

## Account Setup Guide

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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 <sup>®</sup> as a system user.
- 2. Go to Settings > Setup Account.

1 myaccount	System : Account 🗸 🤮 J. Smith
GENERAL	👗 Admin
Setup Account	Profile
Royalty Free	Tickets
CR Solutions	Home Page Settings
Components	Alerts
Employees	Log out
Roles	

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

### **I FUEL-CENTRAL**

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

@ Petrosoft products		
Product Name		
1239		
-		
Sync Settings		
Master Station:	🔻	
Departments Full Copy From Master Account (Y/N)		
Categories Full Copy From Master Account (Y/N)		
Price Groups Full Copy From Master Account (Y/N)		
Promo Groups Full Copy From Master Account (Y/N)		
Price Book Full Copy From Master Account (Y/N)		
Retail Synchronization (Y/N)		
D Owner	ſ	
Login	johnd	
Password		
Confirm Password		
f CR POS Settings		
	/	
PLU Batch Cache Trial Period	30 days	
PLU Batch Cache Alive Period	180 days	
PLU Batch Cache Post Alive Period	30 days	
f Cash Register Settings		
	/	
m Mobile Assistant Settings		
P nesite resolution countys	7	
Price Book setup via inventory		
Allow to change existent items		
Allow to change Descriptions		
Copy Navigations		
Performance Tags		

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

Petrosoft products			
Product Name			
i239			
	~	enter revert	delete
Fuel Central	<b></b>		
CSOMobile			-
i49			
AISSISTANT	_		
DPS			
SmartPOS	~		

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 <sup>®</sup> using your account.
- 2. In the Product Switcher, select Fuel Central.

 <b>Ø</b> FUE	L-CENT	RAL						
			VENDORS TRAN	SACTIONS REPORTS	S SETTINGS			
<b>_</b> }	C	Q						
-Store Office	Loss Preve	ntion QwickServe						
	1		of 25 💽 🔪 🥭					
		GO	Bill To	Ship To	BOL #	Туре	Date	Schedule Date
	0		311GCA87 Greyhound Oil	525001 Greyhound Coc		Hard	02/13/20	02/13/20
Fuel Central	SmartPC	DS Edyalty	311GCA87 Greyhound Oil	525001 Greyhound Coc		Projected	12/31/19	12/31/19
$\sim$			311GCA87 Greyhound Oil	525001 Greyhound Coc		Projected	12/31/19	01/02/20
( <u></u> )	360		311GCA87 Greyhound Oil	525001 Greyhound Coc		Projected	12/31/19	01/04/20
DPS	Retail 3	60 Advanced	311GCA87 Greyhound Oil	525001 Greyhound Coc		Projected	12/31/19	01/06/20
		Analytics	311GCA87 Greyhound Oil	525001 Greyhound Coc		Projected	12/31/19	01/09/20
			311GCA87 Greyhound Oil	525001 Greyhound Coc		Projected	12/31/19	01/11/20
	· •	' 'S	311GCA87 Greyhound Oil	525017 Greyhound Scot		Projected	11/26/19	11/29/19
Product Info	Petroso	ift Customer	311GCA87[Greyhound Oil	525017 Greyhound Scot		Projected	11/26/19	12/05/19
vianagement	Oniversi	iy Ponai	Penn Management Inc	525007 Greyhound Main		Projected	11/21/19	11/23/19
		103233940	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
		163233820	311GCA87 Greyhound Oil	5255263 Greyhound Lat		Projected	07/17/19	07/24/19

### **Setting up Fuel Distributors**

To set up a fuel distributor:

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

Distributor's BOLs	Dis	tributor's BOLs	<u>Filters</u> All						
Distributor's BOLs	Rows: 15 💌 Page 1 of 31 🤇 🕨 🥭							+ /	
Pending Distributor BOLs (10)		BOL #	Date	Terminal	City	State	Vendor	PO#	Invoice #
		2020-02-10	02/10/20	Blwn Sunoco			Sunoco		
Related Links		2020-02-10_1	02/10/20	Blwn Sunoco			Sunoco		
Account Payable		2020-02-10_2	02/10/20	Blwn Sunoco			Sunoco		
Vendor List		2020-02-07	02/07/20	Blwn Sunoco			Sunoco		
BOL's		2020-02-06	02/06/20	Blwn Sunoco			Sunoco		
Fuel Distributors Suppliers		2020-01-09-001	01/09/20	Clvl Sunoco			Sunoco		
Suppliers		09012020	01/09/20	Blwn Sunoco			Sunoco		
		20191224-001	12/24/19	Blwn Sunoco			Sunoco		
		20191223-001	12/23/19	Blwn Sunoco			Sunoco		
		20191223-004	12/23/19	Blwn Sunoco			Sunoco		
		20191223-005	12/23/19	Blwn Sunoco			Sunoco		
		20191220-01	12/20/19	Auro BTS	fds	AK	Sunoco		
		20191219-01	12/19/19	Auro BTS	fds	AK	Sunoco		
		20191216-01	12/16/19	Clvl Sunoco			Sunoco		
		20191216-002	12/16/19	Clvl Sunoco			Sunoco		

