

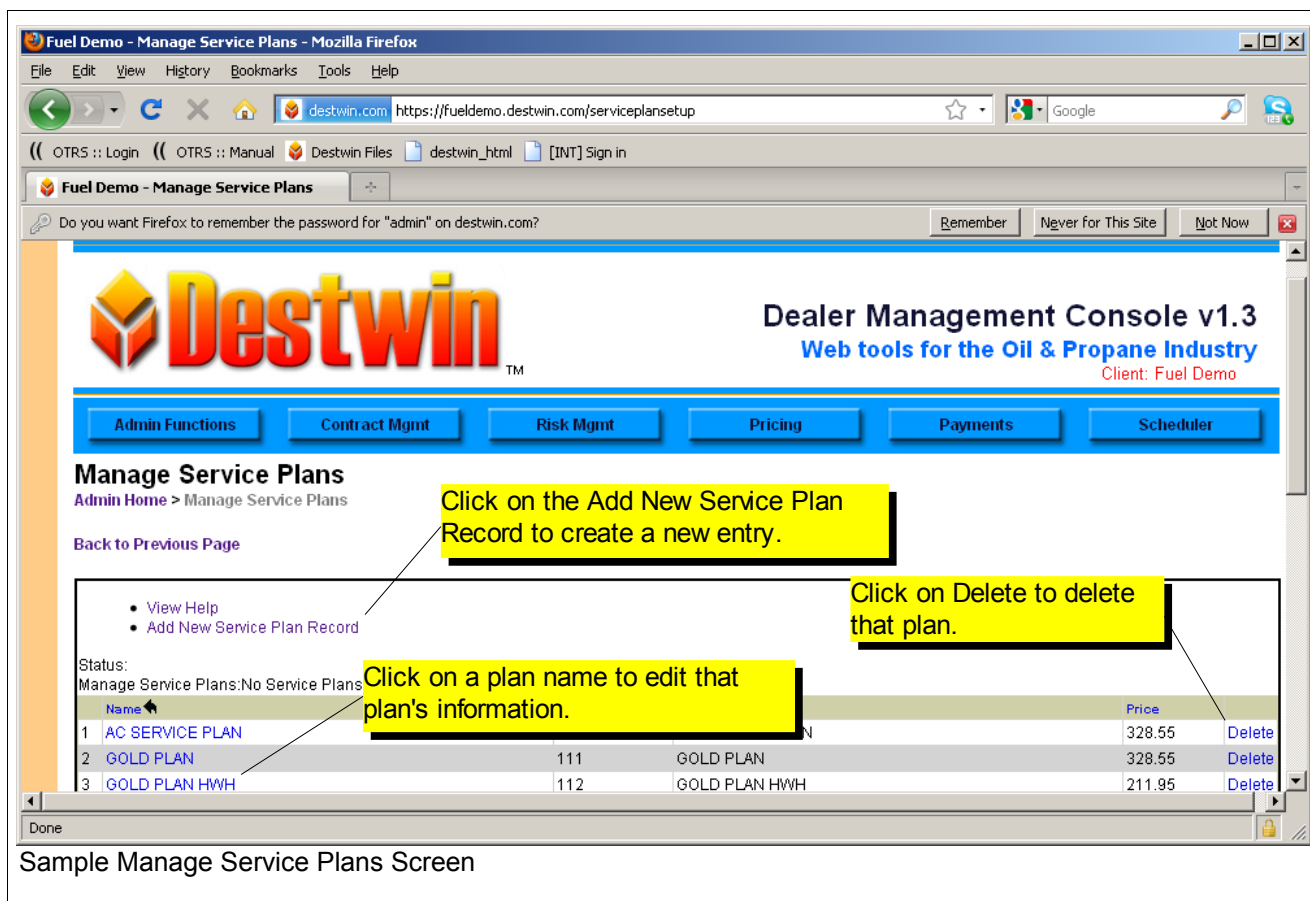
This Quick Reference describes how to add Service Plans that customers can then purchase in conjunction with their contracts. You will require Administrator privileges to access the necessary menus and pages. The first two pages (four steps) describe how to add a Service Plan. The next five pages describe how to enable a Service Plan for use with a particular Price Program / Contract. The final pages provide an example of how the information set in the Admin screens will translate to the customer.



## Add a Service Plan

1. Login as an administrator.
2. Under Admin Functions - Set-up - click on Setup Svc Plans.

The Setup Svc Plans screen allows an Administrator the ability to set up service plans that customers may then purchase in conjunction with their fuel contracts.



