



COMPACONLINE TRANSACTIONS MANUAL

CompacOnline Transaction Manual
Version No: 1.0.2

Date: 7th December 2018

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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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Product Identification

Specifications	
Manual Title	CompacOnline Transactions Manual
Original Publication Date	15/01/18
Current Revision Author(s)	R Liu
Authorised By	W Zheng

Revision History			
Version	Date	Author(s)	Revision Notes
1.0.0	15 Jan 18	J Jang	New manual
1.0.1	31 Jan 18	S Laycock	Updated Conditions of Use and Introduction
1.0.2	07 Dec 18	R Liu	Updated Contact Information

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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 search for and view transactions available on Compac Online. The transactions section is a quick view of the transactions. This manual also details how to change the unit price of the products, and setting pricing schedules. Transaction reports can also be printed off

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.

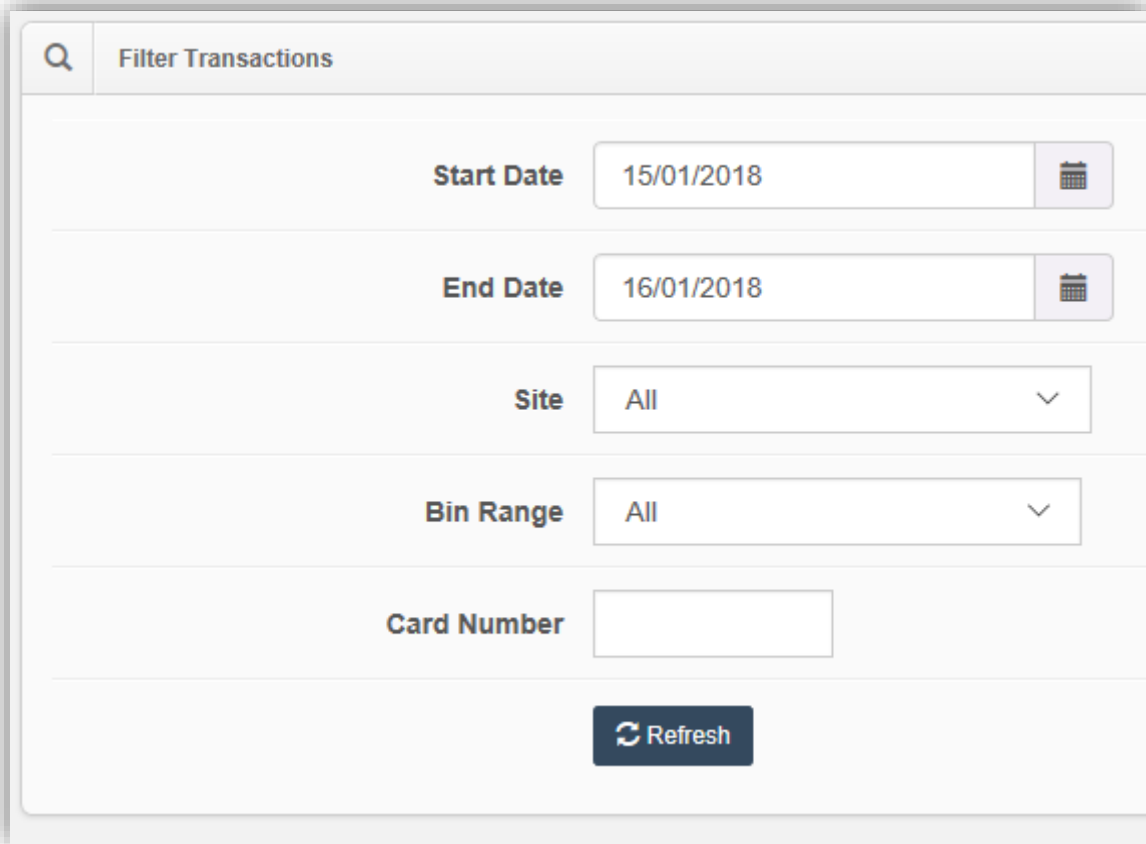
Transactions

Select a start and end date of the transactions you would like to view. This will filter all previous transactions to the ones occurring within the time period inputted.

