FUEL-CENTRAL

Station Setup Guide

Version 2.0

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PETROSOFT

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SETTING UP A STATION FOR FUEL CENTRAL

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

1. Set up a billing company
2. Create a station or open it for editing
3. Set up products and mixes
4. Set up UST equipment
5. (Optional) Connect ATG
6. Assign stations for the fuel distributor
7. Turn a pending station into a fuel distribution site
8. Set up a single station

> ⓘ Before you start setting up a station 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 a station for Fuel Central, make sure the following prerequisites are met:

- CStoreOffice® account is created.
- The Fuel Central company level account setup completed. For details, see the Fuel Central Account Setup manual.

Setting Up a Billing Company

To set up a company for receiving billing information:

1. Go to **Customers** > **Bill to**.
2. At the top right of the **Bill to** list, click the **add** icon.
3. In the **New Billing Address** form, specify the following data:
   o **General**: Enter the information provided by the client. The **Name** field is required.
   o **ACH Payments**: Enter the information for the ACH account provided by the client. In the **ACH Notifications Email** field, enter the email to which the ACH Payment confirmation is sent.
   o **Preferred Send Method**: Select and specify the value of the preferred method for documents sending: **E-mail**, **Postal mail** or **Fax**.

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

Setting Up Stations/Sites

To set up a station or site, you need to create a new station or open an existing one. Go to **Settings** > **General** > **Locations** and then do one of the following:

- At the top right of the **Locations** list, click **Add**. Specify the station name, select the company the station belongs to and then click **Save**.

- In the **Locations** list, select the station and then click **Edit**.

When a new station is created or the existing one is opened for editing, configure the settings below.

Setting Up Products and Mixes

To mark what fuel products the station is going to sell:

1. In the left menu of the **Station Setup** form, select **UST System**.
2. Click the **Mix & Fuels** tab.
3. In the **Used** and **Purchased** and/or **Mixed** columns, select check boxes next to the fuel product types.

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4. (Optional) If the check box in the **Mixed** column is selected, in the **Mixes** list at the bottom of the
   Mix & Fuel tab, specify the mixed products and mix proportion.

Setting up Capacity Inventory

To set up tank capacities for fuel products:

1. In the left menu of the **Station Setup** form, select **UST System**.

2. Click the **UST Equipment** tab.

3. For each fuel product marked at the previous step, specify the following settings:

   o **Product**: Select the fuel product type.

   o **Tank Type**: Select the tank type. The most commonly used value is generic 62, but it should be
     clarified with the customer.

   o **Capacity**: Select the tank capacity value (should be clarified with the customer).

   o **Min Level**: Specify the minimum tank volume (should be clarified with the customer).

   o **Max Level**: Specify the maximum tank volume (should be clarified with the customer).

   o **Piping**: Select the piping type.

> ⓘ You can see the abbreviations of the Piping list values at the bottom of the **UST Equipment** list.

   o **Pip Install**: specify the installation date, if known.

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

To make sure that the settings are configured properly, at the bottom of the **UST Equipment** tab, check the **Capacity Info** list each time you press **enter**.

Enabling Inventory Monitoring via

To set up the inventory monitoring via ATG:

1. In the left menu of the **Station Setup** form, select **ATG**.

2. In the ATG form, enter the ATG information provided by the client.

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

Assigning Fuel Distribution Site to a Fuel Distributor

To assign the fuel distribution site/station to a fuel distributor:

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

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

3. From the **Fuel Distributors** list, select the fuel distributor and click **Edit**.

4. In the **Stations** list, set up a list of stations to assign to a fuel distributor.

5. At the bottom of the form, click **Save** or **Save & Close**.

Assigning Fuel Distribution Site to a Fuel Distributor

To turn a pending station into the fuel distribution site:

1. Go to **Customers** > **Pending Customers**.

2. In the **Pending Customers** list, select the customer and at the top right of the list, click the **edit** icon.

3. In the **Edit Pending Customer** form, specify the following data:

    o **Bill to**: Select the billing company.

    o **General Info**: Specify the billing address of the customer.

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

5. Go to **Customers** > **Bill to** and make sure the customer disappears from the **Pending Customers** list and appears in the **Bill to** list.

