



Ozedi  
Registration  
User Guide

## Ozedi Registration User Guide

| <i>Version Number</i> | <i>Release Date</i> | <i>Who</i> | <i>Sections Affected</i> | <i>Changes</i>                      |
|-----------------------|---------------------|------------|--------------------------|-------------------------------------|
| 1.0                   | 12/03/18            | AW         | All                      | First version of the document       |
| 1.1                   | 25/05/18            | AW         | Buy Data                 | Addition of Usage and Buy Data tabs |
| 1.2                   | 13/06/18            | AW         | Terms                    | Terms and Conditions on Buy Data    |
| 1.3                   | 27/06/18            | AW         | User reg                 | Single name entry                   |

# Ozedi Registration User Guide

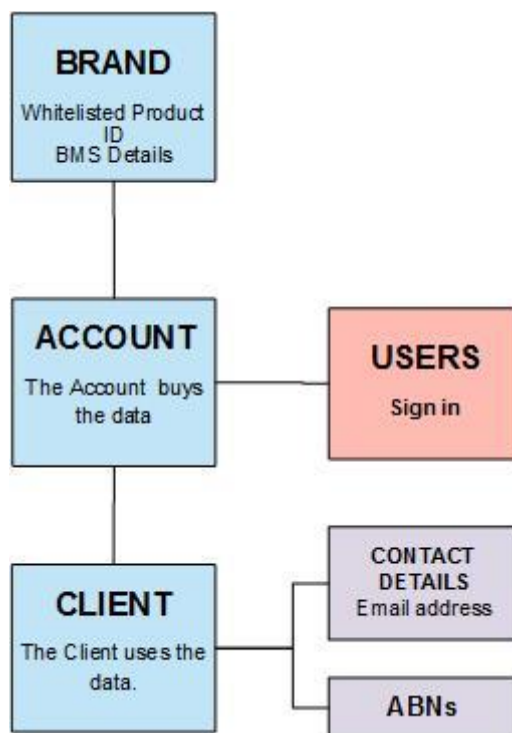
## Contents

|  |    |
|--|----|
| Overview .....                         | 4  |
| Brands .....                           | 4  |
| Getting started .....                  | 4  |
| Registering a User .....               | 5  |
| Accessing the Registration system..... | 6  |
| Internet address.....                  | 6  |
| Account Sign In.....                   | 6  |
| Managing Your Accounts .....           | 7  |
| Create a New Account .....             | 8  |
| Accounts.....                          | 9  |
| Account Holders.....                   | 9  |
| Manage your Account.....               | 9  |
| Account Users .....                    | 10 |
| Clients.....                           | 11 |
| Client Facilities .....                | 11 |
| Adding a New Client.....               | 12 |
| Editing Client Details .....           | 13 |
| Client Contacts .....                  | 14 |
| Data Usage .....                       | 15 |
| Buy Data.....                          | 16 |
| Select quantity to purchase .....      | 16 |
| Accept terms and Conditions.....       | 16 |
| Proceed to PayPal .....                | 17 |

# Ozedi Registration User Guide

## Overview

Ozedi registers all clients depending on their relationship and their chosen business model. The components include:



Ozedi recognises the variety of business models for payroll providers, their resellers and clients and the Registration system has the flexibility to accommodate these variations. This guide is for a payroll providers' clients to register their own account at Ozedi.

## Brands

Ozedi sets up a Brand after the payroll provider has been approved and basic details received. A payroll provider may have multiple Brands for different payroll products. Registration of Accounts are always linked to a Brand because the ATO requires the payroll provider's whitelisted Product ID as part of the messaging details.

Payroll providers will supply their clients with a brand-specific link to be used to self-register at Ozedi. This link ensures the clients are registered under the payroll provider's brand.

## Getting started

The steps you need to take now are:

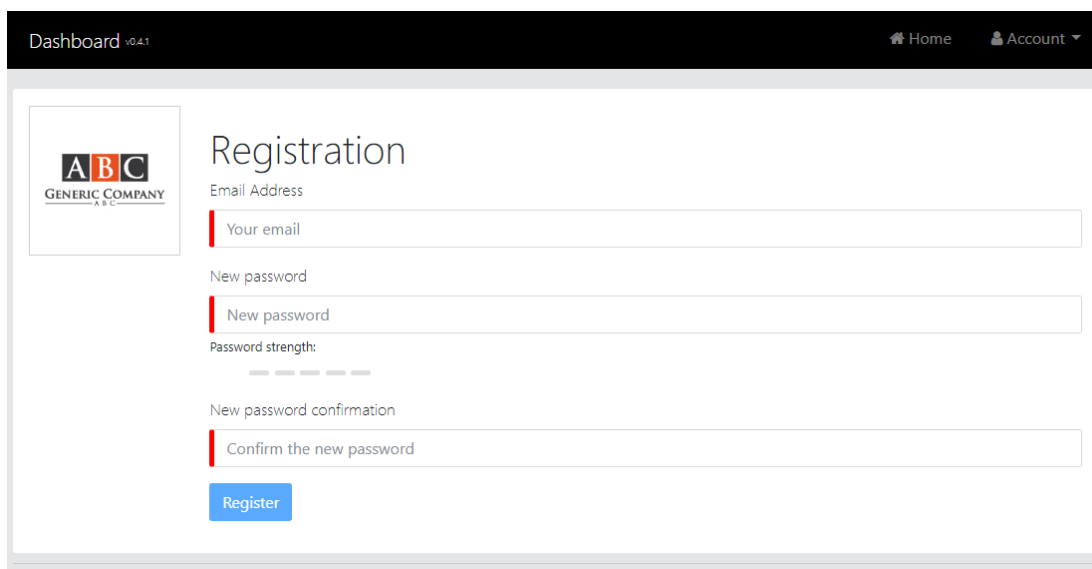
1. Register yourself as a User and add your Account - select the User Register link (see details below).
2. After your Account is set up, you can use the Sign In link to access the system in future.

Then you can the client you created to begin testing using either the API or portal upload.

# Ozedi Registration User Guide

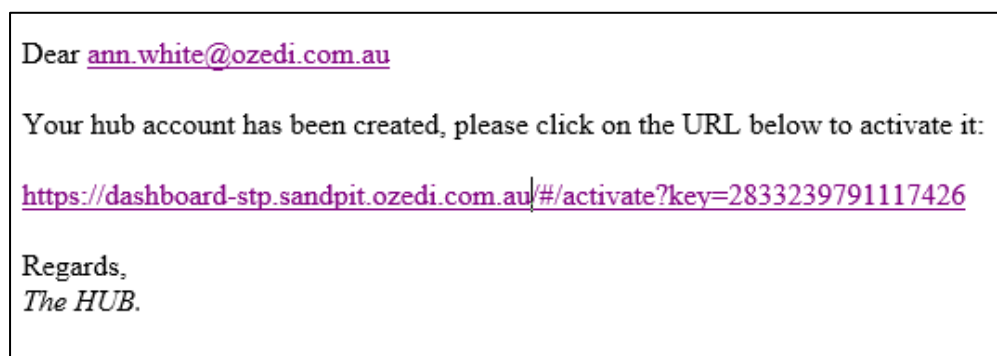
## Registering a User

The screen below displays when you access the User Registration link provided by Ozedi. Complete the form and hit the Register button. An email will be sent to you to validate that you own the email address you have entered (security check). You must activate your User by clicking on the activation link in the email – you have 24 hours to complete this process after which time you will need to contact [support@ozedi.com.au](mailto:support@ozedi.com.au). Activating the User will lead to Signing In and adding a new Account.

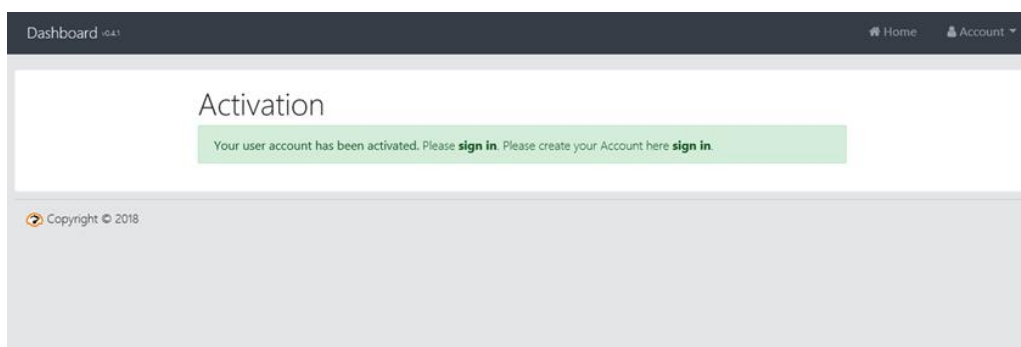


The screenshot shows the 'Registration' page on the Ozedi dashboard. The page has a dark header with 'Dashboard v0.4.1' on the left and 'Home' and 'Account' on the right. The main content area features the 'GENERIC COMPANY' logo on the left and a registration form on the right. The form includes fields for 'Email Address' (with placeholder 'Your email'), 'New password' (with placeholder 'New password'), a 'Password strength' indicator (five dashes), and 'New password confirmation' (with placeholder 'Confirm the new password'). A blue 'Register' button is located at the bottom of the form.

