

# HELP GUIDE



# Access to the Waitomo customer portal:

To access the Waitomo customer portal, you'll need to set up a username and password. Call our team on 0800 922 123 and we'll sort you out.

For the best results, please use Google Chrome to access the portal.

# Logging into the portal:

You can access the portal:

- 1. Via <u>https://portal.waitomogroup.co.nz/waitomogroup</u>
- Via our website <u>www.waitomogroup.co.nz</u> where you can log in by using the link at the top left of the home page 'Portal Login'.



Enter your username and password to log in. This will direct you to the homepage.



# Sections of the portal:

Our portal has four main sections:

- Home The homepage provides a summary of your account balance and today's fuel prices.
- Documents Here you can access all documents that have been previously sent to you.
- Profile This is where you can change or amend your profile and contact details.
- Account Here you can access information about pricing, previous transactions, view reports on road user charges and regional fuel taxes and order new Waitomo Fuel Cards.

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	Ship-to location WAITC	MO PETROLEUM LTD I	OBILCARD -							
	Product	Price (excl GST)	Price (incl GST)							
	Diesel	\$.6307	\$.7253							
	91 Unleaded	\$1.4350	\$1.6503							
	95 Premium	\$1,4746	\$1.6958							
	Industrial Kerosene (Bulk)	\$.7504	\$.8629							
	Go Clear (Bulk)	\$.9200	\$1.0580							
		View pricing	for other dates							

# Accessing your documents

Using the dropdown menu, you can easily access documents previously sent to you (My documents), as well as documents previously emailed to any user linked to your account (All documents).

You can also tailor your selection by using the filters at the top of the page - e.g., document type, date sent, and email address.



To print a copy of previous statements or pricing notifications, simply double-click on the document number on the left-hand side of the page to pull up the document, and then print as normal.

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Home	Documents	Profile	Account	Help guide	Log out			
Customer portal - All docum	ients					WAITOMO PETROLEUM I		
Document number	Document type	Date sent	<b>.</b>	Time sent	Log status	Email address		
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Effective Sep 9, 2020	Email customers newsletters e	tc 09/09/202	0	12:13:10	Emailed	GretaS@waitomogroup.co.nz		
Effective Sep 9, 2020	Email customers newsletters e	tc 09/09/202	0	12:13:09	Emailed	gregp@waitomogroup.co.nz		
727081	Statement	01/09/202	0	10:28:41	Emailed	admin@wpl.co.nz		
Effective Aug 13, 2020	Email customers newsletters e	tc 12/08/202	0	08:02:55	Emailed	gregp@waitomogroup.co.nz		
Effective Aug 13, 2020	Email customers newsletters e	tc 12/08/202	0	08:02:55	Emailed	GretaS@waitomogroup.co.nz		
722206	Statement	03/08/202	0	11:50:41	Emailed	admin@wpl.co.nz		
717723	Statement	01/07/202	0	07:37:56	Emailed	admin@wpl.co.nz		
713278	Statement	02/06/202	0	07:24:00	Emailed	admin@wpl.co.nz		
Effective May 13, 2020	Email customers newsletters e	tc 12/05/202	0	08:51:46	Emailed	GretaS@waitomogroup.co.nz		
Effective May 13, 2020	Email customers newsletters e	tc 12/05/202	0	08:51:43	Emailed	gregp@waitomogroup.co.nz		
708840	Statement	01/05/202	0	05:52:11	Emailed	admin@wpl.co.nz		
Effective Apr 22, 2020	Email customers newsletters e	tc 21/04/202	0	08:35:58	Emailed	GretaS@waitomogroup.co.nz		
Effective Apr 22, 2020	Email customers newsletters e	tc 21/04/202	0	08:35:57	Emailed	gregp@waitomogroup.co.nz		
Effective Apr 22, 2020	Email customers newsletters e	tc 21/04/202	0	08:35:56	Emailed	leanne@wpl.co.nz		
704284	Statement	01/04/202	0	09:07:45	Emailed	admin@wpl.co.nz		
Effective Mar 24, 2020	Email customers newsletters e	tc 23/03/202	0	06:52:31	Emailed	gregp@waitomogroup.co.nz		
Effective Mar 24, 2020	Email customers newsletters e	tc 23/03/202	0	06:52:31	Emailed	GretaS@waitomogroup.co.nz		
Effective Mar 18, 2020	Email customers newsletters e	tc 17/03/202	0	02:04:56	Emailed	gregp@waitomogroup.co.nz		
Effective Mar 18, 2020	Email customers newsletters e	tc 17/03/202	0	02:04:56	Emailed	GretaS@waitomogroup.co.nz		
699700	Statement	02/03/202	0	06:32:05	Emailed	admin@wol.co.nz		