- Click on the [Add New Service Plan Record](#) to open an edit box to create a new plan entry.
- Enter:
  - Name
  - Code (should map to your backend system)
  - Description
  - Price
 And choose to Enable on Contracts
  - Yes
  - No

When Complete click on the **Submit** button to save and [Close Window](#) to exit.

**Create Service Plan Record**

[View Documentation](#)

Create Service Plan Record - ID: , Name: , Code:

Name

Code

Description

Price

Enable on Contracts? ☐ Yes ☒ No

[Close Window](#)

Add Service Plan Screen

## Enable a Service Plan

Destwin allows the administrator to enable Service Plans on individual contracts so that customers can have the option of purchasing or be required to purchase a service plan in conjunction with a fuel contract.

**Destwin** Dealer Management Console v1.3  
Web tools for the Oil & Propane Industry  
Client: Fuel Demo

Admin Functions | Contract Mgmt | Risk Mgmt | Pricing | Payments | Scheduler

**Manage Service**  
Admin Home > Manage Service  
Back to Previous Page

- View Help
- Add New Service Plan

Status: Deleted Record when

Contracts Setup

Name	Code	Description	Price	
1 AC SERVICE PLAN	700	AC SERVICE PLAN	328.55	Delete
2 GOLD PLAN	111	GOLD PLAN	328.55	Delete
3 GOLD PLAN HWH	112	GOLD PLAN HWH	211.95	Delete
4 GOLD PLAN HWH ZONE	113	GOLD PLAN HWH ZONE	211.95	Delete

Click on the Contracts Setup drop down to access your current contracts.

Destwin Admin Screen

**Destwin** Dealer Management Console v1.3  
Web tools for the Oil & Propane Industry  
Client: Fuel Demo

Admin Functions | Contract Mgmt | Risk Mgmt | Pricing | Payments | Scheduler

**Manage Contract Programs**  
Admin Home > Manage Contract Programs  
Back to Previous Page

Show all contracts  
Toggle Contract/Payment  
Add Contract

Global Settings | Capped Price | Flex Price | Fixed / Prebuy

Service plan options are set on a per contract basis. There are three different price programs in this demo, Capped Price, Flex Price, and Fixed / Prebuy. The process of activating service contracts is the same regardless of the price program and is described below.

Contracts Setup Screen

Click on any of your price programs.  
Look for the parameter named: **Ask user for service plan?**

**Contract Setup Screen**

Options for how to apply service plans to this contract are:

- **Yes - required if not on one already** - selecting this option will require / force the customer to include a service plan with this contract.
- **Yes - optional** - selecting this option will present the customer with the option of ordering a service agreement at the same time they are entering into a fuel contract but not force / require them to.
- **No** - selecting this option will disable the service plan offering from this price program.

