

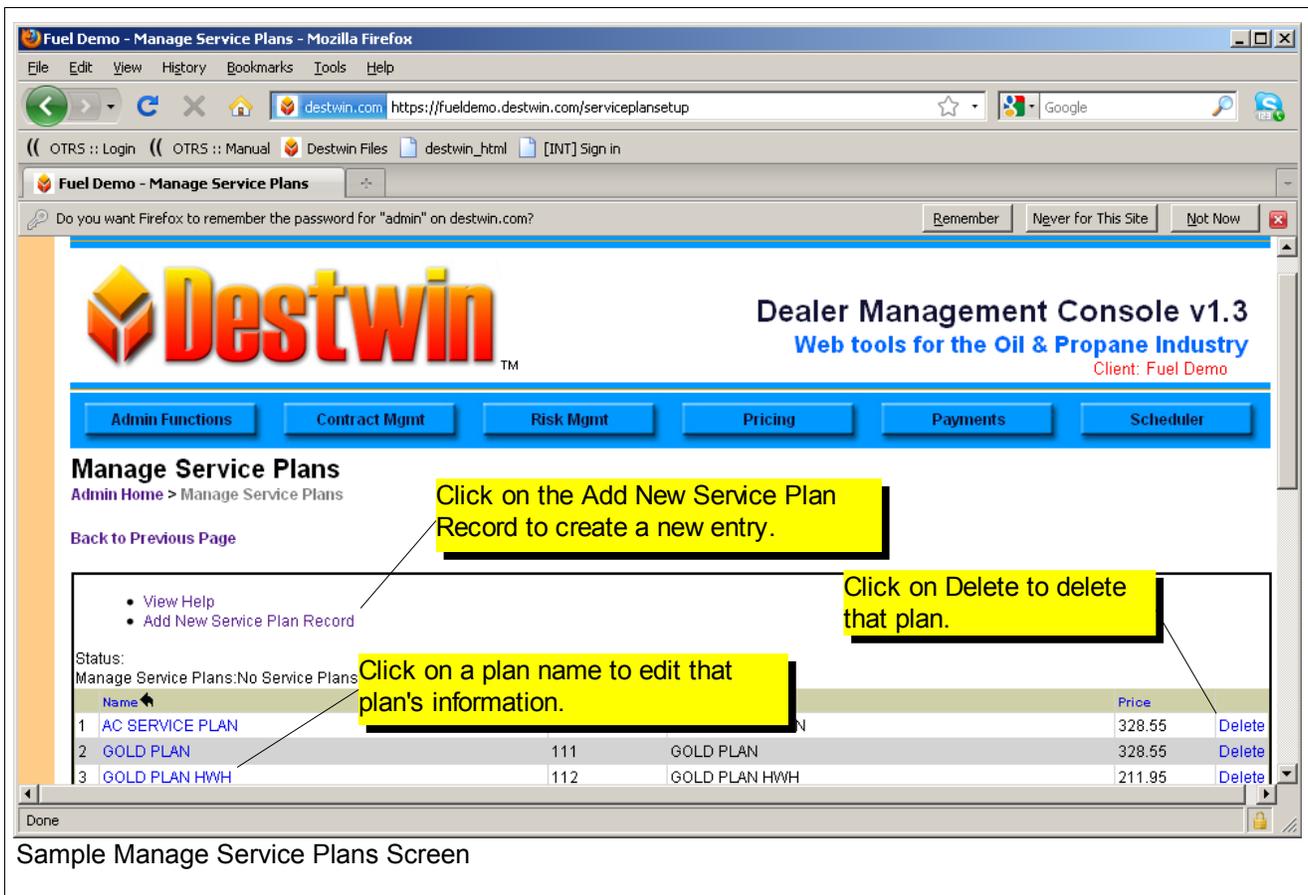
This Quick Reference describes how to add Service Plans that customers can then purchase in conjunction with their contracts. You will require Administrator privileges to access the necessary menus and pages. The first two pages (four steps) describe how to add a Service Plan. The next five pages describe 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

