



ONLINE IDENTIFICATION SERVICE

PRODUCT DESCRIPTION

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#### Version History

Version	Date	Description
v1.0	2021-07-29	Initial version
v1.1	2021-08-22	Updated VH

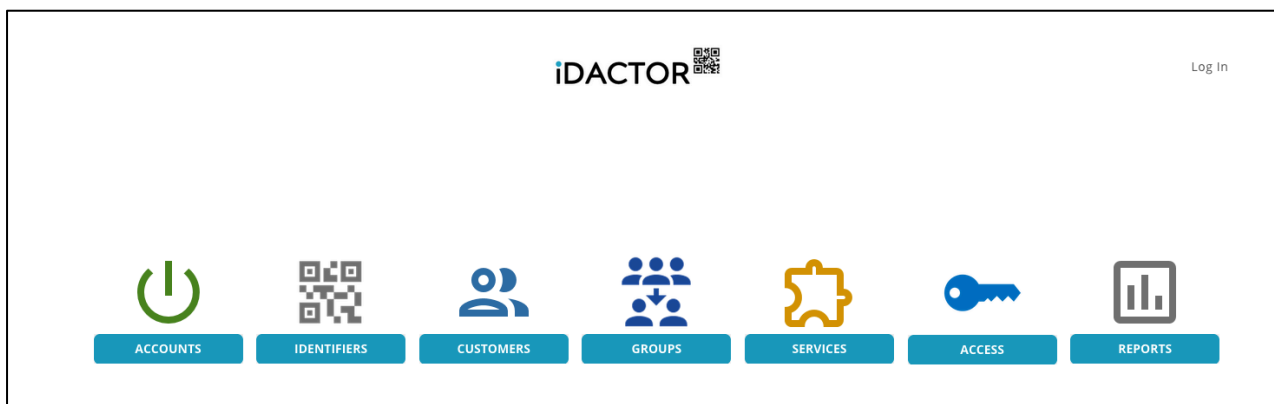
This is a product description for the Idactor Online Identification System

## 1 SYSTEM DESCRIPTION

The system contains several functionality entities that are all serving different purpose but are using the same central database, user management and logging. All access to different interfaces is done with any modern Internet Browser (Firefox and Chrome recommended) over HTTPS connection.

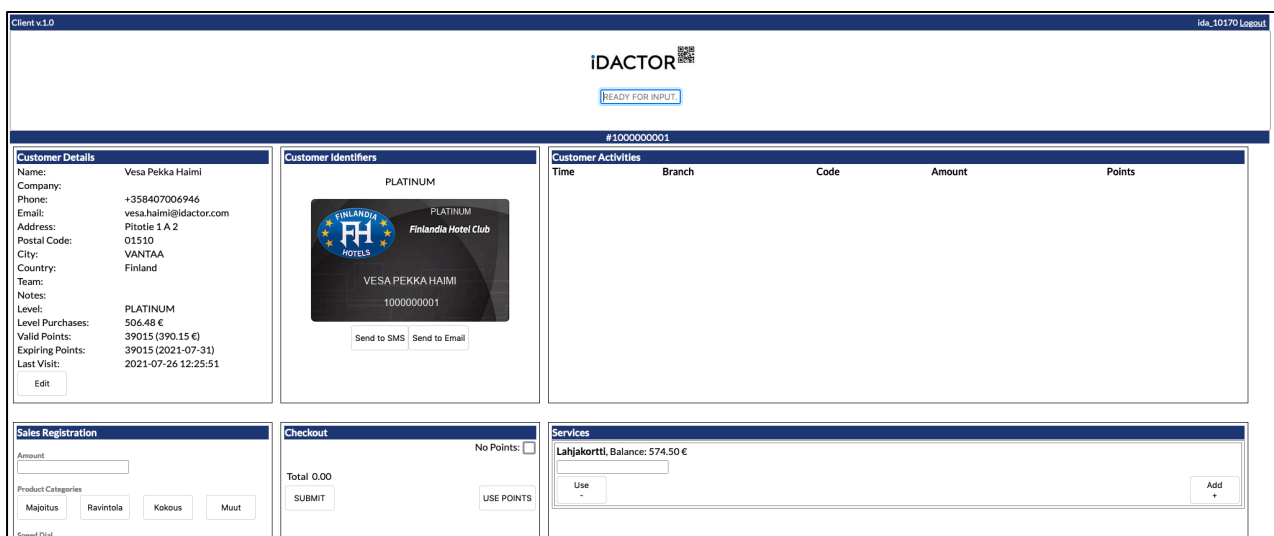
### 1.1 Management Portal

The Management portal provides all essential functionalities for managing the provided service.



### 1.2 Client Portal

The Client portal provides automated or manual mode to handle daily customer activities.



### 1.3 API (Application Programming Interface)

Idactor Online Identification system provides a REST API for programmatic access to read and write data to the Idactor Cloud Based web service.

All connections must be established by using HTTPS and responses are encapsulated inside of standard HTML in JSON format.

All endpoints/clients (e.g., cashier registers, cashier terminals, external web services, ticketing systems) must be pre-registered to the Idactor authentication database to enable connectivity; all connection requests from unknown clients, unknown methods and improper parametrization will be ignored without any error message.

Example Query for Customer's point balance:

GET /api/customers/id\_customer\_points.php

Name	Value
aid	ida_XXXXX
client_id	10x xxx
client_serial	10XXXXXXXXXXXX
timestamp	1613976099385
cid	1000000001

Example Response:

```
<!DOCTYPE html>
<html>
<body>
{"points":"50195"}
</body>
</html>
```

Idactor REST API is documented in detail in a separate document: "IDACTOR REST API".

### 1.4 Mobile Client

Idactor Mobile Client is available for Android and iPhone devices. The client is capable of reading NFC media and Optical codes and sends the read media data to Idactor Cloud Service for further processing.

The software can be operated in several different modes, including:

- a) Entry Mode:  
Software gives either green or red notification whether customers is eligible for access or not.
- b) Cashier Mode:  
Customer's sales transaction can be registered; cash, invoiced, points or service use
- c) Full Cashier Mode:  
Services can be activated for the customer and sales transactions can be registered.

## 1.5 Links to the Major Functionalities

Idactor Website can be found from address <https://www.idactor.com>

Idactor Online Store can be found from address: <https://shop.idactor.com/>

Idactor Management Portal can be found from address: <https://portal.idactor.com/>

Registration to the service: [https://portal.idactor.com/new\\_account](https://portal.idactor.com/new_account)

Client Access can be found from address: <https://portal.idactor.com/clients/client.php>

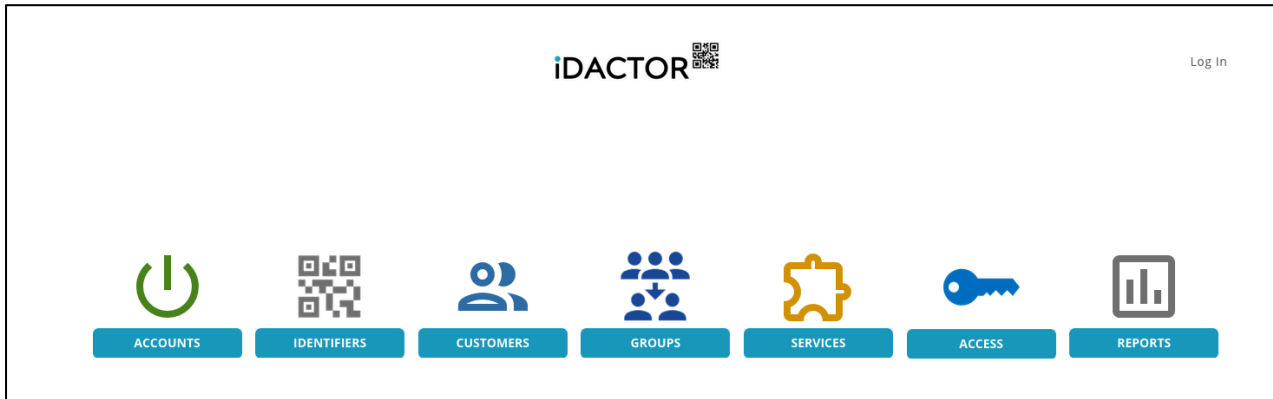
Support (8/5): [support@idactor.com](mailto:support@idactor.com)

Premium Online support: on request

## 2 IDACTOR MANAGEMENT PORTAL

Idactor Online Identification service contains a Management Portal, that can be used for setting essential service configuration parameters, managing account information and billing, creating and managing customer profiles, identifier templates and customized user identifiers, reporting and much more.

