



CompacOnline Card Management

Local Cards, Local Card File, User ID



Local Cards

Create Local Card

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

Search Create Card

Card Type Compac InHouse Test Card

Card Number 1
Number (1-10 digits)

Advanced Options (click anywhere to expand)

Create Card

3. Card Details for new card will display. Owner Details Cost Centre is set to Default, enter the information into each field as required, select Save Details

Card Details for Card # 1 (Card Type: Compac InHouse Test Card)

Owner Details

Cost Centre
Default

Rego
VH1234

Save Details

Card details saved successfully

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

Cardfile Update

Flag all sites to download cardbase changes Flag Sites

Sites flagged. Sites needs to be online for this to happen. Please note this can take up to 30 minutes for online sites and longer for dial up sites.

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



Local Cards

Search and Edit Local Card

1. Select the Card Type from the drop down list
2. Enter the card number in the Card Number field, select Search

Search for cards

Card Type: Compac InHouse Test Card

Include Disabled Cards

1 Contains

Advanced Options (click anywhere to expand)

Search

3. Card will appear under Search Results, card will be ticked. Select Edit Selected Cards

Card Number	PIN	Name	Owner Details 2	Selected
1				<input checked="" type="checkbox"/>

Edit Selected Cards

4. "You are about to edit 1 card, do you want proceed?" will display, select OK

www.compaonline.com says:

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

Prevent this page from creating additional dialogs.

OK Cancel

5. Card details for selected card will display
- Change owner details; change the information in the Cost Centre field, select Save Details

Card Details for Card # 1 (Card Type: Compac InHouse Test Card)

Owner Details

Cost Centre: Default

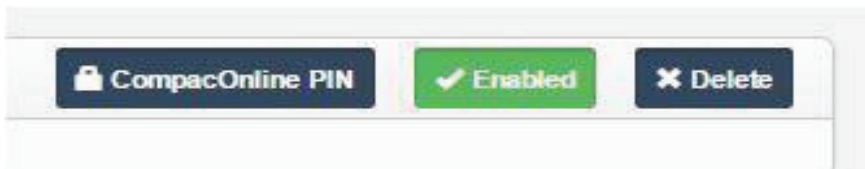
Rego: VH1234

Save Details

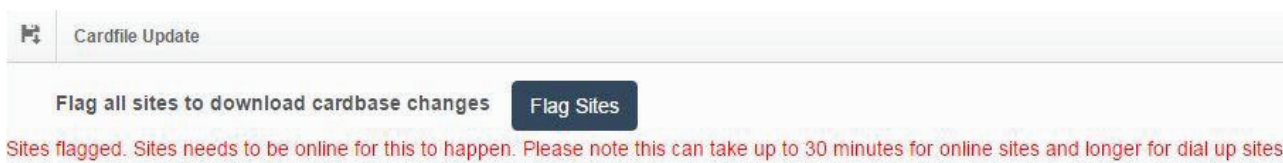
Card details saved successfully



- Change card PIN; select CompacOnline PIN, select Clear PIN, enter new pin number in the NEW PIN field and select Set PIN
- Disable/Enable card; select Disable or Enabled



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



Local Cards

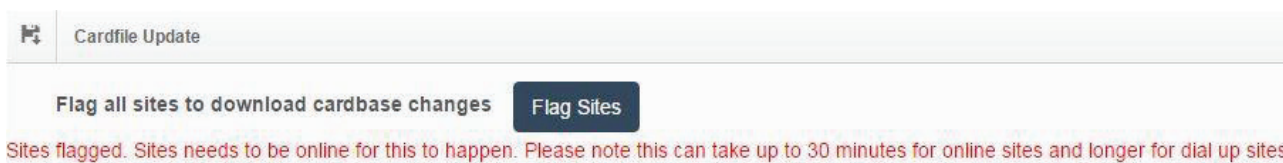
Delete Local Card

Note: deleting a card will also delete the card record from any historical transaction data

1. Select the Card Type from the drop down list
2. Enter the card number in the Card Number field, select Search
3. Card will appear under Search Results, card will be ticked Selected, select Edit Selected Cards



