FUEL-CENTRAL

Account Setup Guide

Version 2.0

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SETTING UP AN ACCOUNT FOR FUEL CENTRAL

Before you can start working with Fuel Central, you need to properly set up your account and configure basic Fuel Central settings. As part of this task, you need to perform the following activities:

1. Enable the Fuel Central module for the account
2. Switch to the Fuel Central module
3. Set up fuel distributors
4. Set up templates for Driver and Dispatcher roles
5. Set up employees
6. Configure distribution settings
7. Set up the distributor vendor (supplier)

> Before you start setting up the account for Fuel Central, make sure all required CStoreOffice® entities have been configured. For details, see Before You Begin.

Before You Begin

Before you set up the account for Fuel Central, make sure the following prerequisites are met:

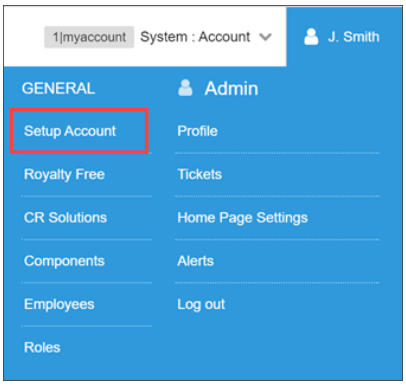
- CStoreOffice® account is created.
- Locations in CStoreOffice® are created.

Enabling the Fuel Central Module

As the first step of the account setup, you need to enable the Fuel Central module for the account.

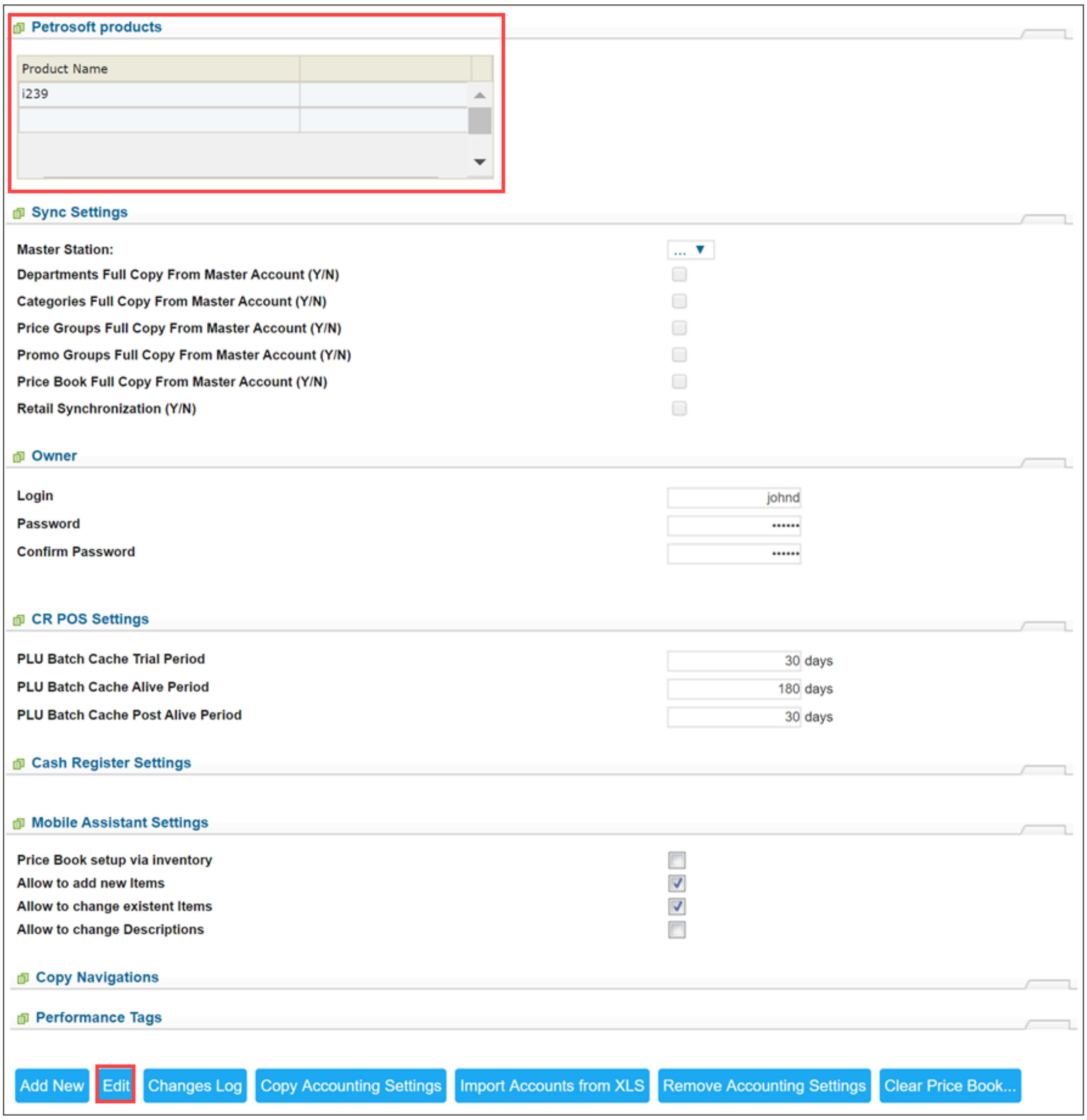
To enable the Fuel Central module:

1. Log in to CStoreOffice® as a system user.
2. Go to **Settings** > **Setup Account**.

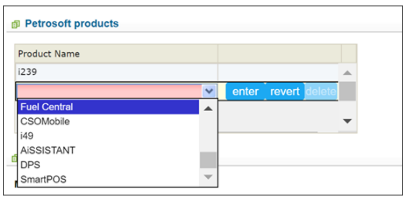


The **Setup Account** menu is available for the system accounts only.

3. At the bottom of the form, click **Edit** to make the Petrosoft products section available for editing.



4. In the **Petrosoft Products** section, select **Fuel Central** and click **enter**. Then select **i239** and click **enter**.



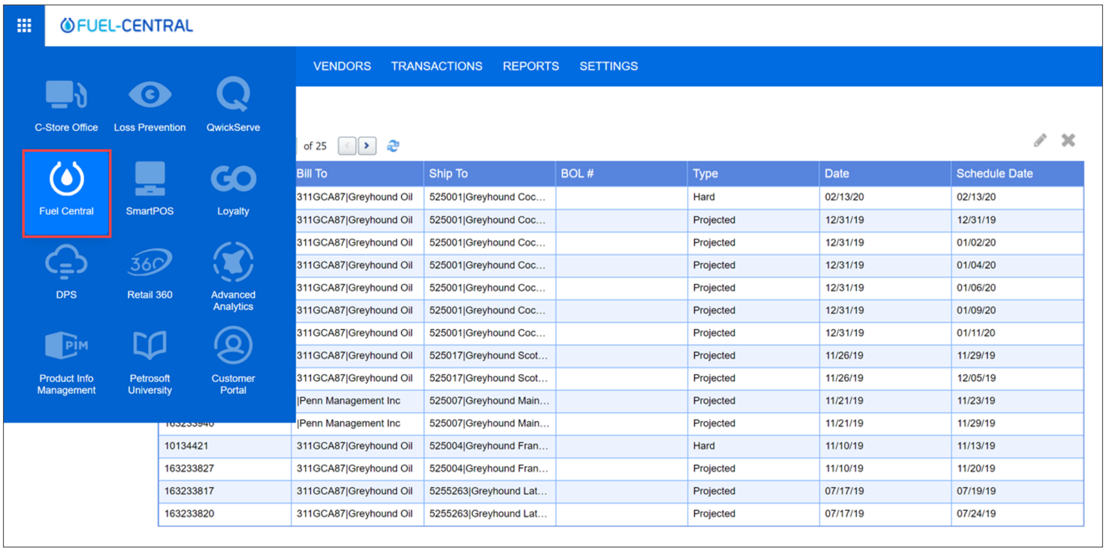
5. At the bottom of the form, click **Save**.