Management Portal Homepage



### 2.1 Navigation

Idactor -logo works always as a link to the homepage.




Each functionality title contains a menu that is expanded when mouse is hovering on top the title:

ACCOUNTS	IDENTIFIERS	CUSTOMERS	GROUPS	SERVICES	ACCESS	REPORTS
MANAGE ACCOUNT	TEMPLATES	CUSTOMER MANAGER	CREATE ORGANIZATION	MANAGE SERVICES	MANAGE ACCESS	DAILY REPORT
PRODUCT BUTTONS	ID-CREATOR	MY CUSTOMERS	ORGANIZATION LIST	ASSIGN SERVICES	ACCESS STATUS	MONTHLY REPORT
MANAGE DEVICES	SEND IDENTIFIERS	ALL CUSTOMERS	CREATE GROUP			AUTOMATED REPORTS
MANAGE SUB-ACCOUNTS		CUSTOMER IMPORT	GROUP LIST			TRANSACTIONS
MANAGE INTERESTS		SEGMENTOR	GROUP REGISTRATION			
MANAGE SHOP		MEDIA MANAGEMENT	GROUP SERVICES			
			CHECK MEDIA			

## 2.2 Login

Un-authorized access to different pages is restricted with username & password. To login to the Idactor Identification Service Management Portal, click any of the page links or Login -link from the upper right corner:

Log In



Username or Email Address

Password

☐ Remember Me

Log In

Lost your password?

[← Go to Idactor Portal](#)

Username or email address

Password

Remember Password (stored in a browser)

Login

Password Recovery

## 2.3 Logout

Logout can be done with the logout -link:

Log Out (ida\_10000)

## 2.4 Password Change & Recovery

"Lost Your Password?" link can be used if account password must be changed or it has been forgotten. New password will be sent to the email address that has been configured as account's primary email address.

In case there is any problems with the login, please contact Idactor support for immediate assistance: [support@idactor.com](mailto:support@idactor.com)



### 3 Accounts



ACCOUNTS

#### 3.1 Accounts -> Manage Account

ACCOUNT MANAGER	
Account Id:	ida_10000
New Password:	<input type="password"/>
Authentication:	<input type="password"/>
Name:	idactor
Branch:	<input type="text"/>
BIC:	<input type="text"/>
Address:	<input type="text"/>
Postal code:	<input type="text"/>
City:	<input type="text"/>
Country:	<input type="text"/>
Phone:	<input type="text"/>
Email:	<input type="text"/>
WWW:	<input type="text"/>
Timezone:	Europe/Helsinki <span>▼</span>
<b>Contact Information</b>	
Firstname:	<input type="text"/>
Lastname:	<input type="text"/>
Phone:	<input type="text"/>
Contact Email:	<input type="text"/>

Account Id – not editable
Change Password
Change Authentication String (future use)
Account Name
Branch Name, if part of the group
Business Identification Code
Company's primary street address
Company's Postal Code
Company's City
Company's Country
Company's primary phone number
Company's primary email
Company's website
Timezone where service is used – important!
Contact – first name
Contact – last name
Contact - phone
Contact – email address

# IDACTOR ONLINE IDENTIFICATION SERVICE PRODUCT DOCUMENTATION



Invoicing Details	
Invoice Name:	<input type="text"/>
Invoice Address:	<input type="text"/>
Invoice Postal Code:	<input type="text"/>
Invoice City:	<input type="text"/>
Invoice Email:	<input type="text"/>
E-Invoice Operator:	<input type="text"/>
E-Invoice OVT:	<input type="text"/>
Invoice Ref:	<input type="text"/>
SMS Settings	
Sender Name:	<input type="text"/>
Message:	<input type="text"/>
Email Settings	
From Email:	<input type="text"/>
From Name:	<input type="text"/>
From Subject:	<input type="text"/>
From Body:	<input type="text"/>
Web Form	
Upload Logo:	<input type="button" value="Browse..."/> No file selected.
Current Logo:	
Upload Terms:	<input type="button" value="Browse..."/> No file selected.
Current Terms:	
Registration Msg:	<input type="text"/>

Paper Invoice - Recipient Name
Paper Invoice - Recipient Address
Paper Invoice - Recipient Postal Code
Paper Invoice - Recipient City & Country
Invoice to Email Address
Electronic Invoice - Operator
Electronic Invoice - OVT
Invoicing - Reference Name/Number
Sender's name in SMS messages
Fixed SMS message
Sender's email address
Sender's Name
Email subject
Email Body
Upload logo used in web registration forms
Upload Member Terms -document
Message shown after successful registration

## Administrator Settings

Admin Settings	
Media Auto-Registration:	<input type="checkbox"/>
SMS Service:	<input type="checkbox"/>
Email Service:	<input type="checkbox"/>
Member Levels:	<input type="checkbox"/>
Member Points:	<input type="checkbox"/>
Group:	<input type="text"/>
Group Master:	<input type="checkbox"/>
Sub-Accounts:	<input type="checkbox"/>
Multiple IDs:	<input type="checkbox"/>
API:	<input type="checkbox"/>
Newsletters:	<input checked="" type="checkbox"/>
Program:	SELECT... <input type="button" value="v"/>
Interests:	<input type="checkbox"/>
Daily SMS:	<input type="text" value="100"/>
Monthly SMS:	<input type="text" value="100"/>
Level Time:	<input type="text" value="12"/>
Point Expiry:	<input type="text" value="12"/>
Default Tax:	<input type="text" value="24"/>
<input type="button" value="UPDATE"/> <input type="button" value="RESET"/>	

Allow auto-registration for unknown media
Enable SMS service
Enable email service
Activate Member Levels
Activate Member Points
Account is part of the group
Account is the master of the group
Account can create sub-account
Customer may have several active identifiers
API use is activated
Account is allowed use Newsletter interface
Select newsletter program (Mailchimp/Klaviyo)
Customers' interest are activated
Limit for daily SMS
Limit for monthly SMS
If Levels are activated -> default level time
If Points are activated -> default point time
DefaultTax rate (VAT)

### 3.2 Accounts -> Product Buttons

Product Buttons are shown in the client portal either as Product Categories or as Product speed-dial buttons. If the entry contains a price value, then button is shown as speed-dial button and without a price value as Product Category.

PRODUCT BUTTONS					ADD ROW
Title	Price	Tax	Tab	Points	
entry	1.00	24		<input type="checkbox"/>	EDIT
drinks	0.00	24		<input type="checkbox"/>	EDIT

**Title:** Name of the product/category -> shown in the button itself

**Price:** Price of the product -> speed-button, Leave empty for category

**Tax:** Amount of tax, if any.

**Tab:** For future use

**Points:** Are points assigned for purchases of this product/category

**Add Row:** Add new value

**Edit:** Edit the selected line

**Save/Delete/Reset:** Visible, if Edit is clicked -> Save values, Delete entry, Cancel Editing.

### 3.3 Accounts -> Manage Devices

Manage Devices are used for controlling Idactor proprietary hardware.

