COMPACONLINE CARD MANAGEMENT MANUAL

CompacOnline Card Management
Version No: 1.0.3

Date: 7th December 2018

Document Control

Document Information	
Document Details	CompacOnline Card Management Manual
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Original Publication Date	16/01/2018

Revision History			
Version	**Date**	**Author(s)**	**Revision Notes**
1.0.0	16 Jan 2018	J Jang	New Manual
1.0.1	20 April 2018	S Laycock	Added pre-pay option
1.0.2	30 Aug 2018	S Laycock	Added introduction
1.0.3	07 Dec 2018	R Liu	Updated Contact Information

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- Along with any warnings, instructions, and procedures in this manual, you should also observe any other common sense procedures that are generally applicable to websites of this type.
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Introduction

Compac Online allows for easy management of multiple sites, with 24/7 remote access.

Functions of Compac Online include editing customer databases, managing transactions, tanks and pumps, and retrieving reports from desired sites.

This manual details how to edit both local and online cards, which allow desired customers to use specified sites. Both local and online cards can be edited – local cards are stored on the device, and are compatible with both online and offline transactions, while online cards can only be used for online transactions.
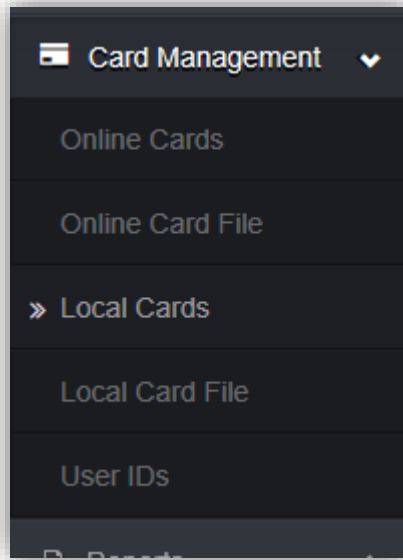
IMPORTANT NOTE:

Access to site data is heavily dependant on the equipment being powered on and connected to the internet. Ensure equipment is online and functioning for full access to all site data.
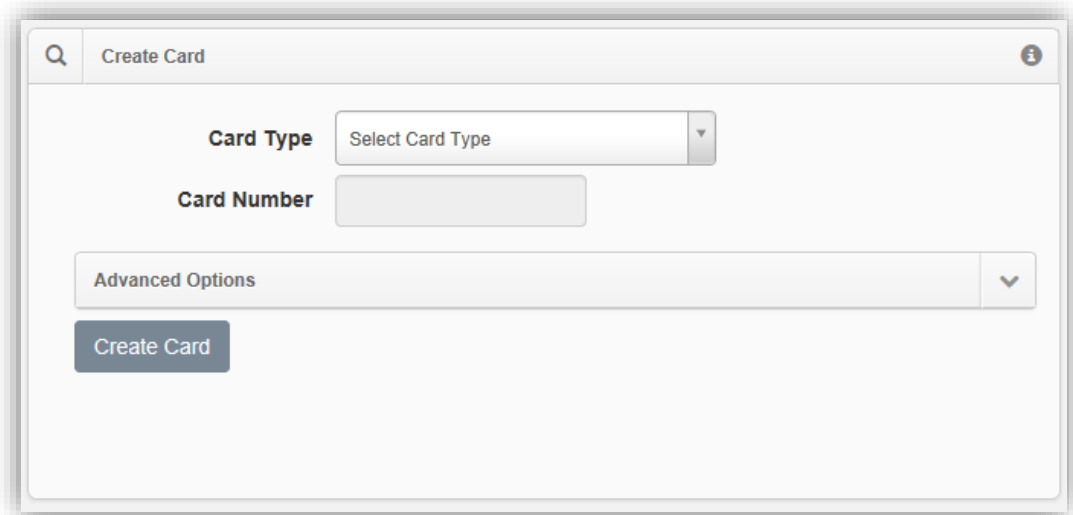
Local Cards

Creating a Local Card

1. On the left-hand tab select **Local Cards** under the **Card Management** section as shown.

NOTE: Local cards are stored on the device.

*NOTE: **Search for cards** section can be used to quickly locate a card type in the drop-down list.*

2. Select the Card Type from the drop-down list.
3. Enter the card number in the Card Number field, select **Create card**.

4. Card details for a new card will be displayed. **Owner Details** Cost Centre is set to **Default**, enter the information into each field as required, then select **Save Details**.

Card Details for Card # 21312523 (Card Type: Z Cards)

Owner Details   Restrictions

Cost Centre

Default1

Name

Card1

✔Save Details

5. Select No PIN Set, enter pin number in **NEW PIN** field, select **Set PIN** (if APPL).
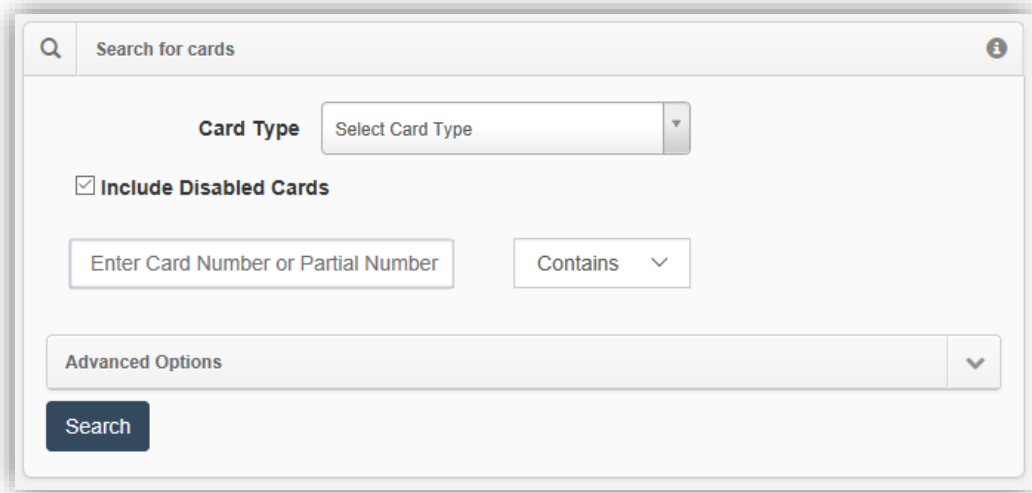

Flag all sites to download cardbase changes   Flag Sites

6. Select **Flag Sites** then **OK** for all sites to update cards.
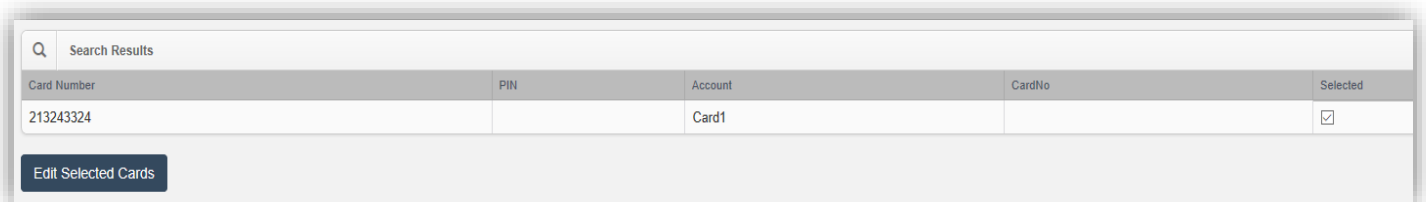
Search and Edit Local Cards

1. On the left-hand tab select **Local Cards** under the **Card Management** section as previous.
2. Select the Card Type from the drop-down list.
3. Enter the card number in the Card Number field, select **Search**.

