop-down arrow in the **Service Center** field and select the correct location from the list.
4.	Click the drop-down arrow in the **Employee Role** field and select the appropriate employee type from the list.
5.	To see a list of all employees for a given role click on the Get All Employees button and a list will appear on the right side of the screen in the white area.
6.	Click the drop-down arrow in the **Bag Type** field and select the bag type from the list.
7.	Click on the radio button next to the way you want to assign bags. (i.e. **Assign From Bag List, Assign Bags Manually** or **Assign Block of Bags**)
8.	Click on the revenue bag number in the white area of the screen on the left and click on the Assign button to assign the bag to an employee on the right side of the screen. To Return a bag you click on the employee name on the right side of the screen and click the Return button in the middle of the screen.
9.	Repeat steps 1 – 8 until you have completed bag Assignment/Return.
10.	Click the Close Button in the top toolbar and you will be prompted to save your work. Click OK to save your work and continue in the Revenue Bags function.

Access the Revenue Bags Change Status Function

This functionality is available in the Traffic and Revenue Control System (TRCS). The steps to change the status of a revenue bag can be found in the TRCS Money Room Manual, Chapter 3.

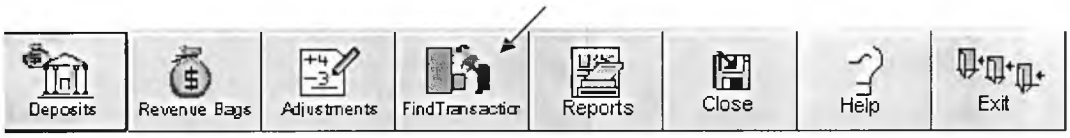
ETC Host/Revenue Reconciliation Functions – Adjustments

The ETC Adjustments function is used by deposit clerks at the CSC to conduct financial reconciliation adjustments.

Access the Host/Revenue Reconciliation Adjustments Function

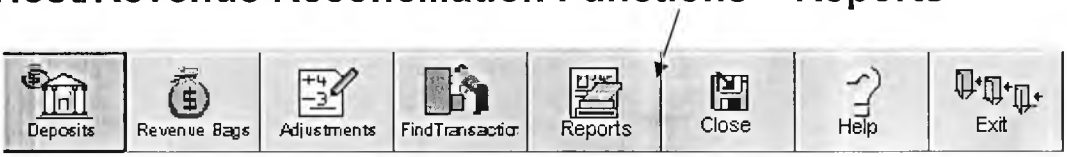
This functionality is available in the Traffic and Revenue Control System (TRCS). The steps to make adjustments can be found in the TRCS Auditor Manual, Chapter 3.

ETC Host/Revenue Reconciliation Functions – Find Transaction



The ETC Find Transaaction function is used by toll collection supervisory/audit staff to find lane transactions. Details on this function can be found in the TRCS Auditor Manual, Chapter 3.

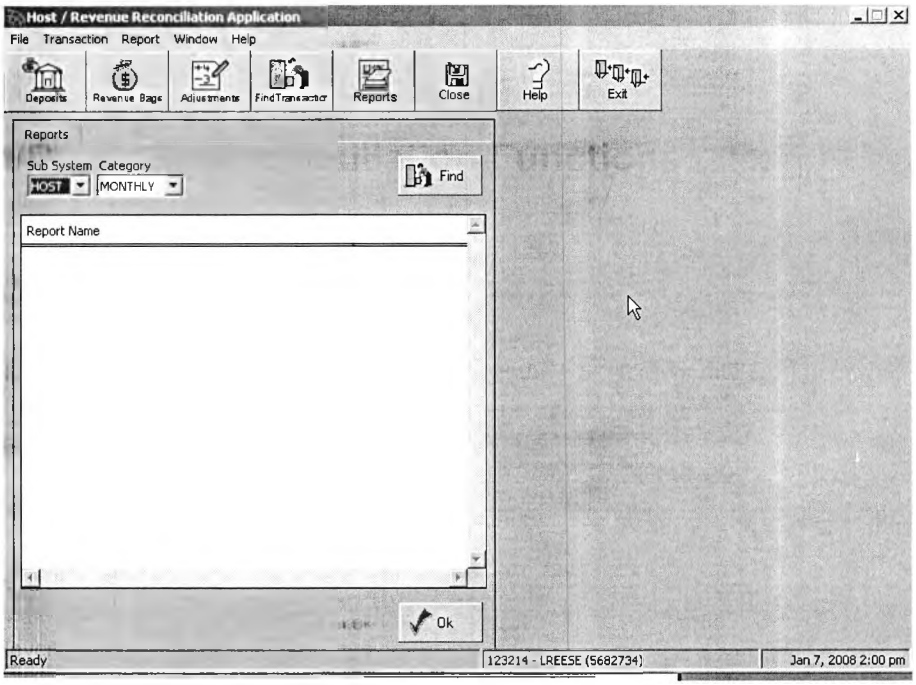
ETC Host/Revenue Reconciliation Functions – Reports



The ETC Host/Revenue Reconciliation Reports function is at the CSC to generate certain reports.