# Managing your account profiles

You can change or amend your account profile, including your contact details, via the profile section of the portal. If you need to change your password, please call us on 0800 922 123 and we'll sort you out a new one.

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	Ship-to location:	55033							
	First name:	Greta							
	Last name:	Shirley							
	Email:	GretaS@waitomogroup.co.r	z						
	Work phone:								
	Mobile:								
	Fax number:								
	Save	Change password							
	Any	y personal information entern	customer portal is for the sole and exclus	ve use of Waitomo Group Ltd. Waitomo G	iroup Ltd will not sell or trade or otherwise pr	ovide any such information to third parties, unless req	ired to do so by law.		
				For the best results, please use Good	le Chrome to access this portal				

To set up new portal users for your account or to amend details for current portal users linked to your account, select 'Portal accounts' from the dropdown menu.

To add a new contact, select the 'New contact' box. To amend a current users' details, click on the pencil icon next to their name.



You can also limit a users' access as needed e.g., no access to view credit status, no access to maintain account profiles etc.

## Managing your account

In this section, you can access information about pricing, previous transactions, view reports on road user charges and regional fuel taxes and order new Waitomo Fuel Cards.

Using the dropdown menu, select one of the following options:

- 1. Account activity
- 2. Account maintenance

- 5. Transaction history
- 6. Reports
- 7. Credit card payment

leanne@wpl.co.nz

3. Fuel cards 4. Fuel pricing

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portal.waitomogroup.co.nz/waitomogroup/Maintenance.asp. 🖈 🐐 🚱 E ∿ ⊠ f Waitomo enquiry@waitomogroup.co.nz Log out WAITOMO PETROLEUM LTD Account mai Fuel cards Fuel pric T T T T Default Contac Reports leanne@wpl.co.nz Portal Credit card ( 1 gregp@waitomogroup.co.nz 1 Greta GretaS@waitomogroup.co.nz

### 1. Account activity

Here you'll find a summary of your current account balance, credit limit and the age of any overdue payments.

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	Customer portal - Account activit	ty					WAITOMO PETROLEUM LTD			
	All values are in New Zealand dollars.  Credit status Outstanding balance 31,421.61 Credit available 68,578.39									
	Aging as of         28/09/2020           From         To         Amount due           Current         31.421.61         3.0         0.00           31         60         0.00         0.00           61         90         0.00         0.00           Over 90         0.00         0.00         0.00									

### 2. Account maintenance

Here you can also update your contact details including address, phone number, fax and email address.

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	Wa					08 enquiry@	100 922 123 @waitomogroup.co.nz	
Home	Documents	Pro	file Account	Help	guide	Log out		WATTOMO PETROI FIIM I TD
		Customer	WAITOMO PETROLEUM LTD					
		Address	PO BOX 5125					
		City	HAMILTON	Country	NEW ZEALAND			
		Region	WAIKATO-COROMANDEL	Telephone	07 847 0829			
		Postcode	3242	Fax				
		E-mail	admin@wpl.co.nz					

### 3. Fuel cards

- To view the status, last transaction date and expiry of existing Waitomo Fuel Cards, or co-branded cards, select 'Fuel card list'.
- To make changes to your card (e.g., cancel the card, request a replacement card, create a new PIN), click on 'Enquiry' next to the relevant card. Here you can message us directly with your request.
- To order a new Waitomo Fuel Card, select 'New card application', fill in the form and press submit. Your request will be sent directly to the team to process. You will also receive an email to confirm your request has been received.
- Terms and conditions for our Waitomo Fuel Cards can be found via the dropdown menu by selecting 'Terms and conditions'.



