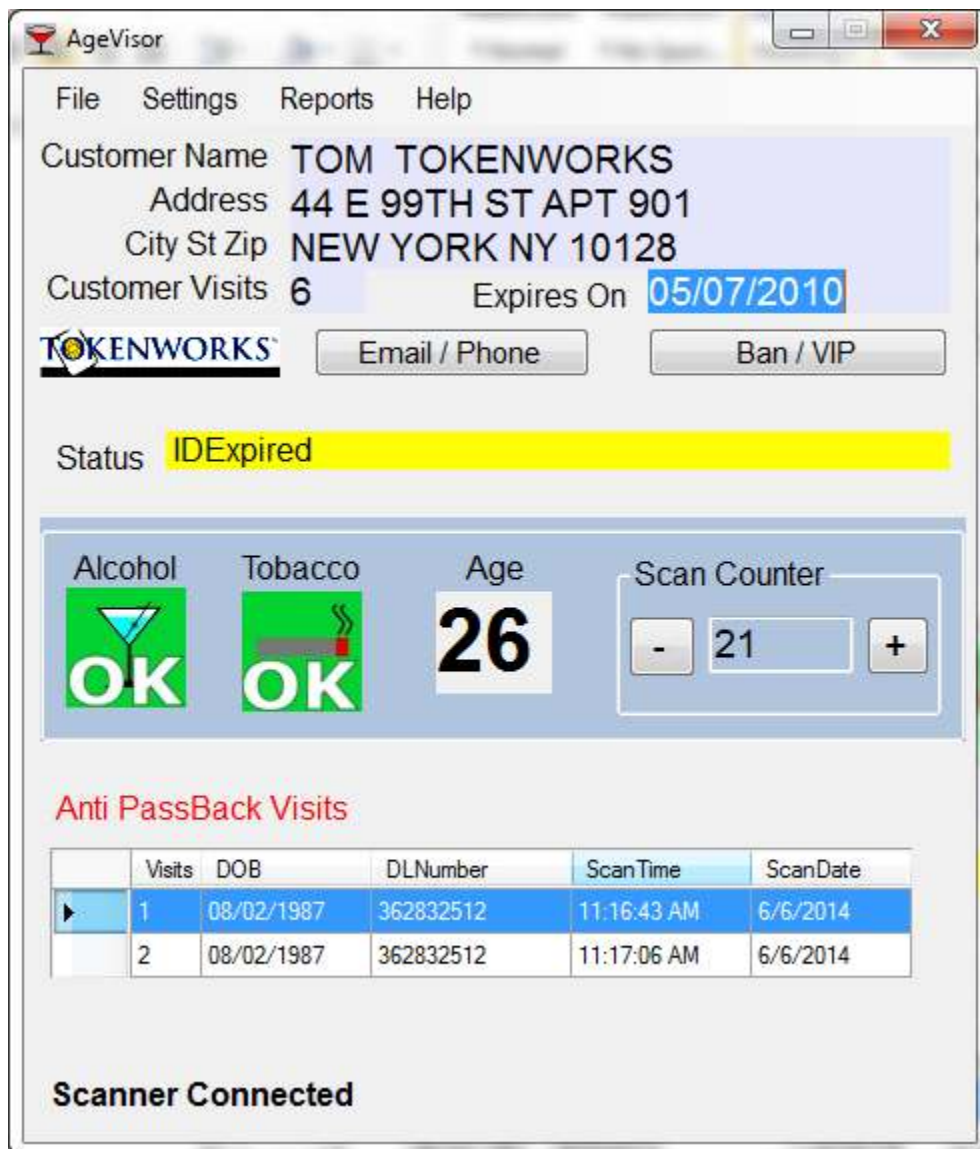


## AgeVisor Quick Guide

The AgeVisor app is an Age Verification and CRM tool that runs out of the tray as a pop up screen. When a card is scanned the cardholders' age is calculated and tested against two age thresholds, one for alcohol and one for tobacco. The scanned data is stored in a database, and is tested for previous visits within a configurable Anti-Passback time window (1-12 hours). Tags can also be applied to customers (Banned, VIP, etc.) so that future visits can be recognized.