The Fuel Central module is now activated for this account.

Switching to the Fuel Central Module

To start working with the Fuel Central module:

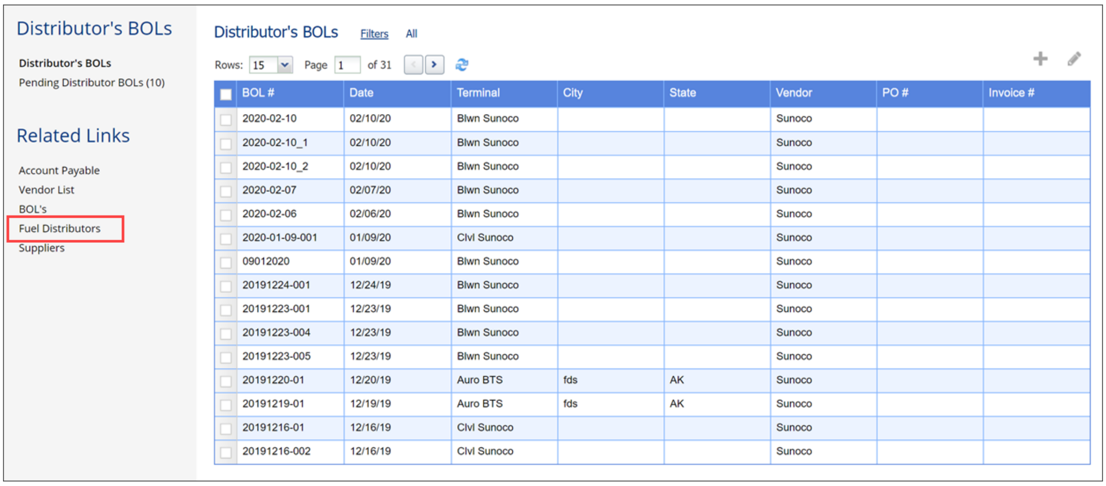
1. Log in to CStoreOffice® using your account.
2. In the Product Switcher, select **Fuel Central**.



Setting up Fuel Distributors

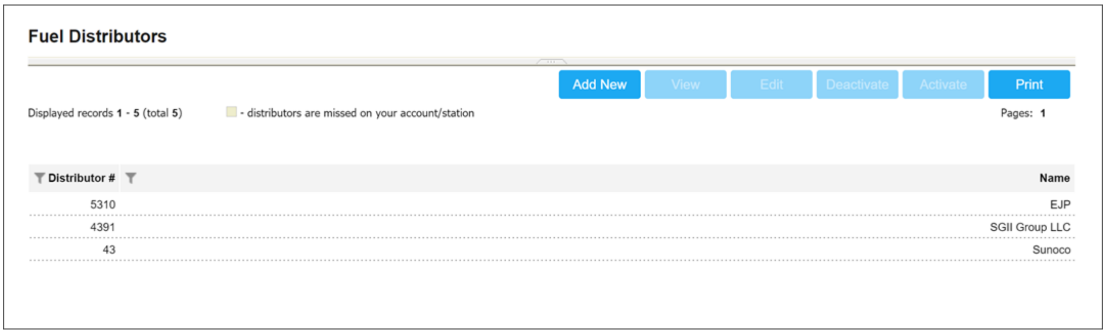
To set up a fuel distributor:

1. Go to **Vendors** > **BOLs**.

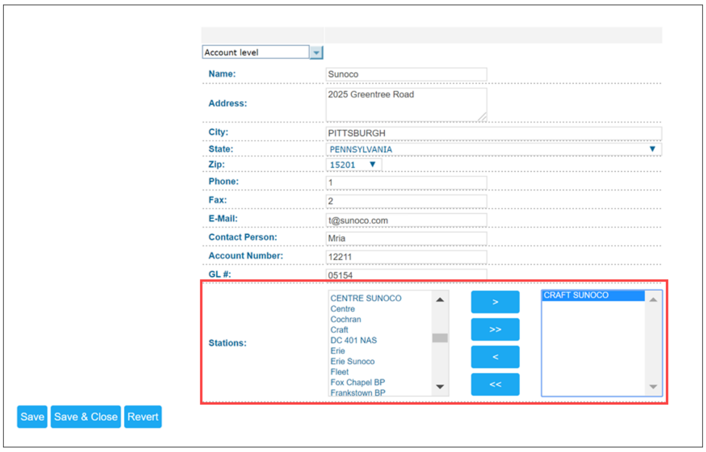


2. Under **Related Links**, select **Fuel Distributors**.

   The Fuel Distributors list displays by default the active distributors available for your account.



3. In the **Fuel Distributors** list, select the distributor and then click **Edit**.
4. Assign the stations of your account to the distributor and then click **Save** or **Save and Close**.

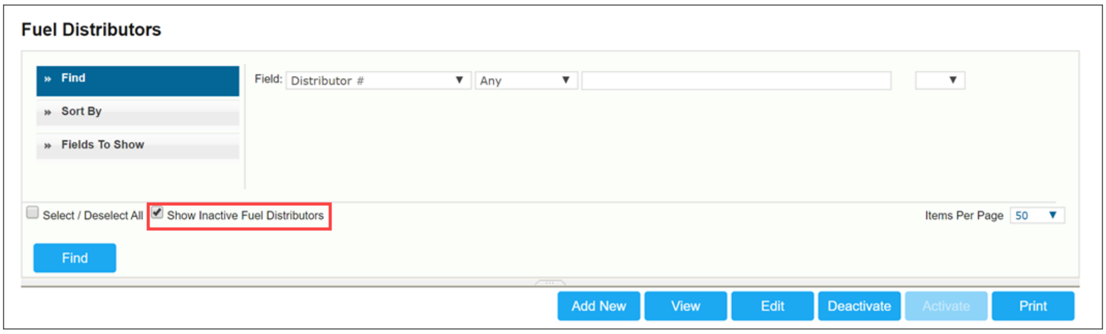


Each station appears in the **Pending Customers** list (**Customers** > **Pending Customers**) visible to the specific distributor.

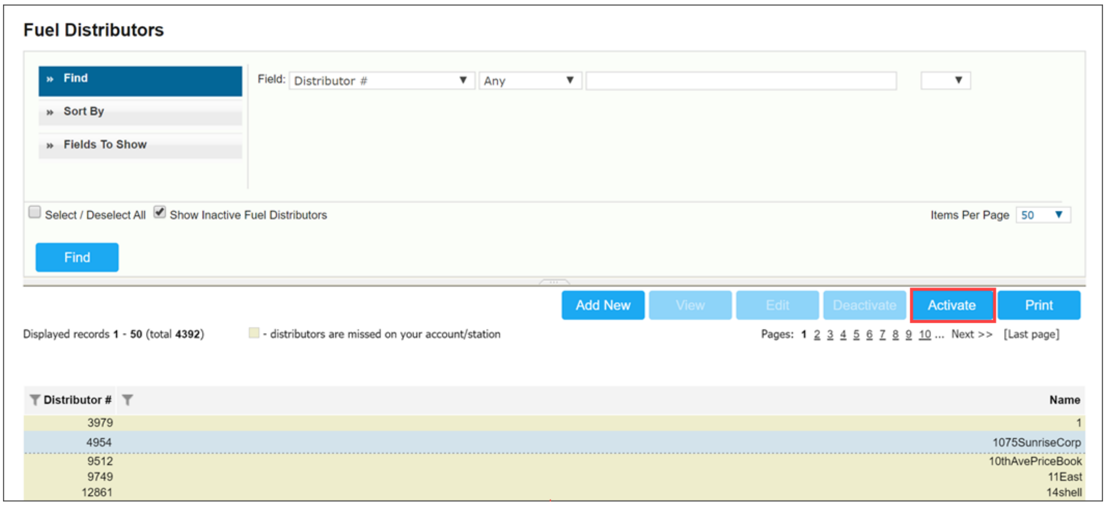
To find and activate inactive distributors:

1. Above the Fuel Distributors list, click the Operational Panel and select the **Show Inactive Fuel Distributors** check box.