NOTE: Full or partial card numbers can be entered to search for the wanted card.

4. The card will appear under **Search Results**, card will be ticked. Select **Edit Selected Cards**.

5. "You are about to edit 1 card; do you want to proceed?" Will be displayed, select **OK**.

6. Card details for selected card will be displayed. Change owner details; change the information in the **Cost Centre Field**, select **Save Details**.

NOTE: Cards must ALWAYS be saved.

7. Change the card PIN; select **CompacOnline PIN**, select **Clear PIN**, enter new pin number in the **NEW PIN** field and select **Set PIN**.

Set PIN   ×

NEW PIN: 1234

Set PIN   Cancel
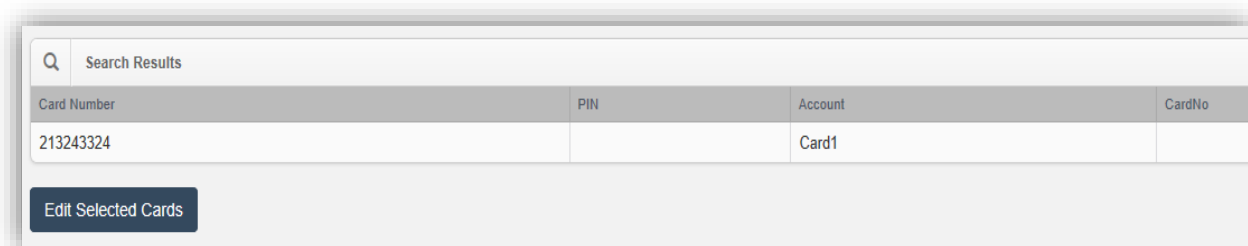
8. Select **Flag Sites** then select **OK** for all sites to be updated.

Flag all sites to download cardbase changes   Flag Sites
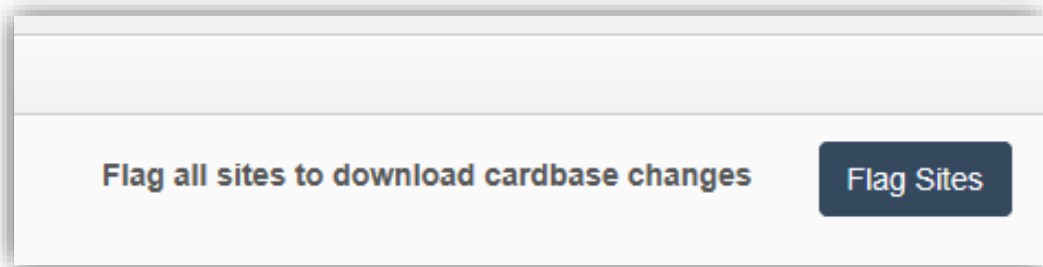
Delete Local Card

NOTE: Deleting a card will also delete card records from any previous historic transaction. Cards should only be deleted if it was added by mistake. Otherwise, invalidate the card instead of deleting it (changing **TRUE** to **FALSE**).

1. On the left-hand tab select **Local Cards** under the **Card Management** section as previous.
2. Select the Card Type from the drop-down list.
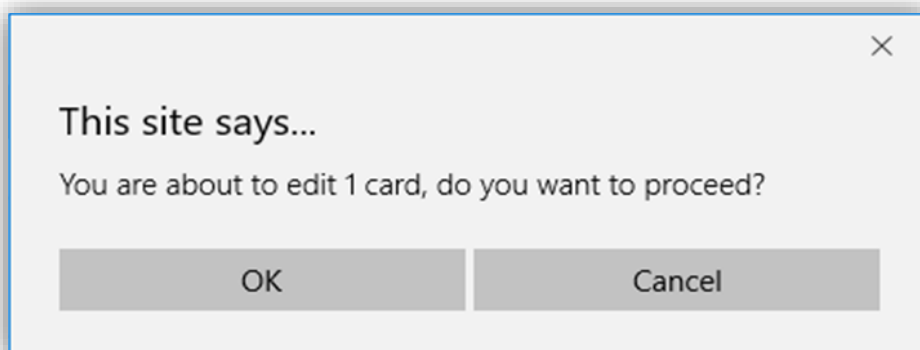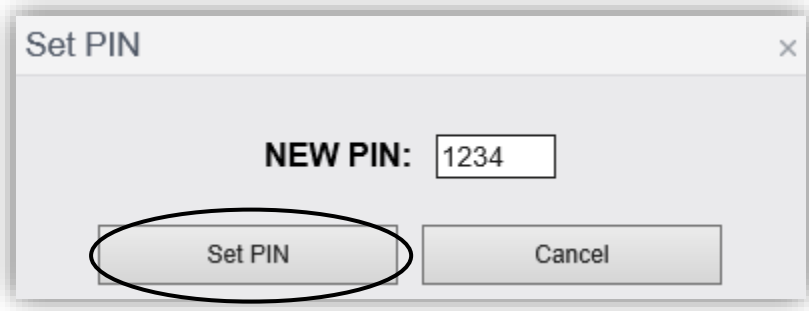3. Enter the card number in the Card Number field, select **Search**.
4. Card will appear under Search Results, card will be ticked (**Selected**), select Edit Selected Cards.

Q Search Results			
Card Number	PIN	Account	CardNo
213243324		Card1	

Edit Selected Cards

5. "You are about to edit 1 card, do you want to proceed?" will be displayed, select **OK**.
6. Select **Delete**. "Are you sure you want to delete this card?" Will be displayed, select **OK**.

This site says...

You are about to edit 1 card, do you want to proceed?

OK   Cancel

This site says...

Are you sure you want to delete this card?

 Deleting a Card may affect transactions that have not been exported yet.

☐ Don't let this page create more messages

OK | Cancel

7. Select **Flag Sites**, Select **OK** for all sites to be updated.

Flag all sites to download cardbase changes | **Flag Sites**

9.
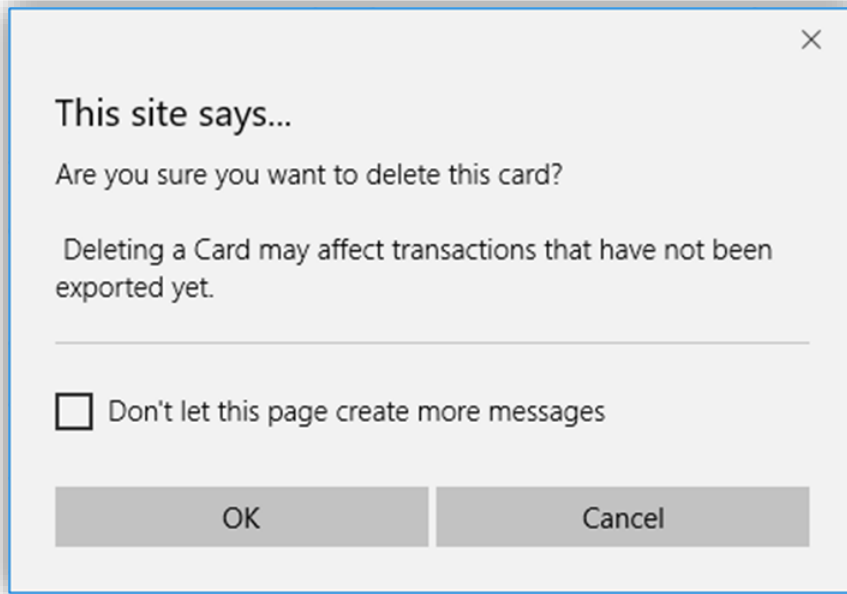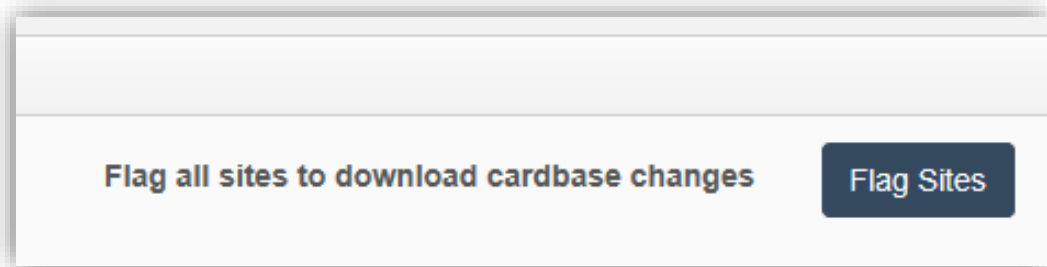
Local Card File