The screenshot shows the AgeVisor application window with the following details:

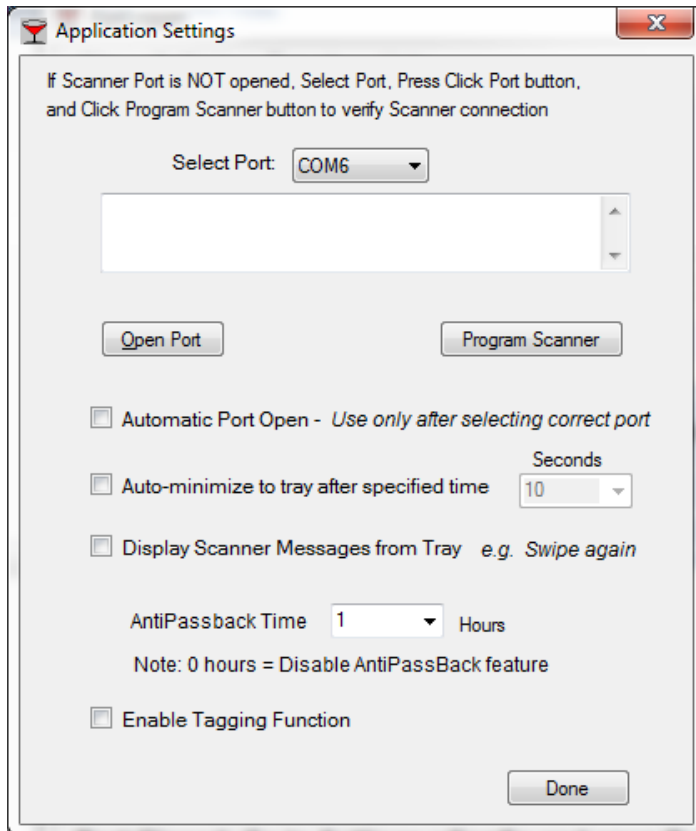
- Customer Information:**
  - Customer Name: TOM TOKENWORKS
  - Address: 44 E 99TH ST APT 901
  - City St Zip: NEW YORK NY 10128
  - Customer Visits: 6
  - Expires On: 05/07/2010
- Buttons:** Email / Phone, Ban / VIP
- Status:** IDExpired
- Verification Results:**
  - Alcohol: OK
  - Tobacco: OK
  - Age: 26
  - Scan Counter: 21
- Anti PassBack Visits Table:**

| Visits | DOB        | DLNumber  | ScanTime    | ScanDate |
|--------|------------|-----------|-------------|----------|
| 1      | 08/02/1987 | 362832512 | 11:16:43 AM | 6/6/2014 |
| 2      | 08/02/1987 | 362832512 | 11:17:06 AM | 6/6/2014 |

**Scanner Connected**

## Application Settings

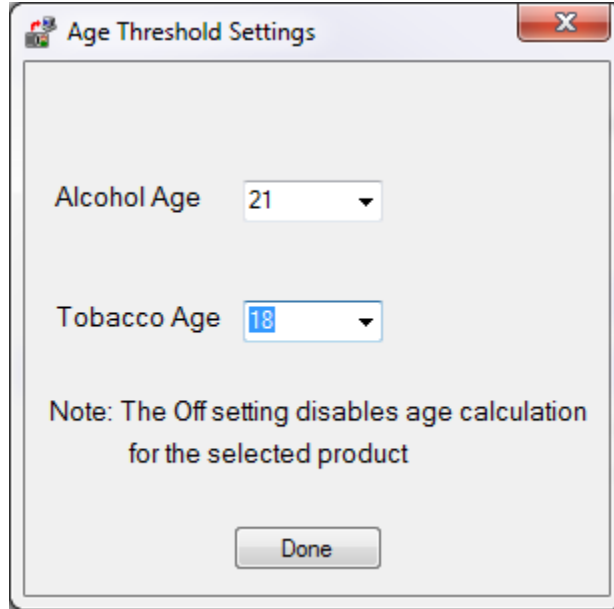
The scanner must be connected to the PC and the drivers installed before the app can read cards. The first time the app is run, go to Settings->Config and click on the Open Port button. Follow the numbered steps below to set the behavior of the pop up and enable the Anti-Passback and Tag system if desired.



1. Click on the Open Port Button, and then Click on Program Scanner to verify connection.
2. Check Automatic Port Open after scanner connection is verified.
3. Check Auto-minimized to run the app from the tray, the app will pop up and stay on the screen for the amount of time (Seconds) specified in the pull-down menu item
4. Check the Display Scanner messages to see balloon messages from tray icon (only works when Auto-minimized is enabled)
5. Enable Anti-Passback feature by setting a time window in hours. Zero hours disables feature.
6. Check the Enable Tagging Function if you want to apply tags to scans.