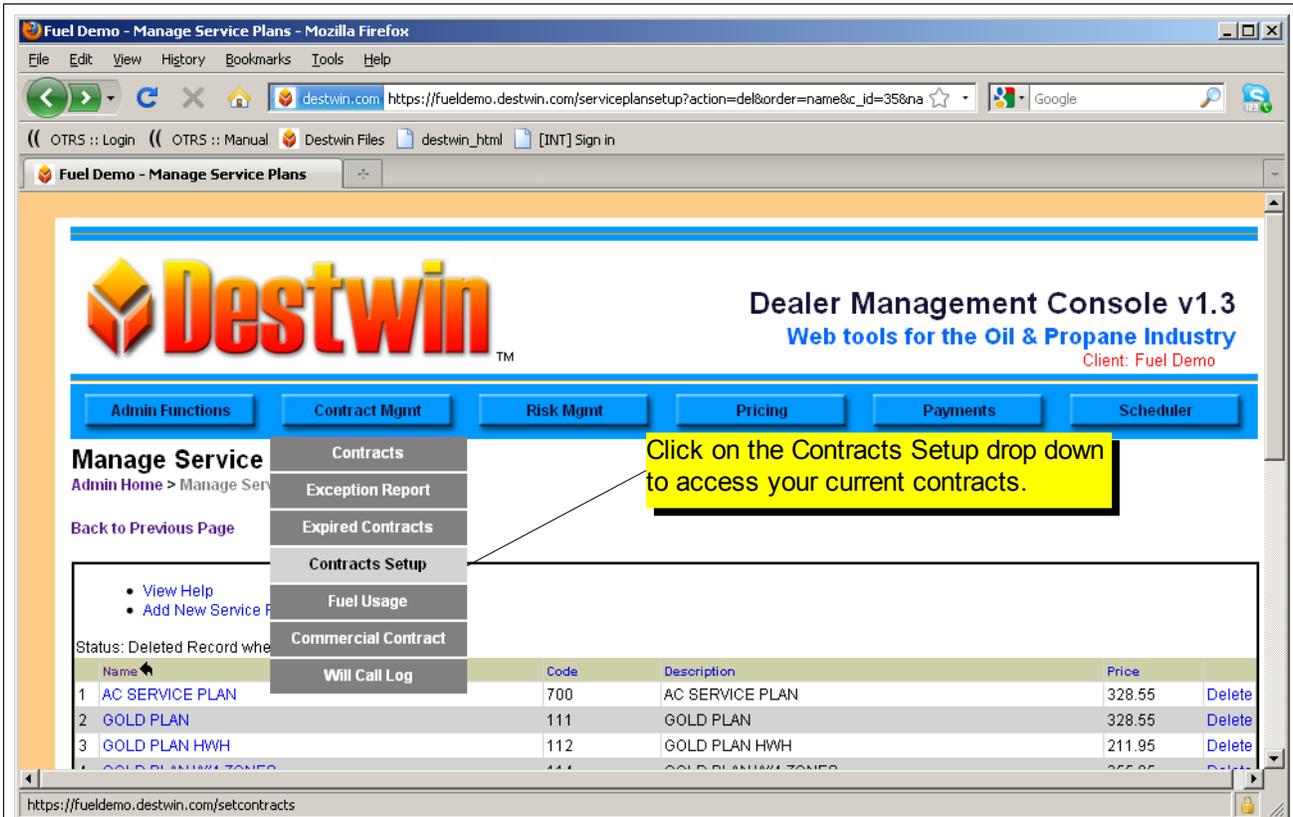
Enable on Contracts? Yes No

[Close Window](#)