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

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

			Add New		Deactivate	Print
splayed records 1 - 5 (total 5)	- distributors are missed on	your account/station				Pages: 1
Dietributer #						Mar
T Distributor # T						Nan
5310						E
4391						SGII Group L
42						Sunc

- 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:

 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**.

Fuel Distributors								
» Find	Field: Distributor #	▼ Any	•				T	
» Sort By								
» Fields To Show								
Select / Deselect All Show Inactive	Fuel Distributors						Items Per Page	50 🔻
Find								
			Add New	View	Edit	Deactivate	Activate	Print

### **6 FUEL-CENTRAL**

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

Fuel Distributors			
<ul> <li>» Find</li> <li>» Sort By</li> <li>» Fields To Show</li> </ul>	Field: Distributor # Y Any	Ÿ	<b>Y</b>
Select / Deselect All Show Inactiv	e Fuel Distributors		Items Per Page 50 🔻
Find			
Displayed records 1 - 50 (total 4392)	- distributors are missed on your account/station	Add New View	Edit         Deactivate         Activate         Print           Pages: 1 2 3 4 5 6 7 8 9 10 Next >> [Last page]         [Last page]
T Distributor # T			Name
3979			1
4954			1075SunriseCorp
9512 9749			10thAvePriceBook 11East
12861			14shell

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.

		46 Greyhound V 💄 J.Smith
GENERAL	TAGS	着 Admin
	Companies	Profile
Roles		Tickets
		Home Page Settings
Competitors		Alerts
Setup Taxation		
Loyalty		

- 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.

Add new role		
Select a template and enter a name for th	ie new role.	
All form fields are required		
Air form fields are required.		
Role Template		
Driver		•
Role Name		
Driver Role		
	Create	Cancel

- 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.

Role management : Greyhound
This role has been customized.
Role Id: 18317
Based on role template: Driver
Role Name: Driver
New template:
Allow assignment for all users: 🕜
Access Data Types:
✓ Expand all
🕆 👕 Data Entry
B Accounting
@ Admin Tools
™ Reports
O Price Book
> ™ Dashboard
B Preferences
Company
Ø Vendors
Customers
Dispatchers
* 19 Fuel

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:

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### **6 FUEL-CENTRAL**

1. Go to Settings > General > Employees.

		46 Greyhound 🗸 💄 J.Smith
GENERAL	TAGS	着 Admin
Employees	Companies	Profile
Roles		Tickets
		Home Page Settings
Competitors		Alerts
Setup Taxation		
Loyalty		
EDI Setup		

- 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.

Employee Setup Personal Data Login & Password Tax Information Forms Signed Employment History Training Data Sharing	Active Authentication Email data sharing only First Name john Last Name	Country Address Enter a location PIN SmartPOS PIN	*
	Gender Male		•

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

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

For the dispatcher, select the Enable access check box to provide the access to CStoreOffice<sup>®</sup>.
 In the Login field, specify the CStoreOffice<sup>®</sup> login.

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

New Employee			×
Employee Setup Personal Data Login & Passoord Tax Information Forms Signed Employment History Training Data Sharing	Enable access Login Interface Default interface	Vorkplaces Interdoro Pranatouro Bunoco Vassingtion Perm Buon Perm Perm Buon Perm Perm Buon Perm Perm Perm Perm Perm Perm Perm Perm	
	Dependents	🗐 Local Tax	•
		Cancel Revert Sa	ave Save and Close

### **Configuring Distribution Settings**

To configure settings for the distributor, go to Settings.