   If necessary, find the distributor by its # or name. For that, enter the corresponding search criteria in the **Field** section and click **Find**.



2. In the **Fuel Distributors** list, select the distributor and click **Activate**.



Result: The distributor is activated.

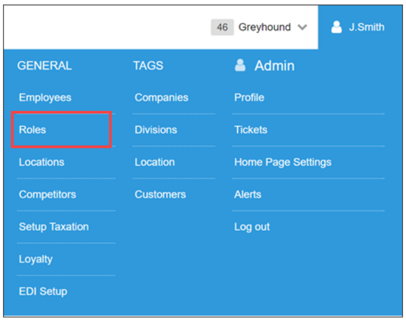
3. Clear the search criteria and the **Show Inactive Fuel Distributors** check box and close the Operational Panel.

Setting up Templates for the Driver and Dispatcher Roles

The Driver and Dispatcher role templates are common for all accounts.

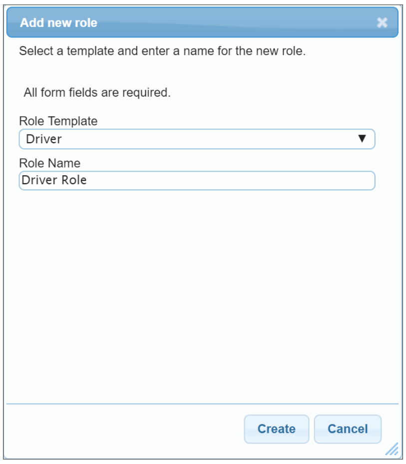
To set up templates for the Driver or Dispatcher role:

1. Go to **Settings** > **General** > **Roles**.



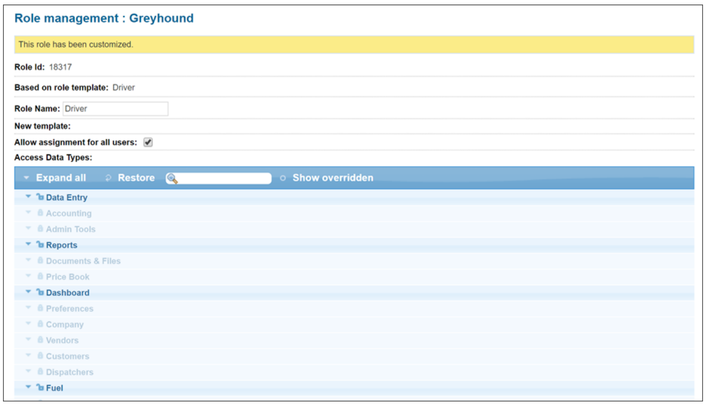
2. At the bottom of the Roles list, click **Add New**.
3. In the **Add new role** form, do the following:
   a. From the **Role Template** list, select **Driver** or **Dispatcher**.
   b. In the **Role Name** field, enter the role name.

c. Click **Create**.



4. From the Roles list, select newly added role template and then click **Edit**.

5. Specify the role permissions by allowing or denying the access to the corresponding data type.



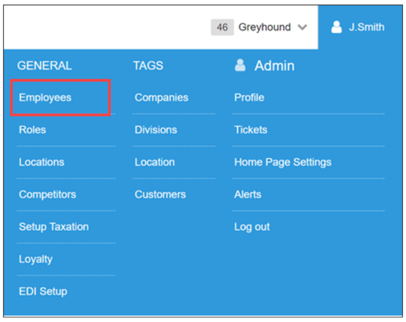
6. At the bottom of the form, click **Save** and then click **Close**.

Setting up Employees

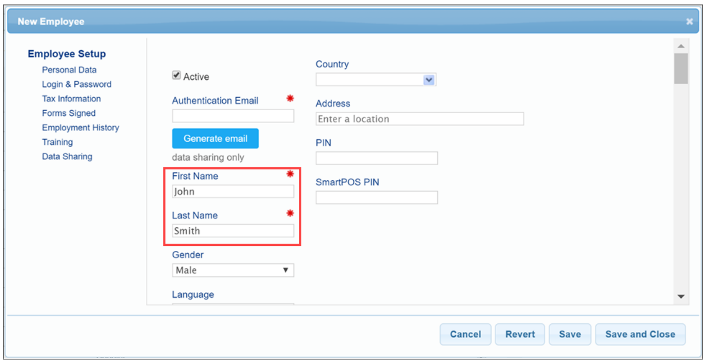
If you are using a third-party carrier only, skip this section.

To set up an employee:

1. Go to **Settings** > **General** > **Employees**.



2. At the top right of the Employees list, click **New**.
3. In the **First Name** and **Last Name** fields, specify the driver's or dispatcher's first name and last name.

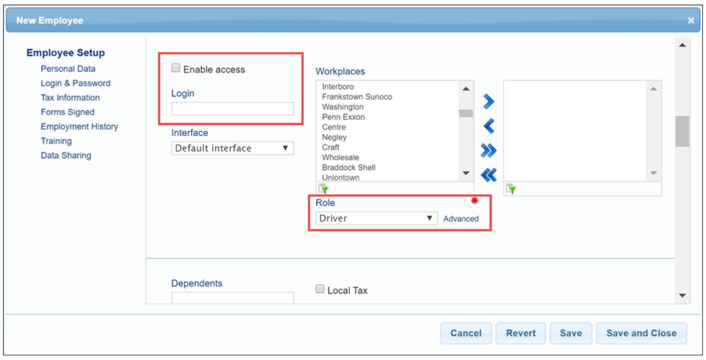


4. In the left menu, select **Login & Password**.
5. Depending on the employee (driver or dispatcher), do one of the following:
   - For the driver, clear the **Enable access** check box to restrict the access to CStoreOffice®.

     Currently, drivers do not have a CStoreOffice® login. The functionality is planned to be reworked.

