

ATIOnet Views & Reports User Guide

About: This document lists the full catalog of Views and Reports available on ATIOnet. For information about Administrative resources please check the Administrative Guides, the focus of this document is data reporting.

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Overview

ATIOnet implements two types of reporting-oriented resources:

Views

Views are web pages reports designed to be consumed directly from the screen instead of on print form. Views can be exported as MS-Excel files.

Reports

Reports are designed and implemented to be used on a hard-copy, and are oriented to fulfill the needs to archive specific views of data to comply with internal or external administrative requirements. Unlike Views, Reports may contain more complex data organization and subclassifications, for example subtotals breaks and grouping

Named Filters

Any search criteria on any on-screen view in ATIOnet can be saved as a named filter. Filters not only let reuse previous search criteria, but also work as a user-defined site navigation tool, users can jump from anywhere on the site to the target view selecting the desired filter from the My Filters list. Saved Filters can be private, or shared with other users.

Use of list views

List views have a consistent look and behavior to ease the operation of the site:

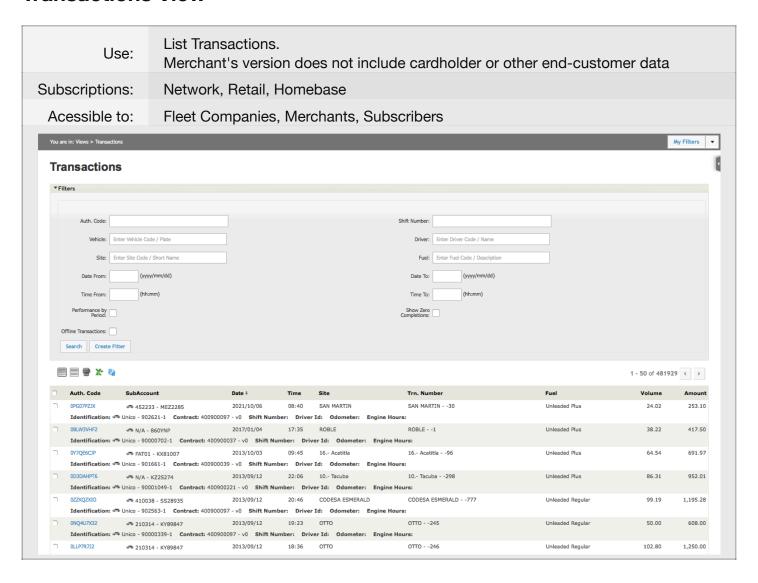
- The New link quits the list view and opens a new form to add a new record to the list. (only apply to some Lists views)
- You can select a Condesed or Detailed view with the control butons over the list's headings, next to the "New" link
- Check for column headings that can order the list
- The check marks on the left of the list allow to select multiple records -or all- to perform a Bulk Action
- The Options group of icons let you perform direct operations on the listed item. Usually Edit, Delete and mark as a Favorite
- Long lists will be split into pages, check the Current Page, Total of Pages and the navigation buttons displayed at the beginning and end of each page view

Note Availability of the following features is subject to the user security role, the related entity

and subscription type. Please refer to the About ATIOnet Document for details about subscription models and Actors for each model.