The email sent to you to confirm your registration will be similar to the one below. You must receive this email (to prove that you own the email address) and you must click on the activation link – this completes the User registration.



The Activation screen below will display to acknowledge that your user is now active. Click on the **Sign In** link.



# Ozedi Registration User Guide

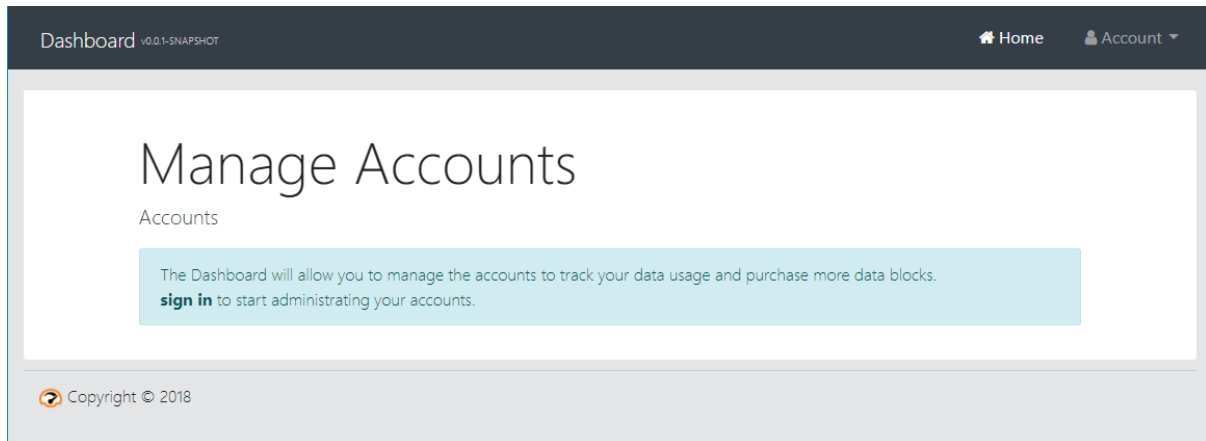
## Accessing the Registration system

### Internet address

When you have been registered, you can access the Ozedi Registration in the test environment using the address below:

<https://dashboard-stp.ozedi.com.au>

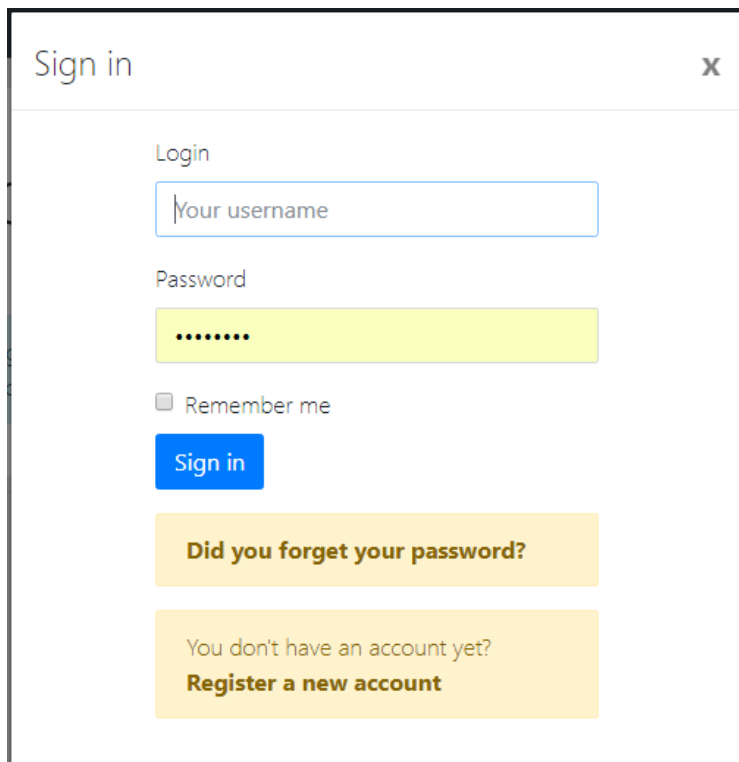
Accessing this URL will bring up the screen below – click on **sign in** link and the screen below will display. Once you have signed in, other functions will be available.