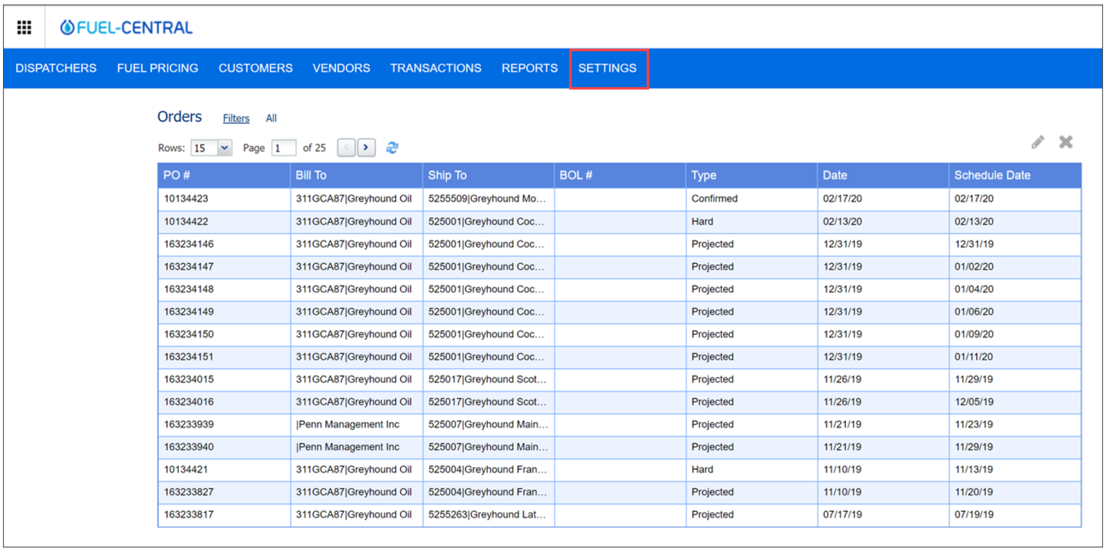
   - For the dispatcher, select the **Enable access** check box to provide the access to CStoreOffice®. In the **Login** field, specify the CStoreOffice® login.

6. From the **Role** list, select the **Driver** or **Dispatcher** role and then click **Save and Close**.



Configuring Distribution Settings

To configure settings for the distributor, go to **Settings**.



PO #	Bill To	Ship To	BOL #	Type	Date	Schedule Date
10134423	311GCA87|Greyhound Oil	5255509|Greyhound Mo...		Confirmed	02/17/20	02/17/20
10134422	311GCA87|Greyhound Oil	525001|Greyhound Coc...		Hard	02/13/20	02/13/20
163234146	311GCA87|Greyhound Oil	525001|Greyhound Coc...		Projected	12/31/19	12/31/19
163234147	311GCA87|Greyhound Oil	525001|Greyhound Coc...		Projected	12/31/19	01/02/20
163234148	311GCA87|Greyhound Oil	525001|Greyhound Coc...		Projected	12/31/19	01/04/20
163234149	311GCA87|Greyhound Oil	525001|Greyhound Coc...		Projected	12/31/19	01/06/20
163234150	311GCA87|Greyhound Oil	525001|Greyhound Coc...		Projected	12/31/19	01/09/20
163234151	311GCA87|Greyhound Oil	525001|Greyhound Coc...		Projected	12/31/19	01/11/20
163234015	311GCA87|Greyhound Oil	525017|Greyhound Scot...		Projected	11/26/19	11/29/19
163234016	311GCA87|Greyhound Oil	525017|Greyhound Scot...		Projected	11/26/19	12/05/19
163233939	|Penn Management Inc	525007|Greyhound Main...		Projected	11/21/19	11/23/19
163233940	|Penn Management Inc	525007|Greyhound Main...		Projected	11/21/19	11/29/19
10134421	311GCA87|Greyhound Oil	525004|Greyhound Fran...		Hard	11/10/19	11/13/19
163233827	311GCA87|Greyhound Oil	525004|Greyhound Fran...		Projected	11/10/19	11/20/19
163233817	311GCA87|Greyhound Oil	5255263|Greyhound Lat...		Projected	07/17/19	07/19/19

You can set up the distribution settings in any order.

Configuring Distribution Company Settings

To start setting up the distribution company settings, go to **Settings** > **Company Preferences**.

The Company Preferences form includes the following sections:

- Contacts: Contact information of the distribution company.
- Misc: Miscellaneous distribution company settings.
- Shifts: The instrument for setting up the distribution company working shifts.
- Terms: Payment settings for issuing Fuel invoices to customers.

To open one of the menus, in the left menu of the form, select the necessary option or scroll through the form.

The following settings for the company are required:

- The distribution company name in the **Contacts** section.
- The shift settings in the **Shifts** section.

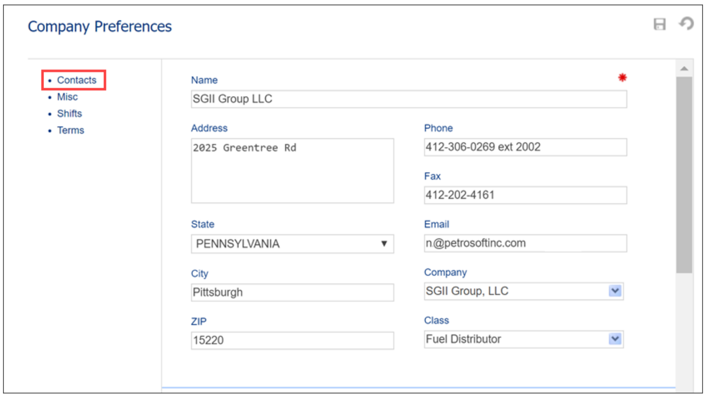
Other company settings are optional.

To save the company settings, at the top right of the form, click **Save**.

To discard changes in the company settings, at the top right of the form, click **Revert**.

Contacts

In the **Contacts** section, you can configure the following company settings:



- (Required) **Name**: Enter the distribution company name.
- **Address**: Enter the distribution company address.
- **State**: From the list, select the distribution company state.
- **City**: Enter the distribution company city.
- **ZIP**: Enter the distribution company ZIP code.
- **Phone**: Enter the distribution company phone number.
- **Fax**: Enter the distribution company fax.
- **Email**: Enter the distribution company email.
- **Company**: From the list, select the parent company of the distribution company. For example, QwickFuel is a parent company, and QF, Inc. is a distribution branch's name.
- **Class**: From the list, select the distribution company class. A special "Fuel Distribution" class is supposed to be created for the FC transactions to be introduced properly in the CStoreOffice®

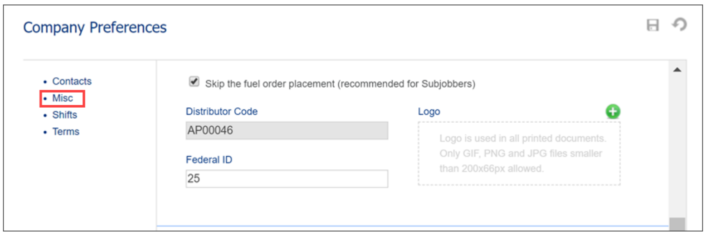
accounting system.

To create a new class, in CStoreOffice®, go to **Settings** > **Company** > **Classes**. In the Classes Setup list, scroll down to the bottom of the form, create a new class and then click **Save and Close**.

To select the newly added class from the Class list, you need to log out and log in to CStoreOffice® again.

Misc

In the **Misc** section, you can configure the following settings:



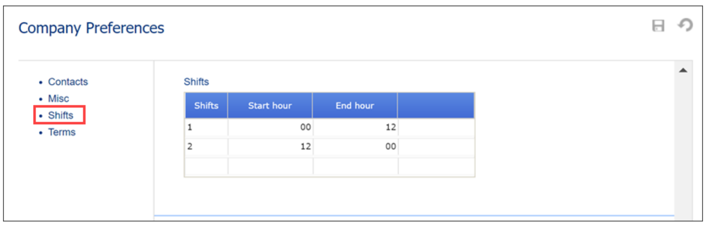
- **Skip the fuel order placement** (recommended for Subjobbers): This option is supposed to be used by subjobbers. It allows reducing the regular fuel ordering flow by creating bills, invoices and BOLs without connecting them to a specific order.

  The term "subjobber" means any person, partnership, firm, corporation or association other than a wholesaler or retailer, who or which buys any commodity, article, goods, wares, or merchandise from a wholesaler and sells such merchandise directly to retailers, thereby performing the selling and delivering functions of a wholesaler.