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		Apply for a new Waitomo Fuel Car Apply for a new Waitomo Fuel Card Instructions for ordering new Waitomo F 1. Complete this page 2. Once you've completed the form, pres-	uel Cards s the submit by Lon and your	r request will be emailed to our	team. You'll also get an email confirma	ition of your order.	3 ).co.nz	
		Your name	Greta Shirley					
		Your email	GretaS@waitomogroup.co.nz					
		Your phone number						
		(We will only use these details if we nee	d to contact you regarding yo	ur card request)				
		Estimated monthly spend	No estimate					
		Card details	Max 30 characters					
	Custor	PIN number	4 digits					
	Custor	Limit per transaction	No limit					
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		76	- 50040					
		If you want to link your account with you	ir EROAD account, please pro	ovide your vehicle registration a	and fleet reference (max 8 characters).			
	701374	venice registration						
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		Postal address for delivery						
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	701374000	00001421 WARWICK 1-5503	30/11/2022		19/12/2019	Enquiry		

### 4. Fuel pricing

Here you can check your fuel pricing for a specific date. Simply enter the date you want to check.

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	Wa	itomo			0801) 922 enquiry@waitomogr	123 roup.co.nz	
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### 5. Transaction history

In this section, you can view and analyse your previous transactions. Your transactions are grouped into Fuel, Card, or All.

You can filter and group the data by using the dropdown menus at the top of the screen. Then click the 'Load' button to display the relevant transactions.

You can also download the data to Excel, or as a PDF or CSV file for further analysis.

You can also reprint any delivery dockets you need. Simply click on the document number and you'll be able to view and print the docket.



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Customer portal - Tr	ransaction hist	ory - All												WAITOMO	PETRO	DLEUM LTD
From date:	29/09/2020	2		To:	29/09/2020	2		L	.oad							
Docum amber	Date 🔺		Time	Trans reference	PO number	Odo	Item number	Item description	Card number	Card description	Fleet	Quantity	Unit price	Total excl GST	Тах	Total incl GST
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No transaction to display.																
Export to Excel E	Export to PDF	Export to CSV														

### 6. Reports

Here you can access a range of useful reports related to your transactions with Waitomo to support your business.

These include:

- 1. Road user charges this is a useful report if you're claiming road user charges back on Unleaded 91 fuel purchased for offroad use. This report can be printed and attached to your claim as evidence of your fuel purchases.
- 2. A 12-month customer sales summary a summary of your transactions from the last year.
- 3. Fuel cost analysis a summary of your transactions, grouped and sorted by your Fuel Card numbers. The report includes total volume, average cost, current total and your previous years' total (so you can easily compare your spend).
- 4. Regional fuel tax a summary of all transactions where the Auckland regional fuel tax has been applied, grouped and sorted by your Fuel Card numbers.

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Fuel Stop Finder	New Openings		<b>℃</b> 🗹 f					
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Home Documents Customer portal - Regional fuel tax report From date: 29(99/2020  To date: 29(99/2020	Profile P Download PDF Download Excel	Account Account activity Account maintenance Fuel cards	Help guide	Log out	WAITOMO PETROLEUM LTD			
		Fuel pricing Transaction history Reports Credit card payment	Road user charges report Customer sales summary (12 months) Fuel cost analysis Regional fuel tax					

# Have other questions about using the portal?

Contact our team with any questions you have. We're here to help.

The Waitomo Team P 0800 922 123 E enquiry@waitomogroup.co.nz