### Account Sign In

Sign in using the details you recorded at Registration first step or the credentials of any of the users you have added since.

You can change the password using the **Account** option on the toolbar AFTER you have logged in.

A screenshot of a 'Sign in' form. The form is titled 'Sign in' and has a close button 'X' in the top right corner. It contains the following elements: a 'Login' label above a text input field with the placeholder 'Your username'; a 'Password' label above a password input field with seven dots; a checkbox labeled 'Remember me'; a blue 'Sign in' button; a yellow button labeled 'Did you forget your password?'; and a yellow button labeled 'You don't have an account yet? Register a new account'.

When completed, the Account management screen displays – see below.

# Ozedi Registration User Guide

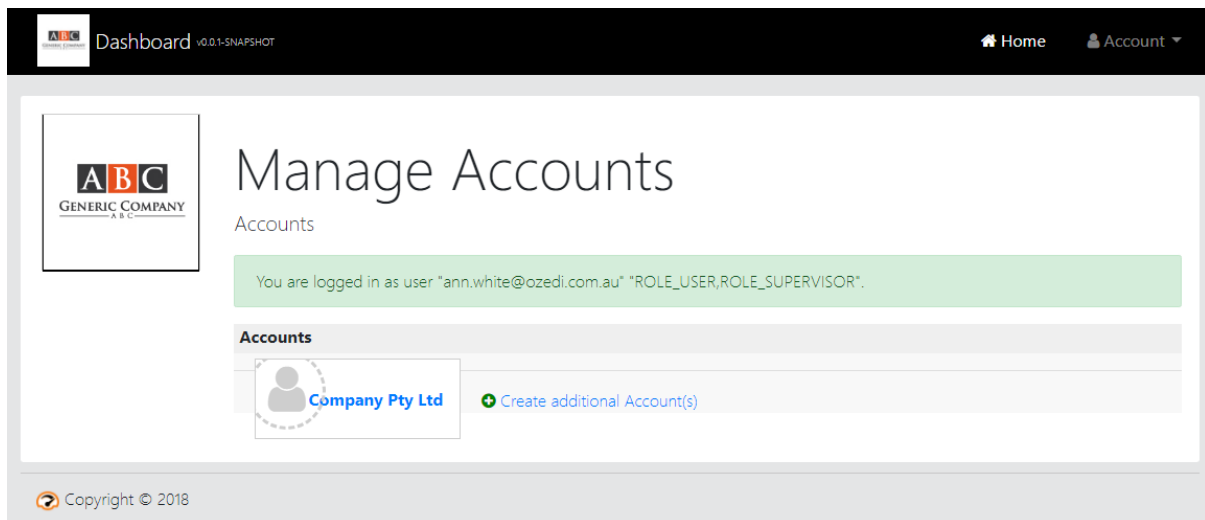
## Managing Your Accounts

You have the following options:

- Select one of the accounts linked to your User and listed below
- Create a new Account

The first time you will need to select to Create a New Account – see instructions below.

If you have registered an Account, it will be displayed as one of the Accounts you have access to as shown below. A User may have access to multiple Accounts – these will be listed for selection.



Clicking on the account displays the Account management screen – see below.

# Ozedi Registration User Guide

## Create a New Account

This screen is used to register a new Account under your payroll provider's Brand. Enter your account details and hit the Register button.

**NB make sure you tick the Single Touch Payroll box**

The screenshot shows the 'Account Registration' page in the ABC Generic Company dashboard. The page title is 'Account Registration' and the sub-header is 'Create Account'. The form includes the following fields and options:

- Name:** A text input field for 'Account Name' with a red error message 'name is required' below it.
- Services:** Three radio button options: 'Single Touch Payroll', 'Business 2 Business', and 'Standard Business Reporting'. A red error message 'service(s) is required' is shown below the options.
- Contact 1:** A section for contact details with the following fields:
  - firstname:** Text input field with a red error message 'firstname is required' below it.
  - lastname:** Text input field with a red error message 'lastname is required' below it.
  - email:** Text input field with a red error message 'email is required' below it.
  - phone:** Text input field with a red error message 'phone is required' below it.
  - address:** Text input field.
  - type:** A dropdown menu with a red error message 'contact type is required' below it.
- Add Contact:** A green plus icon followed by the text 'Add Contact'.
- Register:** A blue button with a white document icon and the text 'Register'.