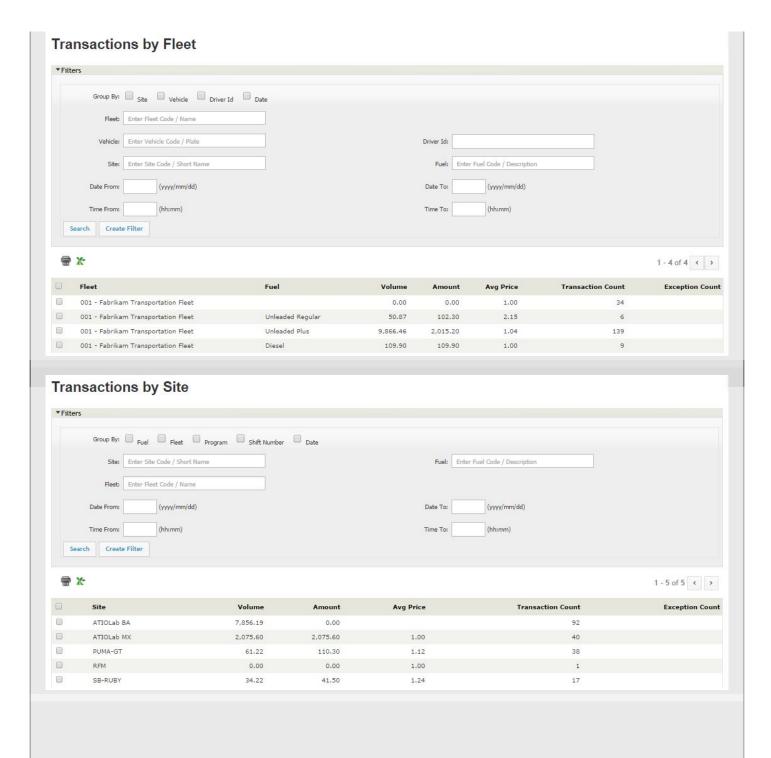
Views

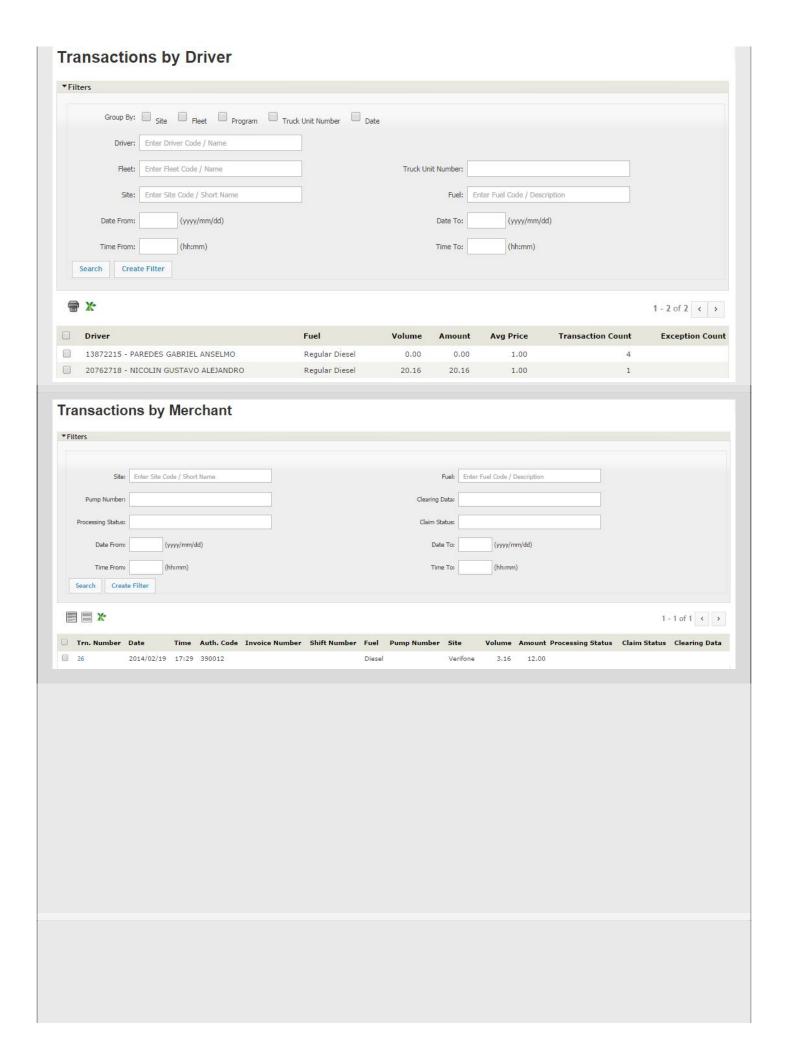
Transactions View

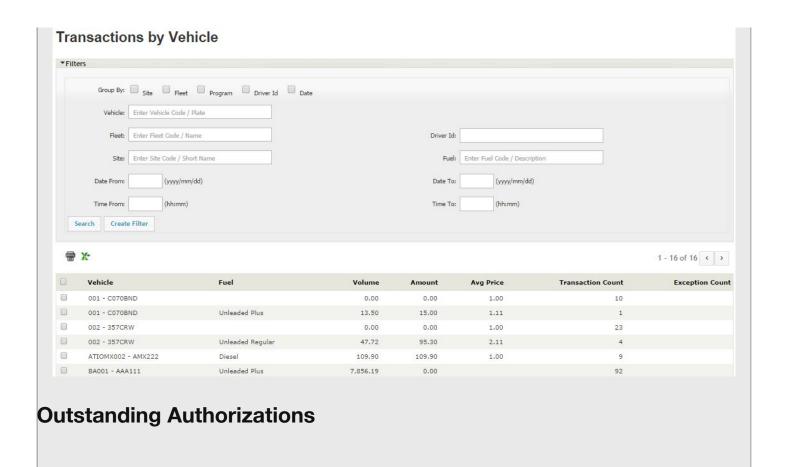


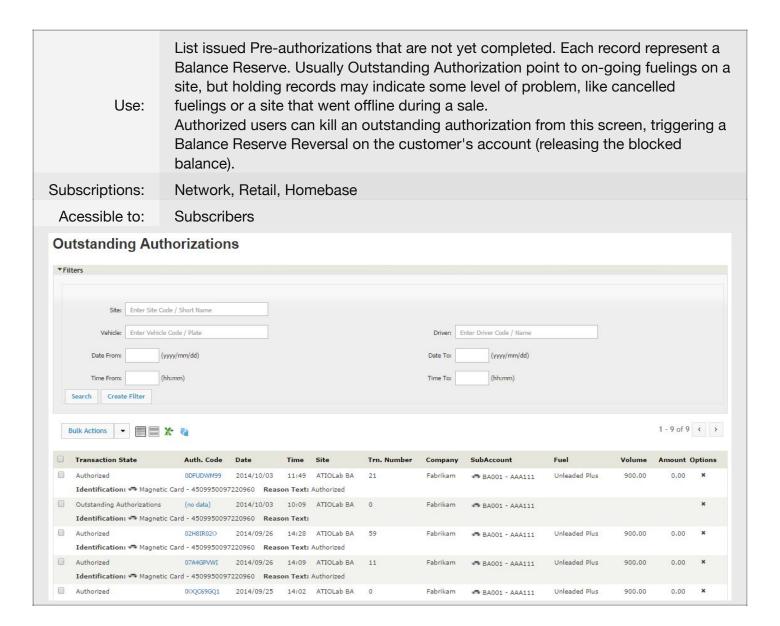
Aggregated Transaction Views

Use:	List Transactions with one or more aggreation criteria. In addition to main aggregation criteria, other Group By fields may also add further level of aggregation. Merchant's only have By Site Version Versions: By Vehicle, By Site, By Driver, By Fleet, By Merchant
Subscriptions:	Network, Retail, Homebase
Acessible to:	Fleet Companies, Merchants, Subscribers









Exceptions View

Exceptions are transaction requests rejected or declined by the host. Exception records can be filtered by type. A particular type of exception is "To be Reviewed". This status flag transactions Use: with minor failures that could be manually reviewed and approved/rejected by an authorized user. Subscriptions: Network, Retail, Homebase Acessible to: Subscribers You are in: Views > Exceptions My Filters ▼ **Exceptions** Decline Without Balance Decline By Quota Rule Decline By Location Rule Filters 1 - 18 of 18 〈 › Bulk Actions Invalid Completion Without Confirmation Transaction : Time Site Trn. Number Company SubAccount 090QJFT78 2014/08/08 17:20 (1) Centro Flotilla ATIO Calidad - 456DEF □ Declined 0QPU2NOW0 2013/12/12 15:40 01.