Add and Edit Local Files
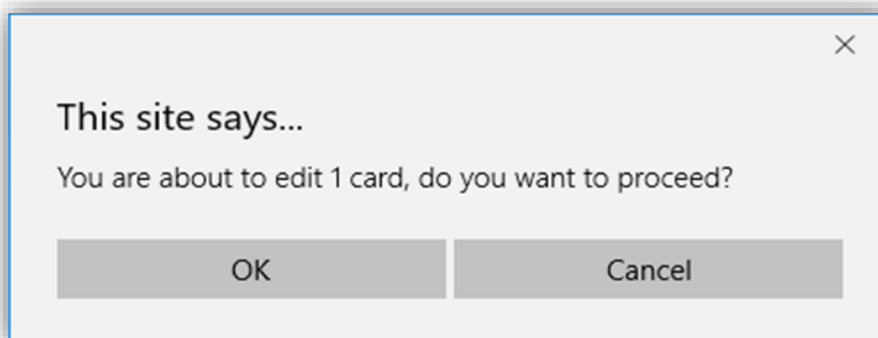
1. On the left-hand tab select **Local Card File** under the **Card Management** section.
2. Select the **Cardbase** from the drop-down list, enter a file name in the Report Name field and select **Get CSV Cardfile**.
   Clicking the **Get CSV Cardfile** will bring you to the homepage, with the report being available for viewing (may take up to 24-48 hours).

3. Scroll down to Reports, select the unread CSV link to open the CSV card file.

4. The first three columns in the CSV are set:
     A. Card number.
     B. Valid TRUE or FALSE.
     C. Card pin number
   (D) – (K) are card Owner Details, these column headers vary for each **CompacOnline** database.

NOTE: *All card data is recorded here.*

- To add a new card, enter a card number on the next row under the last card number, enter **TRUE** in the Valid column, then enter PIN in **SelectPin** column (if APPL) and enter card owner details (if APPL).

- Disable or enable card; find card number, change Valid from **TRUE** to **FALSE**.

- Change card PIN and Owner Details; find card number, change PIN in **SelectPIN** column, change Owner Details in columns (D) to (K) (if APPL).

5. **Save** updated file on your **PC** with the format as **CSV** (Comma delimited) (*.csv)
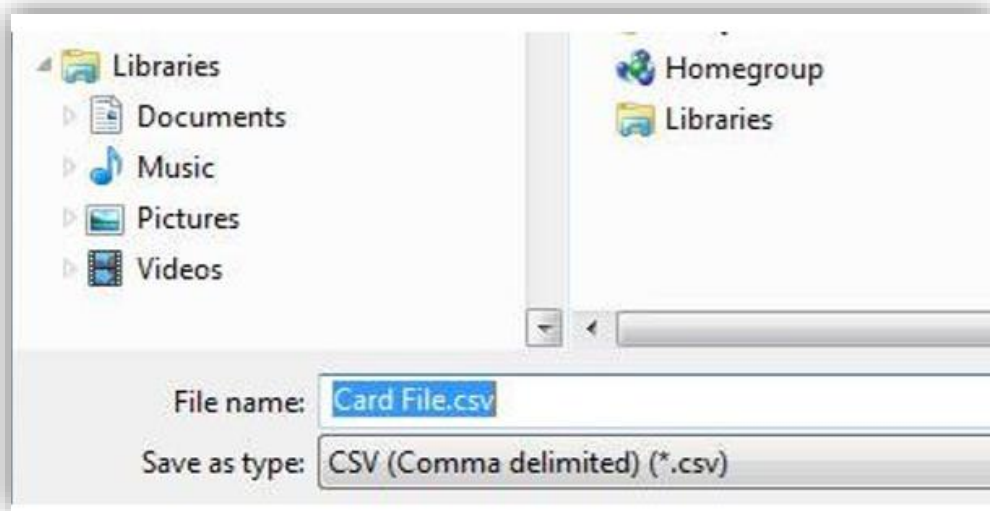
6. "Do you want to keep the workbook in this format?" Will be displayed, select **Yes**.
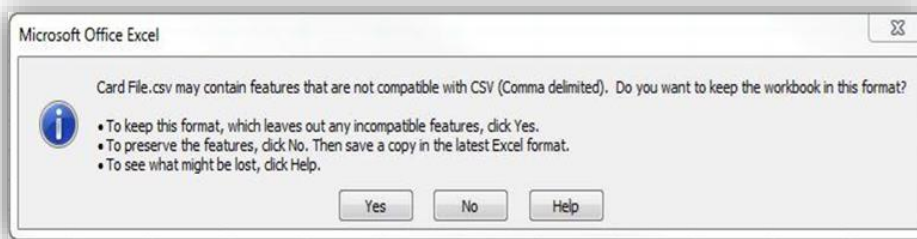
7. "Close the CSV file. Do you want to save the change you have made?" Will be displayed, select **No**.
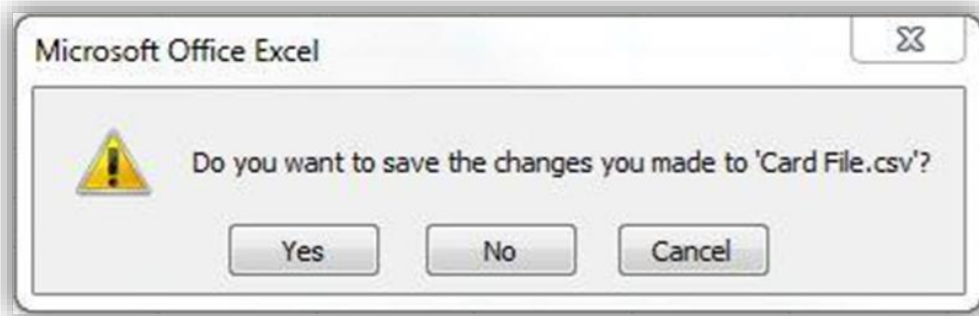
8. Return to **CompacOnline**, Cards Management, Local Card File. In the **Cardfile Upload** section select **choose file**. Select the card file you have saved on your PC and select **Refresh server file**. File Uploaded will display when completed.

