

CapLink

Supplier's Introduction to Caplink

Last Updated 15/07/2024 – v5

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1. Document overview

This document provides a quick introduction/overview to the CapLink Software from a Supplier's perspective. This document does not focus on the guidelines for using CapLink but rather provides an overview of what CapLink is and the requirements for deployment within a Supplier's environment.

2. CapLink overview

The CapLink software is the tool used by our Capricorn Preferred Suppliers to transmit their Capricorn related transactions back to us. The CapLink software is currently deployed at some 2000+ Suppliers across AU / NZ.

CapLink allows a Supplier to transmit their transactions directly from their end to Capricorn's Head Office while providing Supplier the tools to review the flow of those submitted transactions through various reports and monitoring statuses.

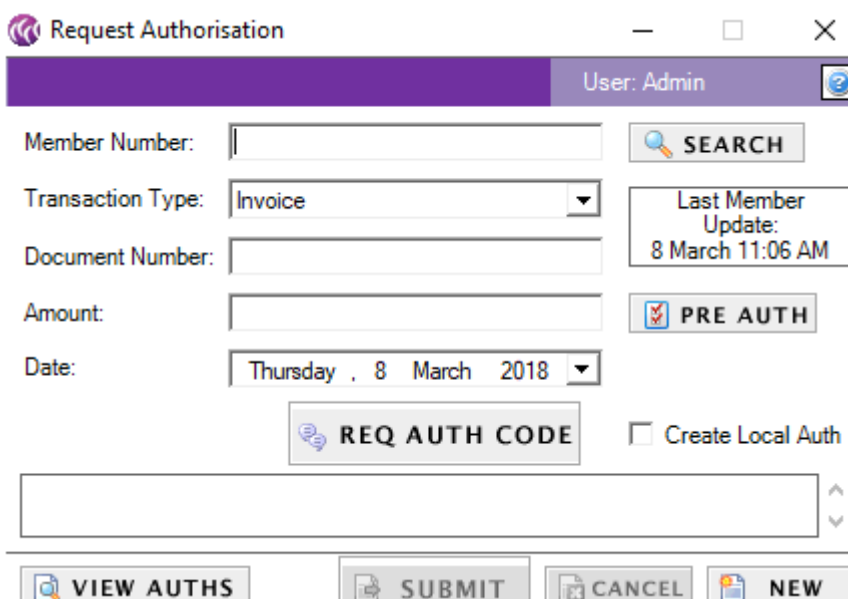
3. Processing methods

CapLink offers three level of integration/setup:

1. Standalone
2. Batch
3. Fully integrated

a. CapLink Standalone (no integration)

CapLink Standalone requires the Supplier/end user to manually key in every single invoice directly in the CapLink software using the available interface as per below



Member Number → Customer's
Capricorn Member Number

Transaction type → Invoice or Credit
(Can be selected from drop down)

Document Number → Supplier Invoice
Reference

Amount → Full amount including GST

Date → Can be back dated to match
invoice. Needs to be no older than the
1st day of the second previous month

b. CapLink Batch (partial integration)

In this case, the Supplier runs a report (either automated or not) that generates a csv/txt files containing all their Capricorn related data/transactions. The file is then saved in a defined folder that CapLink is set to lookup.

The file would contain the following information per transaction:

- Date
- Invoice ID
- Capricorn ID of Member being billed
- Full amount
- Supplier ID (optional – Required if running multiple Capricorn IDs to differentiate each IDs transaction)

A sample template file can be requested from CapLink.support@capricorn.coop . While the column order does not need to match the template, the above fields is the minimum content required for batch to be viable.

c. CapLink Integrated (full integration)

CapLink has a webservice API that can be deployed locally on the machine where the main CapLink install resides. The Supplier's Point of Sale (POS) may leverage the API to interface directly with the CapLink software. The API is an addon to the main CapLink install and only deployed as required. This option is only viable if the POS system in use already offers the means to interface with CapLink through said API.

Please refer to the Appendix section for a list of popular POS that already provide some interfacing to CapLink by default.