- Tenayuca 54840342 LA COSMOPOLITANA, S.A. DE C.V. / 2 ■ N/A - 034AS7 Manual Canceled ORSGOLS04 2013/12/09 10:32 LAB ATIO Flotilla ATIO Calidad 456DEE ☐ Manual Canceled 0GTTOJ954 2013/12/06 12:43 LAB ATIO Flotilla ATIO Calidad - 456DEF 04C029VUK 2013/12/06 Manual Canceled 12:35 LAB ATIO Flotilla ATIO Calidad - 456DEF 09TGEUPDD 2013/12/06 12:31 LAB ATIO Declined 150 Flotilla ATIO Calidad 456DEF 2013/12/06 12:22 LAB ATIO 150 Flotilla ATIO Calidad Unlawful 03KEF8NNZ 2013/12/06 150 11:51 LAB ATIO Declined 0WUH62407 2013/10/29 13:26 (1) Centro 21873386 CONSORCIO ADMINISTRATIVO Y TECNICO S.A. DE C.V. ➡ N/A - MLL7169 Declined 0F41WTFE7 2013/10/01 15:47 OTTO 62208287 GASNGO MEXICO S.A. DE C.V. - N/A - 303WXG 74772494 2013/09/20 отто LA COSMOPOLITANA, S.A. DE C.V. / 2 Declined 18:15 N/A - 034AS7 0ESCBZQF2 2013/08/13 10:10 Aceves(Corpo) Invalid 26505230 ALIMENTOS PRACTICOS Y SELECTOS, S.A. DE C.V. - 15 - KW88975 37335040 0Y2I1T037 2012/03/30 17:03 ES6531 TRANSPORTES THE BIMB'S S.A. DE C.V. - 78 - 399DH9 Invalid 08STICP9D 2012/02/22 08:52 Grillos 135699670 ECONOCOMEX INTERNACIONAL S.A DE C.V ♠ N/A - KW75898 Invalid 01O4WCMDT 2012/01/11 10:04 Tlatilco 40822600 MASKOTA S.A DE C.V - N/A - ¥748338 Invalid 01O4WCMDT 2011/10/05 16:50 Arenas 33705350 GASNGO MEXICO S.A. DE C.V. ≪ N/A - 3372Y 2011/05/05 CLOUTHIER 11:18 ➡ N/A - JHY3926 0FVH4CS6X 2010/04/22 17:33 INGRE ES0101 27992930 GASNGO MEXICO S.A. DE C.V. Invalid → N/A - 3372Y