You are now registered with an Account and a User and ready to access the system through the usual sign in link.



# Ozedi Registration User Guide

## Accounts

### Account Holders

The account level identifies the party purchasing data for the Clients registered under the Account. You must have at least one Client registered as this is the level that records data usage.

### Manage your Account

Accounts have the following facilities:

- Manage Clients
- Manage Users
- Usage
- Buy Data
- Purchase History

**Dashboard v0.4.1** Home Account

### Manage Account

Account [Sign out](#)

**XYZ Company Pty Ltd**  
Edit Account Name  
your service  
account number:  
**0719 12529 1929**

Services  
 Single Touch Payroll

estimated usage

3.0 MB Remaining Data (bytes)  
(approximate months remaining based on monthly usage.)

average monthly usage (monthly usage.)

| Month    | Usage (bytes) |
|----------|---------------|
| January  | 0             |
| April    | 4             |
| July     | 8             |
| December | 0             |

Manage Clients | Manage Users | Usage | Buy Data | Purchase History

# Ozedi Registration User Guide

## Account Users

Accounts can have multiple Users for the following functions:

- Log into the Account details including purchasing data and displaying traffic and history
- Have tax invoices sent to verify purchase of blocks of data

Account Users can be added, edited and deleted if required – they are listed when the “Manage Users” tab is selected – see below.

Dashboard 0.4.1 Home Account

### Manage Account

Account [Sign out](#)

**XYZ Company Pty Ltd**  
Edit Account Name  
your service  
account number:  
**0719 12529 1929**

Services  
Single Touch Payroll

estimated usage  
3.0 MB Remaining Data (bytes)  
(approximate months remaining based on monthly usage.)

average monthly usage  
(monthly usage.)

Manage Clients | Manage Users | Usage | Buy Data | Purchase History

Users for XYZ Company Pty Ltd [+ Create a new User](#)

| ID | Login                  | Email                  | Profiles  | Created Date | Last Modified By | Last Modified Date |
|----|------------------------|------------------------|-----------|--------------|------------------|--------------------|
| 26 | ann.white@ozedi.com.au | ann.white@ozedi.com.au | Activated |              |                  |                    |

[View](#) [Edit](#) [Delete](#)

Use the “Create a new User” button to add users to your Account – see below.

### Create or edit a User

Login

First Name

Last Name

Email

[Cancel](#) [Save](#)

# Ozedi Registration User Guide

## Clients

### Client Facilities

Clients send data and receive responses and are linked to an Account which pays for the services. They are given a unique Client ID which is used in the following places:

- API upload
- Portal upload

The Client identifies the Account which allows Ozedi to check data availability prior to uploading new submissions. All usage statistics are recorded by Client and type of transaction; eg STP.

Facilities to allow clients to self-register their own Client details online will be provided in later releases.

The screenshot displays the 'Manage Account' interface for 'XYZ Company Pty Ltd'. It includes a 'Sign out' button, account number '0719 12529 1929', and usage statistics. The usage statistics section shows '3.0 MB Remaining Data (bytes)' and 'estimated usage' with a donut chart. A line graph shows 'average monthly usage' from January to December. Below this, there are navigation tabs for 'Manage Clients', 'Manage Users', 'Usage', 'Buy Data', and 'Purchase History'. The 'Manage Clients' tab is active, showing a table of clients for 'XYZ Company Pty Ltd' with columns for ID, Name, Client Id, Client UUID, and Account Service. A '+ Create new Client' button is also present.

| ID  | Name                   | Client Id | Client UUID                          | Account Service                 |        |
|-----|------------------------|-----------|--------------------------------------|---------------------------------|--------|
| 3   | GHI Industries Pty Ltd | 00469175  | a010a571-f4a3-4ac4-9b7c-81c74c7db384 | XYZ Company Pty Ltd Account STP | Delete |
| 4   | DEF Sales Pty Ltd      | 53671858  | 85bbdc48-e6a5-4e08-bfa0-a38fe0cb2502 | XYZ Company Pty Ltd Account STP | Delete |
| 164 | BB enterprises         | 38782062  | 5a5162b6-1411-48cd-8aef-3b22a7911906 | XYZ Company Pty Ltd Account STP | Delete |