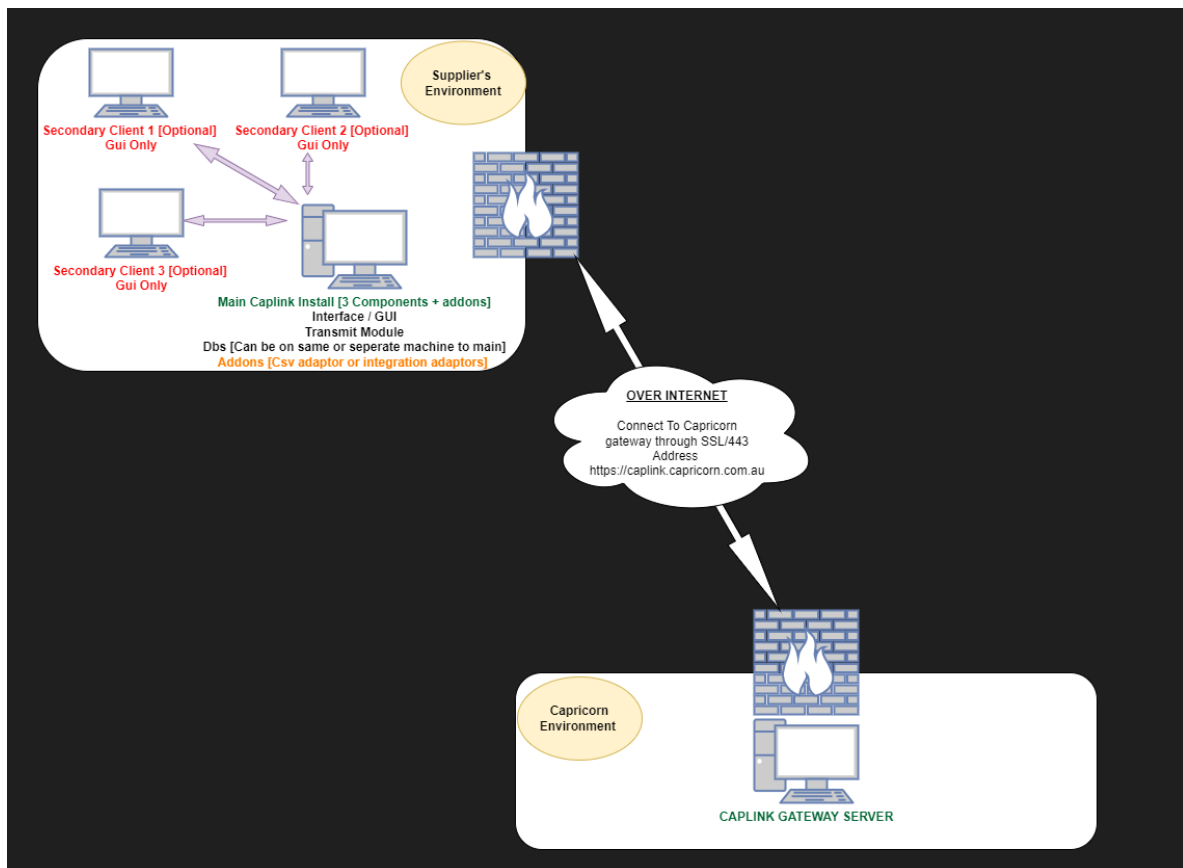
If integration is not available already but the POS developers or the Supplier is willing to develop/design required, additional information can be requested from CapLink.support@capricorn.coop in regards to the CapLink local API.

Any cost associated with development that may be required for integration will be beared by Supplier directly.

4. CapLink component diagram / flow

A CapLink install in a Supplier's environment would consist of two main areas:

1. The Main Install (GUI + TRANSMIT MODULE + DBs) + Addons / transmission adaptors [If using batch or Integrated]
2. Secondary client installs (GUI Only – optional)



5. CapLink minimum requirement

Below are the minimum recommended specs required for a CapLink installation to occur. Below applies to the main instance only.

- . Admin access for the installation
- . Remote Access through TeamViewer (Quick support version available for download – No Install required to run)
Minimum hardware configuration (*Operating system requirements may supersede CapLink requirements*)
 - 1 gigahertz (GHz) or faster
 - 4 GB RAM – **Recommended 8 GB RAM**
 - 20/30 GB free Space - (Minimum Recommended)
- . Software requirements – **Please note CapLink is Windows based only.**
 - Windows 10/11 (if installed on desktop)
 - Windows Server 2019 or higher (if installed on Server)
 - It is not recommended to have Caplink deployed to a Domain controller due to the SQL component.
 - A functional web browser with access to the Internet (Internet Explorer 9.0 onwards or Microsoft Edge. Alternatively, Google Chrome or Firefox).
 - .NET 3.5 SP1; → if not activated already, the Capricorn software team will try to activate where possible.
- . MS SQL – **The (free) express version will be installed as part of the default installation.**
The CapLink installer deploys SQL 2017 express by default. If using your own version MS SQL, Caplink dbs. can be deployed on older versions if required although not advised. Newer versions may also support Caplink however deployments to a newer version will be assessed on a case-by-case basis.

6. Contacts:

For all your CapLink related queries and issues, you can contact the CapLink Support team at Capricorn Society Limited.

Email: CapLink.support@capricorn.coop → Preferred & quickest contact option

Ph: 1800 327 437 (AU) or 0800 401 444 (NZ) → Ask for CapLink Support

Location: Western Australia Time: +08

For all transaction related queries, you can contact the Supplier Support team at Capricorn Society Limited.