MANAGE DEVICES								ADD ROW
#	Name	Location	MAC	IPv4	INI	SUCCESS	FAILURE	
1	rasp1	home	b8:27:eb:5e:66:b0		DHCP=1;WEB=5	SND=0;RL1=3;LD1=	SND=0;LD3=3;	EDIT

**Name:** Name of the device

**Location:** Free description of the device's location, like restaurant, downstairs, etc.

**MAC:** Hardware address of the device

**IPv4:** Fixed ip-address of the device. Leave empty if DHCP is used.

**INI:** Command String for initial connection after device start-up

**SUCCESS:** Command String for successful Service Use

**FAILURE:** Command String for failed Service Use.

#### NOTE!

Command Strings are configured only by Idactor personnel or other authorized personnel.

### 3.4 Accounts -> Manage Sub-Accounts

Each account can create sub-accounts for their own internal use. Sub-accounts can be used for login as the main account and sub-account may have limited access to different functionalities. In example the main account can be used only by the administrator for full access to all the features and different sub-accounts can be used for limited access to selected functionalities, e.g., reporting, client access, etc.

MANAGE SUB-ACCOUNTS											NEW
Username	Password	First Name	Last Name	Email	A-Date	B-Date	Management	Api	Clients	Active	
ida_10000_1		Vesa	Haimi	contact@planetl			None	Full	Off	<input type="checkbox"/>	EDIT

**Username:** Automatically generated value using the main account name, e.g., ida\_10000\_2

**Password:** Automatically generated password - value can be replaced with manual input

**First Name:** Given name of the sub-account

**Last Name:** Family name of the sub-account

**Email:** Email address for the sub-account. Please fill for password recovery purposes

**A-Date:** If sub-account is only used for limited time period, add starting date here.

**B-Date:** If sub-account is only used for limited time period, add ending date here.

**Management:** Limit access on Management Portal

**API:** Limit access on Idactor REST API

**Clients:** Allow Client access login with this sub-account.

**Active:** Activate/Disable selected sub-account.

### 3.5 Accounts -> Manage Interests

If the system should collect interests for the registering users for profiling or marketing purposes, the list of shown interests can be configured using hit feature.

MANAGE INTERESTS		ADD ROW
Golf		EDIT
Cars		EDIT
Gardening		EDIT
Concerts		EDIT

Simply add new rows for new interests. The list will be shown in the customer registration form and can be used when creating customer segments and/or when communicating data to the newsletter programs.

### 3.6 Accounts -> Manage Shop

Please refer to Idactor Shop section in this document

## 4 Identifiers






IDENTIFIERS

### 4.1 Identifiers -> Templates

Before any unique client identifiers can be created, system requires templates that are the foundation for all identifiers. The template can be any chosen graphical file, like a logo, imitation of physical card, photo, etc. The uploaded template files are automatically resized to correct dimensions.

TEMPLATES

NEWMANAGE IDENTIFIERS

<div>Template Name: blue</div>  <div> <div>Image Name: ida_fh-fh_blue_s.jpg</div> <div>Timestamp: 2021-06-26 08:16:34</div> <div>File Type: image/jpeg</div> <div>File Size: 14710</div> <div>Dimensions: 320x197</div> </div> <div>DELETE</div>	<div>Template Name: silver</div>  <div> <div>Image Name: ida_fh-fh_silver_s.jpg</div> <div>Timestamp: 2021-06-26 08:16:52</div> <div>File Type: image/jpeg</div> <div>File Size: 15736</div> <div>Dimensions: 320x197</div> </div> <div>DELETE</div>	<div>Template Name: gold</div>  <div> <div>Image Name: ida_fh-fh_gold_s.jpg</div> <div>Timestamp: 2021-06-26 08:17:05</div> <div>File Type: image/jpeg</div> <div>File Size: 16975</div> <div>Dimensions: 320x197</div> </div> <div>DELETE</div>
--	--	--

### New Template

1. Click New -button from the header.

TEMPLATES

NEWMANAGE IDENTIFIERS

Browse... No file selected.

Name:

SAVERESET

2. Click Browse -button to select desired template graphic from your computer
3. Give descriptive name to your template – template name must be unique for each.

### NOTE!

If system will be used for customer membership levels, then name the template file to match the name of the corresponding level, e.g. silver <-> silver, gold <-> gold, etc.

Created Template files can be deleted with "DELETE" -button.

## 4.2 Identifiers -> Id-Creator

One of the most powerful functionalities of the Idactor Online Identifier -system is the capability to create unique personalized identifiers for the customers. All created identifiers are based on the template files and can contain selected customer profile data like name, email, photo, customer type, membership level, etc.

Identifiers are created with parameters (field names like Customer Id, First Name, Country). These field names are being replaced with customer's actual , unique profile information in real-time when identifier is sent or shown to the customer.

MANAGE IDENTIFIERS				NEW
Title	Valid From	Valid To	Identifier Image	
platinum	0000-00-00	0000-00-00	ida_10000-sport_arena.png	EDIT

### New Identifier

1. Click New -button from the header.
2. Define properties for the new identifier:

IDENTIFIER PROFILE	
Name	<input type="text"/> Identifier Name, must be unique for each
A-Date	<input type="text"/> When identifier validity begins, default: empty
B-Date	<input type="text"/> When identifier validity ends, default: empty
Value	<input type="text"/> Value (price) of the Identifier, default: empty
<input type="button" value="CONTINUE"/> <input type="button" value="RESET"/> <input type="button" value="DELETE"/>	

3. Click to select the template file for the identifier



Note! The Identifier template file can be changed whenever needed

4. Add desired personalization to the identifier image



Get started by clicking NEW -button in the header

PARAMETER	FONT TYPE	FONT SIZE	FONT COLOR	X-AXIS	Y-AXIS	ALIGNMENT	NEW	RESET
Customer Id	Arial	10	Black	0	0	Center	SAVE	RESET
								NEXT

PARAMETER	Select parameter that will be shown in the card
FONT TYPE	Font that selected parameter will use
FONT SIZE	Font size for the selected parameter
FONT COLOR	Font color for the selected parameter
X-AXIS	Set horizontal position for the parameter
Y-AXIS	Set vertical position for the parameter
ALIGNMENT	Set the parameter alignment in the set coordinates
SAVE/RESET/EDIT	Save parameter values / Reset values / Edit selected parameter

NOTE! Parameters' size and position values are scaled with the image, but the visual presentation should remain the same even if the image is scaled smaller/larger.

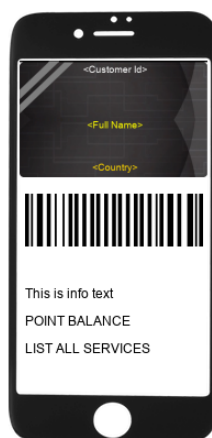
5. Add as many parameters you want and continue then with the NEXT -button



PARAMETER	FONT TYPE	FONT SIZE	FONT COLOR	X-AXIS	Y-AXIS	ALIGNMENT	NEW	RESET
Customer Id	Arial	14	White	188	10	Center		EDIT
Full Name	Arial	14	Yellow	188	120	Center		EDIT
Country	Arial	14	Gold	188	200	Center		EDIT
								NEXT

6. Select the information to display in the identifier

IDENTIFIER CODE	None	Do not show any optical code
	Barcode	Show barcode (code-128)
	QR-Code	Show qr-code
	Both (QR first)	Show both codes, QR-code on top
	Both (Barcode first)	Show both codes, barcode on top
INFO FIELD	Info	Free text in html format. You can use html tags like: <p> = paragraph   = change line <b> = bold <i> = italic <u> = underline
POINTS Set if membership points are used	No	Do not show customer's point balance
	Yes	Show customer's point balance
	Only if available	Show only if balance is positive (>0)
SERVICES	None	Do not show customer's service status
	All	Show the status of all services
	Only with balance	Show the status if balance is positive (>0)



IDENTIFIER CODE

Show Code Barcode ▾

SAVE

INFO FIELD

Info This is info text

SAVE

POINTS

Show Points Yes ▾

SAVE

SERVICES

Services All ▾

SAVE

READY

Finish the Id-creation with READY -button



## 5 CUSTOMERS



CUSTOMERS

### 5.1 Customers -> Customer Manager

CUSTOMER MANAGEMENT	
Identifier:	<input type="text"/>
<input type="button" value="VALIDATE"/>	

Insert Customer Id-number to the field and press VALIDATE -button. You can also use optical reader to read customer identifier's QR- or barcode, or use card-reader in case of NFC media.