# Ozedi Registration User Guide

## Adding a New Client

When adding a new Client, the screen below displays for entry of client details. The details shown below include the following:

- **Client name** (company name)
- **Can send** (on/off – can be used by the Account holder to prevent clients from sending if they are non-financial with them)
- **Client active** (on/off – can be used by the Account holder to prevent all activity for this Client)
- **Account active** (not used)
- **Client contacts** – multiple client contact details can be recorded – see below

### Create or edit a Client ✕

---

**Name**  
  
name is required

**ABN 1**  
  
a valid abn is required

(leave blank if you don't have a RAN or TAN, enter RAN or TAN if you do.)

(leave blank if you don't have a RAN number or TAN number, enter number if you do.)

+ Add ABN

**Can Send** i

**Client Active** i

**Account Active** i

**Contact 1** i  
  
firstname is required

lastname is required

email is required

phone is required

# Ozedi Registration User Guide

## Editing Client Details

When editing a Client, the details shown below include the following:

- Ozedi ID (allocated by Ozedi)
- **Client name** (company name)
- Client ID (8-digit ID allocated by Ozedi and **used in uploads**)
- Client UUID (allocated by Ozedi)
- **Can send** (on/off – can be used by the Account holder to prevent clients from sending if they are non-financial with them)
- **Client active** (on/off – can be used by the Account holder to prevent all activity for this Client)
- **Account active** (not used)
- Client contacts – multiple client contact details can be recorded – see below

Create or edit a Client ×

---

**ID**

164

**Name**

BB enterprises

**Client Id**

38782062

**Client UUID**

5a5162b6-1411-48cd-8aef-3b22a7911906

**ABN 1**

17088268884

ROLE

(leave blank if you don't have a RAN or TAN, enter RAN or TAN if you do.)

AGENT NUMBER

(leave blank if you don't have a RAN number or TAN number, enter number if you do.)

+ Add ABN

**Can Send** i

**Client Active** i

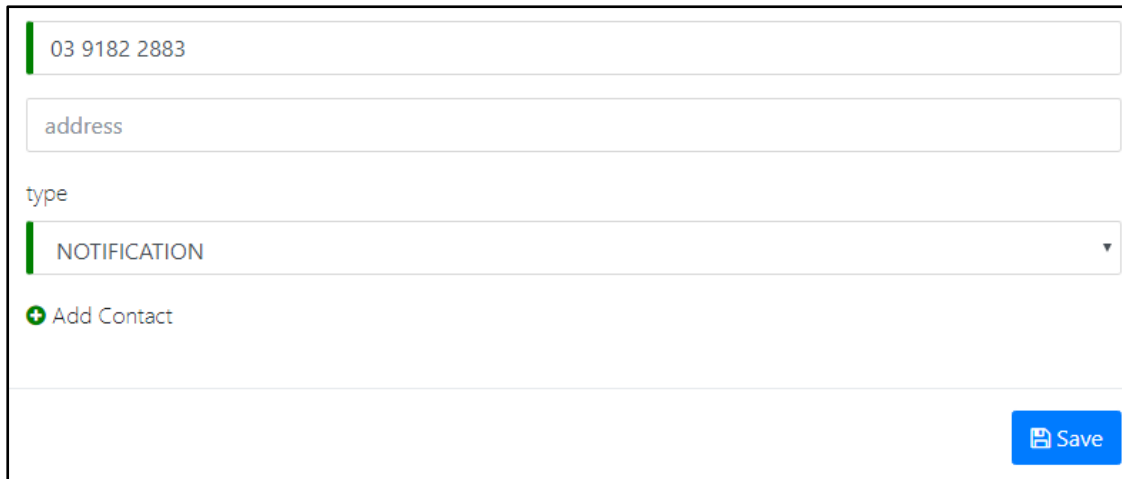
**Account Active** i

**Contact 1** i

Ann White

ann.white@ozedi.com.au

## Ozedi Registration User Guide



The screenshot shows a registration form with the following fields and elements:

- Phone number: 03 9182 2883
- Address: address
- Type: NOTIFICATION (selected from a dropdown menu)
- Buttons: + Add Contact and Save

### Client Contacts

A Client can have multiple contacts attached - see screen above showing details for Contact 1. Contacts 2 onwards will display below as they are added. Details held for each Contact include:

- First name
- Last name
- Email address
- Phone number
- Address
- Contact type – these include:
  - Business contact
  - Technical contact
  - **Notification** – Contacts marked Notification will receive emailed responses from the ATO to submissions.