Card Number: is usually left **blank**.

BIN range: shows the range of cards (number system). This can change the view for specific transactions.

Columns: Can be ticked or unticked to simplify the report to indicate what is required.



The screenshot shows a 'Filter Transactions' dialog box with a search icon in the top left corner. The dialog contains the following fields and controls:

- Start Date:** A text input field containing '15/01/2018' and a calendar icon to its right.
- End Date:** A text input field containing '16/01/2018' and a calendar icon to its right.
- Site:** A dropdown menu with 'All' selected and a downward arrow.
- Bin Range:** A dropdown menu with 'All' selected and a downward arrow.
- Card Number:** A text input field that is currently empty.
- Refresh:** A dark blue button with a circular arrow icon and the text 'Refresh'.

Site Name	✓
Card Number	✓
Date Time	✓
Reference	✓
Type	✓
Reason	✗
Product Name	✗
Amount	✓
Quantity	✗
Unit Price	✗
Pump	✗
Auth Amount	✓

Columns list



Pricing

NOTE: The pricing stated on **CompacOnline** is the unit pricing per product (1 unit).

Select **edit** and scroll to the bottom to edit prices.

Schedule Name	Update
91 98 Diesel	Not Pending <input type="button" value="Edit"/>
91andDiesel	Not Pending <input type="button" value="Edit"/>
AdBlue only	Not Pending <input type="button" value="Edit"/>

Editing Price

The active price shown on CompacOnline is the retail price per unit. A new price can be set through the editing process.

NOTE: For security reasons the prices can only be changed to $\pm 50\%$ of its current active price. **Eg:** A \$1000 dispenser can only be changed to **Max \$1500** or **Min \$500**.

Active Price	New Price
0.951	<input type="text" value="0.951"/>
1.000	<input type="text" value="1.000"/>
1.000	<input type="text" value="1.000"/>

The date and time at which the active price change will be applied can also be set using the **Date Time, To Apply Schedule** section. Simply set the date and time you would like the active price change to occur, and select **Apply Schedule**.

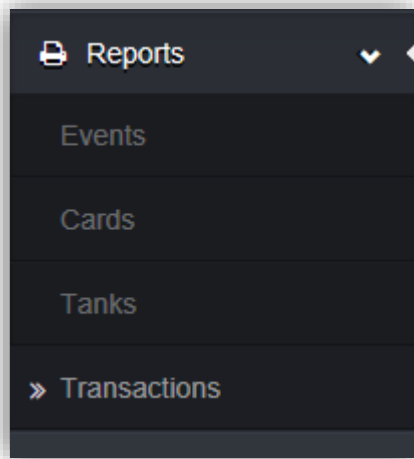
Date Time To Apply Schedule

Date: / /

Time: :