4. "You are about to edit 1 card, do you want to proceed?" will display, select OK
5. Select Delete. "Are you sure you want to delete this card?" will display, select OK
6. Select Flag Sites, selete OK for all sites to update cards





Local Card File

Add & Edit Local Cards

1. Select the Cardbase from the drop down list, enter a file name in the Report Name field and select Get CSV Cardfile

Edit or Replace Server Card File

Cardbases: Compac InHouse Test Card

Report Name: Untitled

Get CSV CardFile

2. CompacOnline will revert to the Home Page. Scroll down to Reports, select the unread CSV link to open the CSV card file

Report tables will auto refresh every 10 seconds

Type	Status	Link
Card File	★ Unread	CSV

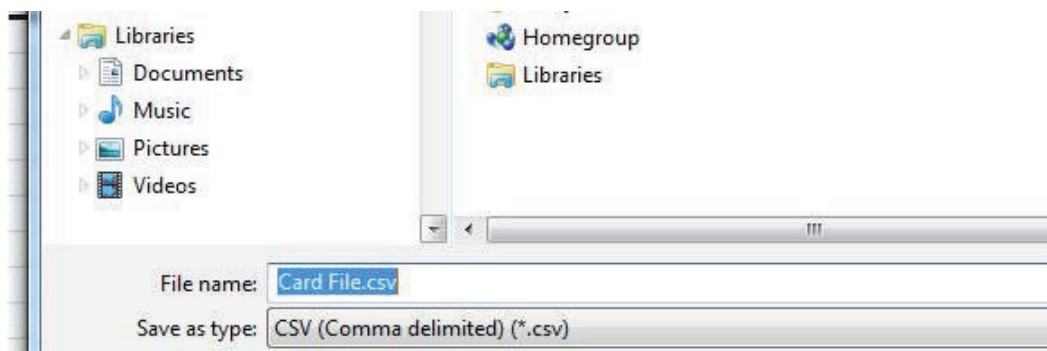
3. First three columns in the CSV are set. (A) card number, (B) valid TRUE or FALSE and (C) card PIN number. (D) - (K) are card Owner Details, these column headers vary for each CompacOnline database

	A	B	C	D	E	F	G
1	Number	Valid	SelectPin	Rego			
2	1	TRUE	1234	VH1234			
3							
4							
5							
6							
7							
8							

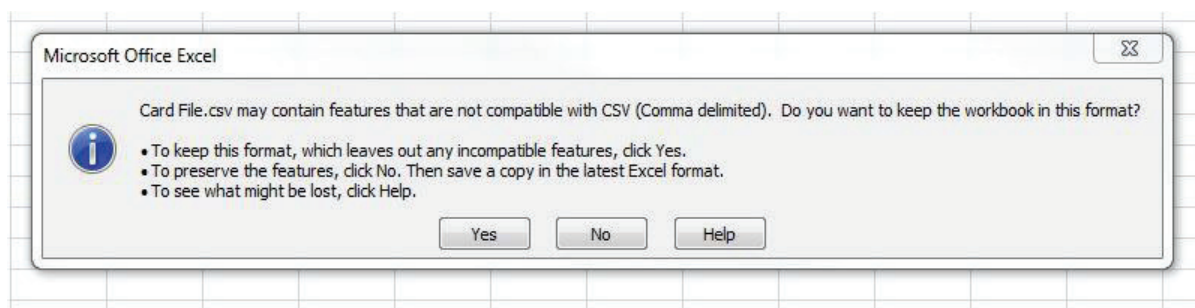
- Adding a new card; enter card number on the next row under the last card number, enter TRUE in Valid column, enter PIN in SelectPin column (if APPL) and enter card owner details (if APPL)
- Disable or enable card; find card number, change Valid from TRUE to FALSE
- Change card PIN and Owner Details; find card number, change PIN in SelectPIN column, change Owner Details in columns (D) to (K) (if APPL)