Setting up a Single Station

To specify information for a single station:

1. Go to **Customers** > **Ship to**.

2. In the **Ship to** list, select the station and at the top right of the list, click the **edit** icon.

3. Specify the following settings for the station:

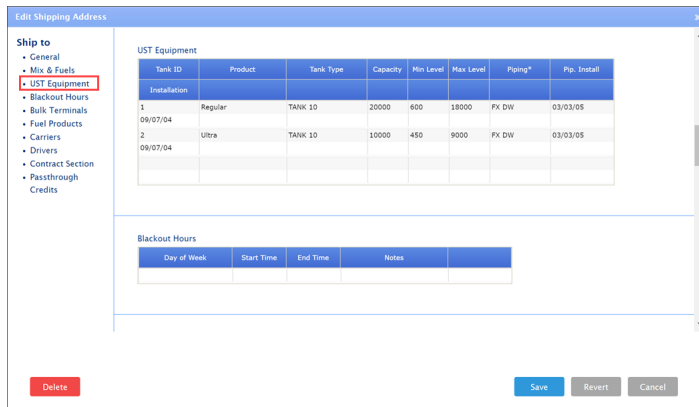   > (i) The required information is marked with red asterisk.

   o In the **General** section, enter contact and billing information.

   o In the **Mix & Fuels** section, make sure the fuel products and mixes values are displayed correctly. If necessary, go to **Station Setup** > **UST System** > **Mix & Fuels**. For details, see Setting up Products and Mixes.
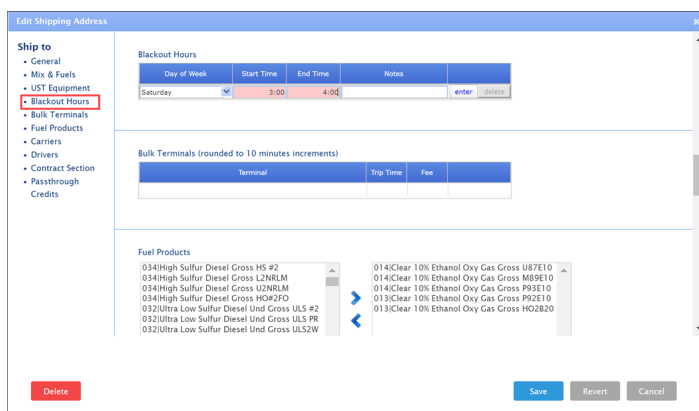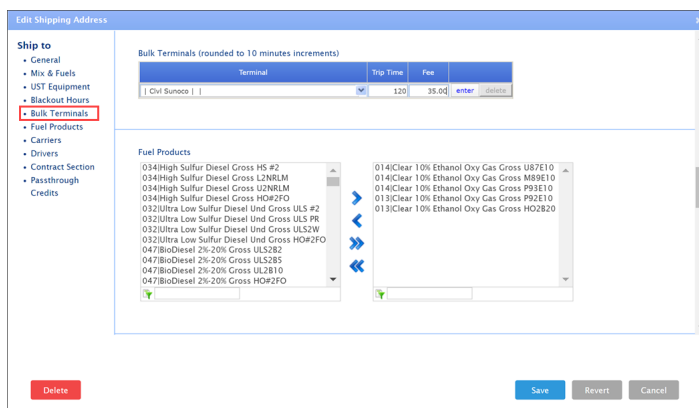

   o In the **UST Equipment** section, make sure the capacity inventory values are displayed correctly. If necessary, go to**Station Setup** > **UST System** > **UST Equipment**. For details, see Setting up Capacity Inventory.

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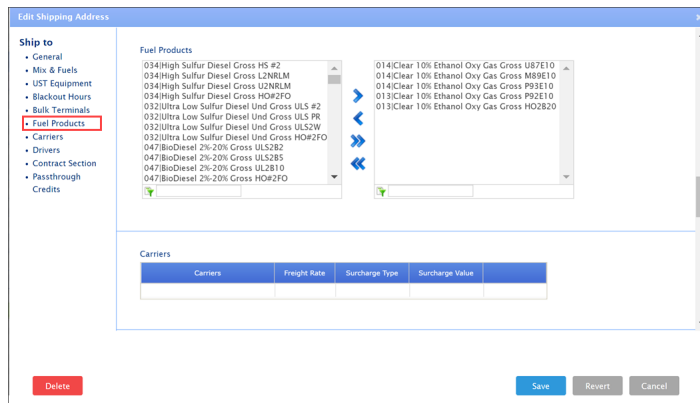o In the **Blackout Hours** section, specify the time periods during which the delivery doesn't take place.