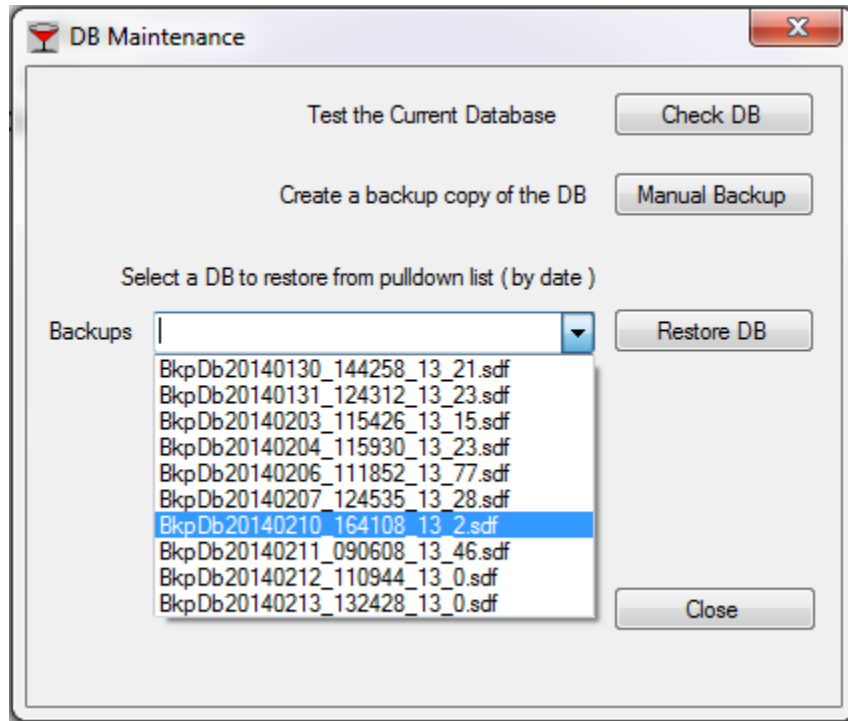
## Other Setting

Under the Settings menu item are two other screens, the age threshold and the Database maintenance. The age settings screen is used to set the legal threshold for alcohol and tobacco sales. The Database maintenance screen contains functions to backup and restore the databases.



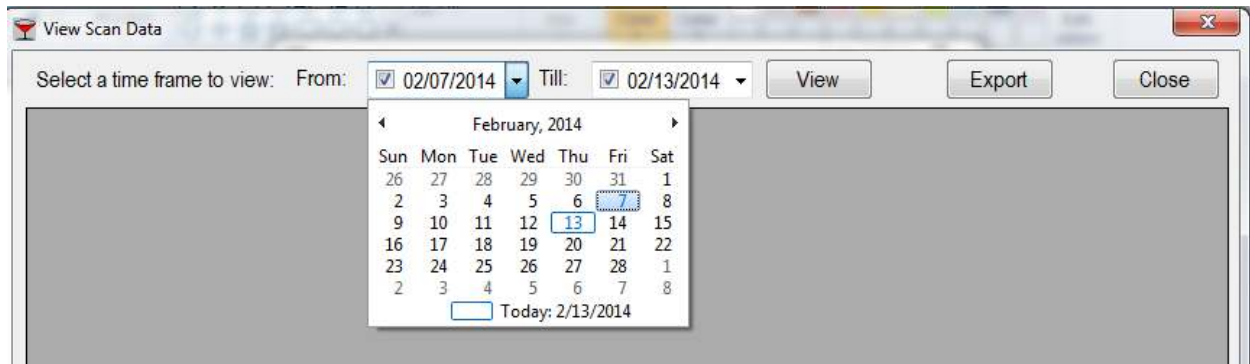
A backup database is created each time the app is run, and stored in the C:\Tokenworks\Backup folder.

Up to the last 15 databases can be restored via the pull-down feature.



## Viewing Customer Records

The Reports menu item has three entries; View Scan data and View Customer Data and Search. The Data view screens have two calendar based date pickers, to select a time frame of which to view the data. The Scan data screen displays records of each card scan, like a history of visits, while the Customer data screen has a single record per card holder, like a Customer list.



Example of picking the from date, using the calendar date picker. Once the dates are set click View to display data, in this case the scan data. If you want to export the current view to a Comma Separated Value file (opens with MS Excel), click the Export button, and a file will be created/overwritten in the following folder: C:\Tokenworks\Export. There are two file names that represent the two data views, Customer Scan.csv represents the View Scan Data screen and Customer.csv represents the View Customer Data screen.

## Search Database

The Search screen allows you to search the database by fields. You can search by name, ID number, email or tag. Enter data into a field and click Search. If you find records, you can view through the records using the forwards and reverse buttons. The Search screen also allows you to edit Tags and contact information. Below are some screen shots that demonstrate the features.