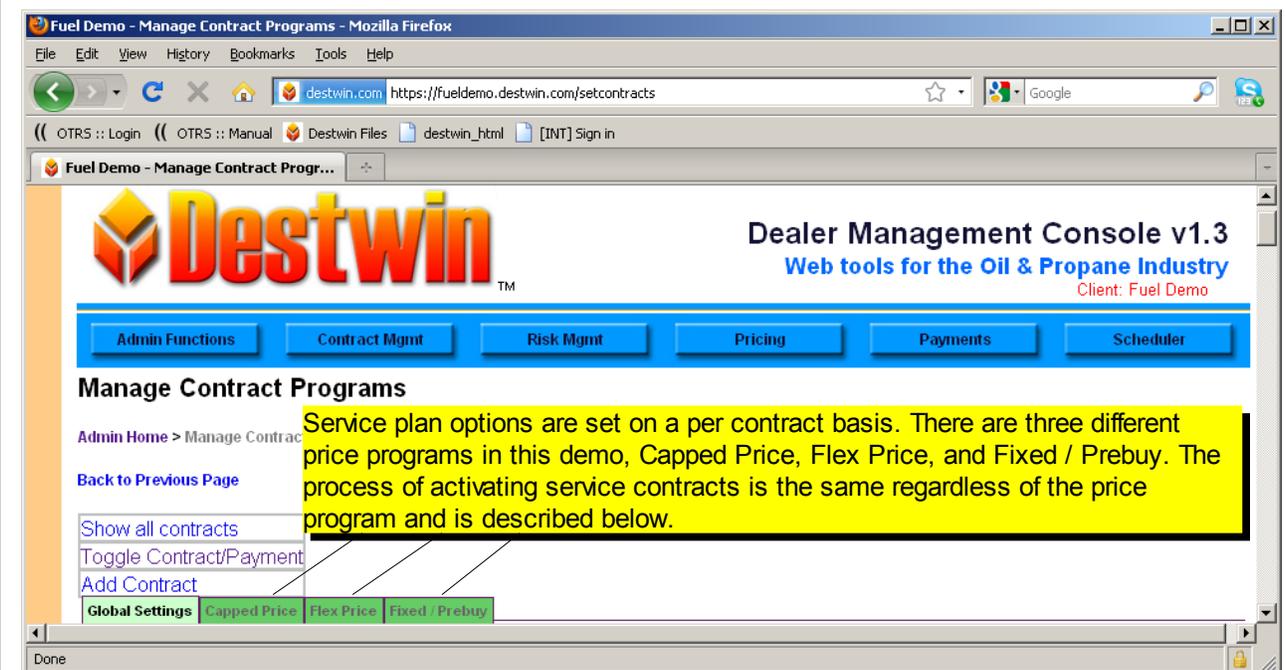
Add Service Plan Screen

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.