Access the Reports Function

To access the ETC Host/Revenue Reconciliation Reports function, complete the following steps:

Step	Action
1	From the VECTOR main menu screen click the ETC Host/Revenue Reconciliation icon. The Host/Revenue Reconciliation Application toolbar displays.
2	Click the Reports icon and the Reports screen displays. 

Field Descriptions: Host/Revenue Reconciliation –Reports

IMPORTANT!: Since agencies can configure VECTOR in a variety of ways and at different times, some fields, field characteristics and options may appear differently on your system than as described in this guide. Please see your Supervisor for more information.

Fields are listed in alphanumeric order, not the order they appear on screen.

Violations – Image Review	
Field Name	**Description, Format, and Features**
Category	Report category list. ***DROP DOWN LIST***
Subsystem	The subsystem list. ***DROP DOWN LIST***

Generating Reports

The Reports button in the Host/Revenue Reconciliation toolbar can be accessed but due to the variety and level of complexity of reports, a different manual has been created to cover them. Please refer to Chapter 7 of this guide or to the "VECTOR Reports Description Document" for information regarding these reports.

VECTOR enables an agency to limit which users may run each type of report. User roles are established and only certain users have rights to run certain reports. The accessible reports vary from agency to agency.
To perform Financial Reconciliation, complete the following steps:

Step	Action
1.	Access the Host/Revenue Reconciliation – Reports screen.
2.	Look in the Sub System drop down list and select the sub system for which you want to run the report.
3.	Look in the Category drop down list and select the category of report you want to run.
4.	Click the Find button at the right of the screen and the white area of the screen will populate with data that matches your report specifications.
5.	When you are done viewing the report click the Close icon in the top toolbar to exit the report function.
6.	Click the Exit icon in the top toolbar to exit the Host Revenue Reconciliation subsystem and return to the main VECTOR window.

CHAPTER 7 - VECTOR WEB APPLICATION

This chapter describes how to use the VECTOR Web application to perform the various CSC activities carried out by a CSR. The Web application is currently used by only a limited number of agencies, specifically those who have a need for retail tag sales.

The contents of this chapter are only produced "on demand" for those customers that need to process Retail Tag Sales.

Proprietary Data

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Chapter 8 - Reports

The Reports button in the Account Management application toolbar can be accessed, but due to the variety and level of complexity of reports, an entirely different manual has been created to cover them. Please refer to the VECTOR Reports Description Document for detailed information regarding reports.

VECTOR enables an agency to limit which users may run each type of report. User roles are established and only certain users have rights to run certain reports. The accessible reports vary from agency to agency. Adjust the instructions to find other reports if necessary.

Important Note: Two reports may be run in VECTOR, all other reports are run in Actuate.

Accessing Reports

Access to reports differs from user to user and project to project. A report should not be run without knowing the impact it has on the database. Some reports are hundreds of pages long if the level of detail is not restricted with input parameters. Most commonly used reports are set up to run automatically. Viewing a saved report has no impact on the database.

Not all reports are used by every project and some reports are only used by one project. This section explains how to access reports in two ways:

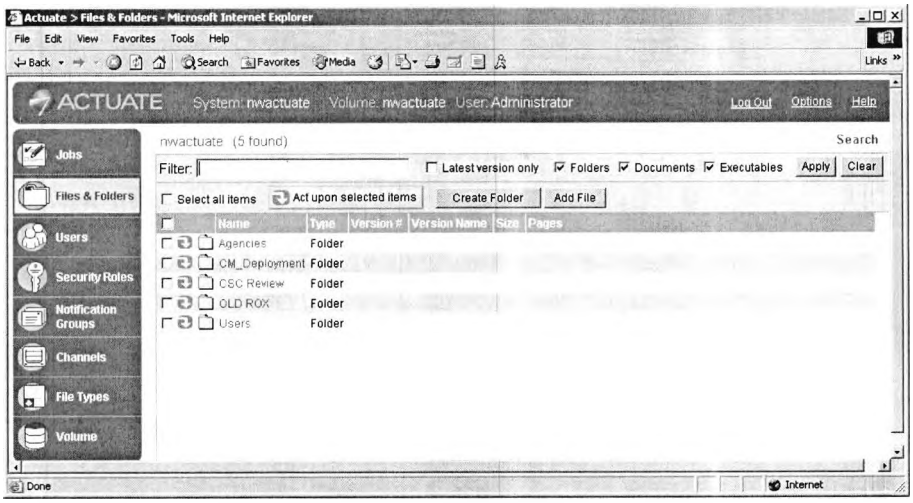
1. Through a web browser
2. Within the VECTOR on-line interface

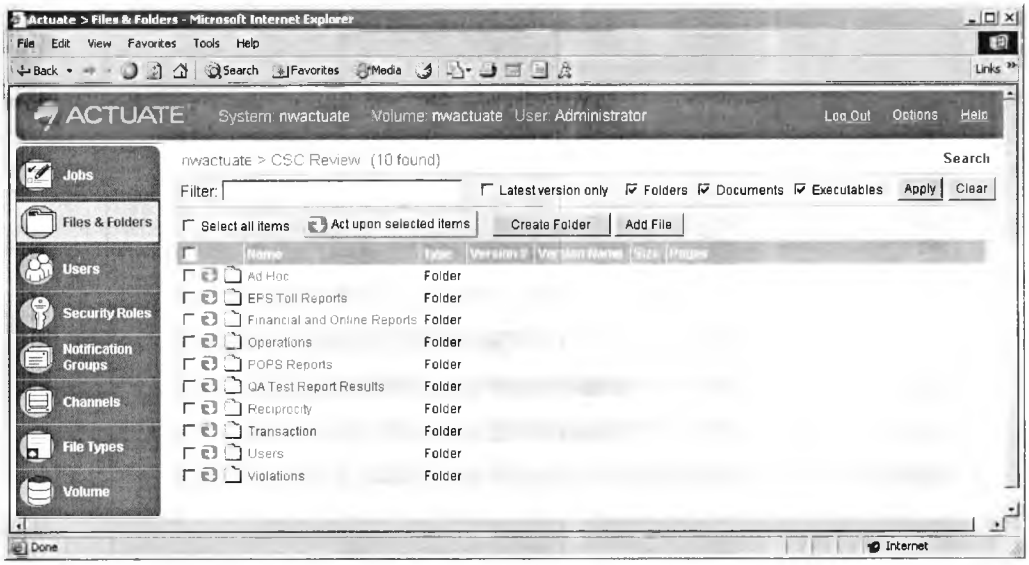
Proprietary Data

Accessing Reports Through The Web Interface

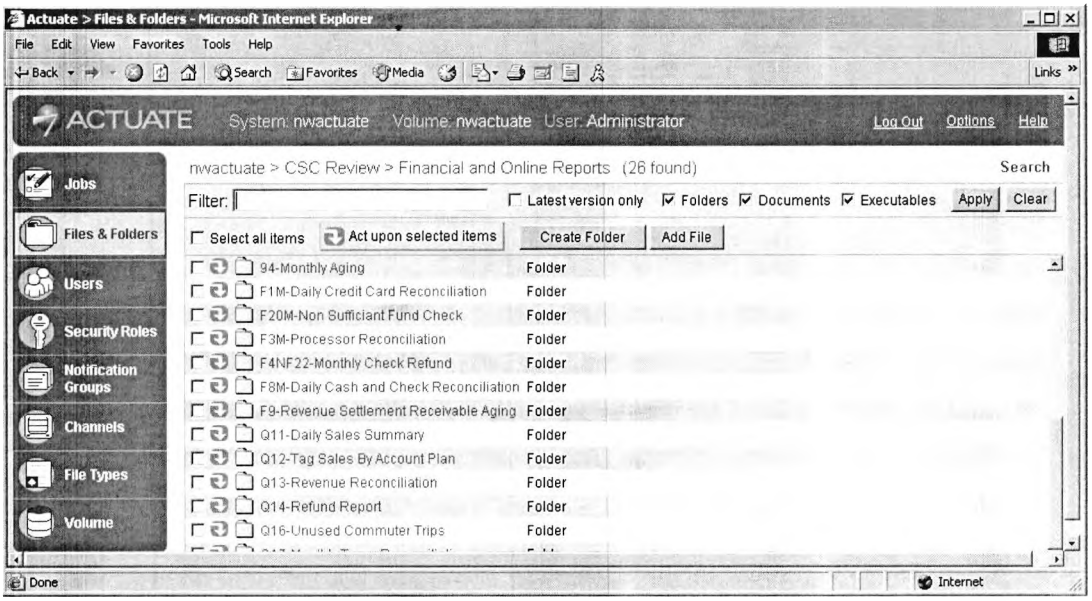
The steps below show how to access Report Q13 but other reports are accessible in a similar manner. It is possible that your Web interface looks slightly different and shows different reports, but the process of selecting and running a report is exactly the same. To access Reports through the Web interface, complete the following steps:

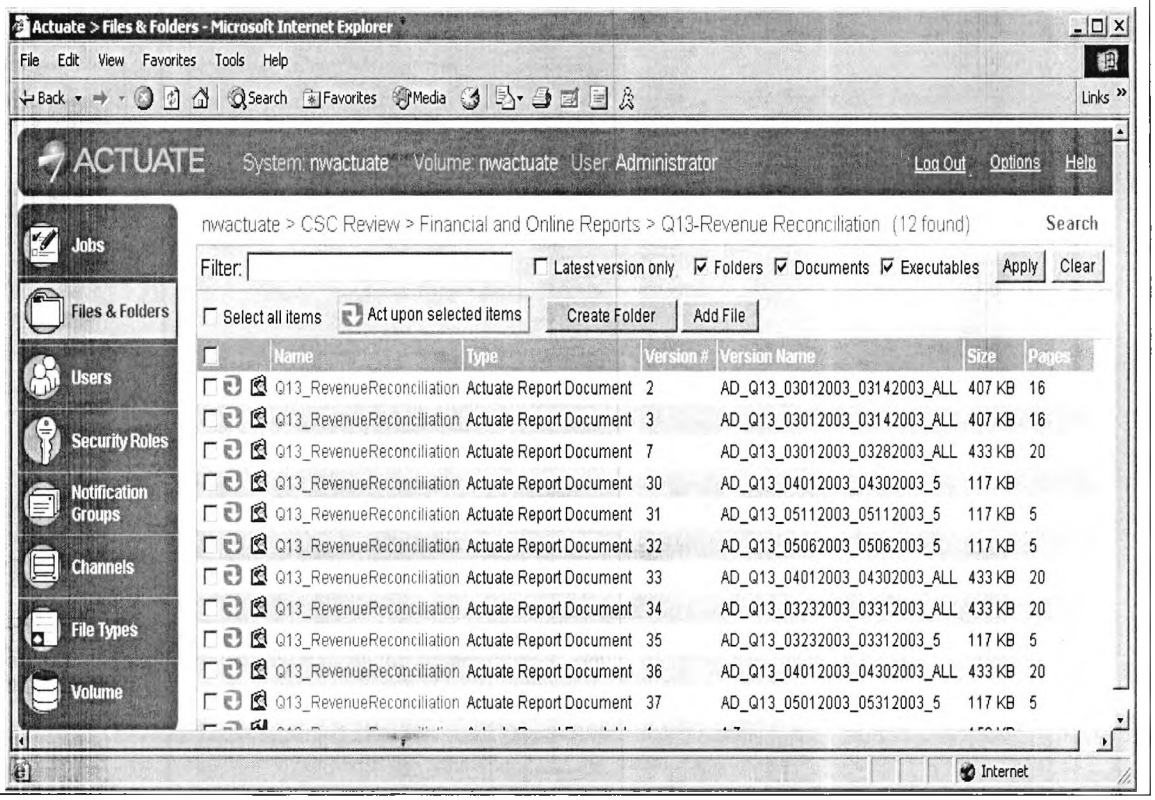
Step	Action
1	Open a Web browser and navigate to the login screen.
2	Enter your name and password and click Log In.
3	The screen displays with various folders. Select CSC Review by clicking in the box.
4	Select a functional category by clicking the appropriate box (which is also known as a link).