Email: input@capricorn.coop

Ph: 1800 327 437 (AU) or 0800 401 444 (NZ) → Ask for Supplier Support

Location: Western Australia Time: +08

7. Appendix - List of POS and their known integration capabilities with CapLink

Listing was last updated on 08/08/2023 - caplink.support@capricorn.coop // POS systems that integrate with Caplink are welcome to engage Caplink Support to have this list updated				
POS Name	Batch	Integrated	Location / Coverage	Comments
AADS (MTS)		YES	AU	Supplier needs to discuss with AADS first (possible additional fee)
AM-WIN		YES	AU	Supplier needs to discuss with AM-WIN first (possible additional fee)
ARMS [Phased Out / Replaced by UIS]		YES	AU	ARMS has been PHASED OUT / Replaced by UIS
AUTO CARE		YES	AU	Supplier needs to discuss with AUTO CARE first (possible additional fee)
AUTOSOFT		YES	AU	Supplier needs to discuss with AUTOSOFT first (possible additional fee)
EASE		YES	AU	Supplier needs to discuss with EASE first (possible additional fee)
ECLIPSE		YES	AU	Supplier needs to discuss with ECLIPSE first (possible additional fee)
MARLIN / MEGABUS	YES		AU	Supplier needs to discuss with MEGABUS first (possible additional fee)
MERLIN POS	YES		AU	Supplier needs to discuss with MERLIN first (possible additional fee)
MICRONET or HARMONIQs		YES	AU	Supplier needs to discuss with MICRONET / HARMONIQs first (possible additional fee)
NOVA - DEALERPRO / PENTANA	YES		AU	Supplier needs to discuss with NOVA first (possible additional fee)
PEACH	YES	YES	AU	Supplier needs to discuss with PEACH first (possible additional fee)
UIS		YES	AU	Supplier needs to discuss with UIS first (possible additional fee)
VOYAGER	YES		AU	Supplier needs to discuss with VOYAGER first (possible additional fee)
WASP		YES	AU	Supplier needs to discuss with WASP first (possible additional fee)
ADEN		YES	AU & NZ	Supplier needs to discuss with ADEN first (possible additional fee)
AUTOLINE [SYSTIME]	YES	YES	AU & NZ	Supplier can contact SYSTIME at systimesupport@systime.co.nz for assistance with setup
EZI PARTS		YES	AU & NZ	Supplier needs to discuss with EZI PARTS first (possible additional fee)
ERA / PENTANA	YES (on older versions only)	YES	AU & NZ	Supplier needs to discuss with PENTANA first (possible additional fee) / If integrated Caplink is usually installed on an ERA managed server
MECHANIC DESK	YES		AU & NZ	Supplier needs to discuss with MECHANIC DESK first (possible additional fee)
Momentum Pro / MARKINSON	YES	YES / Partial	AU & NZ	Supplier needs to discuss with MARKINSON first (possible additional fee)
MYOB	YES		AU & NZ	Supplier will need to figure out how to generate a custom report with required data that can be exported
PINNACLE / HOLLANDER		YES	AU & NZ	Supplier needs to discuss with PINNACLE first (possible additional fee)
PMDs / AUTO-IT	YES		AU & NZ	Supplier needs to discuss with AUTO-IT first (possible additional fee)
PRONTO	YES	YES	AU & NZ	Supplier needs to discuss with PRONTO first to see which integration type they can be setup with
QUICKBOOKS	YES		AU & NZ	Supplier will need to figure out how to generate a custom report with required data that can be exported
QUICKEN	YES		AU & NZ	Supplier will need to figure out how to generate a custom report with required data that can be exported
TITAN	YES	YES	AU / NZ	If integrated – Caplink is hosted from TITAN's end and. Supplier will not have access to Caplink – All Member checks can be done from the Capricorn Supplier portal instead.
TUNE / REVOLUTION	YES	YES	AU & NZ	Supplier needs to discuss with Revolution Support first to see which integration type they can be setup with (possible additional fee) / For fully integrated, Supplier will not have access to Caplink – All Member checks can be done from the Capricorn Supplier portal instead.
UNITS / AUTO-IT	YES	YES	AU & NZ	Supplier needs to discuss with AUTO-IT first (possible additional fee)
WORKSHOP SOFTWARE	YES		AU & NZ	Supplier needs to discuss with Workshop Software first (possible additional fee)
XERO	YES		AU & NZ	Supplier will need to figure out how to generate a custom report with required data that can be exported If invoicing from Xero directly, Capricorn offers the Synk'd solution as the default option
APT	YES		NZ	Supplier needs to discuss with APT first (possible additional fee)
F2 COMSOL		YES	NZ	Supplier needs to discuss with COMSOL first (possible additional fee)
INFUSION	YES		NZ	Supplier needs to discuss with INFUSION first (possible additional fee)
MAGIX	YES		NZ	Supplier needs to discuss with MAGIX first (possible additional fee)
PARTSLINK	YES		NZ	Supplier needs to discuss with PARTSLINK first (possible additional fee)
SAM / ORION	YES		NZ	Supplier needs to discuss with ORION first (possible additional fee)
TPM	YES		NZ	Supplier needs to discuss with TPM first (possible additional fee)