Customise Report

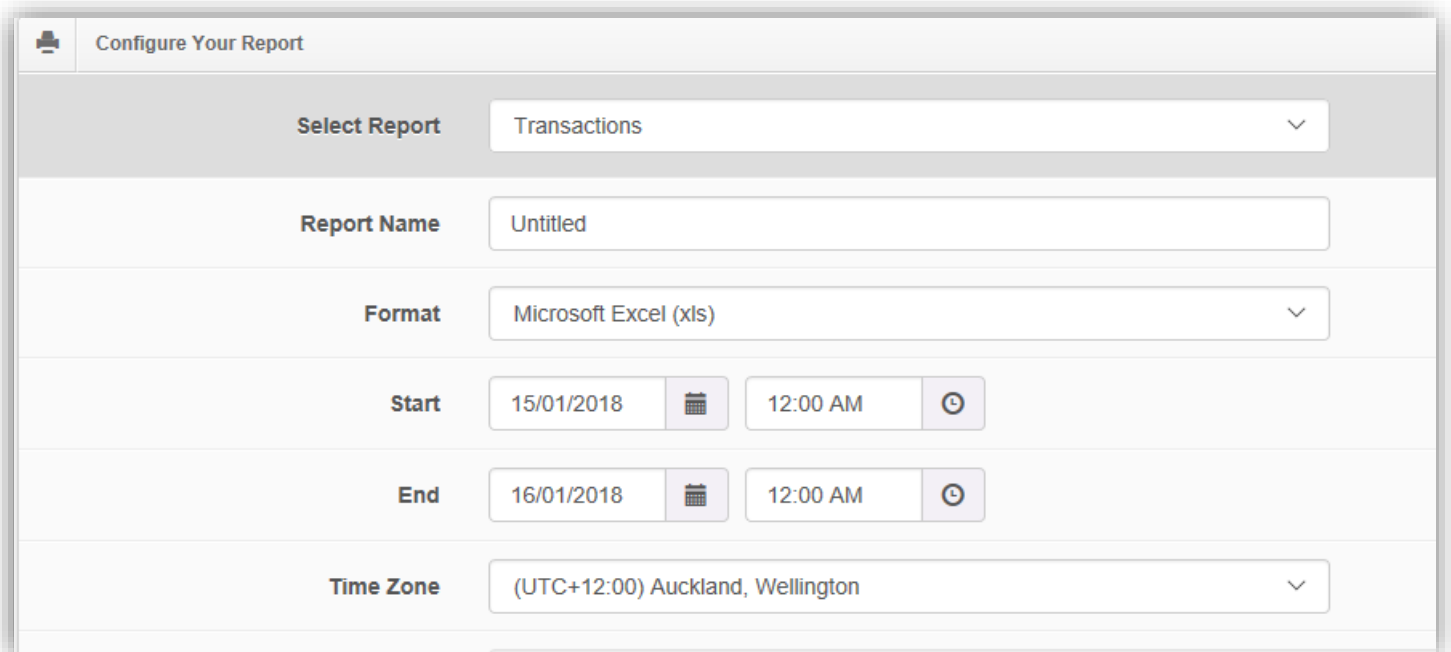
1. On the left-hand side tab select **Transactions** in the **Reports** section.



2. Enter a Report name.
3. Select either **Portable Document Format (PDF)**, **Comma Separated Variables (CSV)** or **Microsoft excel (xls)**.
4. Select **Start & End Date**, for the time period you would like the report for.

NOTE: Leave the time as **12am** unless you require a specific time on the report.

5. The **Time Zone** should always be set to your local time zone.

A screenshot of a web-based 'Configure Your Report' form. The form is titled 'Configure Your Report' and contains several fields for report configuration. The 'Select Report' dropdown is set to 'Transactions'. The 'Report Name' field contains 'Untitled'. The 'Format' dropdown is set to 'Microsoft Excel (xls)'. The 'Start' field is set to '15/01/2018' at '12:00 AM'. The 'End' field is set to '16/01/2018' at '12:00 AM'. The 'Time Zone' dropdown is set to '(UTC+12:00) Auckland, Wellington'. Each date and time field includes a calendar icon and a clock icon for selection.

Customise Report

6. Select the **Columns of data** required for the report.

The screenshot shows a window titled 'Table To Select From:' with a dropdown menu set to 'Transactions'. Below this are two columns: 'Columns From Table' and 'Selected Columns'. The 'Columns From Table' list includes CardNumber, DateTime, Reference, ProductCode, Pump, Hose, Amount, Quantity, and UnitPrice. Between the two columns are four arrow buttons: a single green arrow pointing right, a single red arrow pointing left, a double green arrow pointing right, and a double red arrow pointing left. The 'Selected Columns' list is currently empty. To the right of the 'Selected Columns' list are two vertical arrow buttons, one pointing up and one pointing down.