	-CENTRAL						
DISPATCHERS	FUEL PRICING CUSTOMER	S VENDORS TRAN	ISACTIONS REPORTS	S SETTINGS			
	Orders <u>Filters</u> All						
	Rows: 15 💌 Page 1	of 25 < 🕨					e 🗙
	PO#	Bill To	Ship To	BOL#	Туре	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
						1	

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:

Overlands	News		*
Misc	SGII Group LLC		÷
Shifts			
<ul> <li>Misc</li> <li>Shifts</li> <li>Terms</li> </ul>	Address	Phone	
	2025 Greentree Rd	412-306-0269 ext 2002	
		Fax	
		412-202-4161	
	State	Email	
	PENNSYLVANIA	▼ n@petrosoftinc.com	
	City	Company	
	Pittsburgh	SGII Group, LLC	~
	ZIP	Class	
	15220	Euel Distributor	~

- (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<sup>®</sup>, 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:

Contacts     Misc	Skip the fuel order placement	(recommended for Subjobbers)	
Shifts	Distributor Code	Logo 🔂	
Terms	AP00046		
	Federal ID	Only GIF, PNG and JPG files smaller	
	25		

• 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:

Contacts	Terms				
Shifts	Title				
Terms	Net 3	3	2.0000		
	Net 5	5	0.0000		

- **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 V Page 1 of 8	æ			+	San a	×
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:
  - o Model: Enter the truck manufacturer model.
  - VIN: Enter the truck's Vehicle Identification Number.
  - o 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.

- o **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.

New Truck				×
• General	Model Freightliner Argosy	*	Description Tare Weight: 8730	
Drivers	VIN	*	Truck Terminal	*
	License Plate		Trailer Type	*
	407 SWF		Sunoco 8900 trailer	×
	Drivers			
	Jackson Arthur	•	Garcia Bill	۰ ۲
			Save Revert	Cancel

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**.

varine		Capacity	*
10000_2000_	500	10000	
Description		Min Compartment S	Size 🌟
Standard traile	ndard trailer	2000	
		Description of	*
		Rounding	<b>T</b>
		10	v
Compartments Number	Volume	10	v
Compartments Number 1	Volume 2000	10	v
Compartments Number 1 2	Volume 2000 2000	10	Y

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**.

Truck Terminals				
Rows: 15 💌 Page 1 of 1	< >> 2			+ / ×
Name	City	State	ZIP	Phone
Dayton Truck Terminal	Dayton	он	45458	(502) 961-0925
Pittsburgh Truck Terminal	Pittsburgh	PA	15241	(502) 961-0912
Prestonsburg Truck Terminal	Prestonsburg	кү	44652	(502) 961-0978
Pittsfield Truck Terminal	Pittsfield	MA	47865	(502) 961-0945

To set up a truck terminal:

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- 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.
  - o 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**.

New Truck Terminal			
Truck Terminal Setup	Name	*	
• General	Dayton Truck Terminal		
Trucks     Bulk Terminals	Address	Phone	
Drivers	234 Wilkinsown St	(502) 961-0925	
		Fax	
		(502) 961-0927	
	State	Email	
	OHIO	▼ daytonTT@gmail.com	
	City		
	Dayton		
	ZIP		
	45458		
		Save Revert Cancel	

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**.

Carriers				
Rows: 15 💌 Page 1 of	1 < > 🥏			+ / ×
Name	City	State	ZIP	Phone
Sunoco	Newtown Square	PA	19073	

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.
  - o Trailer type: From the list, select one or more trailer types.
- 3. At the bottom of the form, click **Save**.

New Carrier			×
General	Name	•	^
<ul> <li>Trailer Types</li> </ul>	Sunoco		
	Address	FEIN	
	3801 West Chester Pike	74Wolt	
		Phone	
	State	Fax	
	PENNSYLVANIA	×	
	City	Email	
	Newtown Square		
	ZIP	Contact Person	
	19073		
	Trailer type		
	Sunoco Latrobe BP 7000 Sunoco Latrobe BP 8500	▲ 10000_1000_100 10000 1000 500	~
		Save Revert Cancel	

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:
  - o Name: Enter the name of the bulk terminal.
  - o Address: Enter the address of the bulk terminal location.
  - o State: From the list, select the state of the bulk terminal location.
  - o City: Enter the city of the bulk terminal location.
  - o **ZIP**: Enter the ZIP code of the bulk terminal location.
  - o **Phone**: Enter the phone of the bulk terminal location.
  - Fax: Enter the fax of the bulk terminal location.
  - o 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**.

Sunoco Partners Marketing & Te	rminals I P			
			Vendor Name	
Address	Phone		Valero	
5733 Butler Street teen	(923) 342-758896		Sunoco	
	Fax	*	1830	
	(923) 342-7397			
State	TCN	*		
PENNSYLVANIA	T-25-PA-1781			
City	Use my location			
Pittsburgh		~		
ZIP	•			
15201				

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.

Products			
Fuel products Fees & taxes			
Rows: 15 ▼ Page 1 of 6 ●	2		🕀 🔟 😣
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.

o **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.