# Ozedi Registration User Guide

## Data Usage

The Usage tab on the Account dashboard displays the messaging submissions and responses from the ATO. The status is displayed; ie

- QUEUED – the message has been received at Ozedi
- PUSHED – Ozedi has successfully pushed the message to the ATO
- RESPONDED – Ozedi has successfully retrieved a response from the ATO
- NO RESPONSE AVAILABLE – the ATO has not generated a response within the maximum 72 hours limit. Please contact the ATO and request an update on this message.

Dashboard v0.41
Home Account



**Manage Account**

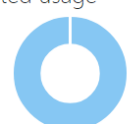
Account [Sign out](#)

**XYZ Company Pty Ltd**

[Edit Account Name](#)  
your service

account number:  
**0719 12529 1929**

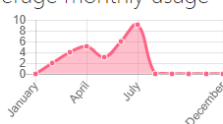
estimated usage



**2.0 MB Remaining Data**  
(bytes)

(approximate months remaining based on monthly usage.)

average monthly usage



(monthly usage.)

Services

- Single Touch Payroll

[Manage Clients](#) | 
 [Manage Users](#) | 
 [Usage](#) | 
 [Buy Data](#) | 
 [Purchase History](#)

Messages

| ID    | Audit Created             | Audit Modified            | Message Abn  | Message UUID                         | Poll Count | Last Time Polled          | Bytes | Direction | Client            | Message Status |
|-------|---------------------------|---------------------------|--------------|--------------------------------------|------------|---------------------------|-------|-----------|-------------------|----------------|
| 17294 | May 11, 2018, 3:30:01 PM  | May 11, 2018, 3:30:09 PM  | 62483468038  | 5db3e817-8bfe-4914-bc94-511041500193 | 1          | May 11, 2018, 3:30:09 PM  |       | OUT       | DEF Sales Pty Ltd | RESPONDED      |
| 17295 | May 11, 2018, 3:30:09 PM  | May 11, 2018, 3:30:09 PM  | 518247533556 | 5db3e817-8bfe-4914-bc94-511041500193 | 1          | May 11, 2018, 3:30:09 PM  |       | IN        | DEF Sales Pty Ltd | RESPONDED      |
| 17569 | May 14, 2018, 11:54:34 AM | May 14, 2018, 11:54:46 AM | 62483468038  | 2753be84-3492-4e7a-b1a8-52d01639c5da | 1          | May 14, 2018, 11:54:46 AM |       | OUT       | GHI Industries    | RESPONDED      |

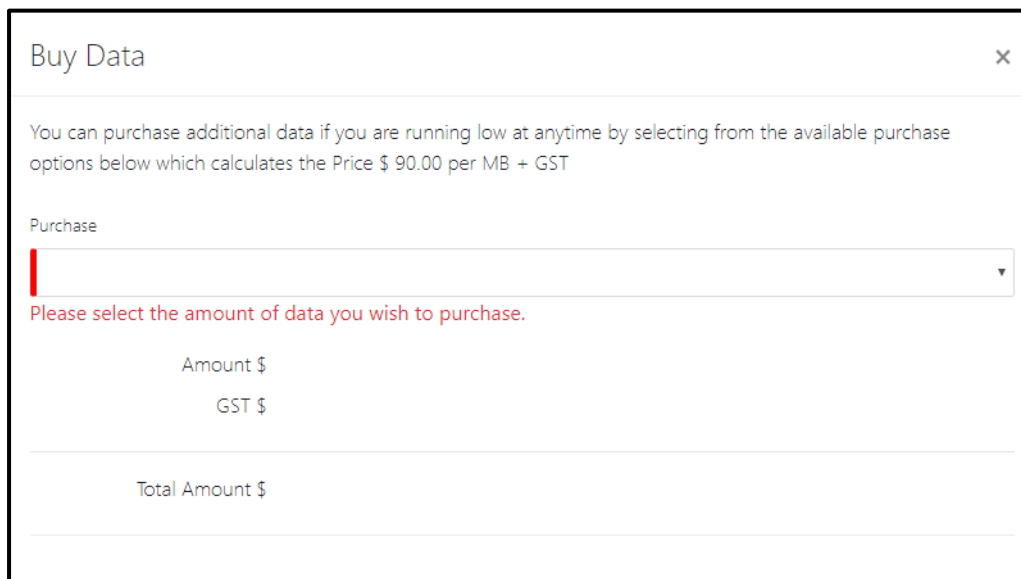
# Ozedi Registration User Guide

## Buy Data

### Select quantity to purchase

The Buy Data tab enables the purchase of data to be used for messaging. The screen below displays requiring entry of the number of megabytes being purchased. Valid quantities are:

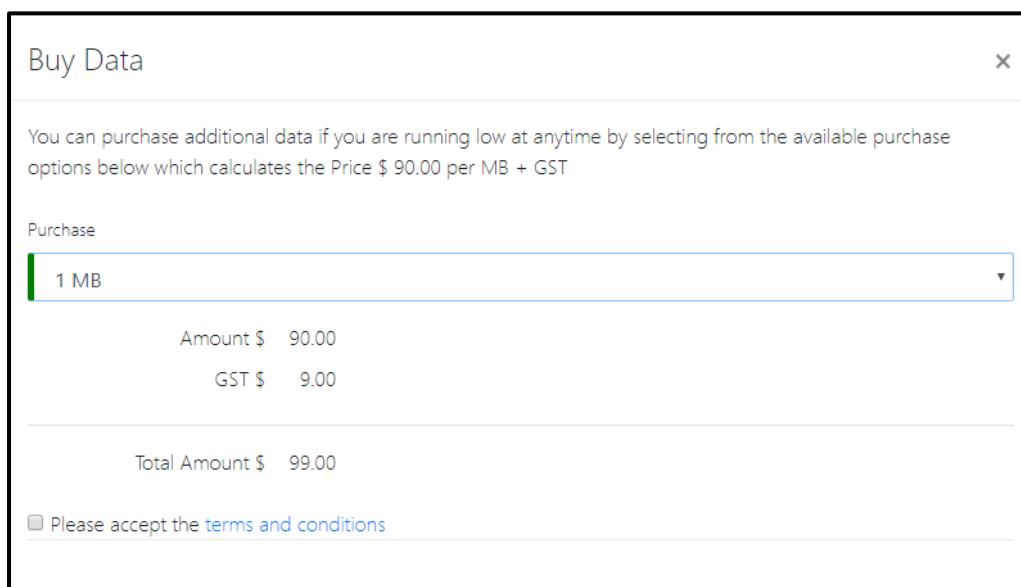
- 0.5MB
- 1MB
- 2MB
- 5Mb
- 10MB
- 100MB



The screenshot shows a dialog box titled "Buy Data" with a close button (X) in the top right corner. Below the title, there is a descriptive text: "You can purchase additional data if you are running low at anytime by selecting from the available purchase options below which calculates the Price \$ 90.00 per MB + GST". A dropdown menu labeled "Purchase" is currently empty, with a red vertical bar on the left and a downward arrow on the right. Below the dropdown, a red error message reads: "Please select the amount of data you wish to purchase." Underneath, there are three rows of labels: "Amount \$", "GST \$", and "Total Amount \$", each followed by a horizontal line for input.

### Accept terms and Conditions

Then the screen displays the terms and conditions link and the accept tick box. You can read the T&Cs at this point. To continue, tick the box.



The screenshot shows the same "Buy Data" dialog box. The "Purchase" dropdown menu now has "1 MB" selected, highlighted with a green bar on the left and a blue border. The error message is gone. The "Amount \$" field now contains "90.00", the "GST \$" field contains "9.00", and the "Total Amount \$" field contains "99.00". At the bottom of the dialog, there is a checkbox that is checked, followed by the text "Please accept the [terms and conditions](#)".



# Ozedi Registration User Guide

## Proceed to PayPal

Accepting the terms and conditions activates the BUY DATA button which will take the user to PayPal for payment. Once payment has been successfully completed, the Account dashboard will display the amended available data for processing.

### Buy Data ×

You can purchase additional data if you are running low at anytime by selecting from the available purchase options below which calculates the Price \$ 90.00 per MB + GST

Purchase

1 MB ▾

|           |       |
|-----------|-------|
| Amount \$ | 90.00 |
| GST \$    | 9.00  |

---

Total Amount \$ 99.00

[Buy Data](#)