NOTES:

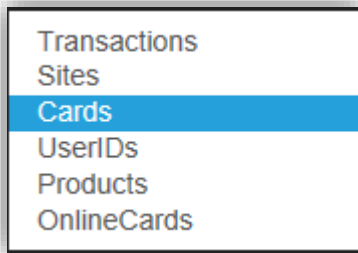
- Select **column name** in the first box Columns from Table.
- Select **single green arrow** to move over selected Column name.
- Select **double green arrow** to move all columns over.
- Select **single red arrow** to move column back so it does not appear on report.
- Select **double arrow** to move all Columns back.

7. Change the **Table to Select** from **Transactions** to **Cards**.

8. Again, select the Columns of data that you require on the report.

The screenshot shows a window titled 'Table To Select From:' with a dropdown menu set to 'Cards'. Below this are two columns: 'Columns From Table' and 'Selected Columns'. The 'Columns From Table' list includes Number, Valid, OwnerDetails1, OwnerDetails2, OwnerDetails3, OwnerDetails4, OwnerDetails5, OwnerDetails6, and OwnerDetails7. Between the two columns are four arrow buttons: a single green arrow pointing right, a single red arrow pointing left, a double green arrow pointing right, and a double red arrow pointing left. The 'Selected Columns' list is currently empty. To the right of the 'Selected Columns' list are two vertical arrow buttons, one pointing up and one pointing down.

- Select column name in the first box **Columns from Table**.
- Select **single green arrow** to move over selected Column name.
- Select **double green arrow** to move all columns over.
- Select **single red arrow** to move column back so it does not appear on report.
- Select **double arrow** to move all Columns back.
- To move the selected columns in the right order, select the column name and press the up or down arrow to put it in the correct place.
- Repeat this process with the **UserID** Table and **Sites Table** if applicable.



9. When all the required columns for the table have been selected, go to the saved lists section next to the green tab and enter in the report name.
Eg Weekly Report and select Save Current List.

Columns

↑ Saved Lists

Select a previously saved list of columns:

✖ Delete Selected List

Save the current list of columns:

✔ Save Current List

Table To Select From: Cards

Columns From Table		Selected Columns
Number		
Valid		
OwnerDetails1	➡	
OwnerDetails2	⬅	
OwnerDetails3	➡➡	
OwnerDetails4	⬅⬅	
OwnerDetails5		
OwnerDetails6		
OwnerDetails7		

10. Then select Generate Report at the bottom of the page.
11. The site will return to the home page where the report will be processed then available to download. Once the status is listed as **unread**, a link for the report will be available.

Auto refresh is on		
Type	Status	Link
Transactions Report	★ Unread	CSV

- Examples of reports have been shown below.

PDF Version:

Transactions Report											
Site Name: BUREAU TEST.DEV - ATG Status.DEV - Card king.DEV - Com Fill.DEV - Com Futra.DEV - Com tank.DEV - OPTService Status.DEV - OPTService Status FEP1.DEV - OPTService Status FEP2,Farmlands Test Site,IOR,NZ VPN,Service Test,TEST 1,TEST 2,TEST 3,TEST 5,TEST 6,TEST Kavinesh,United Petroleum Test										Start Date: 29 August 2016 12:00:00 AM	
Time Zone: (UTC+12:00) Auckland, Wellington					Card Range: No Limits			End Date: 23 January 2018 12:00:00 AM			
Card Number	Site	Date Time	Reference	Product Code	Pump	Hose	Amount	Quantity	Unit Price	Odometer	
438616000002228	Farmlands Test Site	9/9/2016 3:30:00 PM	4	8	1	1	5.67	5.1	1.111	NOT Req	
438616000002228	Farmlands Test Site	9/9/2016 3:35:00 PM	5	8	1	1	0	0	0.000	NOT Req	
4999990000009109	Farmlands Test Site	9/9/2016 4:14:00 PM	6	N/A	1	1	0	0	1.111	NOT Req	
4999990000009109	Service Test	9/9/2016 4:22:00 PM	7	N/A	1	1	0	0	1.111	NOT Req	
4999990000009109	Service Test	9/9/2016 5:02:00 PM	8	8	1	1	5.52	4.97	1.111	NOT Req	
7080590002407144	Service Test	12/9/2016 2:24:38 PM	9	8	1	1	10.87	10.87	1.000	5	
7080590002407144	Service Test	12/9/2016 2:44:29 PM	10	8	1	1	16.37	16.37	1.000	6	
7080590002407144	Service Test	12/9/2016 3:04:19 PM	11	8	1	1	6.1	6.1	1.000	5	
7080590002407144	Service Test	12/9/2016 3:10:29 PM	12	8	1	1	8.7	8.7	1.000	56	
7080590002407144	Service Test	12/9/2016 3:11:22 PM	13	8	1	1	2.77	2.77	1.000	5	
7080590002407144	Service Test	12/9/2016 3:15:54 PM	14	8	1	1	6.57	6.57	1.000	5	