General	Product Name				Product Code (PCATS)
	BioDiesel 2%-20%	Dyed Gross HO#2	FO	*	047
	Product Vendors				Product Type (Taxation)
	BP		BP Oil		170
	Gulf Oil		Cenex		Octane Rating
	Husky	)	Center		diesel
	Musket		Colonial		
	Petron		COP Gulf-GIE		
	PetroProd				
	Shell	• • • • • • • • • • • • • • • • • • •	C		
	Sun R&M	•	700-	*	
	L		<b>.</b>		

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.

### **I FUEL-CENTRAL**

 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**.

General	Туре	
Product Types	Charge (for positions of invoices and bills)	*
Ship To Bulk terminal	Name	•
	States	Rate
	ALASAMA ALASKA ARIZONA CALIFORNIA COLORACIOT DISTRICT OF COLUMBIA DELAWARE FLORIDA GEORGIA HAWAII	× ×
-	Fuel Product Types	

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:
  - o In the **General** section, specify the vendor contact information.

General	Vendor ID	•			
<ul> <li>Carriers</li> </ul>	1108	Name			
Fuel Products     Bulk Terminals	Address	Sunoco	×		
	3801 West Chester Pike	Main Office	~		
		Phone			
	State	Fax			
	City				
	Newtown Square	Email			
	ZIP	Contact Person			
	Account Number	FEIN			

• 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.

al Decaluate	Carrier Name							
ulk Terminals								
	Fuel Products BioDiseal 2%-20% Dry BioDiseal 2%-20% Pre BioDiseal US & LS 2% BioDiseal US & LS 2% BioDiseal US & LS 2% Disear Gas Mid Studiesel Gro ULS 10% Biodiseal Gro ULS 2% Biodiseal Gro ULS 2% Biodiseal Gro ULS 2% Biodiseal Gro	d Gross U2DB20 mium Gross U2PB10 mium Gross U2PB5 Dyed Gross U2LMB2 Dyed Gross U2LMB2 Dyed Gross U2LMB2 So U2DB10 So U2DB10 So U4PB10 So U4PB10 So U2DB12 So U4PB10 So U4PB10	<		000 t ioDiesel 2%-20' ioDiesel 2%-20' ioDiesel 2%-20' ioDiesel 2%-20' ioDiesel 2%-20' ioDiesel 2%-20' ioDiesel 2%-20' ioDiesel 2%-20'	% Dyed Gross U2D % Dyed Gross UL2! % Dyed Gross UL2! % Gross HO#ZFO % Gross UL2B10 % Gross UL2B20 % Gross UL52B2 % Gross UL52B2 % Premium Gross I % Premium Gross I	B10 B20 DB5 H0#2FO J2DB10	<
	Tr .			1	r			

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

General	Fuel Products			
Carriers Fuel Products Bulk Terminals	BoDesel 2%-2% Dyed Gross U2D820 BioDesel 2%-20% Permium Gross U2P810 BioDesel 2%-20% Permium Gross U2P815 BioDesel ULS & LS 2% Dyed Gross U2UM85 BioDesel ULS & LS 2% Dyed Gross U2UM85 Clarc Gas Gross Mit 89 U.S 10% Biodesel Gross U2D810 ULS 10% Biodesel Gross U2M910 ULS 10% Biodesel Gross U2M910 ULS 2% Biodesel Gross U2M910	↓	10001 BioDiesel 2%-20% Dyed Gross U.2820 BioDiesel 2%-20% Dyed Gross U.2820 BioDiesel 2%-20% Dyed Gross U.2082 BioDiesel 2%-20% Dyed Gross U.2085 BioDiesel 2%-20% Gross U.2810 BioDiesel 2%-20% Gross U.2820 BioDiesel 2%-20% Gross U.2822 BioDiesel 2%-20% Premium Gross I0/82F0 BioDiesel 2%-20% Premium Gross I0/82F0	< >
	Bulk Terminals			
	4321  Auro BTS  fds  AK 432  Nvls Gulf Oil te  AL   Pttb Sunoco	^ >	Biwn Sunoco    Brcv Marathon    Civl ARC    Civl Buckeye    Civl Buckeye	^

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

General	Bulk Terminals			
• Carriers • Fuel Products • Bulk Terminals	43211 Auro 815( (64) AK 432) (Hv6 Guil (01) (6) AL   Pittb Sunocol	<b>^ &gt; &lt; &gt;</b>	Birn Sunaco    Bircy Marithon    Civl ARC    Civl Suncco    Civl Suncco    Civl Zenithon B    Civl Zenithon B    Civp Euclinow    Cirps PFT S    Civp Buckeye    Dimt Guti Oi    Dimt Lucknow	~

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