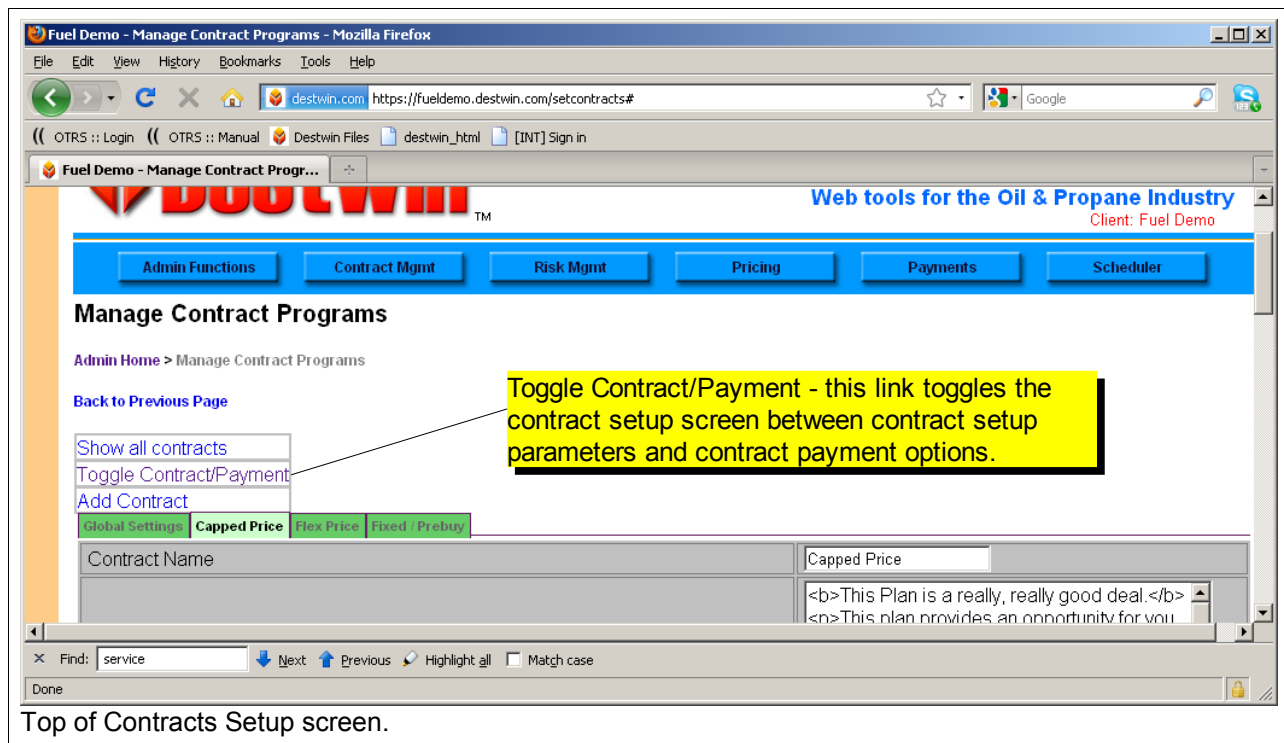
#### Tech Tip

Press Ctrl-F to pop-up or active a find function and search for 'service plan' to quickly find this particular parameter. You can use the Ctrl-F function to search for any text string at any time.

Choose the desired setting by clicking in the circle next to the applicable option. In the above screen, **No** has been selected. If you do make a change to these (or any settings) remember to scroll to the bottom of the screen and click on the **Submit the above form** button to actually activate and store any changes.

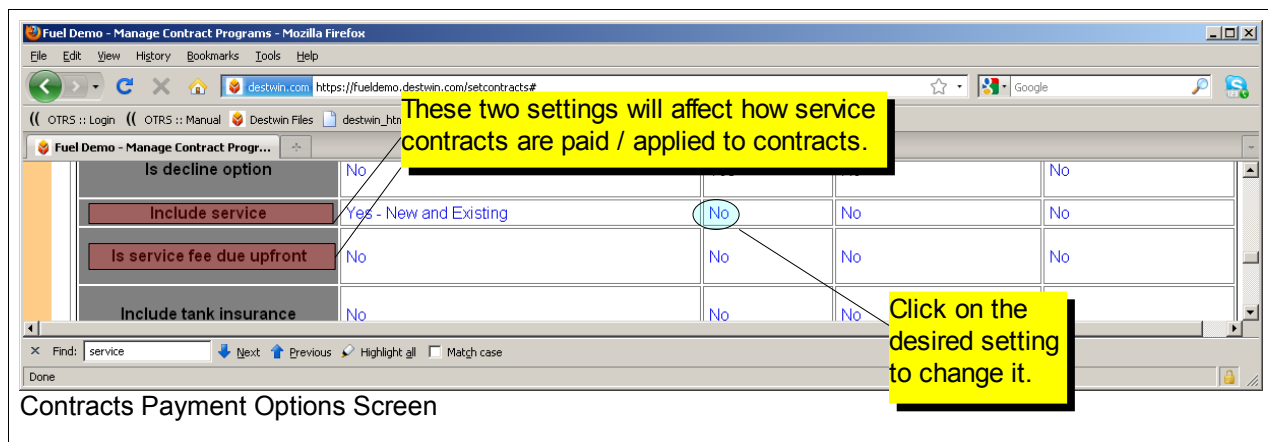
**Bottom of Contract Setup screen.**

Once the Service Plan parameter has been set, there are options that can be set for how the Service Plan will be paid for. Scroll to the top of the Manage Contract screen and click on the **Toggle Contract/Payment** link.



There are two settings that affect how payments for service contracts may be applied to contracts:

- **Include service**
- **Is service fee due upfront**



The **Include Service** Payment setting has the following options:

- **No** - select this option if you do NOT want to factor the service plan price into the payment option.
- **Yes - New and Existing** - select this option if you DO want to factor the service plan price for both a new service plan and / or an existing service plan into the payment option.
- **Yes - New Only** - select this option if you DO want to factor the service plan price into the payment option buy ONLY for a new service contract.
- **Yes - Existing Only** - select this option if you DO want to factor the service plan price into the payment option buy ONLY for an existing service contract.