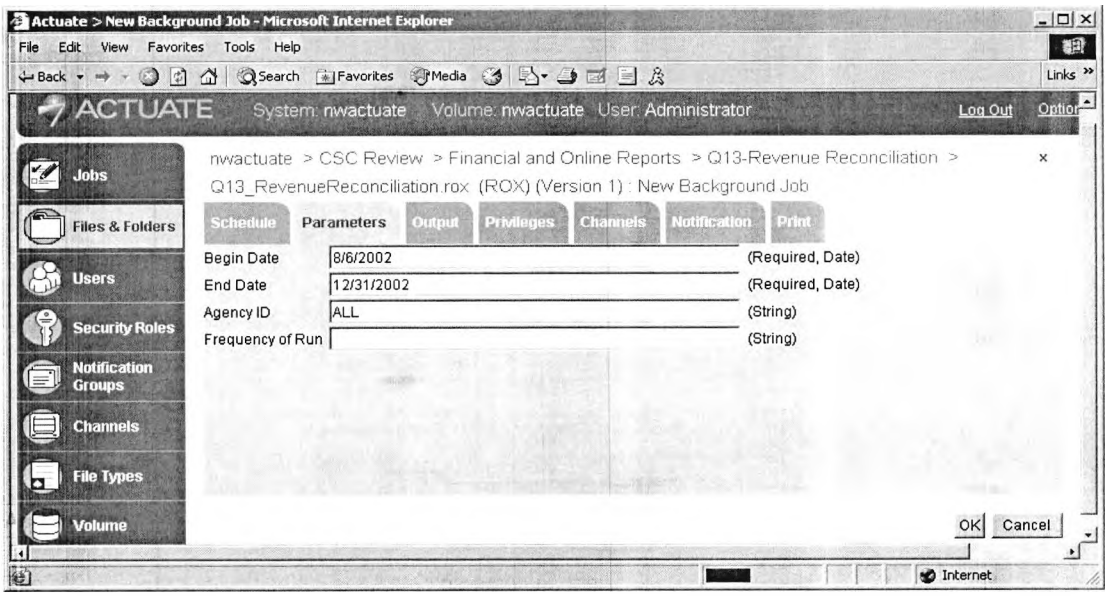


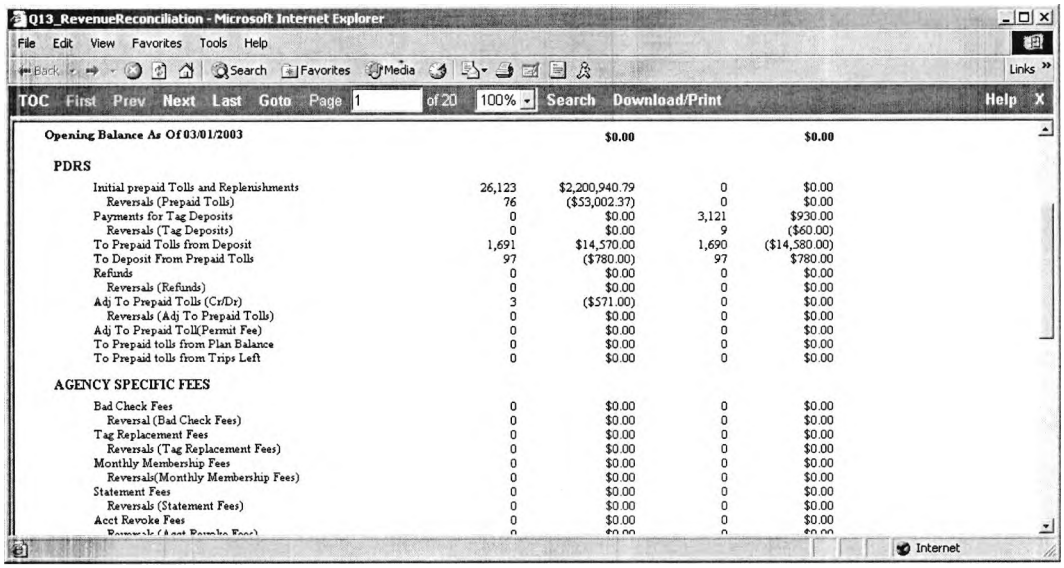
Step	Action
5	Choose a report to view. Click one of the boxes (known as a hyperlink) to access more information.
6	The screen shows two sets of files. There are files that can be viewed and files that can be run. Viewable files are reports that were already run. All run reports appear in this section for an established length of time. The file that can be run is the executable (always the last in the list). Click the executable to open the run parameters.





Step	Action
7	The screen shows basic and advanced run parameters. It also shows the default run parameters. Parameters are different depending upon the report and the project. Change these to fit the desired query. A reoccurring report that runs daily, weekly or monthly can be established on the Schedule tab. The advanced settings (Output, Privileges, Channels, Notification and Print) allow more control over when and how the report is run and who can view the report. Set the desired parameters and click OK.
8	After the report runs, a new file appears in the Documents You Can View section. The file name shows the report number, date range and other helpful information. The screen is not shown here because the exact information depends on the parameters that are entered, the report requested and project. Click the hyperlink to open the report.