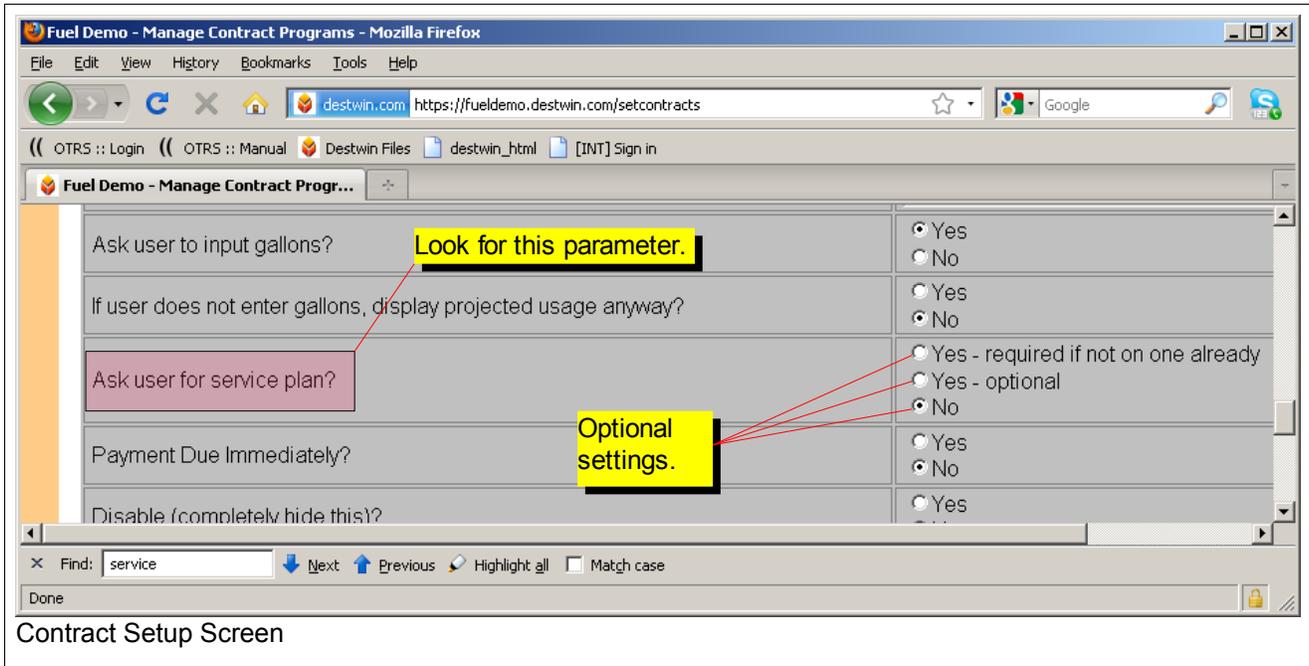


Destwin Admin Screen



Contracts Setup Screen

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

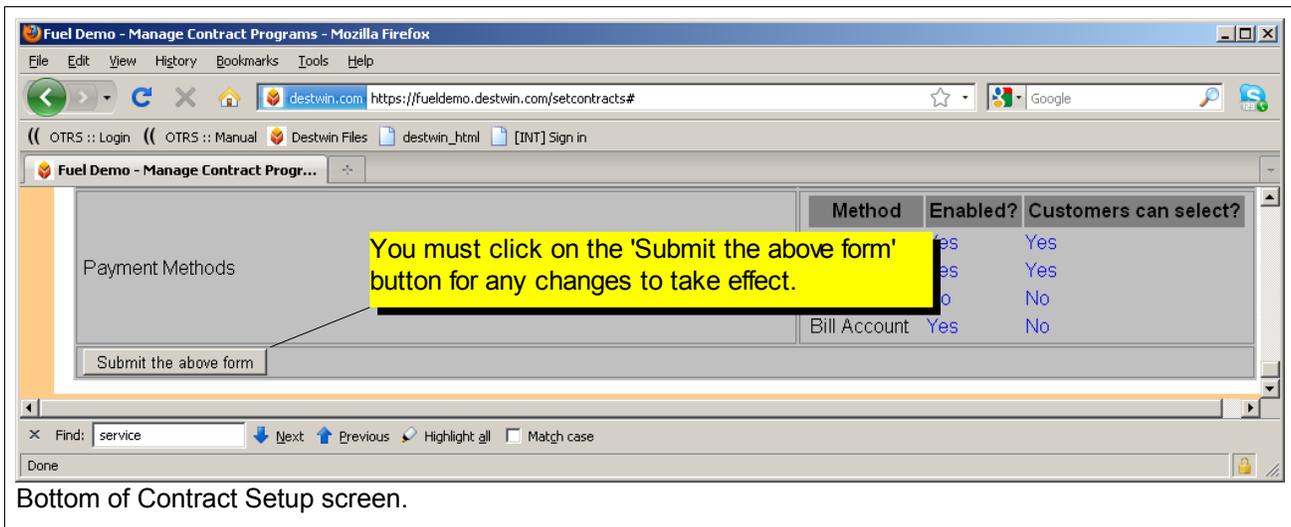


Options for how to apply service plans to this contract are:

- **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.

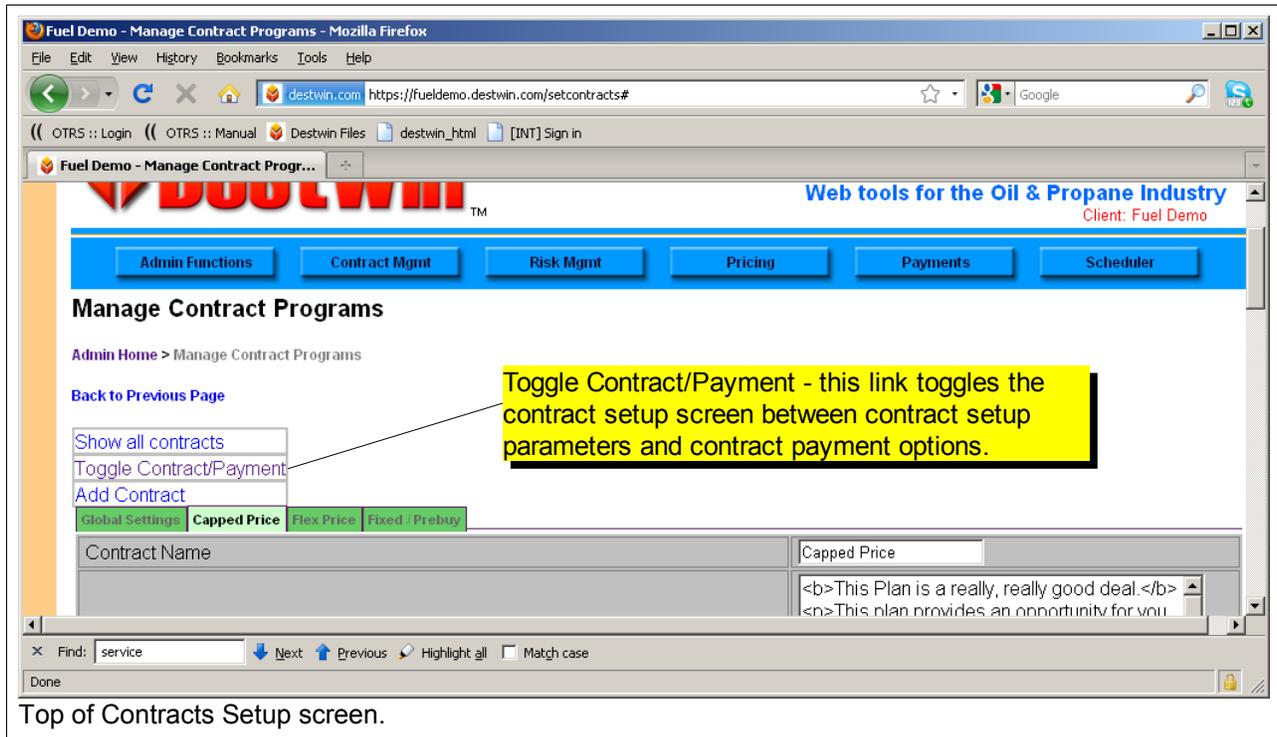
Tech Tip
 Press Ctrl-F to pop-up or active a find function and search for 'service plan' to quickly find this particular parameter. You can use the Ctrl-F function to search for any text string at any time.