Customer Search

Records:

ID Number:

First/Mid: TOM

Last/State:

Edit Tag:

Edit e-mail:

Visit Date:

Clear Search

<< Prev Next >>

Exit

Search by first name

Customer Search

1 records found: 1 of 1

ID Number: 362832512

First/Mid: TOM T

Last/State: TOKENWORKS NY

Edit Tag:

Edit e-mail:

Visit Date: 5/14/2014 3:02:44 PM

Clear Search

<< Prev Next >>

Exit

1 record found

Tag Editor

Save Cancel

Tag: **VIP** Clear Tag

| Code | Alert    |
|------|----------|
| 0    | Banned   |
| 1    | VIP      |
| 2    | CheckID  |
| 3    | 911      |
| 4    | BarStaff |
| 5    | S.O.S.   |
| 6    | Member   |

Note: Mr.Big

Cancel Save

- 1) Tap left side of row to select a Tag
- 2) Tap Clear Button to Remove Tag/Note
- 3) Type into text box to add a Note
- 4) Tap on Save or Cancel when done

Tag editor screen

Edit Email / Phone

E-mail domain: YAHOO.COM

E-mail address: Tom@yahoo.com

Phone number: (123) 456-7890

Cancel Save

Contact edit screen

Customer Search

1 records found: 1 of 1

ID Number: 362832512

First/Mid: TOM T

Last/State: TOKENWORKS NY

Edit Tag: VIP

Edit e-mail: Tom@yahoo.com

Visit Date: 5/14/2014 3:02:44 PM

Clear Search

<< Prev Next >>

Exit

Search screen display results of Editing the Tag/email

The other way to search the database is by viewing either the Scan table or the Status table by using the date pickers, double click a record to display the detailed view. From the detailed view, you can launch the search form with the Driver's license number pre-filled.

Customer Detailed View

First name: TOM T

Last name: TOKENWORKS

Address: 44 E 99TH ST APT 901  
NEW YORK, NY 10128

DOB: 08/02/1987 EXP: 20/10/0507

ID: 362832512

Status: IDExpired - Age 26

Date: 6/6/2014 11:17:06 AM

Search DB Close

Customer Status View

DLNumber: 362832512

First: TOM T

Last: TOKENWORKS St: NY

Tag:

Email: asdfasdf@aol.com

Last Visit: 6/6/2014 11:17:06 AM

Search DB Close

By Clicking on the SearchDB button from either detailed view, you can find the record by the Driver's License number:

The image shows a software window titled "Customer Search". It contains several input fields and buttons. The "ID Number" field is filled with "362832512". Below it are fields for "First/Mid" and "Last/State". There are also buttons for "Edit Tag", "Edit e-mail/ph.", and "Last Visit Date". At the bottom, there are buttons for "Clear", "Search", "<< Prev", "Next >>", and "Exit".

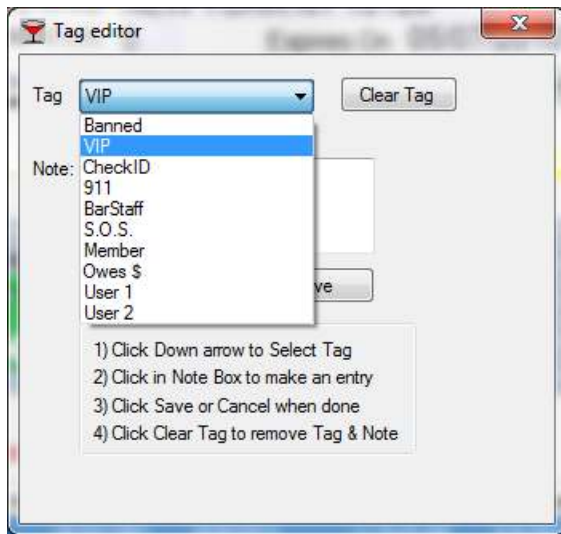
| Field/Label      | Value     |
|------------------|-----------|
| Records:         |           |
| ID Number        | 362832512 |
| First/Mid        |           |
| Last/State       |           |
| Edit Tag         |           |
| Edit e-mail/ph.  |           |
| Last Visit Date: |           |