9. Select **Flag Sites**, Select **OK** for all sites to update cards.

12.
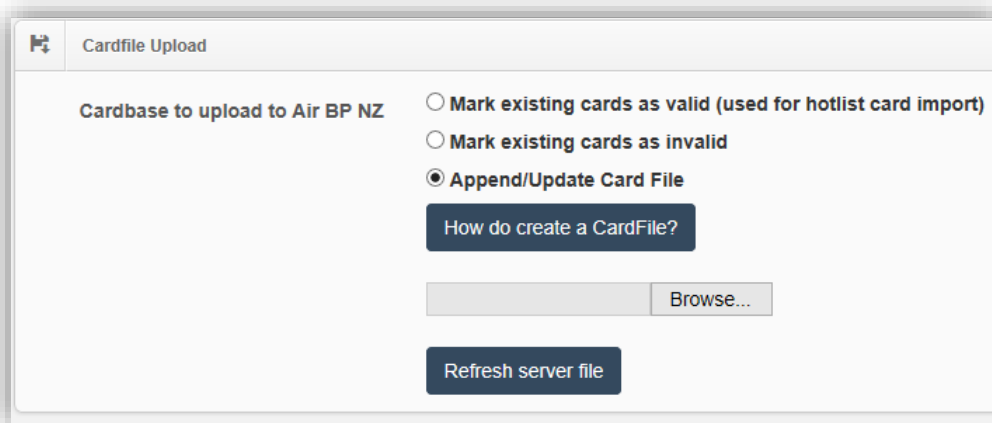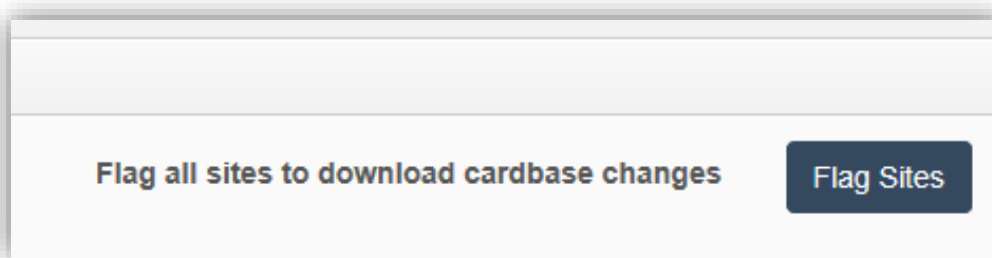
Searching by an Advanced Option

1. Go to Card Management section > Local Cards tab.
2. Select Advanced Options.

3. Enter in Account Name **eg. Demo1**
    as indicated in the image and select **Search**.
4. Then in the results section below will appear all the card records on
    CompacOnline that have the same account name. **eg Demo1**.

User IDs

Add and Edit User IDs

NOTE: *User ID is not applicable to all sites.*

1. On the left-hand tab select **User IDs** under the **Card Management** section as previous.
2. Select the User ID type from the drop-down list, enter a file name in the Report Name field and select **Get CSV ID** file.

☰	User ID	
	User ID Types	testUserID

🔍	Current User ID File	
	Report Name	Untitled	Get User ID File

3. **CompacOnline** will revert to the Home page. Scroll down to Reports, select the **unread** CSV link to **open** the CSV User ID File.

Type	Status	Link
Card User ID File	★ Unread	CSV

4. The first three columns in the CSV are set:

    A. User ID number.
    B. Valid TRUE or FALSE.

(C) - (J) are User Details, these column headers vary for each CompacOnline database.

	A	B	C
1	UserID	Valid	Driver
2	1	TRUE	John Smith
3			
4			
5			
6			

- Adding a User ID; enter User ID number on the next row under the last User ID, enter **TRUE** in **Valid** column and enter card owner details (if APPL).

- Disable or enable User ID; find User ID number, change Valid column from **TRUE** to **FALSE**.

- Change User ID Details; find User ID number, change Owner Details in columns (C) to (J) (if APPL).

5. Save the updated file on your PC with the format as **CSV** (Comma delimited) (*.csv).
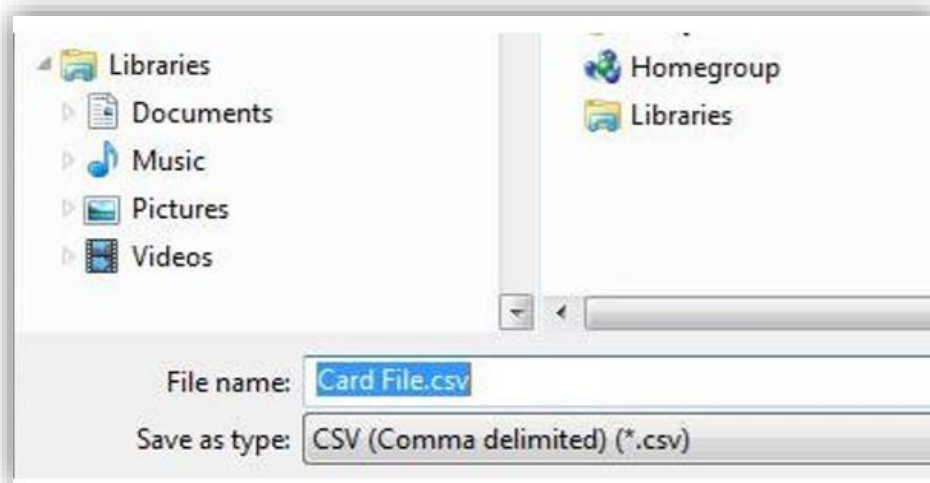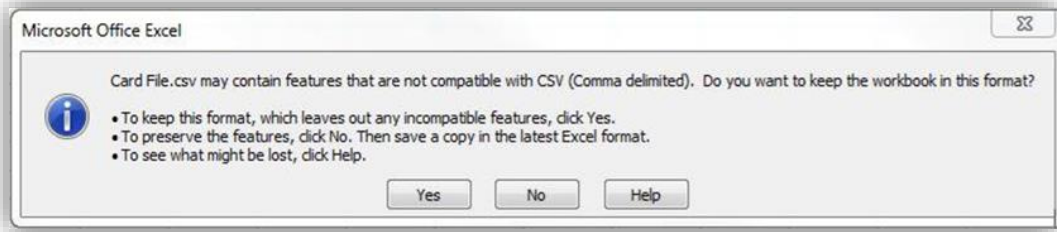
Libraries
  Documents
  Music
  Pictures
  Videos

Homegroup
Libraries

File name: Card File.csv
Save as type: CSV (Comma delimited) (*.csv)

6.   "Do you want to keep the workbook in this format?" Will be displayed, select **Yes**.
7.   Close the CSV file. "Do you want save changes you have made to the User ID file.csv?" Will be displayed, select **No**.
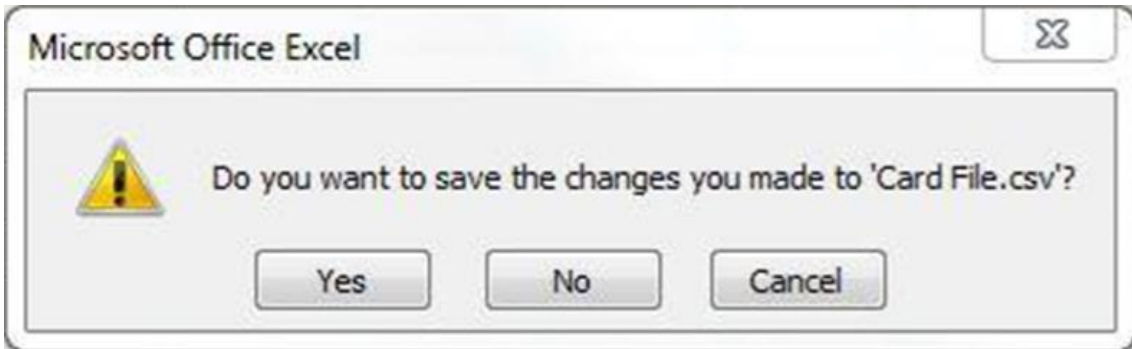
8.   Return to **CompacOnline**, Cards Management, User IDs. Select **Choose File**, in the **Replace User ID File** section. Select the user file you have saved on your PC and select **Refresh Server User ID**. **File Uploaded** will display when completed.