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.



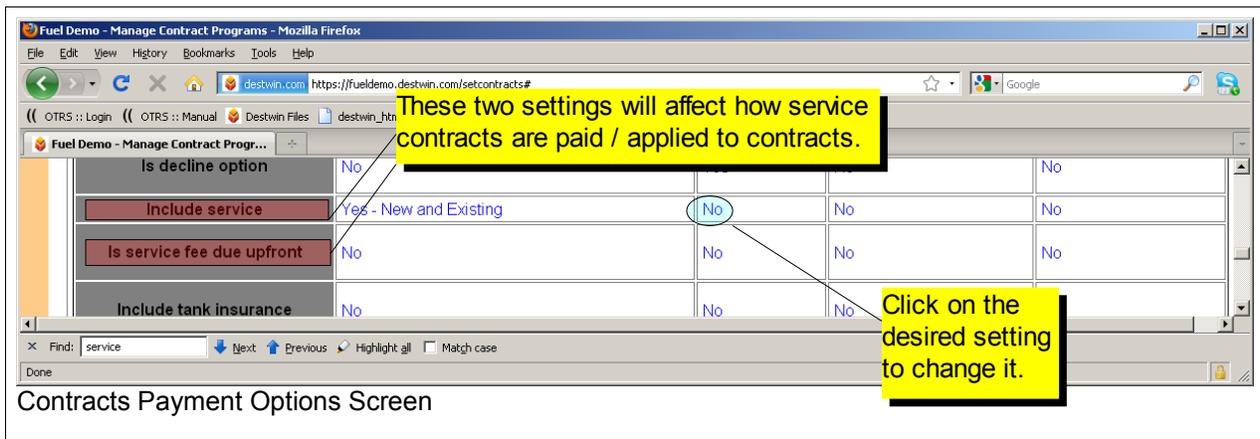
Bottom of Contract Setup screen.

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.