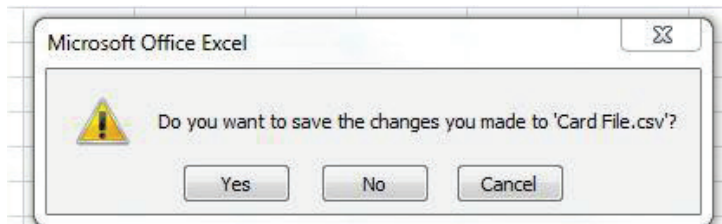
4. Save updated file on your PC with the format as CSV (Comma delimited (*.csv))



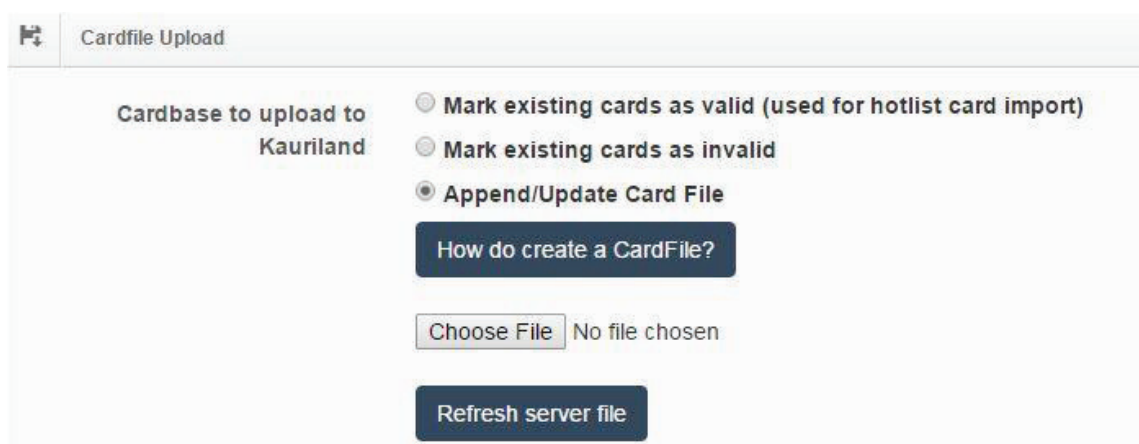
5. "Do you want to keep the workbook in this format?" will display, select Yes



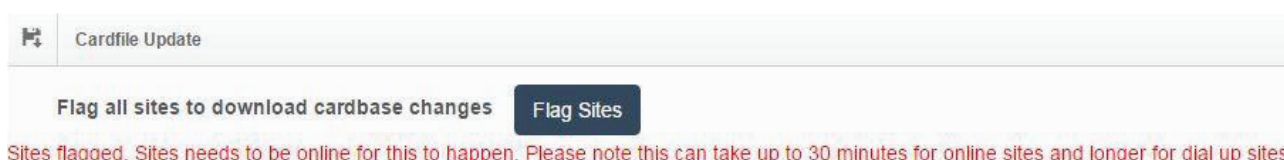
6. Close the CSV file. "Do you want to save changes you made to 'Card File.csv'?" will display, select No



7. 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' and File Upload will display when completed



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





User IDs

Add & Edit User IDs

1. 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: Compac InHouse Test UserID

Current User ID File

Report Name: Untitled

Get User ID File

2. CompacOnline will revert to the Home Page. Scroll down to Reports, select the unread CSV link to open the CSV the User ID File

Report tables will auto refresh every 10 seconds

Type	Status	Link
Card User ID File	★ Unread	CSV

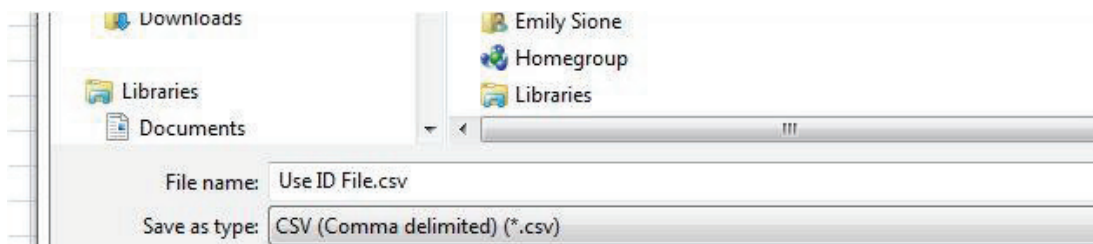
3. First two columns in the CSV are set. (A) User ID number, (B) valid TRUE or FALSE and (C) - (J) are User Details, these column headers vary for each CompacOnline database