Current Accounts Views

List accounting movements and balances with different level of detail.

There are four sub-views:

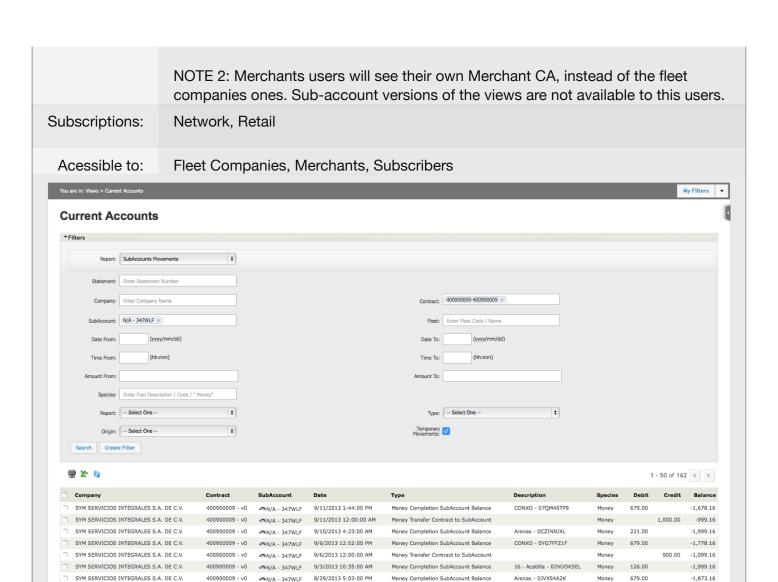
Contract List: Displays current balance for each fleet-company contract on the filter scope

SubAccount List: Displays current balance for each card-holder on the selected contract

Contract Movements: List of the current account posts on the selected contract SubAccount Movements: List of the current account posts on the selected cardholder

Use:

NOTE: Transactions differ from Current Account Movements in several ways. Every transaction posts at least one CA movement but other operations like payments and balance transfer between subaccounts or between the contract and its subaccounts (cardholder's individual account) also post CA movement. Also, some transactions like a Pre-authorization/Completion pair post temporary CA movements to block balance until the completion is received and processed. Additionally, the CA movement may show the contract price for the customer and/or Merchant, instead of the pump price that would be displayed on the Transaction View.