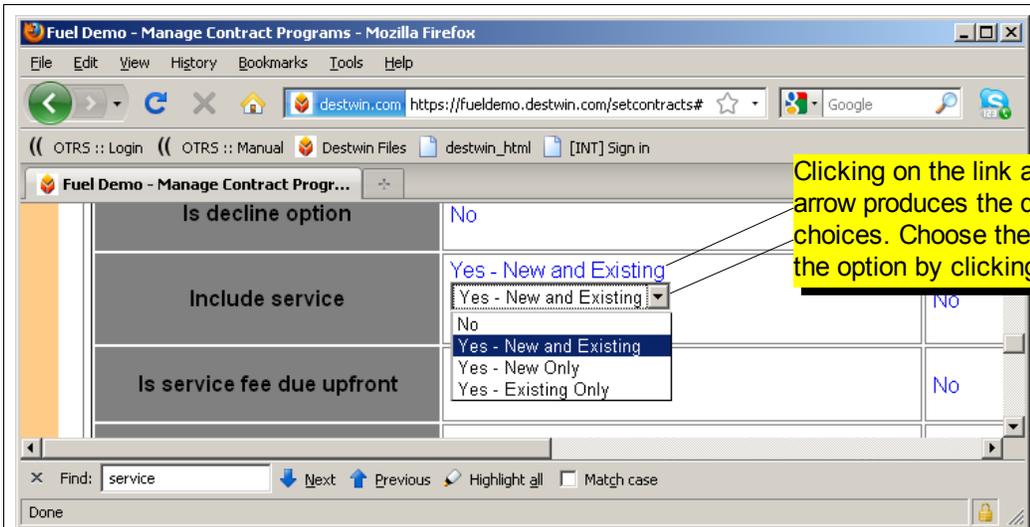
There are two settings that affect how payments for service contracts may be applied to contracts:

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

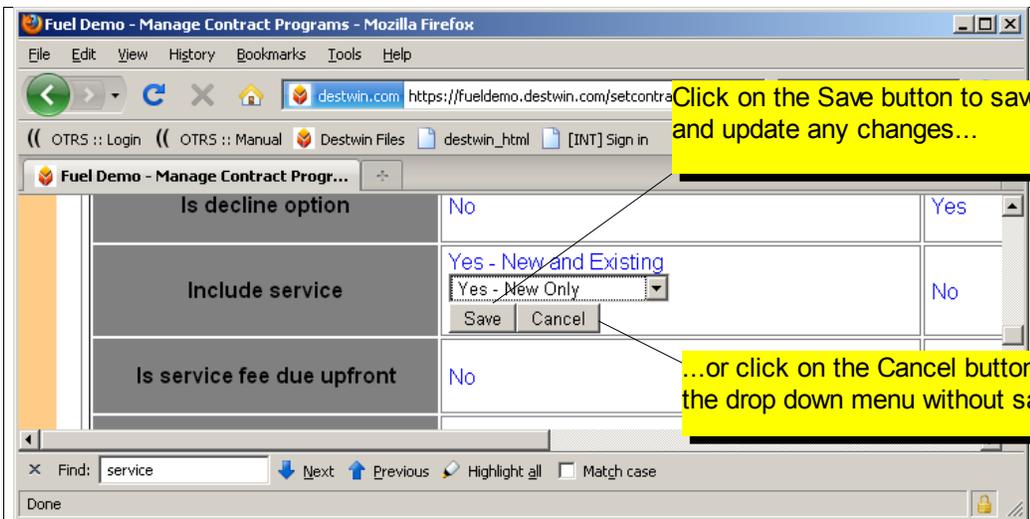


The **Include Service** Payment setting has the following options:

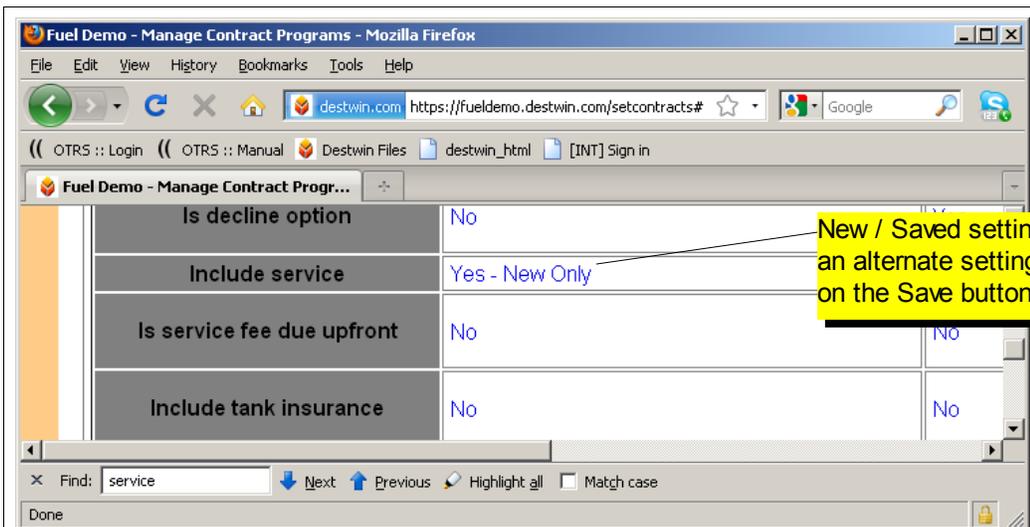
- **No** - select this option if you do NOT want to factor the service plan price into the payment option.
- **Yes - New and Existing** - select this option if you DO want to factor the service plan price for both a new service plan and / or an existing service plan into the payment option.
- **Yes -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