- **Distributor Code**: A code assigned to the fuel distributor by our system.
- **Federal ID**: An identifier assigned to the fuel distributor by the corresponding institution.
- **Logo**: To upload your fuel distribution company logo, drag and drop the logo onto the log box or click the add icon and upload the file from the computer. The logo appears on all printed documents.

Shifts

In the **Shifts** section, you can configure the settings for shifts:



The **Start hour** and **End hour** fields are used for creating the driver's schedule. Currently, the 24 format is used. That is, 00 till 12, 12 till 00.

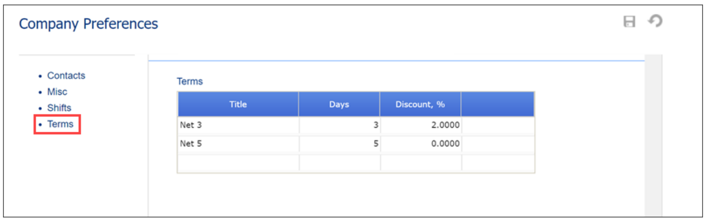
To create a new shift in the Shifts list:

1. Click the last empty row.
2. In the **Shifts** field, enter the shift number.
3. In the **Start hour** field, enter the shift starting time.
4. In the **End hour** field, enter the shift ending time.
5. To the right of the row, click **enter**.

To delete a shift, in the Shifts list, click the shift row and then click **delete**.

Terms

In the **Terms** section, you can configure the terms settings:



- **Title**: The name of the term configuration.
- **Days**: The number of days to complete the invoice payment.

To create new term, in the **Terms** list, click the last empty row. In the **Title** field, enter the term title, in the **Days** field, enter the number of days and then click **enter**.

To delete the term, in the **Terms** list, select the term and then click **delete**.

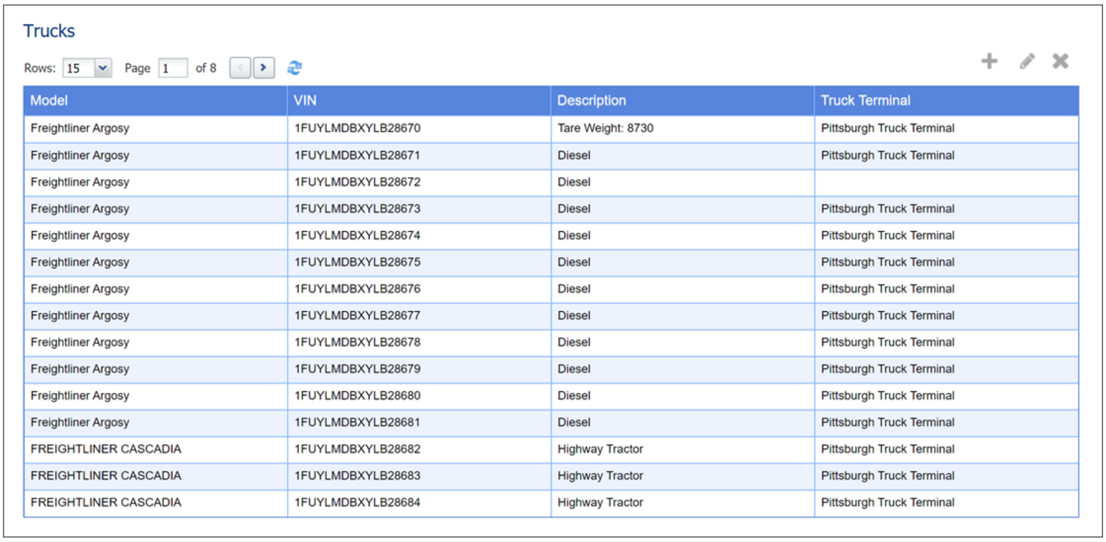
You can use the company terms for each specific client in the following cases:

- When invoicing the customer by editing the **Edit Shipping Address** form. Go to **Customers** > **Ship to**.
- When editing the invoice by editing the **Invoice** form. Go to **Customers** > **Invoices**.

Setting up Trucks

Each truck is supposed to be assigned to a truck terminal, trailer, and have a list of drivers authorized to work on it.

To open the list of the fuel distribution company trucks, go to **Settings** > **Trucks**.



Trucks

Rows: 15 Page 1 of 8

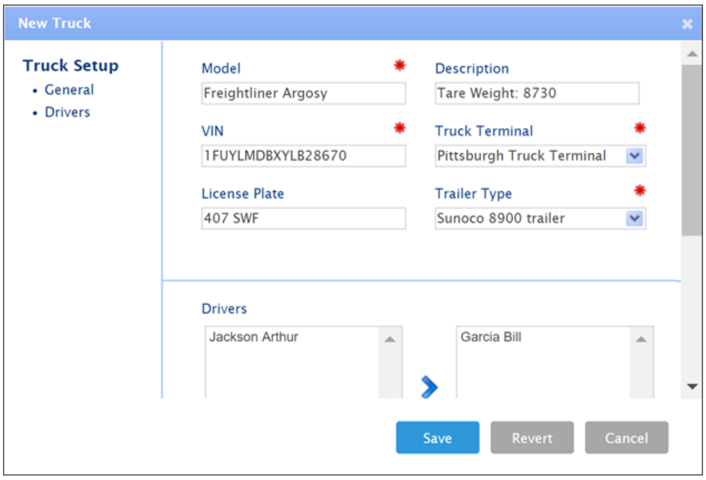
Model	VIN	Description	Truck Terminal
Freightliner Argosy	1FUYLMDBXYLB28670	Tare Weight: 8730	Pittsburgh Truck Terminal
Freightliner Argosy	1FUYLMDBXYLB28671	Diesel	Pittsburgh Truck Terminal
Freightliner Argosy	1FUYLMDBXYLB28672	Diesel	
Freightliner Argosy	1FUYLMDBXYLB28673	Diesel	Pittsburgh Truck Terminal
Freightliner Argosy	1FUYLMDBXYLB28674	Diesel	Pittsburgh Truck Terminal
Freightliner Argosy	1FUYLMDBXYLB28675	Diesel	Pittsburgh Truck Terminal
Freightliner Argosy	1FUYLMDBXYLB28676	Diesel	Pittsburgh Truck Terminal
Freightliner Argosy	1FUYLMDBXYLB28677	Diesel	Pittsburgh Truck Terminal
Freightliner Argosy	1FUYLMDBXYLB28678	Diesel	Pittsburgh Truck Terminal
Freightliner Argosy	1FUYLMDBXYLB28679	Diesel	Pittsburgh Truck Terminal
Freightliner Argosy	1FUYLMDBXYLB28680	Diesel	Pittsburgh Truck Terminal
Freightliner Argosy	1FUYLMDBXYLB28681	Diesel	Pittsburgh Truck Terminal
FREIGHTLINER CASCADIA	1FUYLMDBXYLB28682	Highway Tractor	Pittsburgh Truck Terminal
FREIGHTLINER CASCADIA	1FUYLMDBXYLB28683	Highway Tractor	Pittsburgh Truck Terminal
FREIGHTLINER CASCADIA	1FUYLMDBXYLB28684	Highway Tractor	Pittsburgh Truck Terminal

To set up a track:

1. At the top right of the **Trucks** list, click the **add** icon.
2. In the **New Truck** form, specify the following data:
   - **Model**: Enter the truck manufacturer model.
   - **VIN**: Enter the truck's Vehicle Identification Number.
   - **License Plate**: Enter the vehicle registration plate/license plate number.
   - **Description**: Enter the truck description. The description can contain any additional information.
   - **Truck Terminal**: Each truck is supposed to be assigned to a truck terminal. From the list, select the truck terminal.