**Fuel Demo - Manage Contract Programs - Mozilla Firefox**

File Edit View History Bookmarks Tools Help

destwin.com https://fueldemo.destwin.com/setcontracts#

OTRS :: Login OTRS :: Manual Destwin Files destwin\_html [INT] Sign in

**Fuel Demo - Manage Contract Progr...**

Is decline option	No	
Include service	Yes - New and Existing	No
Is service fee due upfront	No	No

Find: service Next Previous Highlight all Match case Done

Clicking on the link and then the down arrow produces the drop down menu of choices. Choose the desired setting from the option by clicking on it.

Include service options expanded (result of clicking on link)

**Fuel Demo - Manage Contract Programs - Mozilla Firefox**

File Edit View History Bookmarks Tools Help

destwin.com https://fueldemo.destwin.com/setcontracts#

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**Fuel Demo - Manage Contract Progr...**

Is decline option	No	Yes
Include service	Yes - New Only	No
Is service fee due upfront	No	

Save Cancel

Find: service Next Previous Highlight all Match case Done

Click on the Save button to save and update any changes...

...or click on the Cancel button to exit the drop down menu without saving.

Include service options expanded (Save and Cancel buttons shown)

**Fuel Demo - Manage Contract Programs - Mozilla Firefox**

File Edit View History Bookmarks Tools Help

destwin.com https://fueldemo.destwin.com/setcontracts#

OTRS :: Login OTRS :: Manual Destwin Files destwin\_html [INT] Sign in

**Fuel Demo - Manage Contract Progr...**

Is decline option	No	
Include service	Yes - New Only	
Is service fee due upfront	No	No
Include tank insurance	No	No

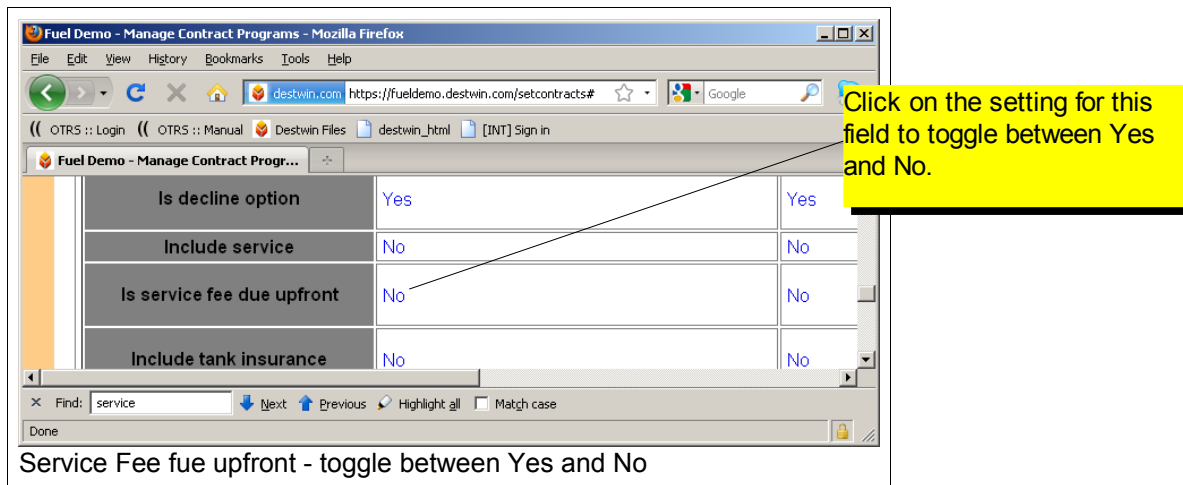
Find: service Next Previous Highlight all Match case Done

New / Saved setting after choosing an alternate setting and clicking on the Save button.

Include service options expanded (result of saving a change)

The **Is service fee due upfront** parameter can be toggled between **Yes** and **No** by clicking on the **Yes** or **No**.

- **Yes** - full price of the service contract is due at the time of the contract /order.
- **No** - full price of service contract is spread in equal installments over the number of payments in the payment plan.



Changes made on the Payment Options pages take effect immediately, there is no **Submit** button.