Include service options expanded (result of clicking on link)



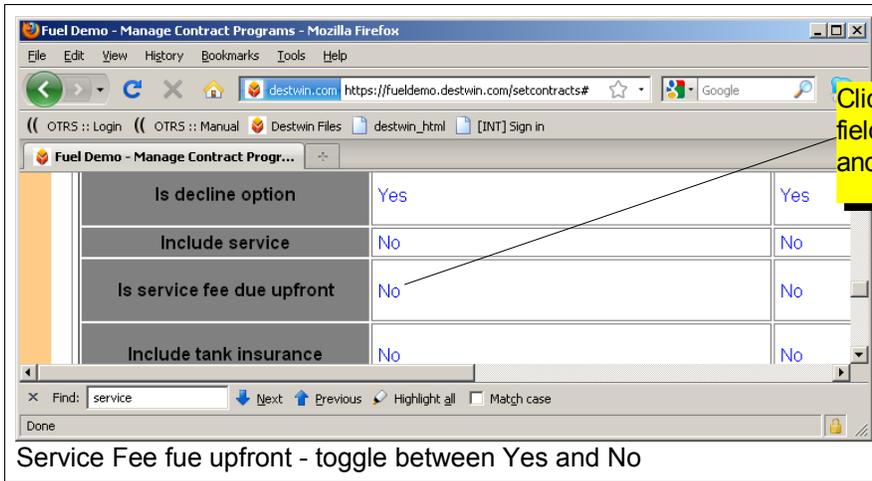
Include service options expanded (Save and Cancel buttons shown)



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

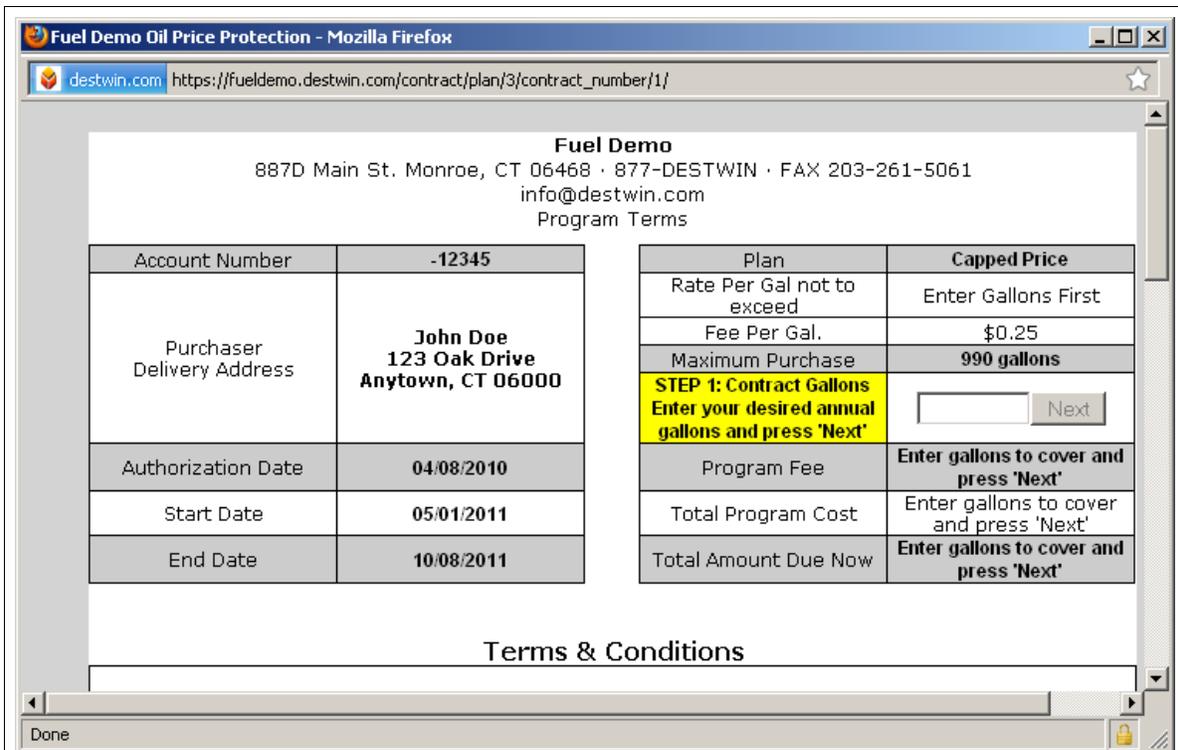
Ask user for service plan? - Yes - required if not on one already