## Tagging System

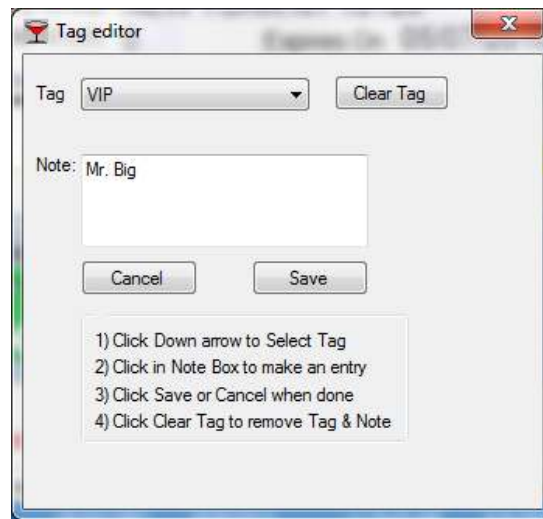
The Tag system (if enabled in settings->AppSettings) allows users to apply a TAG to a customer's record plus a note. The next time that customer card is scanned; the tagging system will recognize the card and display the tag information screen, to alert you and act accordingly. Below are screen shots of how a tag is entered, and how what a tag information screen looks like.

By clicking the Tag button on the main form,

After a scan, the tag editor is displayed



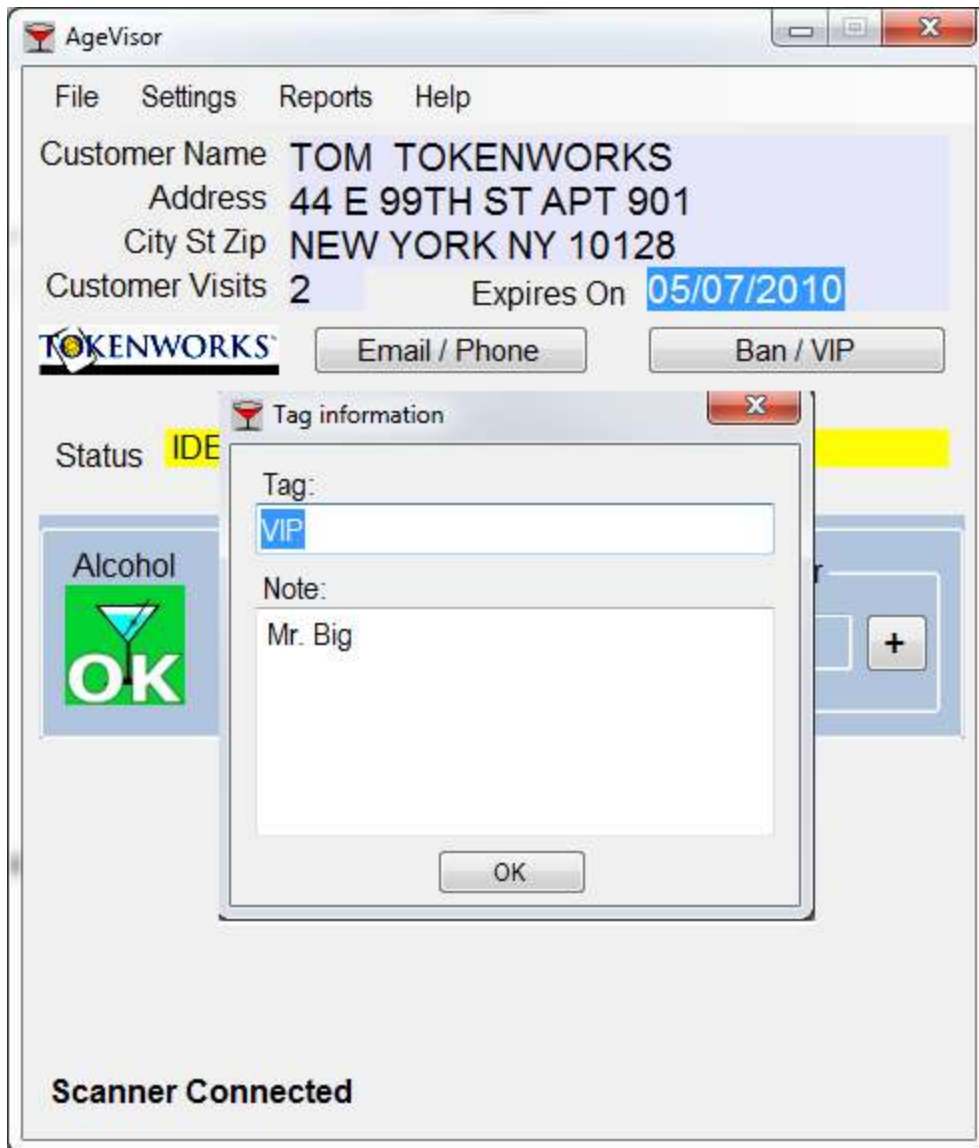
Selecting a predefined Tag (VIP)



Adding a note to the TAG (Mr. Big)



## Tag Information screen



Click ok to dismiss the Tag information screen