9.   Select **Flag Sites**, Select **OK** for all sites to update cards.

16.
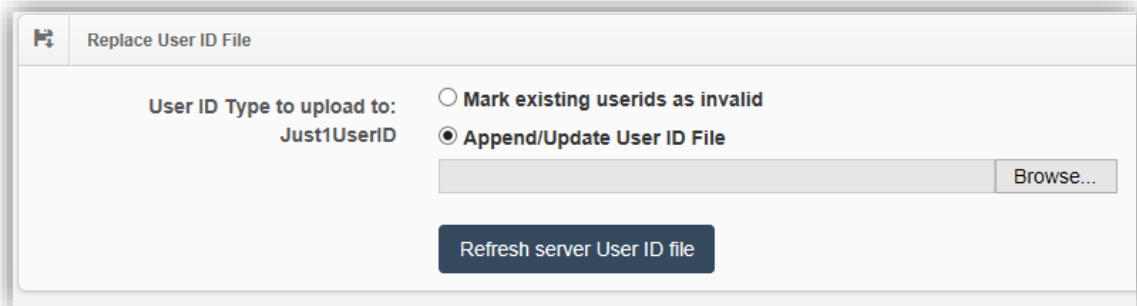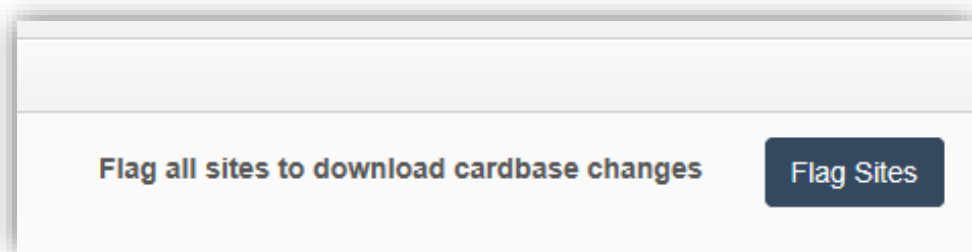
Online Cards

*NOTE: **Online cards** are slightly different to **Local Cards**.*

- **Local Cards** can be used for both offline and online transactions. However **Online Cards** are only compatible with online transaction.
- **Online Cards** will not work if it is not communicating with the CompacOnline server (the site has no internet access).

There are two types of Online Cards:
- Pre-paid
- Online authorisation

Creating an Online Authorisation Card

1. On the left-hand tab select **Online Cards** under the **Card Management** section as shown.
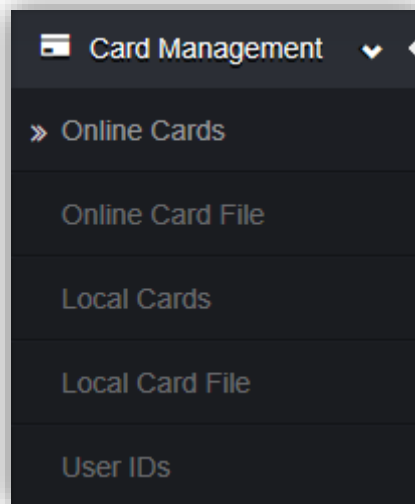
2. Select the **Card Type** from the drop-down list.
3. Enter the card number in the **Full Card Number (PAN)** field, then select **Create Card**.

NOTE: The Full Card Number field must have 10 numbers.

4. **Card Details** for a new card will be displayed. Select an appropriate **Header** and fill out the **OWNER_DETAILS**. Then select **Save**.

*NOTE: There is no need to flag site for **Online Cards**.*

Online Cards

Creating a Prepay Card

Prepay cards can be set up in the same way that online authorisation cards can be set up. As with setting up an Online Authorisation card:

1. On the left-hand tab select **Online Cards** under the **Card Management** section.
2. Select the **Card Type** from the drop-down list.
3. Enter the card number in the **Full Card Number (PAN)** field, then select **Create Card**.

*NOTE: Prepay cards require 8 digits in the **Card Prefix** section and 8 digits in the **Number** section.*

4. When setting up a prepay card, an initial balance needs to be set. Enter a balance in the **Initial Balance** section.
5. **Card Details** for a new card will be displayed. Select an appropriate **Header** and fill out the **OWNER_DETAILS**. Then select **Save**.

*NOTE: There is no need to flag site for **Online Cards**.*
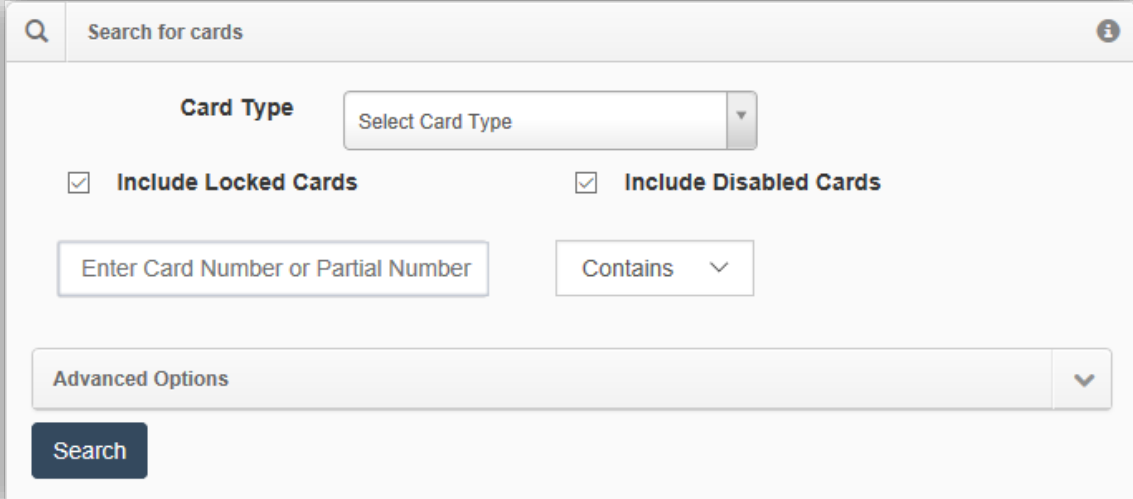
Once a prepay card has been added, funds can be added to the card on Compac Online – refer to Search and Edit Online Cards.

The balance of cards can also be changed by downloading the online card file and changing the balance, then uploading the updated file to Compac Online. See Add and Edit Online Card File.

NOTE: Changes to user balances are recorded. See the User Access manual for information on how to view the changes.

Search and Edit Online Cards

1. As before, select **Online Cards** from the **Card Management** tab.
2. Select the card type in the drop down list.
3. Optionally, enter a card number or partial number. **Advanced search** can be used to further specify the search by entering Owner Details.
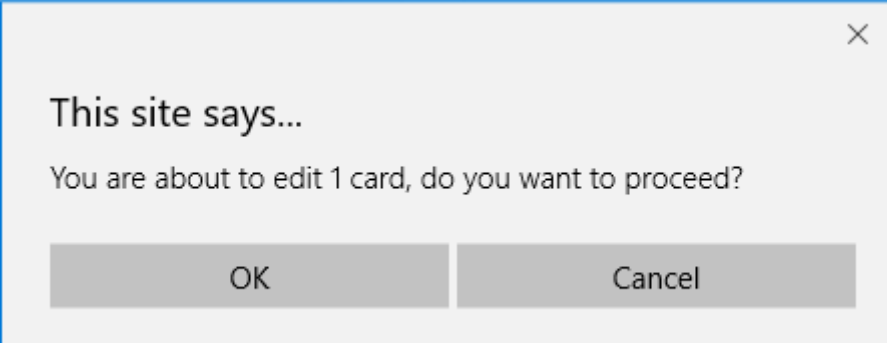
4. Press **Search**. A relevant list of cards will appear. All cards will be selected; deselect unwanted cards and press **Edit Selected Cards.**

5. If 'You are about to edit 1 card, do you want to proceed?' appears, select **OK.**

From here, the card can be edited. The **Owner Details** section can be used to edit the owner details of a card. The toolbar on the top right of this can be used to enable or disable a card or delete the card. Selecting **Enabled** will toggle between Enabled and Disabled and vice versa.