     You can add a new truck terminal from here: from the list, select **Add New**.
   - **Trailer Type**: From the list, select the type of the fuel trailer compatible with this truck type.
   - **Drivers**: Set up a list of drivers assigned for the truck. Drivers can be selected from users with the driver's role created previously.

3. At the bottom of the form, click **Save**.



To edit or delete a track, in the **Trucks** list, select it and at the top right of the list, click the **edit** or **delete** icon.

Setting up Trailer Types

A trailer is a kind of cistern attached to the truck and filled with fuel. It can have several compartments to carry several types of fuel at a time.

To open the list of the trailer types available for the fuel distribution company, go to **Settings** > **Trailer Types**.

To set up a trailer type:

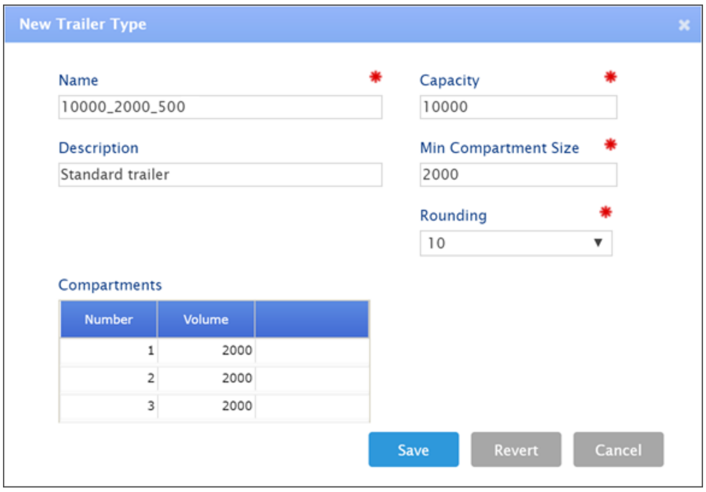
1. At the top right of the **Trailer Types** list, click the **add** icon.
2. In the **New Trailer Type** form, specify the following data:
   - **Name**: Enter the trailer type name.
   - **Description**: Enter the trailer type description. The description can contain any additional information.
   - **Capacity**: Enter the total capacity of the trailer. The capacity is calculated as a sum of compartments volume.
   - **Min Compartment Size**: Enter the smallest compartment size. It is not possible to order less fuel than this amount.
   - **Rounding**: This parameter is used for fuel volume calculation for the projected order for the specific trailer.
   - **Compartments**: Set up the trailer compartments and their capacity. The sum of compartment size must be equal or smaller than the total trailer capacity.

To add a compartment, click the last empty row of the list, enter the compartment number, the compartment volume (how many gallons the compartment can hold maximum) and then click **enter**.

Each compartment should be entered in the **Compartments** table. For example, if a truck has 3 compartments there should be 3 entries even if it is the same: 1-3000, 2-3000, 3-3000.

> We don't know how many trailers of a specific type the customer has. So, the dispatcher is supposed to make sure that there are no situations when a customer has only one trailer of this type, and system included it into more than one order.

3. At the bottom of the form, click **Save**.

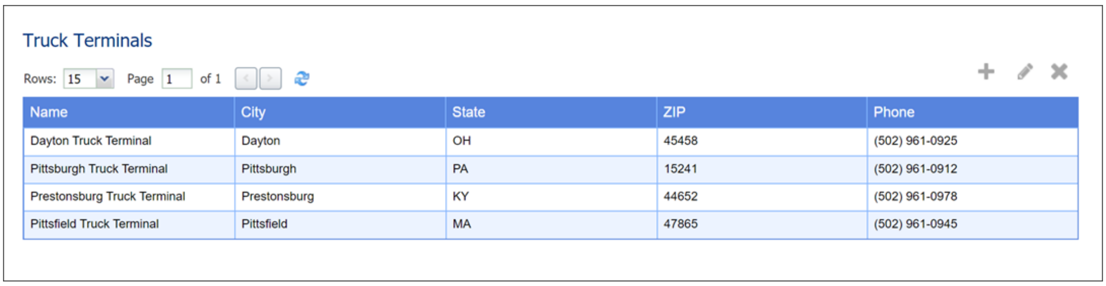


To edit or delete a trailer type, in the **Trailer Types** list, select the trailer type and at the top right of the list, click the **edit** or **delete** icon.

Setting up Truck Terminals

Each truck terminal has a list of trucks and bulk terminals assigned to it.

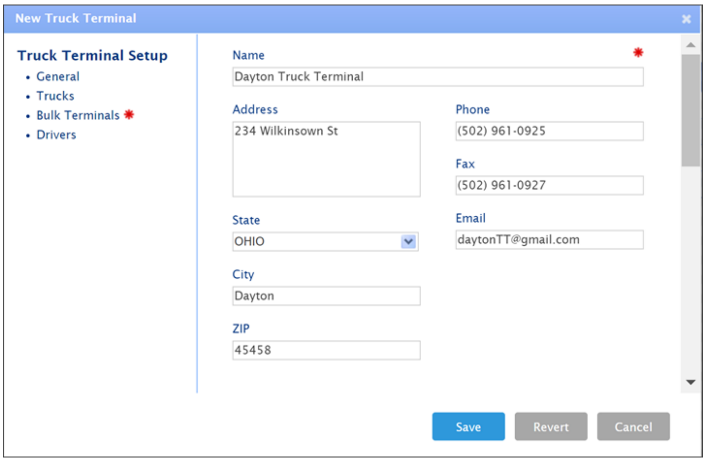
To open the list of the fuel distribution company truck terminals, go to **Settings** > **Truck Terminals**.



Name	City	State	ZIP	Phone
Dayton Truck Terminal	Dayton	OH	45458	(502) 961-0925
Pittsburgh Truck Terminal	Pittsburgh	PA	15241	(502) 961-0912
Prestonsburg Truck Terminal	Prestonsburg	KY	44652	(502) 961-0978
Pittsfield Truck Terminal	Pittsfield	MA	47865	(502) 961-0945

To set up a truck terminal:

1. At the top right of the **Truck Terminals** list, click the **add** icon.
2. In the **New Truck Terminal** form, specify the following data:
   - **General**: Specify the following general information for the truck terminal:
     - (Required) **Name**: Enter the truck terminal name.
     - **Address**: Enter the truck terminal location address.
     - **State**: Enter the truck terminal location state.
     - **City**: Enter the truck terminal location city.
     - **ZIP**: Enter the truck terminal location ZIP code.
     - **Phone**: Enter the truck terminal location phone.
     - **Fax**: Enter the truck terminal location fax.
     - **Email**: Enter the truck terminal location email.
   - **Trucks**: Select the distribution company trucks to work at this truck terminal.
   - **Bulk Terminals**: Select the bulk terminal from which you are going to purchase the fuel and set the trip time from the bulk terminal to the current truck terminal.
   - **Drivers**: Set up a list of drivers assigned to the terminal.
3. At the bottom of the form, click **Save**.



To edit or delete the truck terminal, in the Truck Terminals list, select the truck terminal and at the top right of the list, click the **edit** or **delete** icon.