## Sample Settings / Result

### Add Service Plan

Plan settings:

**Name** - Gold Plan

**Code** - 111

**Description** - Gold Plan

**Price** - 328.55

**Enable on Contracts** - Yes

### Enable a Service Plan

Capped Price program setup

**Ask user for service plan?** - Yes - required if not on one already

Capped Price Payment Options

**Include service** - Yes - New Only or 12 Equal Monthly Payments, includes service plan Payment option

**Is service fee due upfront** - Yes for 12 Equal Monthly Payments, includes service plan Payment option

The above settings will produce the results as displayed below.

**Fuel Demo Oil Price Protection - Mozilla Firefox**

destwin.com https://fueldemo.destwin.com/contract/plan/3/contract\_number/1/

**Fuel Demo**  
 887D Main St. Monroe, CT 06468 · 877-DESTWIN · FAX 203-261-5061  
 info@destwin.com  
 Program Terms

Account Number	-12345	Plan	Capped Price
Purchaser Delivery Address	<b>John Doe 123 Oak Drive Anytown, CT 06000</b>	Rate Per Gal not to exceed	Enter Gallons First
Authorization Date	04/08/2010	Fee Per Gal.	\$0.25
Start Date	05/01/2011	Maximum Purchase	990 gallons
End Date	10/08/2011	<b>STEP 1: Contract Gallons</b> Enter your desired annual gallons and press 'Next'	<input type="text"/> Next
		Program Fee	Enter gallons to cover and press 'Next'
		Total Program Cost	Enter gallons to cover and press 'Next'
		Total Amount Due Now	Enter gallons to cover and press 'Next'

**Terms & Conditions**

Done

First Customer Contract Screen for Capped Price Program

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 info@destwin.com  
 Program Terms

Account Number	-12345	Plan	Capped Price
Purchaser Delivery Address	<b>John Doe 123 Oak Drive Anytown, CT 06000</b>	Rate Per Gal not to exceed	Enter Gallons First
Authorization Date	04/08/2010	Fee Per Gal.	\$0.25
Start Date	05/01/2011	Maximum Purchase	990 gallons
End Date	10/08/2011	<b>STEP 1: Contract Gallons</b> Enter your desired annual gallons and press 'Next'	900 Next
		Program Fee	\$225.00
		Total Program Cost	After Selection Below
		Total Amount Due Now	After Selection Below

**Please choose a service plan**

	Service Plan	Annual Fee	Description
<input checked="" type="radio"/>	GOLD PLAN	\$328.55	GOLD PLAN

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Done

Customer must select the Service Plan before they can proceed to the next step.

Customer Contract Screen for Capped Price Program after entering an acceptable number of gallons



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 info@destwin.com  
 Program Terms

Account Number	-12345
Purchaser Delivery Address	<b>John Doe</b> <b>123 Oak Drive</b> <b>Anytown, CT 06000</b>
Authorization Date	04/08/2010
Start Date	05/01/2011
End Date	10/08/2011

Plan	<b>Capped Price</b>
Rate Per Gal not to exceed	Enter Gallons First
Fee Per Gal.	\$0.25
Maximum Purchase	990 gallons
<b>STEP 1: Contract Gallons</b> Enter your desired annual gallons and press 'Next'	
Program Fee	\$225.00
Total Program Cost	After Selection Below
Total Amount Due Now	After Selection Below

**STEP 1: Contract Gallons**  
 Enter your desired annual gallons and press 'Next'

900 Next

**Please choose a service plan**

	Service Plan	Annual Fee	Description
<input checked="" type="radio"/>	GOLD PLAN	\$328.55	GOLD PLAN

**STEP 2: Choose your payment plan.**  
 Note - budget payments for monthly payment plans are based on projected annual usage, not contracted gallons.

	Description	Service Plan Cost	Price Per Gal.	Payment Amount	Amount Due Now	Total Program Cost
<input type="radio"/>	Pre-payment (Best Price)		Not to exceed \$3.229	n/a	\$3041.10	\$3,041.10
<input type="radio"/>	12 Equal Monthly Payments, includes service plan	\$328.55	Not to exceed \$3.279	n/a	\$508.55 (includes service fee)	\$4,115.45
<input type="radio"/>	12 Equal Monthly Payments		Not to exceed \$3.329	\$323.91	\$323.91	\$3,886.90
<input type="radio"/>	Pay as delivered		Not to exceed \$3.379	n/a	\$225.00	\$3,266.10

**Terms & Conditions**

Done

Customer Contract Screen after choosing the available Service Plan.

Amount Due Now includes the full price of the Service Plan in the first monthly payment as set. Information that describes this is provided to the customer as noted.