Capped Price Payment Options

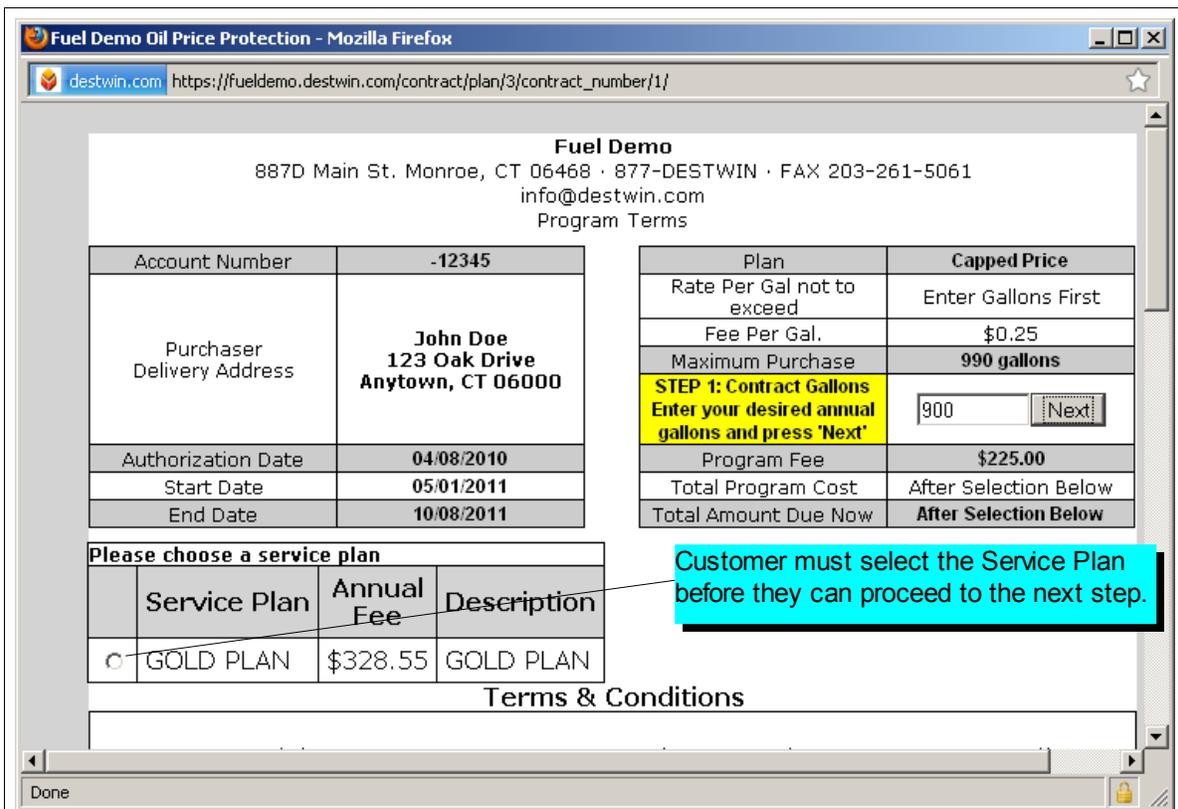
Include service - Yes - New Only or 12 Equal Monthly Payments, includes service plan Payment option

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.



First Customer Contract Screen for Capped Price Program



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

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

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

Plan	Capped Price
Rate Per Gal not to exceed	Enter Gallons First
Fee Per Gal.	\$0.25
Maximum Purchase	990 gallons
STEP 1: Contract Gallons 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

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

Service Plan Cost is displayed for the payment option that we set to require the plan, but not for those plans for which we did not require a 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.