6. To delete a card, select Delete.
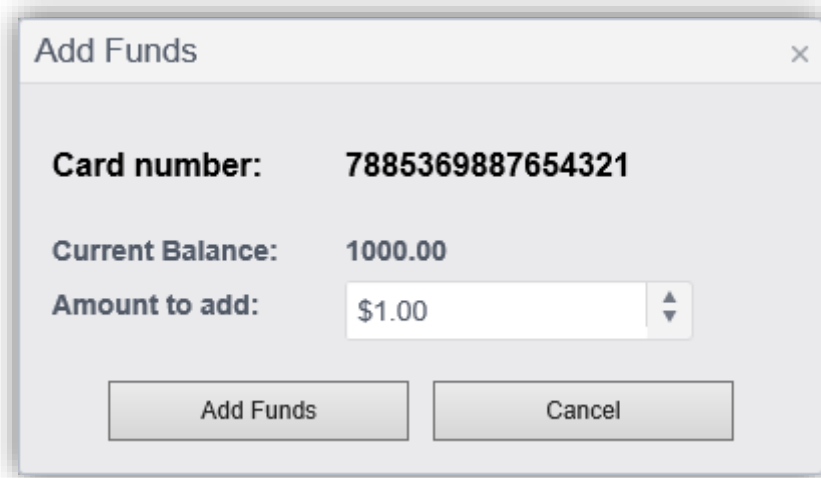
NOTE: *Deleting a card also deletes the transaction history. A card should only be deleted if it was created by accident. Otherwise, change it to Disabled.*

7. Select **OK** on the pop up.

8. Prepay cards can have funds added in the **Prepay** section. Select **Add Funds.**

9. Enter the desired amount of funds to be added and select **Add Funds.**
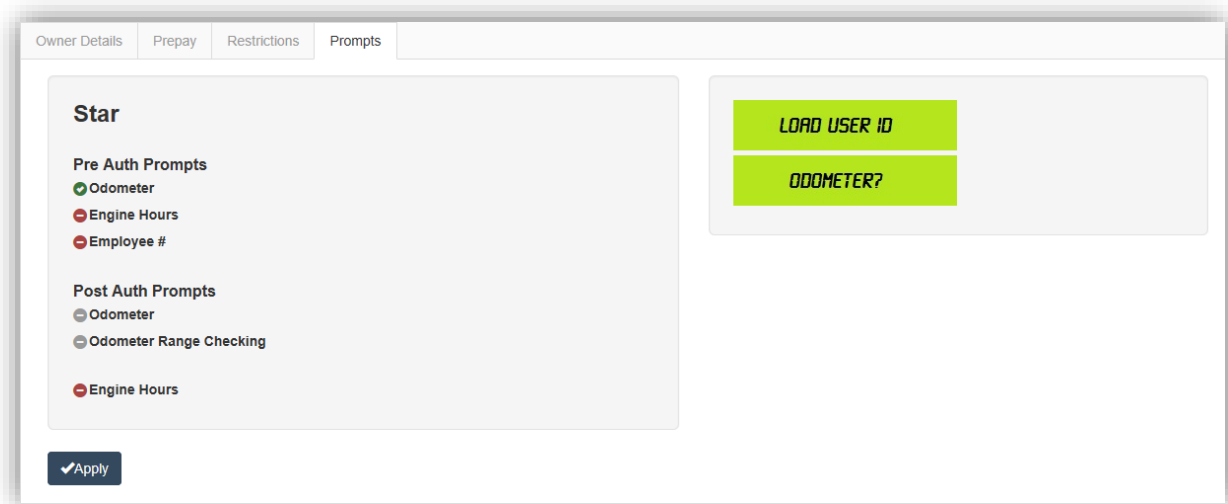
For information on the **Restrictions** tab, see Restrictions.

The **Prompts** tab can be used to customise the prompts that are required to be entered for each card.

10. To change Prompts, simply press the icon next to the desired prompt to toggle it from required or not.

Restrictions

Restrictions on fuel types can be placed on both **Local** and **Online Cards**.

This is for security purposes, so that the user is not using fuel other than what is required.

1. Set the **Card Profile**, then select **Set Profile**.
2. Tick the fuel types, available for the user. Then select **Set Products**.

Card Profile

Card Profile	No profile ▾	
	Total	Remaining

[Reset Limit]   [Set Profile]

Products
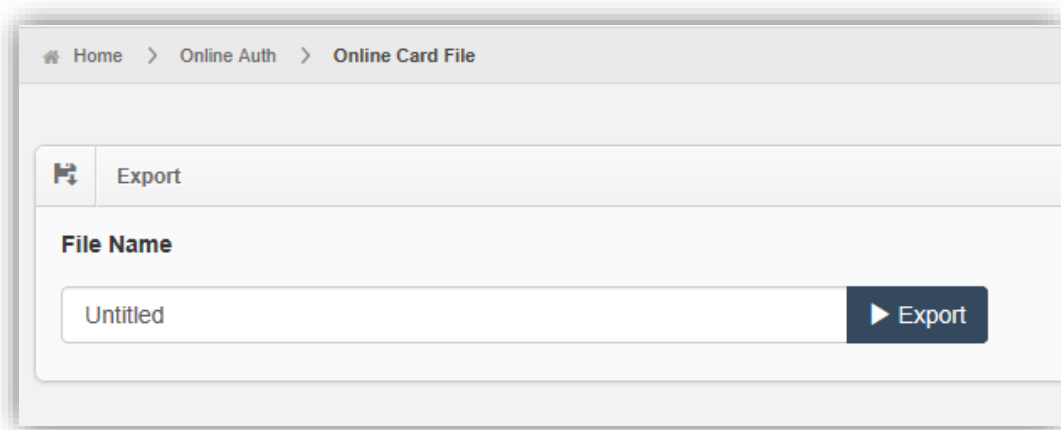
- ☑ Grade 1
- ☑ 91
- ☑ Grade 3
- ☑ Diesel
- ☑ Grade 5
- ☑ Grade 6
- ☑ Grade 7
- ☑ Group 8
- ☑ Grade 9
- ☑ Grade 11
- ☑ Grade 13
- ☐ AUTH

[Set Products]

Online Card File

Add and Edit Online Files
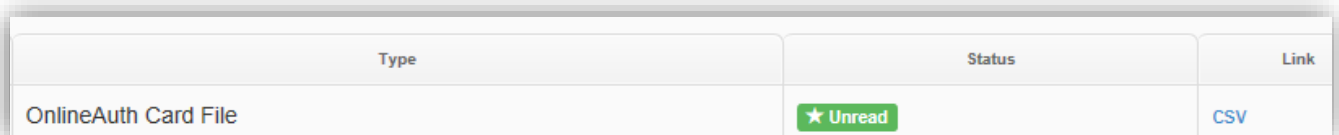
Downloading the Online Card File enables the user to edit and update these files. From the online card file, cards can be enabled, added, and modified. To download and edit the card file:

1. Under the **Export** section give the **File Name** a suitable title and select **Export**.
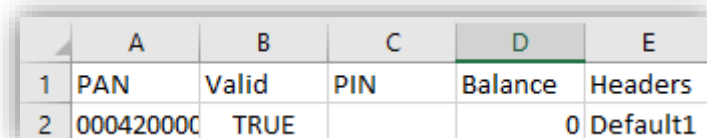
2. You will be redirected to the homepage and given access to a csv link (status should read **Unread** for all new **Links.**)

3. Selecting **csv** under **Link** will download or open this file. Once the file is open in Excel, all online cards can be edited. Cards can be added, disabled (changing **TRUE** to **FALSE**) and the balance of cards can be modified. Simply write in the desired new balance.