#### IDENTIFIED CUSTOMER

In case customer's identification is already registered, then customer's profile information is shown:

CUSTOMER PROFILE	
ID:	1000000001
UID:	4007249909831
First Name:	Vesa Pekka
Last Name:	Haimi
Company:	<input type="text"/>
Phone:	+358407006946
Email:	vesa.haimi@hotmail.com
Address:	Pitotie 1 A 2
PostalCode:	01510
City:	VANTAA
Country:	Finland
DOB:	1972-09-18
Notes:	<input type="text"/>
Kiinnostukset/Interests:	<input type="text" value="Golf"/> <input type="text" value="Cars"/> <input type="text" value="Gardening"/>
<input type="button" value="CONTINUE"/> <input type="button" value="RESET"/>	

Click the CONTINUE -button to save information and continue to next page.

## NEW CUSTOMER

In case this is the first-time when customer identifier is being read or customer profile information is not registered, then the form is empty.

### NOTE!

**If Phone information is empty, then identifiers can't be sent to customer's mobile.**

**If Email information is empty, then identifiers can't be sent to customer's email.**

Please fill at least First Name & Last Name (or company), Phone and Email fields.

CUSTOMER PROFILE	
ID:	1001078559
UID:	0484EECAAB6D80
First Name:	<input type="text"/>
Last Name:	<input type="text"/>
Company:	<input type="text"/>
Phone:	<input type="text"/>
Email:	<input type="text"/>
Address:	<input type="text"/>
PostalCode:	<input type="text"/>
City:	<input type="text"/>
<input type="button" value="CONTINUE"/> <input type="button" value="RESET"/>	

Click the CONTINUE -button to save information and continue to next page.

## UNKNOWN ID NUMBER

If customer identifier has not been registered, then warning "*UNKNOWN ID NUMBER*" is shown. If customer has been registered to the service and should have valid identifier, then customer information can be searched by name or other personal detail with CUSTOMERS -> MY CUSTOMERS or with CUSTOMERS -> ALL CUSTOMERS functionality and issue a new identifier to the customer.

### 5.1.1 Customer Management View

CUSTOMER PROFILE	
ID:	1000000001
First Name:	Vesa Pekka
Last Name:	Haimi
Company:	
Phone:	+358407006946
Email:	vesa.haimi@hotmail.com
Last visit:	2021-08-13 10:12:58
Active Points:	0 (0.00 €)
Expiring Points:	0 ()
Current Level:	(->0000-00-00)
Level Purchases:	0 €
Allow Member Messaging:	No
Allow Marketing:	No
<a href="#">EDIT</a>	


  

TRANSACTIONS	
Timestamp	Issuer Amount Points Description
2021-08-20 00:05:07	idactor 0.00 0 IDENTIFIER SUBMIT:email

CUSTOMER POINTS	
Timestamp	Issuer Amount Points A-Date B-Date Code

CUSTOMER IDENTIFIER	
<div> <div>1000000001</div>  <div>VESA PEKKA HAIMI</div> </div> <div> <a href="#">SMS</a> <a href="#">EMAIL</a> </div>	

SERVICES	
<b>Season 2021</b> Price: 150.00, QTY: 1 Mon,Tue,Wed,Thu,Fri,Sat,Sun	Current: 1.00 <a href="#">UPDATE</a>

The Customer Management -view consists of different sections:

CUSTOMER PROFILE	Customer Profile and status information
CUSTOMER IDENTIFIER	List of Customer Identifies. Sending to SMS or email NOTE! Sending if disabled if customer profile doesn't contain valid phone number and/or email address
SERVICES	List of available services and status/balance
TRANSACTIONS	List of customer transactions – three months backwards
CUSTOMER POINTS	Customer point history only visible if points functionality is activated

### 5.1.2 Editing Customer Profile

CUSTOMER PROFILE		
ID:	1000000001	
First Name:	Vesa Pekka	
Last Name:	Haimi	
Company:		
Phone:	+358407006946	Phone number must be stored in international format
Email:	vesa.haimi@hotmail.com	Valid email address is required to send IDs to email
Osoite/Address:	Pitotie 1 A 2	
PostalCode:	01510	
City:	VANTAA	
Country:	Finland	
DOB:	1972-09-18	
Notes:		
Current Level:	BLUE	Membership level - if functionality is activated
Level Expiry:	2023-08-31	Expiry date for current level - if levels are activated
New Level:	<input type="text" value="v"/>	Change Customer membership level
New Expiry:	2023-08-31	Expiry date for the set membership level
Register Additional Transaction		
Extra Sales:		Register sales activity for the customer, without tax
Extra Tax:		Set amount of tax for the Extra Sales - default 0
Extra Points:		Register extra points for the customer
Description:		Description for the extra registration, visible in log
Allow Member Messaging:	<input checked="" type="checkbox"/>	Standard customer messaging allowed (opt-in)
Allow Marketing:	<input type="checkbox"/>	Extended customer messaging allowed (opt-in)
<input type="button" value="UPDATE"/> <input type="button" value="CANCEL"/>		

### 5.1.3 Services

SERVICES	
Lahjakortti	
Price: 0.00, QTY: 0	
Mon,Tue,Wed,Thu,Fri,Sat,Sun	Current: 574.50
<input type="button" value="UPDATE"/>	

Title	Name of the Service
Price	Price of the Service. If zero (0), then price is the set by the input field
Qty	Content of the Service. If zero (0), then set by the input field
Validity	Weekdays when service is available
Current	Customer balance of the selected service

## 5.2 Customers -> My Customers

Print

Export

Show 100 entries

MEDIA_ID	LASTNAME	FIRSTNAME	COMPANY	SALES_TOTAL	VALID_POINTS	VISITS	FIRST_VISIT	LAST_VISIT	LEVEL	NOTES
1000000001	Haimi	Vesa Pekka		163.50	0	1	2021-06-29 09:32	2021-07-26 12:25	blue	
1010001001	Haimi	Vesa		0.00	0	0	2021-01-31 21:23	2021-02-01 18:26	gold	

Print	Print the table – prints only those values that are visible on the page
Export	Export table data in Excel or CSV format, or copy data to clipboard
Search table	Search and filter based on the search -value. NOTE! Sometimes unreliable when table is large.
Show 100	Number of records visible on the page
↓ MEDIA_ID	Click the column title to sort the table by that column (ascending)
↑ MEDIA_ID	Another click will sort the values in descending order
lastname firstname	Fields under each column can be used to find and filter desired values. NOTE! This functionality is reliable also with large tables and should be used instead of the search -field
« <	Go to first page, go to previous page
> »	Go to next page, go to last page

## 5.3 Customers -> All Customers

This is a similar feature like the previous one but intended for group accounts with several branches. With this functionality you can see all customers from all branches.

## 5.4 Customers – Customer Import

Customer import process can be used to import/insert customer data that is collected and stored in a CSV (Comma Separated Values) file.

Idactor Customer Import allows also using Copy&Paste functionality to import small number of customers, but for larger result sets, the traditional file import is recommended.