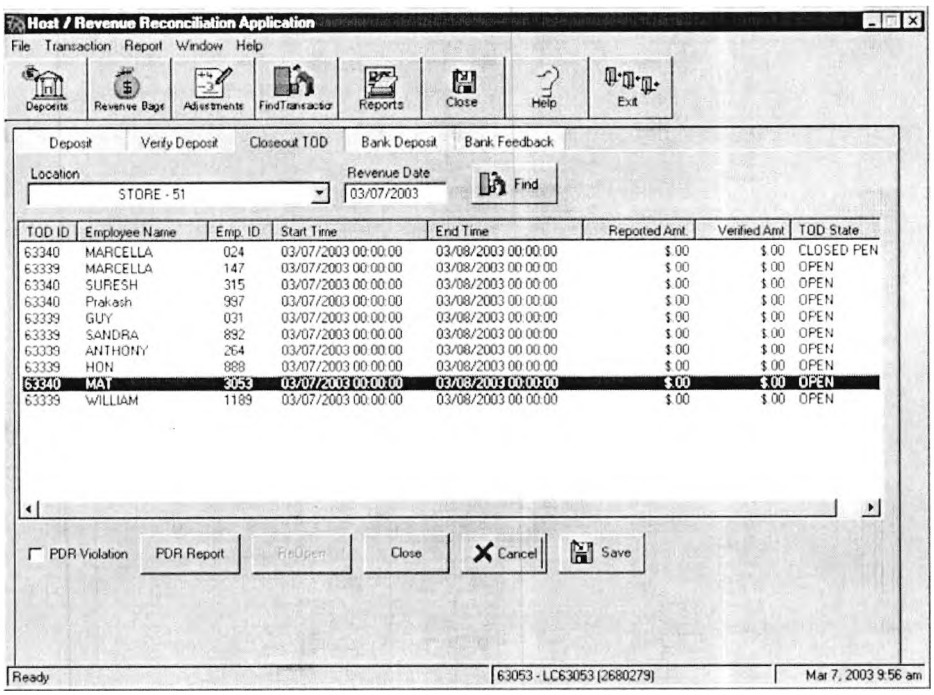


Opening Balance As Of 03/01/2003		**$0.00**		**$0.00**
PDRS				
Initial prepaid Tolls and Replenishments	26,123	$2,200,940.79	0	$0.00
Reversals (Prepaid Tolls)	76	($53,002.37)	0	$0.00
Payments for Tag Deposits	0	$0.00	3,121	$930.00
Reversals (Tag Deposits)	0	$0.00	9	($60.00)
To Prepaid Tolls from Deposit	1,691	$14,570.00	1,690	($14,580.00)
To Deposit From Prepaid Tolls	97	($780.00)	97	$780.00
Refunds	0	$0.00	0	$0.00
Reversals (Refunds)	0	$0.00	0	$0.00
Adj To Prepaid Tolls (Cr/Dr)	3	($571.00)	0	$0.00
Reversals (Adj To Prepaid Tolls)	0	$0.00	0	$0.00
Adj To Prepaid Toll(Permit Fee)	0	$0.00	0	$0.00
To Prepaid tolls from Plan Balance	0	$0.00	0	$0.00
To Prepaid tolls from Trips Left	0	$0.00	0	$0.00
AGENCY SPECIFIC FEES				
Bad Check Fees	0	$0.00	0	$0.00
Reversal (Bad Check Fees)	0	$0.00	0	$0.00
Tag Replacement Fees	0	$0.00	0	$0.00
Reversals (Tag Replacement Fees)	0	$0.00	0	$0.00
Monthly Membership Fees	0	$0.00	0	$0.00
Reversals(Monthly Membership Fees)	0	$0.00	0	$0.00
Statement Fees	0	$0.00	0	$0.00
Reversals (Statement Fees)	0	$0.00	0	$0.00
Acct Revoke Fees	0	$0.00	0	$0.00

A report was successfully run and opened through the Web interface.