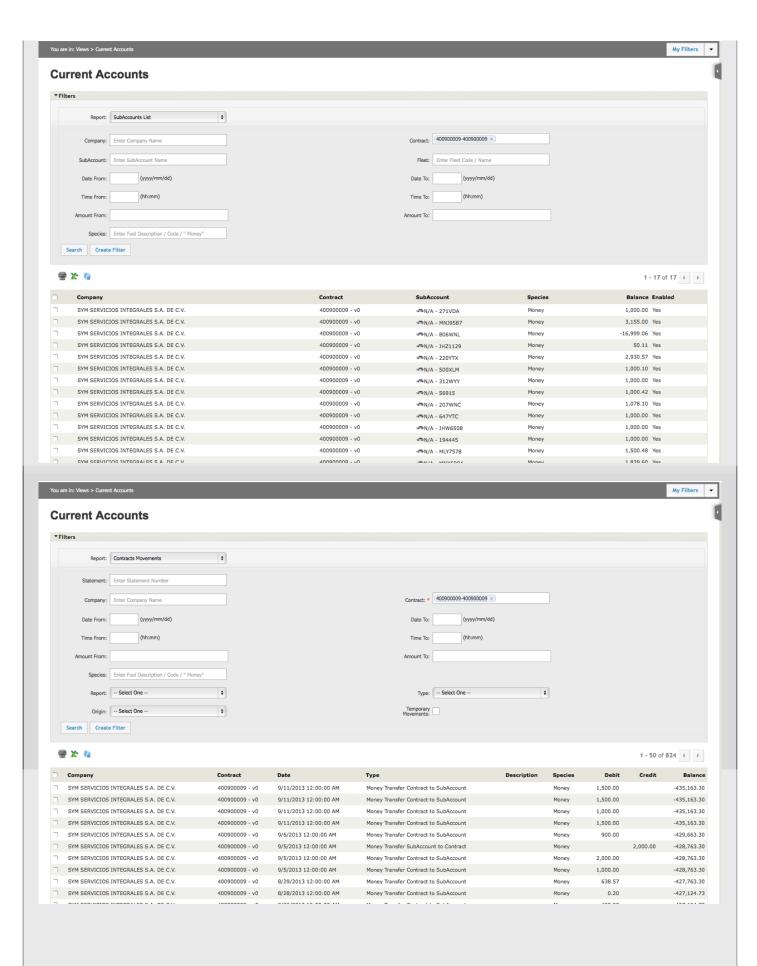


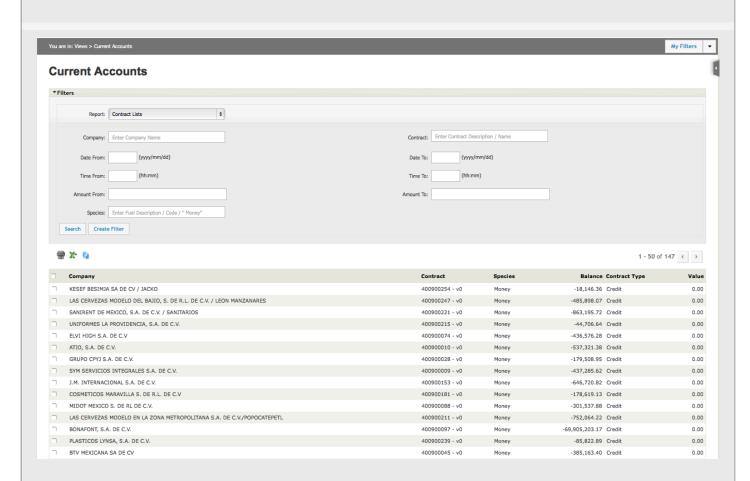
Money 194.16 -1,194.16

39.27 -1,000.00

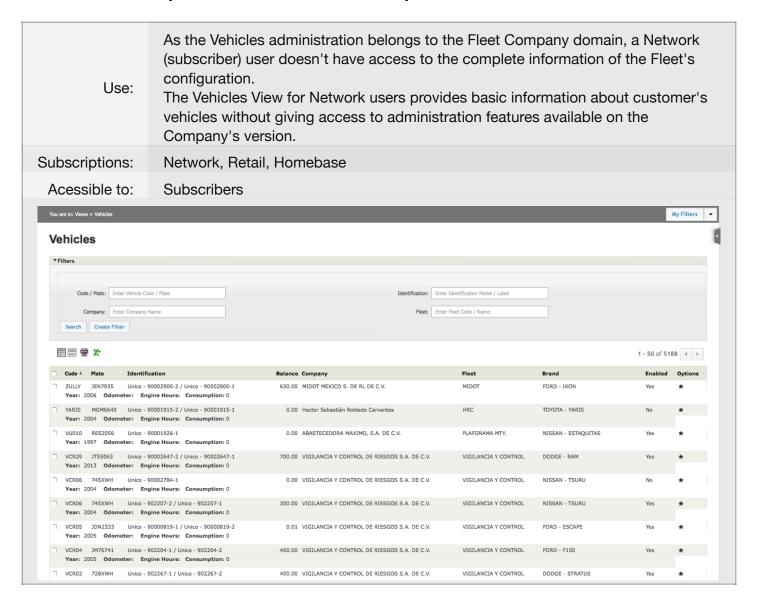
SYM SERVICIOS INTEGRALES S.A. DE C.V. 400900009 - V0 N/A - 347WLF 8/29/2013 7:37:00 AM Money Completion SubAccount Balance CONXO - 09D5EQUDD