Select the file that contains imported customer data

**CUSTOMER IMPORT**

Load CSV File  

Browse... No file selected.
IMPORT

OR

Step 3 – Copy & Paste customer data to the available columns

#	FIRSTNAME	LASTNAME	COMPANY	DOB	PHONE	EMAIL	TEAM	NOTES	ID

LOAD
RETURN

#### 5.4.1 Customer Import from CSV file

If as CSV file is used to import customer data, then the first row in the file must have following values as titles:

firstname	lastname	company	dob	address	postalcode	city	country	phone	email	team	notes	id
-----------	----------	---------	-----	---------	------------	------	---------	-------	-------	------	-------	----

Note! Mandatory fields are both firstname and lastname, or company. Other fields are optional.

Note! Id field should be left empty by default so that system will automatically assign Idactor Customer Id number to the imported users.

If the first row the CSV-file contains unrecognized titles, then warning will be displayed:

Unrecognized Titles

postalcode

START-OVER

If import is successful, then the following message will be displayed: "Imported xx Records"

#### 5.4.2 Customer Import with Copy & Paste

The system provides a convenient way to transfer data from data sheets, like Excel, with copy & paste.

Simply copy the desired column from existing Excel sheet, like address and paste it to the address column

# IDACTOR ONLINE IDENTIFICATION SERVICE PRODUCT DOCUMENTATION



Virta	Markku	+358500092054
Virolainen	Markku	+358500025837
Viljaranta	Marko	+358500015360
Viljaranta	Mika	
Viitaniemi	Mona	+358500083763
Viitaniemi	Petri	+358500866297
Viitala	Riitta	+358443000051
Viinikainen	Saku	+358445515171
Vesala	Santeri	+358400017877
Veikkola	Satu	+358405518437



#	FIRSTNAME	LASTNAME	COMPANY	DOB	PHONE
	Markku	Virta			+358500092054
	Markku	Virolainen			+358500025837
	Marko	Viljanen			+358500015360
	Mika	Viljaranta			
	Mona	Viitala			+358500083763
	Petri	Viitaniemi			+358500866297
	Riitta	Viitala			+358443000051
	Saku	Viinikainen			+358445515171
	Santeri	Vesala			+358400017877
	Satu	Veikkola			+358405518437
	Samuli	Vastamäki			
	Jussi	Vastaranta			+358400056062

Note! The row count must be the same with imported data.

Note! Empty values are acceptable in case the total row count is the same.

Click LOAD -button to continue.

#	ID NUMBER	FIRSTNAME	LASTNAME	COMPANY	DOB	PHONE
1	1000000003	Markku	Virta			+358500092054
2	1000000004	Markku	Virolainen			+358500025837
3	1000000005	Marko	Viljanen			+358500015360
4	1000000006	Mika	Viljaranta			
5	1000000007	Mona	Viitala			+358500083763
6	1000000008	Petri	Viitaniemi			+358500866297
7	1000000009	Riitta	Viitala			+358443000051
8	1000000010	Saku	Viinikainen			+358445515171
9	1000000011	Santeri	Vesala			+358400017877
10	1000000012	Satu	Veikkola			+358405518437
11	1000000013	Samuli	Vastamäki			
12	1000000014	Jussi	Vastaranta			+358400056062

Imported data is now visible in the tabular format and new customer id has been assigned to each value. Check that values are correct and finish the import with CONTINUE -button.

## 5.5 Customers – Segmentor

CUSTOMER SEGMENTS				NEW
Title	Description	Modified	Matching Records	

Customer Segmentor is used for finding and grouping customers based on the given criteria. Created and stored segments can be used for statistical purposes, sending identifiers and for targeted newsletters.

To create new segment, press NEW -button from the header.

Define name for the segment. You can also add description for the segment. Continue with SAVE -button.

SEGMENT DETAILS

Title

Customer Sales - best

Description

Customers with over 1000€ sales

Matching Records

0

SHOW

SAVE

RESET

DELETE

RULES

ADD RULE

ASSIGN SERVICES

SEND IDENTIFIERS

Matching Records	Number of matching customer records
SHOW	Show all customer matching the set criteria
SAVE	Save changes
RESET	Reset all changes
DELETE	Delete the segment ("new customers")
ADD RULE	Adding new rule
ASSIGN SERVICES	Assign services to the customers matching the set rules
SEND IDENTIFIERS	Send identifiers to the customers matching the set rules

### 5.5.1 Defining a Rule

RULES

ADD RULE

NEW

Medi ▾

= ▾

SAVE

RESET

#### Parameters

Media Id	Customer's ID Number
First Name	
Last Name	
Company	
Email	
Phone	
City	
Country	
Team	Customer's Team information
Notes	Customer's Notes information
DOB	Customer's birthday (YYYY-MM-DD)
Gender	
Level	Current membership level
First Visit	Date and Time of customer's first visit
Last Visit	Date and Time of customer's previous visit
Total Sales	Amount of purchases



Valid Points	Available membership points
Visits	Number of visits
Opt-In - basic	Customer's permission for messaging
Opt-In - extended	Customer's permission for advertising

## Operators

=	Equal
!=	Not Equal
>	Larger Than
>=	Larger or equal
<	Less Than
<=	Less or equal
like	Contains
not like	Doesn't contain

### 5.5.2 Example Rule Sets

A) All customer who has id between 1001000001 and 1001000100:

- Media ID >= 1001000001
- Media ID <= 1001000100

B) All Customers who have company information stored, but not "Acme Inc".

- Company !=
- Company not like Acme

C) All Customers who have visited today and number of visits is at least 5

- Last Visit = today
- Visits >= 5

Always check the number of matching entries from "Matching Records" row.  
All set rules are saved automatically so pressing SAVE -button is not necessary.

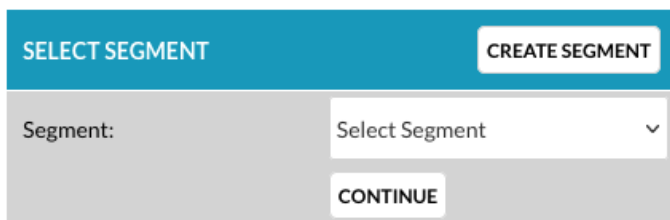
#### NOTE!

If the segment is going to be used for identifier delivery, then it is a good idea to set rules to exclude customers who don't have a phone number and/or email address set:

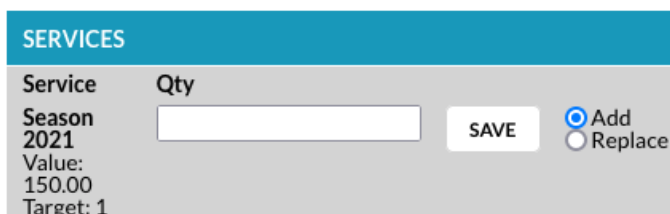
Phone != and Email !=

### 5.5.3 Assign Services

By pressing the ASSIGN SERVICES -button you will be automatically moved to the Services -> Assign Services -functionality. Please see details in the respective chapter.



Select the segment to whom you want activate services and click CONTINUE -button.



The left most column shows the information of all created services: Title, value and target.

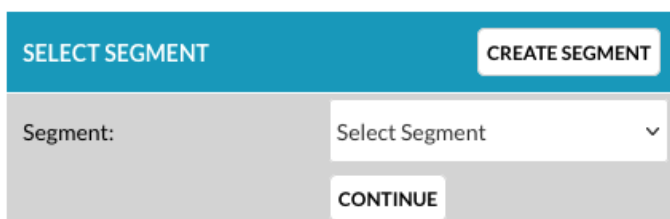
Set the desired value to the Qty field.

Please note that value in the Qty -field will be multiplied with the Service Target -value. In example, if Serial service is set to include 10 meals with a price of 50€, then Value is 50€ and Target is 10. It means that inserting a value '1' to the Qty field, activates 10 meals to the customer. If you insert Qty value 5 to this service, then 50 meals will be activated.