Accessing Reports Through VECTOR

VECTOR enables an agency to limit which users may run each type of report. User roles are established and only certain users have rights to run certain reports. The accessible reports vary from agency to agency. The example below shows how to display Report 55B. Adjust the instructions to find other reports if necessary. To access Reports through VECTOR, complete the following steps:

Step	Action
1	From the VECTOR main menu screen, click the Host/Revenue Reconciliation icon.
2	The ETC Host/Revenue Reconciliation Functions toolbar displays.
3	The Host / Revenue Reconciliation Application opens to the Deposit tab. Click the Closeout TOD tab. 
4	Look in the list and find the employee for which you want to run the report. Use the drop-down list of locations if necessary. Change the revenue date as needed. Click the PDR Report button at the lower left of the screen.

Step	Action
5	The report runs and appears as below:

Report Date 03/07/2003 — PDR Detail - Violation Accounts Receivable — Report Number 558

Time 15:45:04 — Reporting Period 03/07/2003 To 03/07/2003

ID	Date	Tim	Transaction Typ	Category	Sub Category	Pay Type	Price	Quantity	Amount	Account No.
Store	Store - 51									
Tour Date	03/07/2003									
Employee	MAI									
Employee Id	3043									
Agency										
278139928	03/03/2003	15:33:09	R	ACCTSREC	VIOLTOLL	CHECK	$2.00	1	$2.00	2083275
278139928	03/03/2003	15:33:09	R	ACCTSREC	VIOLTOLL	CHECK	$9.85	1	$9.85	2083275
278139928	03/03/2003	15:33:09	R	ACCTSREC	VIOLFEE	CHECK	$8.15	1	$8.15	2083275
278139933	03/03/2003	15:33:11	R	ACCTSREC	VIOLTOLL	CHECK	$4.85	1	$4.85	2083275
278139933	03/03/2003	15:33:11	R	ACCTSREC	VIOLTOLL	CHECK	$3.05	1	$3.05	2083275
278139933	03/03/2003	15:33:11	R	ACCTSREC	VIOLTOLL	CHECK	$2.00	1	$2.00	2083275
278139933	03/03/2003	15:33:11	R	ACCTSREC	VIOLTOLL	CHECK	$4.85	1	$4.85	2083275
278139933	03/03/2003	15:33:11	R	ACCTSREC	VIOLTOLL	CHECK	$5.25	1	$5.25	2083275
278139939	03/03/2003	15:33:13	R	ACCTSREC	VIOLFEE	CHECK	$2.00	1	$2.00	2083275
278139945	03/03/2003	15:33:14	R	ACCTSREC	VIOLTOLL	CHECK	$2.00	1	$2.00	2083275
278139948	03/03/2003	15:33:16	R	ACCTSREC	VIOLTOLL	CHECK	$2.00	1	$2.00	2083275
278139948	03/03/2003	15:33:16	R	ACCTSREC	VIOLTOLL	CHECK	$2.00	1	$2.00	2083275
278139948	03/03/2003	15:33:16	R	ACCTSREC	VIOLFEE	CHECK	$16.00	1	$16.00	2083275
278139956	03/03/2003	15:33:19	R	ACCTSREC	VIOLFEE	CHECK	$20.00	1	$20.00	2083275
278139959	03/03/2003	15:33:21	R	ACCTSREC	VIOLTOLL	CHECK	$2.00	1	$2.00	2083275
278139959	03/03/2003	15:33:21	R	ACCTSREC	VIOLTOLL	CHECK	$2.00	1	$2.00	2083275
278139959	03/03/2003	15:33:21	R	ACCTSREC	VIOLFEE	CHECK	$16.00	1	$16.00	2083275
278139961	03/03/2003	15:33:23	R	ACCTSREC	VIOLFEE	CHECK	$20.00	1	$20.00	2083275
278139966	03/03/2003	15:33:25	R	ACCTSREC	VIOLTOLL	CHECK	$2.00	1	$2.00	2083275
278139966	03/03/2003	15:33:25	R	ACCTSREC	VIOLTOLL	CHECK	$2.00	1	$2.00	2083275

Description Of Days Within VECTOR

VECTOR processing and VECTOR reports employ three different "days" for recording information or filtering information to be seen:

1. Revenue day
2. Calendar day
3. Posting day

Understanding these differences and their effect upon information retrieved from the VECTOR databases is critical for proper VECTOR monitoring and reporting.

Calendar day

All transactions recorded by VECTOR (or received from non-VECTOR lanes) contain a date and time stamp of when the transaction occurred. Such information allows filtering of transactions on the basis of the calendar day in which they occurred. Additionally, as the transaction proceeds through the processing stream, date and time stamps are added to its record to note changes in status (such as the date and time when the transaction is posted to a customer's account).