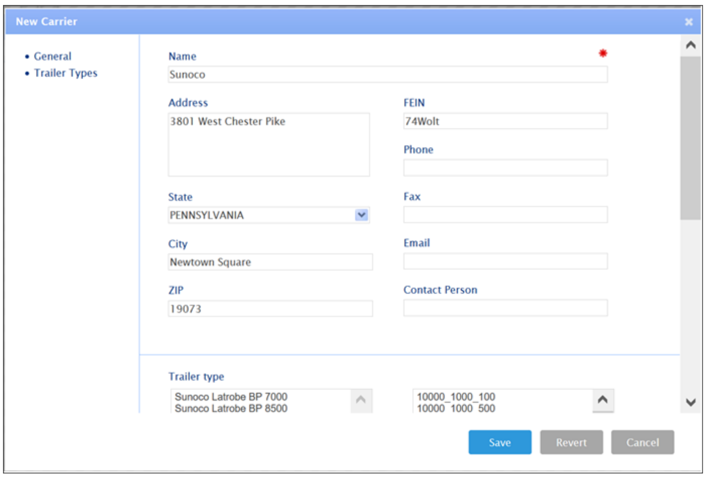
Setting up Carriers

A company uses the services of the third-party carriers when its own resources are not enough. Each carrier has a list of trailers assigned to it.

To open the list of the fuel distribution company third party carriers, go to **Settings** > **Carriers**.

To set up the carrier:

1. At the top right of the **Carriers** list, click the **add** icon.
2. In the **New Carrier** form, specify the following data:
    - **General**: Specify the following general information for the carrier:
        - (Required) **Name**: Enter the carrier name.
        - **Address**: Enter the carrier location address.
        - **State**: Enter the carrier location state.
        - **City**: Enter the carrier location city.
        - **ZIP**: Enter the carrier location ZIP code.
        - **FEIN**: Enter the carrier FEIN (Federal Employer Identification Number).
        - **Phone**: Enter the carrier phone number.
        - **Fax**: Enter the carrier fax number.
        - **Email**: Enter the carrier email.
        - **Contact Person**: Enter the name of the carrier representative for contacts.
    - **Trailer type**: From the list, select one or more trailer types.
3. At the bottom of the form, click **Save**.



To edit or delete the carrier, in the **Carriers** list, select the carrier and at the top right of the list, click the **edit** or **delete** icon.

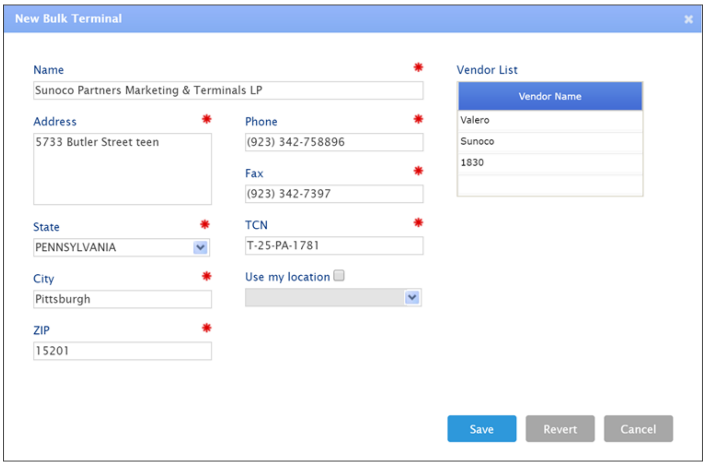
Setting up Bulk Terminals

To open the list of the bulk terminals the fuel distribution company cooperates with, go to **Settings** > **Bulk Terminals**.

To set up a bulk terminal:

1. At the top right of the **Bulk Terminals** list, click the **add** icon.
2. In the **New Bulk Terminal** form, specify the following data:
   - **Name**: Enter the name of the bulk terminal.
   - **Address**: Enter the address of the bulk terminal location.
   - **State**: From the list, select the state of the bulk terminal location.
   - **City**: Enter the city of the bulk terminal location.
   - **ZIP**: Enter the ZIP code of the bulk terminal location.
   - **Phone**: Enter the phone of the bulk terminal location.
   - **Fax**: Enter the fax of the bulk terminal location.
   - **TCN**: Enter the terminal control number for the bulk terminal.
   - **Use my location**: Select this check box if necessary.
   - **Vendors List**: After you set up distributor vendors, come back to this bulk terminal and set up the list of vendors. For details on how to set up distributor vendors, see Setting up Distributor Vendors (Suppliers).

4. At the bottom of the form, click **Save**.



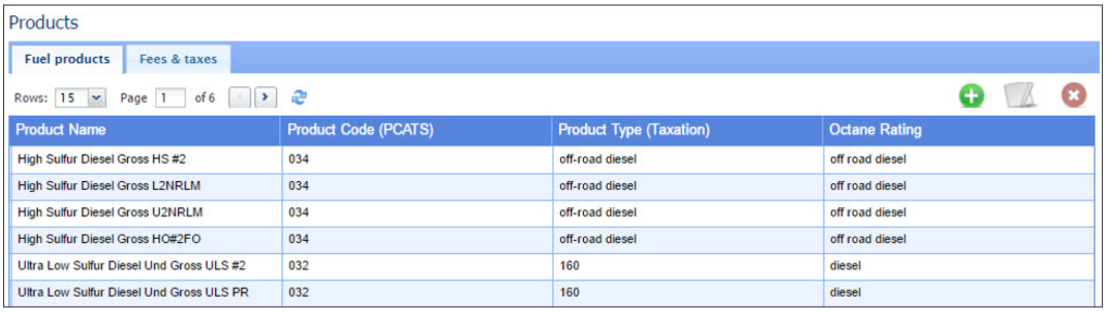
To edit or delete a bulk terminal, select it in the list and at the top right of the **Bulk Terminals** list, click the **edit** or **delete** icon.

Setting up Products

To open the **Products** form, go to **Settings** > **Products**.

In the **Products** form, product data is presented on the following tabs:

- Fuel products: The list of the fuel products available for the fuel distribution company for selling to its customers.
- Fees & taxes: The list of taxes of the fuel products.



Product Name	Product Code (PCATS)	Product Type (Taxation)	Octane Rating
High Sulfur Diesel Gross HS #2	034	off-road diesel	off road diesel
High Sulfur Diesel Gross L2NRLM	034	off-road diesel	off road diesel
High Sulfur Diesel Gross U2NRLM	034	off-road diesel	off road diesel
High Sulfur Diesel Gross HO#2FO	034	off-road diesel	off road diesel
Ultra Low Sulfur Diesel Und Gross ULS #2	032	160	diesel
Ultra Low Sulfur Diesel Und Gross ULS PR	032	160	diesel

Fuel Products

To set up the fuel product:

1. At the top right of the products list, click the **add** icon.
2. In the **New Fuel Product** form, specify the following data:
   - **Product name**: Enter the fuel product name. You can select an existing product name or select the **Add New** option and enter your product name.

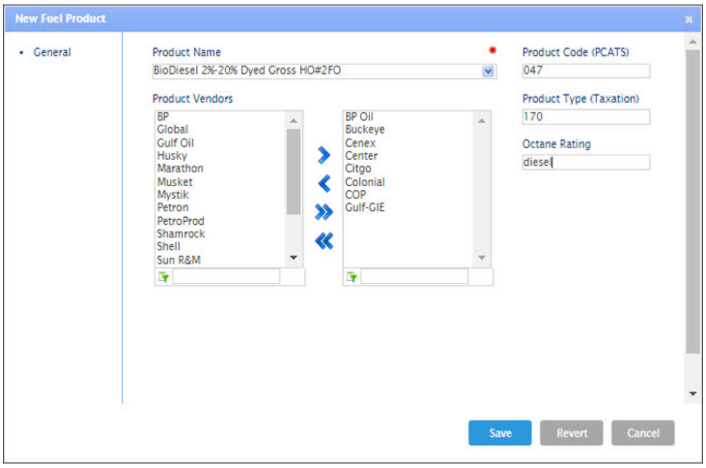
     > For a DTN customer account, the fuel product name is available in the list of suggested fuel names. In other cases, it is supposed to be entered manually.