Add -setting will add the new value to the existing service balance. Replace -setting will replace all existing balances with the new value.

#### 5.5.4 Send Identifiers

By pressing the Send Identifiers -button you will be automatically moved to the Identifiers -> Send Identifiers -functionality.



Select the segment to whom you want to send the identifier and click CONTINUE -button.

Next select the Identifier that will be sent to the selected segment:

SELECT IDENTIFIER

ADD IDENTIFIER RESET



illallinen

Select the delivery method(s) and click SEND -button:

SEGMENT DETAILS

Name

Peruskoulu 21-22

Count

1230

Description

CUSTOMER IDENTIFIER

Send via SMS:

☐

Send Time (optional)

▼

Send to Email:


☐

Send Time (optional)

▼

<Customer Id>

<Full Name>



SEND

"Send Time" can be configured for scheduled delivery.

NOTE! To prevent too high sending bursts, the message sending is throttled to take place in sequences. It may take several minutes or hours to send high number of messages.

## 5.6 Customers – Media Management

MEDIA MANAGER

Media:

CHECK

Insert Customer Media Id and click CHECK -button.

CUSTOMER PROFILE	
Media:	1000000001
Firstname:	Vesa Pekka
Lastname:	Haimi
Company:	
Address:	Eerikstra
Postalcode:	00100
City:	HELSINKI
Phone:	+3584011112222
Email:	
<input type="button" value="UPDATE"/> <input type="button" value="MERGE"/> <input type="button" value="DELETE"/> <input type="button" value="CANCEL"/>	

You can change Customer's profile information and save it with UPDATE -button.

### 5.6.1 Merge

If customer's profile information should be transferred under different Media Id (or from one physical media to another), then MERGE functionality can be used.

MERGE	
Old Media:	1000000001
New Media:	Leave empty if unknown
<input type="button" value="SEARCH"/> <input type="button" value="CANCEL"/>	

If you already know the Media ID where information should be transferred, then please add the new Media Id to the New Media -field. Otherwise system will allocated the next available Media Id -number.

Click SEARCH -button to continue.

The Merge functionality contains three sections (the recommended option bolded). CURRENT -column shows the information stored to the current Media Id and NEW -column shows information already stored to the new Media Id, if any.

Media	
MEDIA	<input checked="" type="radio"/> Delete Old <input type="radio"/> Clean Old <input type="radio"/> Skip
Current Media	1000000001
New Media	1000000003

**Delete Old:** Deletes the current media information and the same media id can't be re-used

**Clean Old:** Cleans the current media information, but the same Media Id can be re-used

**Skip:** No changes on either media

### Customer Profile

PROFILE	<input checked="" type="radio"/> Overwrite	<input type="radio"/> Combine	<input type="radio"/> Skip
	CURRENT	NEW	
Media	1000000001	1000000003	
Firstname	Vesa Pekka		
Lastname	Haimi		

**Overwrite:** Replace information in the new media and delete information on current media

**Combine:** Keep current Media information and add values to new media (purchases, points)

**Skip:** No changes on either media

### Services

SERVICES	<input checked="" type="radio"/> Overwrite	<input type="radio"/> Combine	<input type="radio"/> Skip
	CURRENT	NEW	
Media	1000000001	1000000003	
Season 2021	1.00	0	


**Overwrite:** Replace information in the new media and delete information on current media

**Combine:** Keep current Media information and add values to new media (service balance)

**Skip:** No changes on either media

Click PROCEED -button to continue.

## 5.6.2 Delete



portal.idactor.com

All data will be erased - Are you sure?

Deletes all information from the media.

## 6 GROUPS



GROUPS -functionality provides a convenient way to handle customers in groups. Instead of assigning services to everyone separately, you can assign individual customers into a group and assign services to whole group with one single click. Groups -functionality includes also special reporting and invoicing possibilities.

## 6.1 Groups -> Create Organization

Each group can belong to certain a organization. By default, each account has itself automatically added to the organization list (Groups -> Organization List) and new organization can be established with Create Organization -functionality.

NEW COMPANY / ORGANIZATION	
Name:	<input type="text"/>
Name2:	<input type="text"/>
Business Code:	<input type="text"/>
CostCenter:	<input type="text"/>
Address:	<input type="text"/>
Post number:	<input type="text"/>
City:	<input type="text"/>
Country:	<input type="text"/>
Phone:	<input type="text"/>
Email:	<input type="text"/>
WWW:	<input type="text"/>
INVOICING	
Name:	<input type="text"/>
Address:	<input type="text"/>
Postalcode:	<input type="text"/>
City:	<input type="text"/>
Email:	<input type="text"/>
AUTOMATED SERVICES	
Select:	<input type="text" value="Select Service..."/> ▼
Amount:	<input type="text"/>
Shared Balance:	<input type="checkbox"/>
CONTACT	
Firstname:	<input type="text"/>
Lastname:	<input type="text"/>
Phone:	<input type="text"/>
Email:	<input type="text"/>
<input type="button" value="SAVE"/> <input type="button" value="RESET"/> <input type="button" value="DELETE"/>	

Name of the Organization
Commonly used name
Business Identification Code
Cost Center
Address
Postal Code
City
Country
Phone Number
Email Address
Internet Site

Invoicing Name
Invoicing Address
Invoicing Postal Code
Invoicing City
Invoicing Email Address

Service that is automatically activated for the groups under this organization
Amount (qty) of activated service
If balance is shared between all the customers (or if each customer has their own service balance)

Contact First Name
Contact Last Name
Contact Phone Number
Contact Email
Save data, Reset, Delete Organization

## 6.2 Groups -> Organization List

↓ ID	M_NAME	M_NAME_2	M_BUSINESSCODE	M_COSTCENTER	CNAME
<a href="#">Details</a>	Idactor Ltd	Idactor		0	

Listing all saved organizations. To see and edit organization data, click the Details -button.

## 6.3 Groups -> Create Group

CREATE GROUP

Company/Team:

idactor Ltd

Group:

Test Group

Check-in:

2021-08-23

15:00

Check-out:

2021-08-25

12:00

Group Size:

10

Information:

Test Group

Contact email:

SAVE

RESET

Select the Organization (optional)
Give name to the group – mandatory
Define the date&time group gets activated
Define the date&time group deactivates
Size of the group. Defines the quantity how many customers can be added in the group.
Descriptive group description
Contact email for the group.
Save data or Reset

NOTE! Group is only active between the set check-in and check-out time. Also, the assigned services are only available if group's check-in time has passed, and all services become in-active after the check-out time.

Click SAVE -button after completing the form.

Group Registered

DONE

GUESTS

NEW GROUP

DONE: Opens Group Listing

GUESTS: Opens Group Registration -functionality, where customers can be added to group

NEW GROUP: Opens a new Create Group -form

## 6.4 Groups -> Group List

Print

Export



Search table

Show

100

entries

↓ COMPANY NAME	GROUP NAME	CHECK-IN	CHECK-OUT	GROUP SIZE	NOTES	DETAILS	PEOPLE
idactor Ltd	test	2021-08-23 15:00	2021-08-24 12:00	0(10)	Test Group	<a href="#">Details</a>	<a href="#">People</a>
	Test Group	2021-08-23 15:00	2021-08-25 12:00	0(10)	Test Group	<a href="#">Details</a>	<a href="#">People</a>
<div>company name</div>	<div>group name</div>	<div>Check-In</div>	<div>Check-Out</div>	<div>Group Size</div>	<div>notes</div>	<div>Details</div>	<div>People</div>

 Print	Print the table – prints only those values that are visible on the page
 Export ▾	Export table data in Excel or CSV format, or copy data to clipboard
<input type="text" value="Search table"/>	Search and filter based on the search -value. NOTE! Sometimes unreliable when table is large.
Show <input type="text" value="100"/>	Number of records visible on the page
↓ MEDIA_ID	Click the column title to sort the table by that column (ascending)
↑ MEDIA_ID	Another click will sort the values in descending order
<input type="text" value="lastname"/> <input type="text" value="firstname"/>	Fields under each column can be used to find and filter desired values. NOTE! This functionality is reliable also with large tables and should be used instead of the search -field
⏪ ⏩ ⏴ ⏵	Go to first page, go to previous page Go to next page, go to last page
<a href="#">Details</a>	Show Group information
<a href="#">People</a>	Show Customer Registration information

## 6.5 Groups -> Group Registration

Group Registration -functionality can be used to add customers to the selected group.