All such information views or filters that employ such date and time-stamps for filtering are configured to look at information on a calendar day basis.

Revenue day (or collection day)

Both lanes and CSC walk-in centers have the concept of a revenue day around which shifts are created. Revenue days are frequently different than calendar days (for example, a revenue day can be from a certain time in the day to another time in the day while the calendar day is from 12:00 a.m. to 11:59 p.m. of a given day). Revenue days are based on a daily processing cycle involving creation and sending of the daily lane transaction file and include the daily reconciliation of the manual tolls collected by toll collectors and subsequent bank deposits. Plaza-specific processing delays in receiving all toll collector receipts for the day and providing them to VECTOR (and a manual money room) for validation, reconciliation and entry can result in different revenue days for different VECTOR plazas.

CSCs, which also receive financial transactions for posting to customer accounts, have a similar concept of the revenue day as exists in lanes. Normal shift work schedules for CSCs, however, cause the CSC revenue day to be the same as the calendar day (since CSC financial transactions are only generated during the fraction of the day during which the CSC is open for customer business). Transactions received after the closeout of a revenue day at a plaza are included in the next revenue day lane transaction files.

Posting day

Posting day refers to the calendar day in which a given transaction is posted to a customer's account. VECTOR reports that employ posting day as the primary filter focus on the different sources of transactions that were posted during the selected period. As the time-phased processing indicates, posted transactions could have originated at various times in the past (for example, transactions from different revenue days can be posted on the same posting day).

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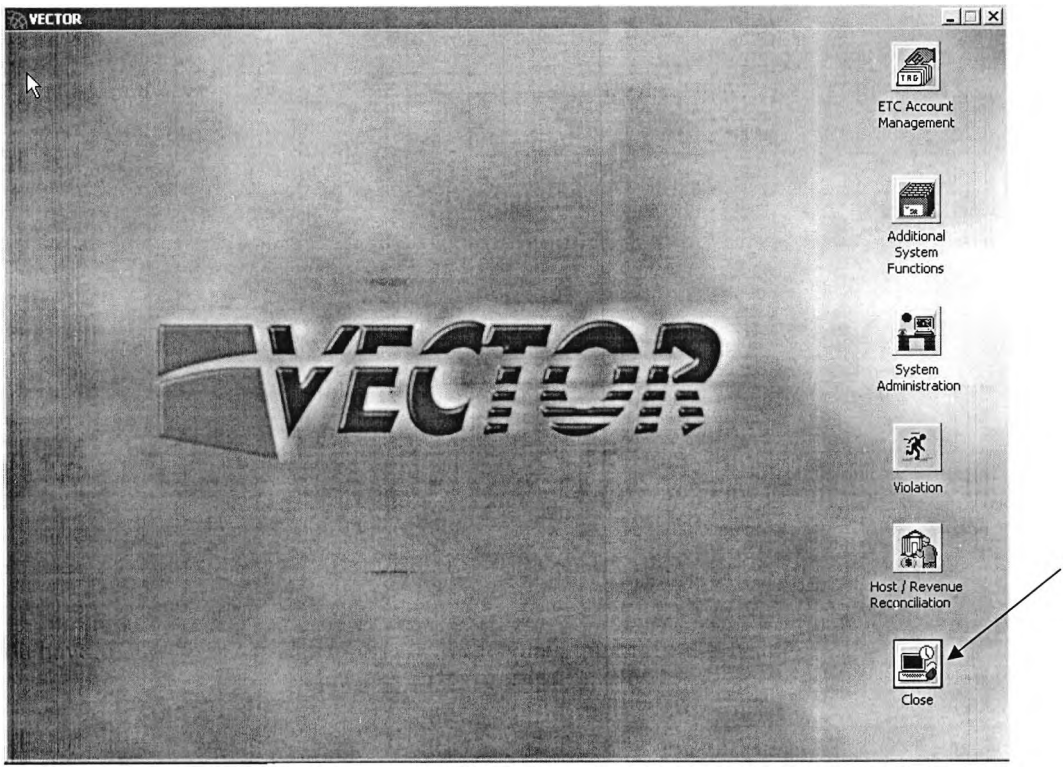
Chapter 9 – Logging Off

When you have finished working in VECTOR for the day, log off of the system.



To log off at the end of the day, complete the following steps:

Step	Action
1	Click the Close button on the right side of the Main Screen.
2	This logs you off of the VECTOR system.