4. Once the cards have been edited, save the new file with an appropriate title.
5. Return to the **Online Card File** page and under the **Import** section, select **Step 1: Select**.
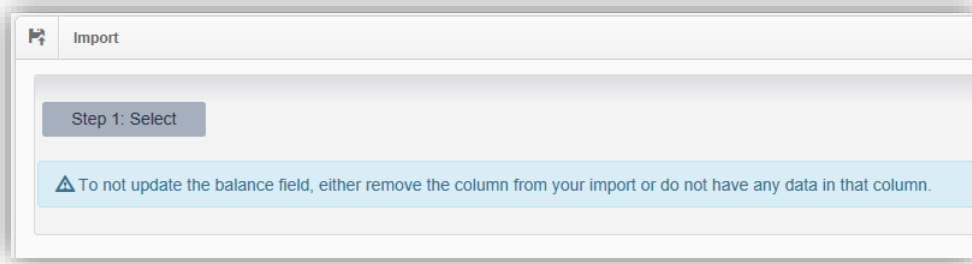
6. Locate the csv file you have edited and select **Open**.
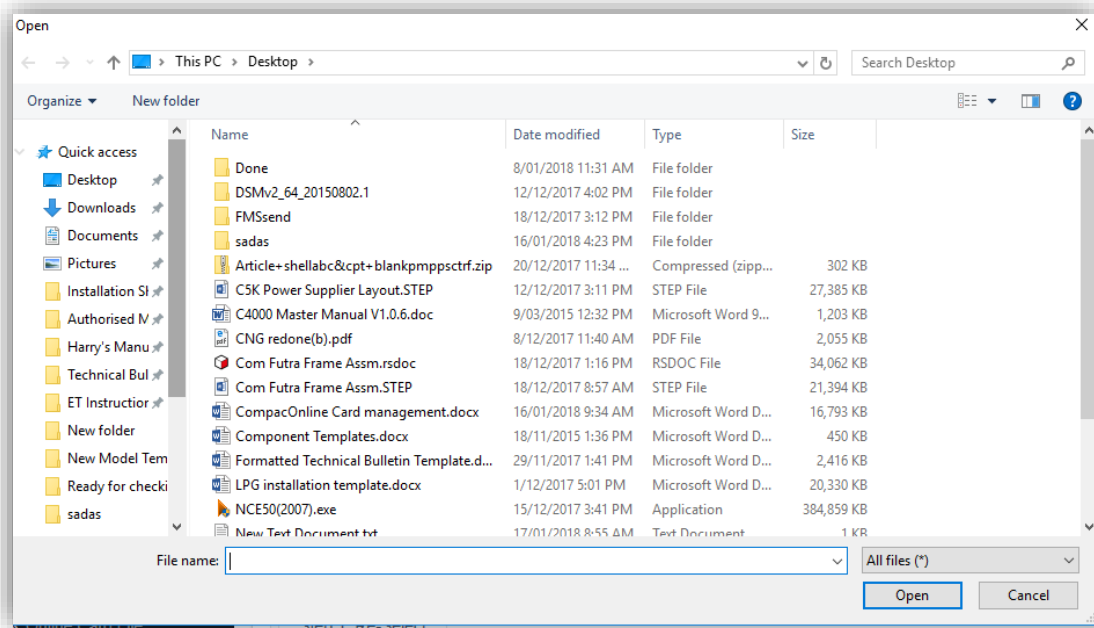
7. After the csv file has been located, select Step 2 Import to import data.

25.
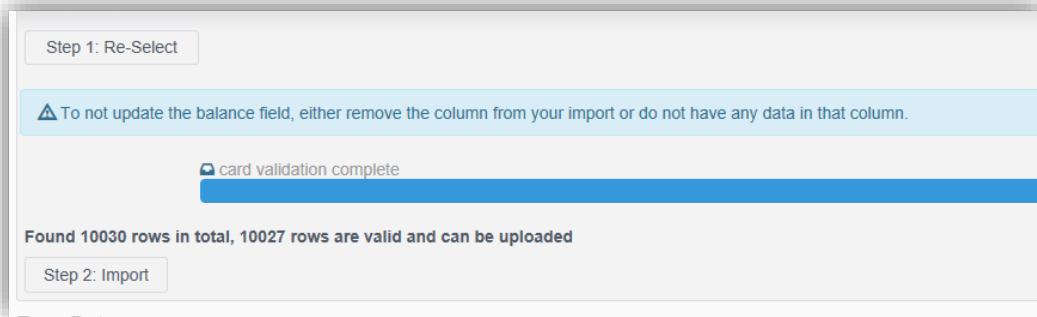
Generating a Prepay card file Using Excel

1. Enter the **first two card numbers** without the leading ISO numbers.

PAN	Valid	PIN	Balance	Headers	OwnerDe	OwnerDe	OwnerDe	OwnerDe
1502000001	TRUE		20					
1502000002	TRUE		20					
	TRUE		20					
	TRUE		20					
	TRUE		20					
	TRUE		20					
	TRUE		20					
	TRUE		20					
	TRUE		20					
	TRUE		20					
	TRUE		20					
	TRUE		20					
	TRUE		20					
	TRUE		20					

2. Select the two card numbers and drag it down to create card numbers **150200003~1502001000**.

1502000969	TRUE		20		
1502000970	TRUE		20		
1502000971	TRUE		20		
1502000972	TRUE		20		
1502000973	TRUE		20		
1502000974	TRUE		20		
1502000975	TRUE		20		
1502000976	TRUE		20		
1502000977	TRUE		20		
1502000978	TRUE		20		
1502000979	TRUE		20		
1502000980	TRUE		20		
1502000981	TRUE		20		
1502000982	TRUE		20		
1502000983	TRUE		20		
1502000984	TRUE		20		
1502000985	TRUE		20		
1502000986	TRUE		20		
1502000987	TRUE		20		
1502000988	TRUE		20		
1502000989	TRUE		20		
1502000990	TRUE		20		
1502000991	TRUE		20		
1502000992	TRUE		20		
1502000993	TRUE		20		
1502000994	TRUE		20		
1502000995	TRUE		20		
1502000996	TRUE		20		
1502000997	TRUE		20		
1502000998	TRUE		20		
1502000999	TRUE		20		

3. **Insert** a column after the card number and in the box next to the first card number,
enter: = CONCATENATE("788536",A2) then push **enter**.