o In the **Bulk Terminals** section, from the **Terminal** list, select the bulk terminal and specify the trip time and the freight rate (in the **Fee** column) for it.
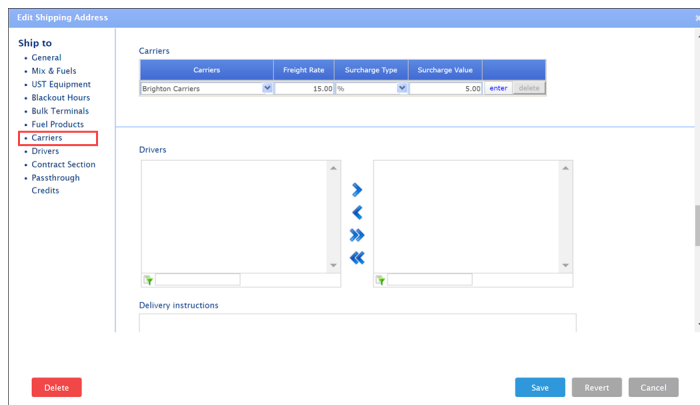

For more information on how to set up bulk terminals, see the Fuel Central Account Setup manual.

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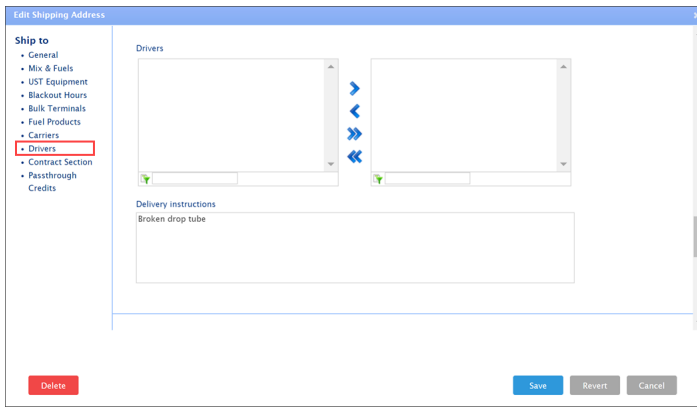o In the **Fuel Products** section, set up a list of required fuel products.

For more information on how to set up fuel products, see the Fuel Central Account Setup manual.

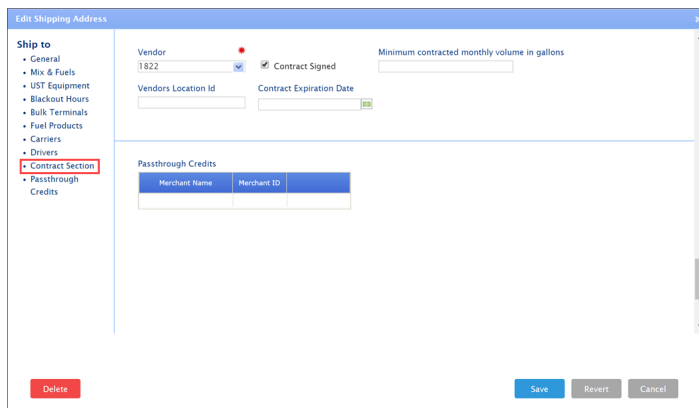o In the **Carriers** section, select the carrier, specify its freight rate, surcharge type and value.

For more information on how to set up carriers, see the Fuel Central Account Setup manual.

o In the **Drivers** section, do the following:
  - Set up a list of drivers.
  - In the **Delivery instructions** field, enter special instructions like "Broken drop tube", "Small lot" and so on.
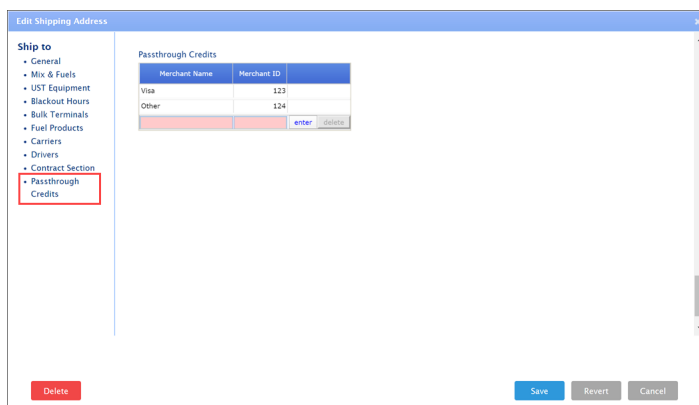
For more information on how to set up drivers, see the Fuel Central Account Setup manual.

o In the **Contract** section, select the vendor and specify the contract information if you have a signed contract with this vendor.

For more information on how to set up distributor vendors (suppliers), see the Fuel Central Account Setup manual.

o In the **Passthrough Credits** section, enter the pass through credits data, if any.

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