CSV Version

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
	CardNumber	DateTime	Reference	ProductCc	Pump	Hose	Amount	Quantity	UnitPrice	Exported	Odometer	Receipt	EOV	LocalDateTime	UserID	Registrati	Test
2	428418000000770	20/07/2016 15:45	9868	3	2	1	77.5	84.34	0.919	FALSE	NOT Req	*-----EFTPOS---		20/07/2016 14:45			FALSE
3	4835610000009850	20/07/2016 15:55	9869	3	2	1	40.08	43.61	0.919	FALSE	NOT Req	*-----EFTPOS---		20/07/2016 14:55			FALSE
4	5036460000005290	20/07/2016 17:34	9870	3	2	1	42.31	46.04	0.919	FALSE	NOT Req	*-----EFTPOS---		20/07/2016 16:34			FALSE
5	5035130000004030	21/07/2016 12:01	9872	3	2	1	46.88	51.02	0.919	FALSE	NOT Req	*-----EFTPOS---		21/07/2016 11:01			FALSE
6	5402230000000990	21/07/2016 15:26	9877	3	2	1	56.34	61.31	0.919	FALSE	NOT Req	*-----EFTPOS---		21/07/2016 14:26			FALSE
7	4943100000003940	21/07/2016 15:36	9879	3	2	1	55.22	60.08	0.919	FALSE	NOT Req	*-----EFTPOS---		21/07/2016 14:36			FALSE
8	5035130000008250	21/07/2016 16:04	9880	3	2	1	47.82	52.03	0.919	FALSE	NOT Req	*-----EFTPOS---		21/07/2016 15:04			FALSE
9	5035130000003690	22/07/2016 9:33	9888	3	2	1	31.47	34.24	0.919	FALSE	NOT Req	*-----EFTPOS---		22/07/2016 8:33			FALSE
10	5043010000004450	22/07/2016 14:13	9894	3	1	1	1100	1196.95	0.919	FALSE	NOT Req	*-----EFTPOS---		22/07/2016 13:13			FALSE
11	4835610000006170	22/07/2016 14:35	9895	3	1	1	878.29	955.7	0.919	FALSE	NOT Req	*-----EFTPOS---		22/07/2016 13:35			FALSE
12	5043010000000530	22/07/2016 15:41	9896	3	2	1	60.54	65.88	0.919	FALSE	NOT Req	*-----EFTPOS---		22/07/2016 14:41			FALSE
13	5366180000002440	22/07/2016 16:04	9898	3	2	1	56.09	61.03	0.919	FALSE	NOT Req	*-----EFTPOS---		22/07/2016 15:04			FALSE
14	5892790000007700	22/07/2016 16:45	9900	3	2	1	81.97	89.2	0.919	FALSE	NOT Req	*-----EFTPOS---		22/07/2016 15:45			FALSE
15	4284550000005410	22/07/2016 18:03	9903	3	2	1	50.99	55.49	0.919	FALSE	NOT Req	*-----EFTPOS---		22/07/2016 17:03			FALSE