SYM SERVICIOS INTEGRALES S.A. DE C.V. 400900009 - v0 ←N/A - 347WLF 8/28/2013 12:00:00 AM





Vehicles View (Network Users Version)



Reports

Lists Reports

Use:	Provide printer-friendly version of: Vehicles Drivers Sites Transactions by Site
Subscriptions:	Network, Retail, Homebase
Acessible to:	Subscribers, Companies



2014/10/06 14:50:25

Driver	Identification	Balance License Number	License State	License Country	Enabled
92555443 - BIRRIEL RICARDO RAUL	Card - 92555443	8 0 92555443	Buenos Aires	Argentina	Yes
26660074 - CABRAL GASTON EDGARDO	Card - 26660074	& ₀ 26660074	Buenos Aires	Argentina	Yes
14877201 - CHAO LUIS OSCAR	Card - 14877201	& ₀ 14877201	Buenos Aires	Argentina	Yes
13674668 - COMIS JUAN LUIS	(no data)	8 0 13674668	Buenos Aires	Argentina	Yes
13354224 - DI TOMA SAVERIO	Card - 13354224	♣ 0 13354224	Buenos Aires	Argentina	Yes
22211968 - DOMINGUEZ JUAN ADRIAN	Card - 22211968	& ₀ 22211968	Buenos Aires	Argentina	Yes
29171367 - FUKUDA JORGE DANIEL	Card - 29171367	& ₀ 29171367	Buenos Aires	Argentina	Yes
28491933 - GIANIVICO PATRICIO MAURO EZEQUIEL	Card - 28491933	& ₀ 28491933	Buenos Aires	Argentina	Yes
14295567 - KEES EUSEBIO	Card - 14295567	& ₀ 14295567	Buenos Aires	Argentina	Yes

Print

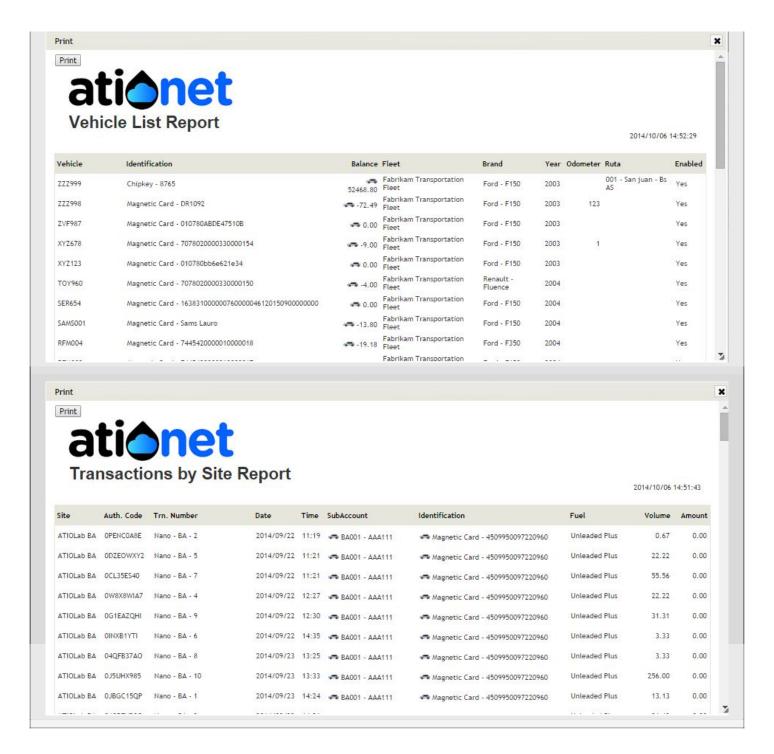


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Code	Short Name	Full Name	Phone N°	Phone N°	Zip Code	Address
01	Verifone	Laboratorio Verifone			1602	Street 1, (1602) (Buenos Aires) Buenos Aires Argentina
02	PBS LAB	Laboratorio PBS			33172	Street 1, (33172) (Miami) Florida United States
03	Tampa VF	Laboratorio Verifone Tampa			33172	street 1, (33172) (Tampa) Florida United States
04	Panama	Demo Panama			3322	Street 1, (3322) (Panama) Florida United States

Print



Vehicle Activity