   - **Product vendors**: Set up a list of vendors from whom you are purchasing these products.

     If the **Product Vendors** list is empty, you can create them first at **Vendors** > **BOLs** > **Vendors List** and then come back to the **Fuel products** tab, select this fuel product and add vendors.

   - **Product code (PCATS)**: Enter the unified product code according to Petroleum Convenience Alliance for Technology Standards.
   - **Product type (Taxation)**: Enter the product type used for the taxation purposes when charging your customers. The product type is used for grouping fuel products by taxes.
   - **Octane rating**: Enter the octane rating of the fuel product. It cannot be edited after the product is created, otherwise it might case accounting discrepancies.

3. At the bottom of the form, click **Save**.



To edit or delete a fuel product, in the products list, select the trailer type and at the top right of the list, click the **edit** or **delete** icon.

Fees & Taxes

To set up the fees and taxes:

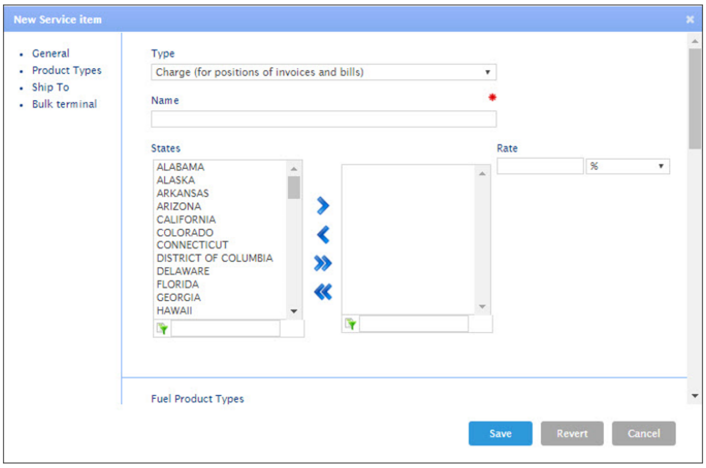
1. At the top left of the Products form, click the **Fees and taxes** tab.
2. At the top right of the products list, click the **add** icon.
3. In the **New Service item** form, specify the following data:
   - **General**: Specify the following general information for the tax:
     - **Type**: From the list, select the type of the tax distributor is going to charge the customer with – charge, fee, product, service, tax.
     - **Name**: Enter the tax name.
     - **States**: Set up a list of state tax added to each fuel delivery.
     - **Rate**: Enter the tax rate – in dollars or in percentage.
   - **Product Types**: Select the fuel product types for the taxation purposes.

     The fuel product types are specified when setting up the fuel product at the **Menu** > **Fuel Central** > **Products** > **Fuel products**.
   - **Ship To**: Set a list of stations for shipping. The left column displays the stations that were properly assigned to the company from the **Pending Customers** list.

> Taxes, Fees and Surcharges that have correct settings (the **Fuel Product** type, **Ship to** and **Bulk Terminal** settings are configured properly) are automatically added to the invoice. Other products with the Charge type *Charge* can be added manually for positions of invoices and bills.

- **Bulk terminal**: Select the bulk terminals from the list.

3. At the bottom of the form, click **Save**.

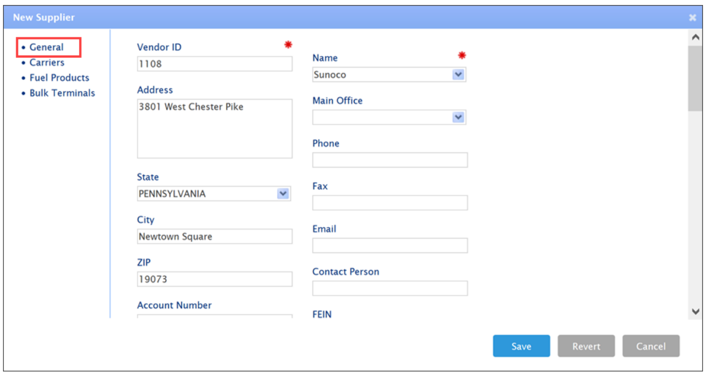


To edit or delete a tax, in the **Taxes** list, select the tax and at the top right of the list, click the **edit** or **delete** icon.

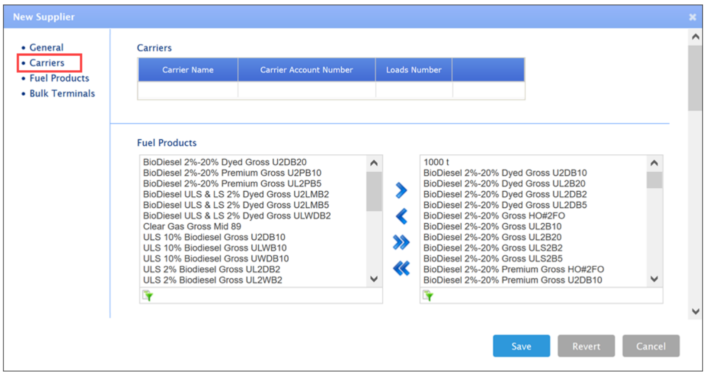
Setting up Distributor Vendors (Suppliers)

To set up a distributor vendor or supplier:

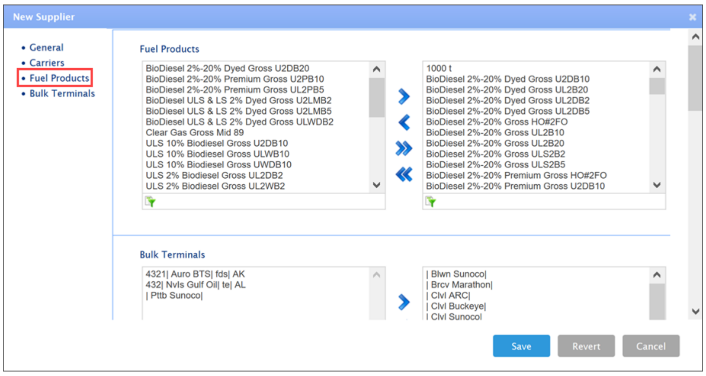
1. Go to **Vendors** > **Suppliers**.
2. At the top right of the **Suppliers** list, click the **add** icon.
3. In the **New Supplier** form, specify the following data:
   - In the **General** section, specify the vendor contact information.



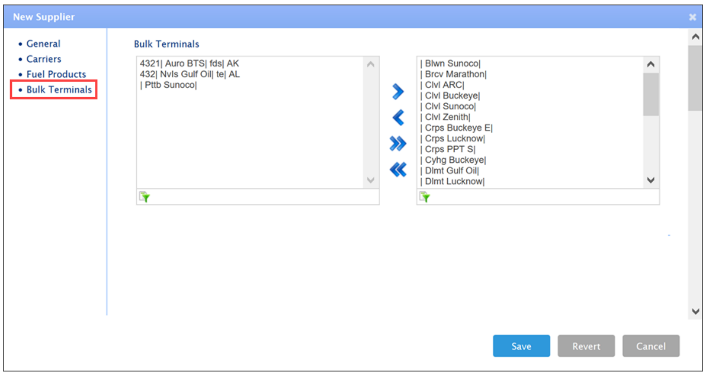
- In the **Carriers** section, select the carriers you are planning to hire for working with this vendor when needed and specify the account and loads numbers for the selected carrier.



- In the **Fuel Products** section, select the fuel products that you are going to purchase from this supplier.



- In the **Bulk Terminals** section, select the bulk terminals where you are going to purchase the selected fuel products.



4. At the bottom of the form, click **Save**.