Destwin Quick Reference Console Version 1.3 How to Setup and Manage Service Plans 07-APR-10

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.



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<b>Destwin</b>	Dealer Management Console v1.3 Web tools for the Oil & Propane Industry Client: Fuel Demo
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Manage Service Plans         Admin Home > Manage Service Plans         Back to Previous Page	lew Service Plan new entry.
View Help     Add New Service Plan Record	Click on Delete to delete that plan.
Status: Manage Service Plans:No Service Plans <mark>Click on a plan name to o</mark>	edit that
Name A plan's information.	Price
1 AC SERVICE PLAN	N 328.55 Delete
2 GOLD PLAN 111	GOLD PLAN 328.55 Delete
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Done	
Sample Manage Service Plane Serven	
Sample Manage Service Flans Screen	

3.	Click on the Add New Service Plan Record to open an	
	edit box to create a new plan entry.	

- 4. 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.

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Code								
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Enable on Contracts?	C Yes ● No							
Submit								
Close Window								
Done								
Add Service Plar	n Screen							

Page 2 of 9

## 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.



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

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Fuel Demo - Manage Contract Progr	-
Ask user to input gallons?	© Yes © No
If user does not enter gallons, display projected usage anyway?	©Yes ●No
Ask user for service plan?	<ul> <li>○ Yes - required if not on one already</li> <li>○ Yes - optional</li> <li>○ No</li> </ul>
Payment Due Immediately? Settings.	C Yes ● No
Disable (completely hide this)?	© Yes
🕆 Find: service 🗸 Next 👚 Previous 🖌 Highlight all 🗖 Match case	
Done	
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.

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Payment Method	button for any changes to take effect	es	Yes
	button for any changes to take ellect.	o	No
	Bill Account	Yes	No
Submit the above	orm		
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Done			
Bottom of Contra	t Setun screen		
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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.

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Admin Functions Contract Mgmt Risk Mgmt	Pricing Payments Scheduler
Admin Home > Manage Contract Programs         Back to Previous Page         Show all contracts         Toggle Contract/Payment         Add Contract         Add Contract         Global Settings         Capped Price         Flex Price         Fixed / Prebuy	Payment - this link toggles the creen between contract setup contract payment options.
Contract Name	Capped Price
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Done	
Top of Contracts Setup screen.	

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

- Include service
- Is service fee due upfront

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Is decline option	No
Include service Yes - New and Existing (No) No	No
Is service fee due upfront No No No	No
Include tank insurance No No	Click on the
🗙 Find: service 🗸 Next 👚 Previous 🖌 Highlight all 🧮 Match case	desired setting
Done	to change it. 🛛 🗋 🦼
Contracts Payment Options Screen	

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.

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	Yes - New and Existing Yes - New Only	
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Is decline option	NoNew	/ Saved setting after choosing
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Done		
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.

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Servi	ce Fee fue upfront - togg	le between Yes and No		

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.

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	<b>Fuel Demo</b> 887D Main St. Monroe, CT 06468 · 877-DESTWIN · FAX 203-261-5061 info@destwin.com Program Terms								
	Account Number	-12345	]	Plan	Capped Price				
				Rate Per Gal not to exceed	Enter Gallons First				
	Purchaser Delivery Address	John Doe	John Doe Fee Per Gal. 123 Oak Drive Maximum Purchase		\$0.25				
		123 Oak Drive			Oak Drive Maximum Purchase		990 gallons		
		Anytown, CT U6UUU STEP Enter gallo		STEP 1: Contract Gallons Enter your desired annual gallons and press 'Next'	Next				
	Authorization Date	04/08/2010		Program Fee	Enter gallons to cover and press 'Next'				
	Start Date	Start Date 05/01/2011		Start Date 05/01/2011 Total Program		Total Program Cost	Enter gallons to cover and press 'Next'		
	End Date	10/08/2011		Total Amount Due Now	Enter gallons to cover and press 'Next'				
Terms & Conditions									
Done									
First C	Sustomer Contract Sc	reen for Capped Price	e Pro	ogram					

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						Rate Per Gal not to exceed	Enter Gallons First			
	Purchaser Delivery Address		Jo	hn Doe		Fee Per Gal.	\$0.25			
			123	Oak Drive		Maximum Purchase	990 gallons			
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		End Date	10	/08/2011		Total Amount Due Now After Selection				
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		Start Date		05/01	/2011		Total Progra	am Cost	After Sel	ection Below		
		End Date		10/08/	/2011		Total Amount	Due Now	After Sel	ection Below		
	Service Plan       Annual Fee       Description         Image: Construction of the plan of the plan of the plan, but not for those plans for which we did not require a service plan.         STEP 2: Choose your payment plan.         Note - budget payments for monthly payment plans are based on projected annual usage.											
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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.