**GROUP REGISTRATION**

Group: Select Group... ▼

CONTINUE

Select the desired group and click CONTINUE -button.

Top section of the page shows the Group information. It will also display how inserted information is divided by the gender and age, if information is inserted in the form.

GROUP REGISTRATION	
Company:	idactor Ltd
Group:	Test Group
Group Size:	10
Check-In:	2021-08-23 15:00
Check-Out:	2021-08-25 12:00
Duration:	2 days
Notes:	Test Group
Female:	0
Male:	0
AGE DISTRIBUTION	
0-4v:	0
5-11v:	0
12-17v:	0
18v-:	0
Unknown:	0

SAVE RESET

#	Media	Firstname	Lastname	Gender	DOB	Address	Postcode	City	Country	Phone	Email	Notes	Role
1	<input style="border: 2px solid blue;" type="text"/>	<input type="text"/>	<input type="text"/>	OM OF	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Guest ▼
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	OM OF	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Guest ▼
3	<input type="text"/>	<input type="text"/>	<input type="text"/>	OM OF	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Guest ▼
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	OM OF	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Guest ▼
5	<input type="text"/>	<input type="text"/>	<input type="text"/>	OM OF	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Guest ▼
6	<input type="text"/>	<input type="text"/>	<input type="text"/>	OM OF	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Guest ▼
7	<input type="text"/>	<input type="text"/>	<input type="text"/>	OM OF	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Guest ▼
8	<input type="text"/>	<input type="text"/>	<input type="text"/>	OM OF	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Guest ▼
9	<input type="text"/>	<input type="text"/>	<input type="text"/>	OM OF	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Guest ▼
10	<input type="text"/>	<input type="text"/>	<input type="text"/>	OM OF	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Guest ▼

SAVE RESET

You can insert the Media Id number either manually or read media information to the field with a barcode reader or with a NFC card reader. All other fields are optional. Role field can be used to promote selected user in select role (Guest/Guardian/Leader).

To delete inserted customer information, just clear Media, Firstname and Lastname fields and click SAVE. This will remove the information from the list.

When adding new customers to the group, the system will automatically check that insert Media ID doesn't belong to any overlapping group and that media has not been added to

the group already. If the inserted Media is not available then a warning message will be shown and incorrect media line must be cleared before inserting new records.

NOTE! Currently this feature supports only physical media. In the future it will be extended to support virtual (=mobile) identifiers as well.

## 6.6 Groups -> Group Services

Group Services can be used to activate services to the selected group.

SELECT GROUP

Group:

CONTINUE

Select Group and click CONTINUE -button.

		SAVE	
Select	Media	Name	Season 2021 (Value:150,00 Qty:1)
<input type="checkbox"/>	1000000001		
<input type="checkbox"/>	1000000002		

1. Select the Media Numbers from the left, individually or all with "Select" link.
2. Add amount/qty of activated service to the input field above the service.
3. Click SAVE -button

After selecting the checkbox for the desired cards, you can activate any number of services by inserting amount/qty to all activated service fields and save all of them with a single click of SAVE -button.

## 6.7 Groups -> Check Media

This feature can be used to find current assignments of a Media Id.

CHECK MEDIA

Media:

CONTINUE

Type the media number manually or read value with NFC media-reader or with a barcode reader. Click CONTINUE -button to proceed to next phase.

CHECK MEDIA

Media: 

CONTINUE

Id-number: 1000000001  
UID: 4007249909831

CURRENT REGISTRATIONS

Company: idactor Ltd  
Group: Test Group  
Group Size: 10  
Check-In: 2021-08-23 15:00  
Check-Out: 2021-08-25 12:00  
  
Name:  
Phone:  
DOB: 0000-00-00  
Gender:  
Role: guest  
Notes:

CURRENT SERVICES

Season 2021: 1.00

CLEAR ALL CUSTOMER DATA?

YES

RETURN

The feature will show the current group and service assignments. By clicking the YES - button all group and service activations will be cleared.

#### NOTE!

Clearing data affects only to the group and service assignments. Media or permanent customer profile information will not be affected.

## 7 SERVICES



SERVICES

Services is an essential feature for validating and tracing customers' activities. Services may include settings for several different type of needs, like gift-cards, prepaid balance, guest credit, serial services, season passes, access permissions, attendance control, etc.

## 7.1 Services – Manage Services

TITLE	TYPE	VALUE	TARGET	TAX	A-DATE	B-DATE	VALIDITY	VALID_FROM	VALID_TO	LIMIT/DAY	RELAY	CHECK-IN	SHOP	NEW
Season 2021	Seasonal Servi	150.00	1	24			Always	00:00	23:59	0	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	EDIT

Start by clicking the NEW -button from the header row.

TITLE	Name of the service. Mandatory & Unique.	
TYPE	Prepaid Balance	For freely set balance, like gift-cards, vouchers
	Serial Service	For serial services like 10x lunch, 5xdrinks
	Seasonal Service	Active for the set validity period (a-date & b_date)
	Credit	Credit service like in-house balance for guests
	Credit Service	Sub-service(s) for the Credit -service
	Access	Access permission for the doors & gates
VALUE	Price of the service, decimal separator "."	
TARGET	Qty/Amount of activated service use	
TAX	Amount of tax, for logging and reporting purposes	
A-DATE	The date when service gets active	
B-DATE	The date when service gets inactive	
VALIDITY	Always, Mon, Tue, Wed, Thu, Fri, Sat, Sun, Weekdays, Weekend	
VALID FROM	The time of the day when service gets active	
VALID TO	The time of the day when service gets inactive	
LIMIT/DAY	How many times the service can be used daily, 0=no limit	
RELAY	Service controls a local relay (e.g., kiosks, vending machines, dispensers)	
CHECK-IN	Service use will trigger an email to be sent to the account administrator	
SHOP	Is service published to the Idactor Shop	
	SAVE=Save service settings EDIT= Edit the saved service DELETE= Delete the selected service RESET= Reset changes to the service	

If SHOP -checkbox is selected, then Publish to Shop -window is shown after pressing SAVE -button. Please see details in the SHOP -chapter.

### 7.1.1 Example Services

A) Gift Card with freely set amount:

Title: Gift Card  
Type: Prepaid Balance  
Value: 0  
Target: 0

B) 10x Serial for Lunch, valid from Monday to Friday, one per day:

Title: 10x lunch  
Type: Serial Service  
Value: 95.50  
Target: 10  
Validity: Weekdays  
Limit: 1

C) Pass for the 2021-2022 season:

Title: Season Pass 2021-2022  
Type: Seasonal Service  
Value: 500  
Target: 1  
A-Date: 2021-09-01  
B-Date: 2022-05-31

D) Credit of 200.00 for meals, controlled by a gate/electronic door

1. Title: Credit 200  
Type: Credit  
Value: 200  
Target: 0
2. Title: Breakfast  
Type: Credit Service  
Value: 4.00  
Target: 1  
Valid\_From: 06:00  
Valid\_To: 10:00  
Relay: checked
3. Title: Lunch  
Type: Credit Service  
Value: 7.50  
Target: 1  
Valid\_From: 11:00  
Valid\_To: 14:00  
Relay: checked

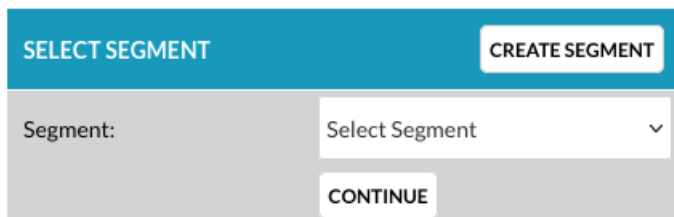
NOTE! When services are validated automatically, validity times should not overlap.