A	B	C	D	E	F	G
PAN		Valid	PIN	Balance	Headers	OwnerDet
1502000001	7885361502000001	TRUE		20		
1502000002		TRUE		20		
1502000003		TRUE		20		
1502000004		TRUE		20		
1502000005		TRUE		20		
1502000006		TRUE		20		
1502000007		TRUE		20		
1502000008		TRUE		20		
1502000009		TRUE		20		
1502000010		TRUE		20		
1502000011		TRUE		20		

4. **Select** the new card number that was created in column B, place the curser on the bottom right side of the box. **Double click** and the whole column will be generated as follows:

PAN		Valid	PIN	Balance	Head
1502000001	7885361502000001	TRUE		20	
1502000002	7885361502000002	TRUE		20	
1502000003	7885361502000003	TRUE		20	
1502000004	7885361502000004	TRUE		20	
1502000005	7885361502000005	TRUE		20	
1502000006	7885361502000006	TRUE		20	
1502000007	7885361502000007	TRUE		20	
1502000008	7885361502000008	TRUE		20	
1502000009	7885361502000009	TRUE		20	
1502000010	7885361502000010	TRUE		20	
1502000011	7885361502000011	TRUE		20	
1502000012	7885361502000012	TRUE		20	
1502000013	7885361502000013	TRUE		20	
1502000014	7885361502000014	TRUE		20	
1502000015	7885361502000015	TRUE		20	
1502000016	7885361502000016	TRUE		20	
1502000017	7885361502000017	TRUE		20	
1502000018	7885361502000018	TRUE		20	
1502000019	7885361502000019	TRUE		20	
1502000020	7885361502000020	TRUE		20	
1502000021	7885361502000021	TRUE		20	
1502000022	7885361502000022	TRUE		20	
1502000023	7885361502000023	TRUE		20	
1502000024	7885361502000024	TRUE		20	
1502000025	7885361502000025	TRUE		20	
1502000026	7885361502000026	TRUE		20	
1502000027	7885361502000027	TRUE		20	
1502000028	7885361502000028	TRUE		20	
1502000029	7885361502000029	TRUE		20	
1502000030	7885361502000030	TRUE		20	
1502000031	7885361502000031	TRUE		20	
1502000032	7885361502000032	TRUE		20	
1502000033	7885361502000033	TRUE		20	
1502000034	7885361502000034	TRUE		20	
1502000035	7885361502000035	TRUE		20	
1502000036	7885361502000036	TRUE		20	
1502000037	7885361502000037	TRUE		20	

5. Insert the third column, then copy the entire second column. **Paste Special** on column C and select **Values**.

PAN			Valid	PIN	Balance	Headers	OwnerDe	OwnerDe
1502000001	7885361502000001		TRUE		20			
1502000002	7885361502000002		TRUE		20			
1502000003	7885361502000003		TRUE		20			
1502000004	7885361502000004		TRUE		20			
1502000005	7885361502000005		TRUE		20			
1502000006	7885361502000006		TRUE		20			
1502000007	7885361502000007		TRUE		20			
1502000008	7885361502000008							
1502000009	7885361502000009							
1502000010	7885361502000010							
1502000011	7885361502000011							
1502000012	7885361502000012							
1502000013	7885361502000013							
1502000014	7885361502000014							
1502000015	7885361502000015							
1502000016	7885361502000016							
1502000017	7885361502000017							
1502000018	7885361502000018							
1502000019	7885361502000019							
1502000020	7885361502000020							
1502000021	7885361502000021							
1502000022	7885361502000022							
1502000023	7885361502000023							
1502000024	7885361502000024							
1502000025	7885361502000025		TRUE		20			
1502000026	7885361502000026		TRUE		20			
1502000027	7885361502000027		TRUE		20			
1502000028	7885361502000028		TRUE		20			

Paste Special

Paste
- All
- Formulas
- Values
- Formats
- Comments
- Validation

- All using Source theme
- All except borders
- Column widths
- Formulas and number formats
- Values and number formats
- All merging conditional formats

Operation
- None
- Add
- Subtract

- Multiply
- Divide

Skip blanks   Transpose

Paste Link   OK   Cancel

6. Now **column C** will be generated like the following:

	A	B	C	D	E	F	G	
	PAN			Valid	PIN	Balance	Headers	O
	1502000001	7885361502000001	7885361502000001	TRUE		20		
	1502000002	7885361502000002	7885361502000002	TRUE		20		
	1502000003	7885361502000003	7885361502000003	TRUE		20		
	1502000004	7885361502000004	7885361502000004	TRUE		20		
	1502000005	7885361502000005	7885361502000005	TRUE		20		
	1502000006	7885361502000006	7885361502000006	TRUE		20		
	1502000007	7885361502000007	7885361502000007	TRUE		20		
	1502000008	7885361502000008	7885361502000008	TRUE		20		
	1502000009	7885361502000009	7885361502000009	TRUE		20		
	1502000010	7885361502000010	7885361502000010	TRUE		20		
	1502000011	7885361502000011	7885361502000011	TRUE		20		
	1502000012	7885361502000012	7885361502000012	TRUE		20		
	1502000013	7885361502000013	7885361502000013	TRUE		20		
	1502000014	7885361502000014	7885361502000014	TRUE		20		
	1502000015	7885361502000015	7885361502000015	TRUE		20		
	1502000016	7885361502000016	7885361502000016	TRUE		20		
	1502000017	7885361502000017	7885361502000017	TRUE		20		
	1502000018	7885361502000018	7885361502000018	TRUE		20		
	1502000019	7885361502000019	7885361502000019	TRUE		20		
	1502000020	7885361502000020	7885361502000020	TRUE		20		
	1502000021	7885361502000021	7885361502000021	TRUE		20		
	1502000022	7885361502000022	7885361502000022	TRUE		20		
	1502000023	7885361502000023	7885361502000023	TRUE		20		
	1502000024	7885361502000024	7885361502000024	TRUE		20		
	1502000025	7885361502000025	7885361502000025	TRUE		20		
	1502000026	7885361502000026	7885361502000026	TRUE		20		
	1502000027	7885361502000027	7885361502000027	TRUE		20		
	1502000028	7885361502000028	7885361502000028	TRUE		20		
	1502000029	7885361502000029	7885361502000029	TRUE		20		
	1502000030	7885361502000030	7885361502000030	TRUE		20		
	1502000031	7885361502000031	7885361502000031	TRUE		20		
	1502000032	7885361502000032	7885361502000032	TRUE		20		
	1502000033	7885361502000033	7885361502000033	TRUE		20		
	1502000034	7885361502000034	7885361502000034	TRUE		20		
	1502000035	7885361502000035	7885361502000035	TRUE		20		
	1502000036	7885361502000036	7885361502000036	TRUE		20		

7. Delete column A and column B. Now the card file is generated correctly and is ready to be uploaded onto the database.

PAN	Valid	PIN	Balance	Headers	OwnerDet	OwnerDet	OwnerDet	OwnerD
7885361502000001	TRUE		20					
7885361502000002	TRUE		20					
7885361502000003	TRUE		20					
7885361502000004	TRUE		20					
7885361502000005	TRUE		20					
7885361502000006	TRUE		20					
7885361502000007	TRUE		20					
7885361502000008	TRUE		20					
7885361502000009	TRUE		20					
7885361502000010	TRUE		20					
7885361502000011	TRUE		20					
7885361502000012	TRUE		20					
7885361502000013	TRUE		20					
7885361502000014	TRUE		20					
7885361502000015	TRUE		20					
7885361502000016	TRUE		20					
7885361502000017	TRUE		20					
7885361502000018	TRUE		20					
7885361502000019	TRUE		20					
7885361502000020	TRUE		20					
7885361502000021	TRUE		20					
7885361502000022	TRUE		20					
7885361502000023	TRUE		20					
7885361502000024	TRUE		20					
7885361502000025	TRUE		20					
7885361502000026	TRUE		20					
7885361502000027	TRUE		20					
7885361502000028	TRUE		20					
7885361502000029	TRUE		20					
7885361502000030	TRUE		20					
7885361502000031	TRUE		20					
7885361502000032	TRUE		20					
7885361502000033	TRUE		20					
7885361502000034	TRUE		20					
7885361502000035	TRUE		20					
7885361502000036	TRUE		20					