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

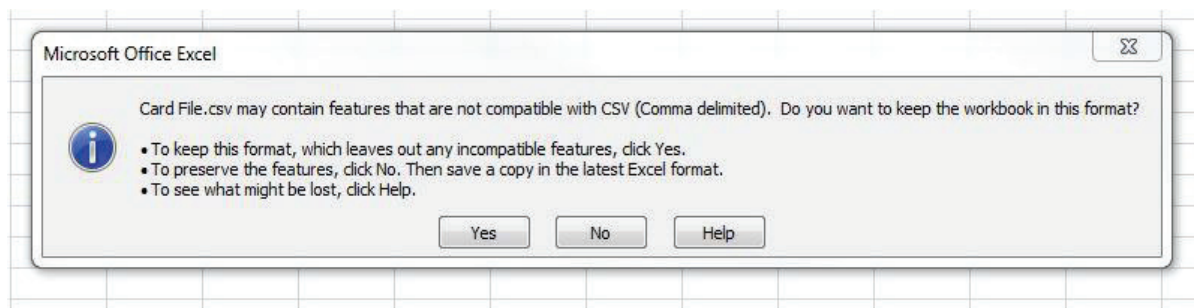
- Adding a User ID; enter User ID number on the next row under the last User ID, enter TRUE in Valid column and enter card owner details (if APPL)
- Disable or enable User ID; find User ID number, change Valid column from TRUE to FALSE
- Change User ID Details; find User ID number, change Owner Details in columns (C) to (J) (if APPL)



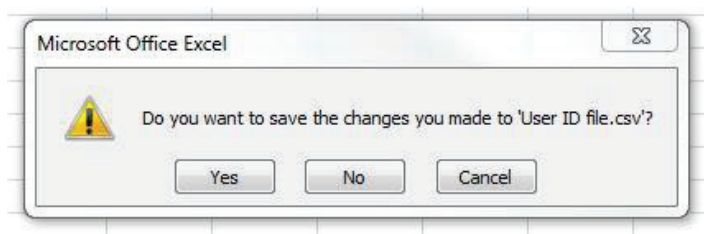
4. Save updated file on your PC with the format as CSV (Comma delimited (*.csv))



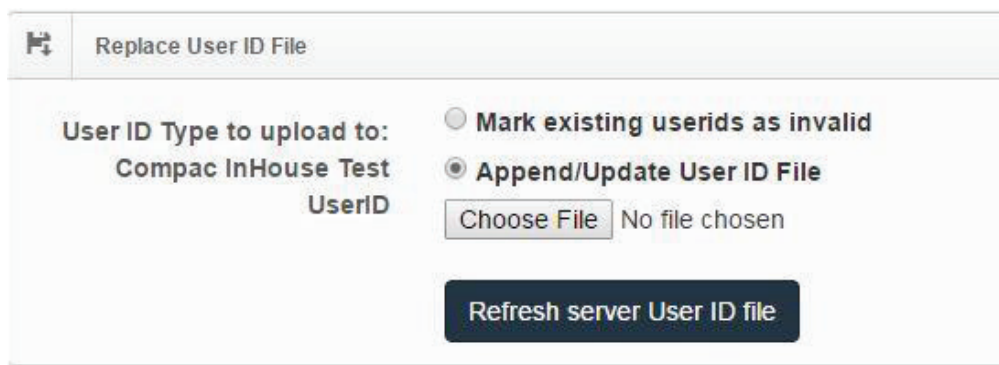
5. "Do you want to keep the workbook in this format?" will display, select Yes



6. Close the CSV file. "Do you want to save the changes you made to 'User ID file.csv'?" will display, select No



7. 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' and File Uploaded will display when completed



8. Select Flag Sites. "Are you sure you want to upload the User ID Type to all the associated site?" will display, select OK