## 7.2 Services -> Assign Services

After creating necessary Services, you should activate them to respective customers.

Service activation can be done individually from the Customer Management, but for mass activation Assign Services is much faster and more convenient way.

Before using Assign Services -feature, you should have created necessary Customer Segments - see chapter: Customers -> Segmentor for more details.



If you don't have any segments created or want to create a new one, then click CREATE SEGMENT -button.

Otherwise select the desired Segment from the list and click CONTINUE -button.



The left most column shows the information of all created services: Title, value and target.

Set the desired value to the Qty field.

Please note that value in the Qty -field will be multiplied with the Service Target -value. In example, if Serial service is set to include 10 meals with a price of 50€, then Value is 50€ and Target is 10. It means that inserting a value '1' to the Qty field, activates 10 meals to the customer. If you insert Qty value 5 to this service, then 50 meals will be activated.

Add -setting will add the new value to the existing service balance. Replace -setting will replace all existing balances with the new value.

Click the SAVE -button to activate the service for the customers in the segment.

## 7.3 Services -> Service Status

This feature can be used to see the current balance of services.

SERVICE STATUS

Media Id:

Select Service: 

All ▾

Only with balance: ☒

SEARCH

RESET

Media Id	If you want to see only one specific customer, then type the Id number
Select Service	Show the balances of all services or only for the selected one
Only with balance	Show only those customers who have balance (>0)

Season 2021		150.00 € (1)		
ID	TITLE	VALUE	NAME	COMPANY
1000000001	Season 2021	1.00	Vesa Pekka Haimi	

The result will first show the overall status of the services; total value and qty, and then the listing for the customers.

### NOTE!

The ID -column works as a link to the customer's profile.

## 8 ACCESS



ACCESS

### 8.1 Access -> Access Control

ACCESS CONTROL									
#Title	Location	SID	MAC	CIP	PU	CO	SUCCESS	FAILURE	ADD ROW
Restaurant - gate	6th floor	ida_1000	80:1F:12:6C:A	dhcp	MAUTH=0;DHC		BEEP=1;RLY=1;GRN	BEEP=0;LED1=2000	EDIT

Access control provides settings for remote devices, e.g., Idactor FastTrack, how to execute local operations, like opening a gate/door with a relay, making a sound, showing information on a local display, etc.

Please contact Idactor support for detailed instructions: [support@idactor.com](mailto:support@idactor.com)

## 8.2 Access -> Access Status

This feature provides a real-time view for the access data

Restaurant: Gate 1					Restaurant: Gate 2				
2021-08-21 21:58:00	1001078797	muu ruoka	0.00		2021-08-21 21:45:52	1001057900	Access Denied	0.00	
2021-08-21 21:44:19	1001079858	Dinner aik. 0%	6.92		2021-08-21 21:45:49	1001057802	Access Denied	0.00	
2021-08-21 21:44:12	1001078596	Dinner aik. 0%	6.92		2021-08-21 21:44:18	1001078966	Dinner aik. 0%	6.92	
2021-08-21 21:41:50	1001078614	Dinner aik. 14%	7.90		2021-08-21 21:44:14	1001078978	Dinner aik. 0%	6.92	
2021-08-21 21:41:21	1001079905	Dinner aik. 14%	7.90		2021-08-21 21:41:51	1001078672	Dinner aik. 14%	7.90	
2021-08-21 21:39:54	042B9F32656980	Access Denied	0.00		2021-08-21 21:40:19	1001079861	Dinner aik. 0%	6.92	
2021-08-21 21:38:06	1001078604	Dinner aik. 0%	6.92		2021-08-21 21:40:16	1001079787	Dinner aik. 0%	6.92	
2021-08-21 21:38:01	040E9832656981	Access Denied	0.00		2021-08-21 21:40:03	1001057871	Dinner aik. 14%	7.90	
2021-08-21 21:38:01	1001078944	Dinner aik. 14%	7.90		2021-08-21 21:39:59	1001057868	Dinner aik. 14%	7.90	
2021-08-21 21:37:52	1001078248	Dinner aik. 14%	7.90		2021-08-21 21:39:54	042B9F32656980	Access Denied	0.00	

The customer ID number works as a link to the Customer Management -functionality.

## 9 REPORTS



REPORTS

You can fetch and see the reports with your internet browser or configure scheduled reporting to the email.

### 9.1 Reports -> Daily Report

**DAILY REPORT**

Select date:

SEARCH

Click the Select date -field and select the desired reporting date. By default, the feature shows statistics for the current date. Click SEARCH -button to continue.

Summary for the date

#### SUMMARY - 2021-08-18

SHOP:25	122.76 (1)
ida_10000:0:32	1.00 (1)



## Summary by Client Device

SUMMARY BY DEVICE - 2021-08-18	
(100015)	
SHOP:25	122.76 (1)
ida_10000:0:32	1.00 (1)

## All transactions

ALL - 2021-08-18						
TIME	MEDIA	NAME	CODE	PRICE/QTY	TAX	COMPANY ID
2021-08-18 19:24:42	1000000002	Vesa haimi	SHOP:25	122.76	24	
2021-08-18 19:56:39			ida_10000:0:32	1	19	

## 9.2 Reports -> Monthly Report

MONTHLY REPORT			
Month:	August	2021	
Unit:	ALL		
	SEARCH		

Select the desired Month and Year for the report. You can also define a Company or a Branch as a filter from Unit -dropdown.

Click SEARCH -button to continue.

### SUMMARY - 08/2021

Points_Balance	0 (0.00 €)
Points_Out	0 (0.00 €)
SHOP:25	122.76 (122.76)
ida_10000:0:32	0.01 (0.01)
Sales Total	122.77

### SUMMARY BY ACCOUNT - 08/2021

idactor (ida_10000)	
SHOP:25	122.76 (122.76)
Points_Balance	0 (0.00 €)
Points_Out	0 (0.00 €)
ida_10000:0:32	0.01 (0.01)
Sales Total	122.77

Report shows a summary of all the accounts, and then each account separately for sub-accounts customers.

## 9.3 Reports -> Automated Reports

Daily reports can be fetched manually from the portal (Reports -> Daily Reports) or configure a scheduled daily reporting.

**AUTOMATED DAILY REPORTING**

**NOTE!**  
Time set between 00:00 and 12:00 will send previous day data!

Sending Time (hh:mm):

Recipients:

Set the Sending Time for the report and Recipients email address separated by semi-colon. Click SAVE -button to save the report.

The system shows currently configured automated reports:

Recipients	Time	
vesa.haimi@idactor.com	04:00	<input type="button" value="DELETE"/>

You can remove automated reporting by clicking the DELETE -button.

## 9.4 Reports – Transactions

The feature show today's transactions by default and you can specify certain month and year to display.

**TRANSACTIONS**

Month:

Show  entries

ID	ID NUMBER	NAME	BRANCH	TIMESTAMP	AMOUNT	POINTS	CODE
87244	1000000002	Vesa haimi	ida_10000	2021-08-18 19:24:42	122.76	0	SHOP:25
87247			ida_10000	2021-08-18 19:56:39	0.01	0	ida_10000:0:32
90109	1000000001		ida_10000	2021-08-20 00:05:07	0.00	0	IDENTIFIER SUBMIT:email