

Destwin Quick Reference
Console Version 1.3
How new contracts are controlled when customers are currently under contract.
20-JUN-10

This Quick Reference Guide describes the criteria (and how to set them) that determine under what circumstances a customer currently under contract may enter into a new contract. It also describes the conditions under-which message is displayed to the customer when they try to enter a contract and how to edit that message.

Part 1 - The Settings

There are two settings that control whether or not a customer currently can enter into a contract if currently under contract. One considers the gallons remaining, the other considers the date and they don't behave the same with respect to the Message.

Gallons Criteria:

Advanced Site Parameter:

When customer has used __%, allow them to create new contract

Date Criteria:

Site Parameter:

Days in advance a person can create a new contract (if currently under contract)

The table below describes the system behavior when the above criteria are met.

Gallons Criteria Met	Date Criteria Met	Customer can enter new contract	Customer receives Message
Yes	Yes	Yes	Yes
Yes	No	Yes	Yes
No	Yes	Yes	No
No	No	No	No

Note that the customer receives the Message when the Gallons criteria is met and this Message is never dependent on the Date criteria.

The Message itself is an Advanced Site Parameter:

Message:

Advanced Site Parameter:

Message to show customer before they can create another contract

Part 2 - How to Change the Settings

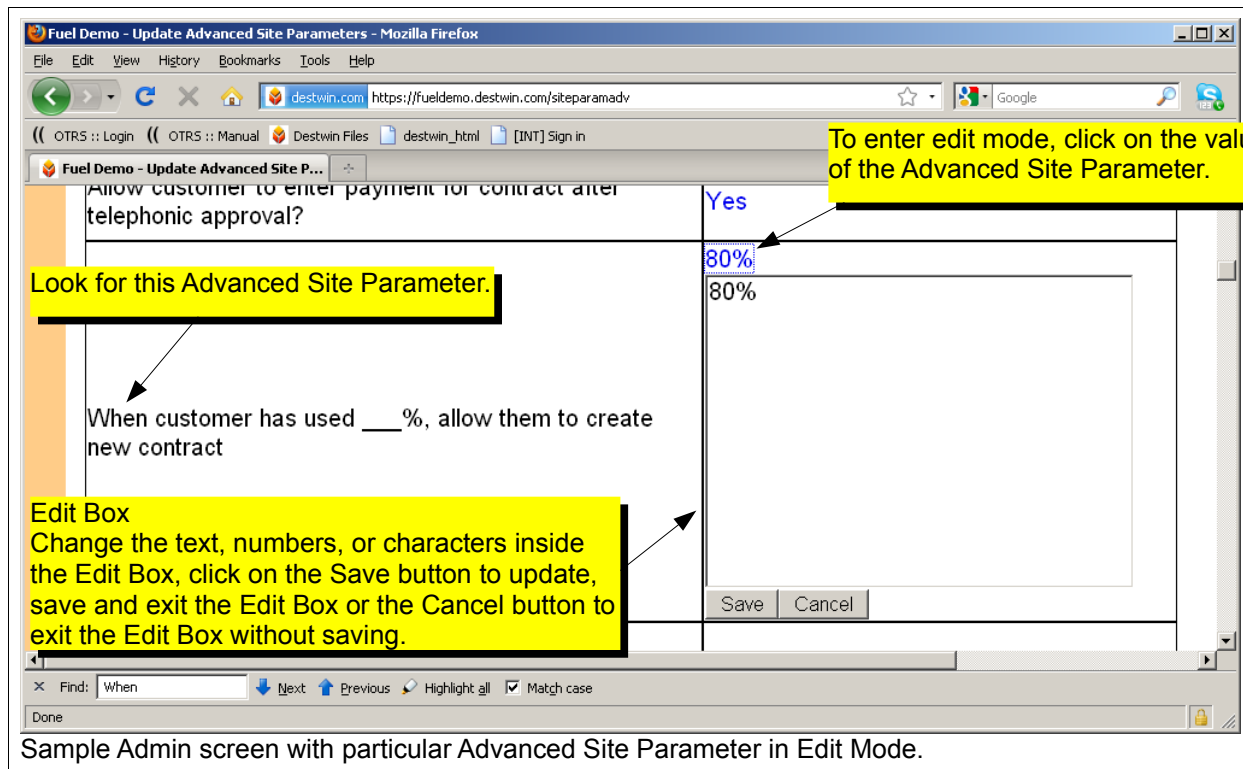
Gallons Criteria:

Advanced Site Parameter:

When customer has used __%, allow them to create new contract

The screenshot shows the Destwin Dealer Management System Admin interface. The top navigation bar includes links for Admin Functions, Contract Mgmt, Risk Mgmt, Pricing, and Payments. The Admin Functions menu is expanded, showing a list of options including Advanced Functions, Categories, Configurations, Set-Up, Documents, E-Mail, Customer Usage, Account Search, Content Management, Form Wizard, Help, and Logout. The 'Advanced Site Parameters' link is highlighted in the 'Documents' section. A yellow callout box points to this link with the text: 'Under Admin Functions, click on the Advanced Site Parameters link.' The main content area displays various configuration fields for the Advanced Site Parameters, including 'Site Parameters', 'Advanced Site Parameters', 'Heat Curve', 'Setup Svc Plans', 'Set Display Fields', 'person can create a new contract (if currently under contract)', 'Deadline (if paying by check)', 'not change', 'end contracts (also return address for customers)', 'Send an email to the above address when contract submitted?', 'Help Email Address (customer service, etc)', and 'Help Phone Number (customer service, etc)'. The 'Site Parameters' field is set to 3, 'Advanced Site Parameters' is 00/00/0000, 'Heat Curve' is 00/00/0000, 'Setup Svc Plans' is 18 months, 'Set Display Fields' is 18 months, 'person can create a new contract (if currently under contract)' is 121, 'Deadline (if paying by check)' is 10, 'not change' is demo, 'end contracts (also return address for customers)' is support@destwin.com, 'Send an email to the above address when contract submitted?' is Yes, 'Help Email Address (customer service, etc)' is support@destwin.com, and 'Help Phone Number (customer service, etc)' is 1-877-337-8946.

Sample Admin screen with Advanced Site Parameters highlighted for selection.



As set above, after a customer has received 80% of their contracted gallons they will be able to enter a new contract.

Tech Tip

Press Ctrl-F to pop-up or activate a find function built into your browser to search for any character string to quickly find this particular parameter you are looking for. You can use the Ctrl-F function to search for any text string at any time.

Date Criteria:

Site Parameter:

Days in advance a person can create a new contract (if currently under contract)

Fuel Demo - Update Site Parameters - Mozilla Firefox

File Edit View History Bookmarks Tools Help

destwin.com https://fueldemo.destwin.com/siteparam

OTRS :: Login OTRS :: Manual Destwin Files destwin_html [INT] Sign in

Fuel Demo - Update Site Parameters

Destwin™

Dealer Management

Web tools for the Oil &

Admin Functions Contract Mgmt Risk Mgmt Pricing Payments

Advanced Functions

Categories

Configurations

Set-Up

Documents

E-Mail

Customer Usage

Account Search

Content Management

Form Wizard

Help

Logout

Site Parameters

Advanced Site Parameters

Heat Curve

Setup Svc Plans

Set Display Fields

person can create a new contract (if currently under contract)

Deadline (if paying by check)

not change)

and contracts (also return address for customers)

Send an email to the above address when contract submitted?

Help Email Address (customer service, etc)

Help Phone Number (customer service, etc)

Allow users to schedule appointments? (if installed)

Allow users to get new password?

5500

55

3

00/00/0000

00/00/0000

18 months

18 months

121

10

demo

support@destwin.com

☒ Yes

☐ No

support@destwin.com

1-877-337-8946

☒ Yes

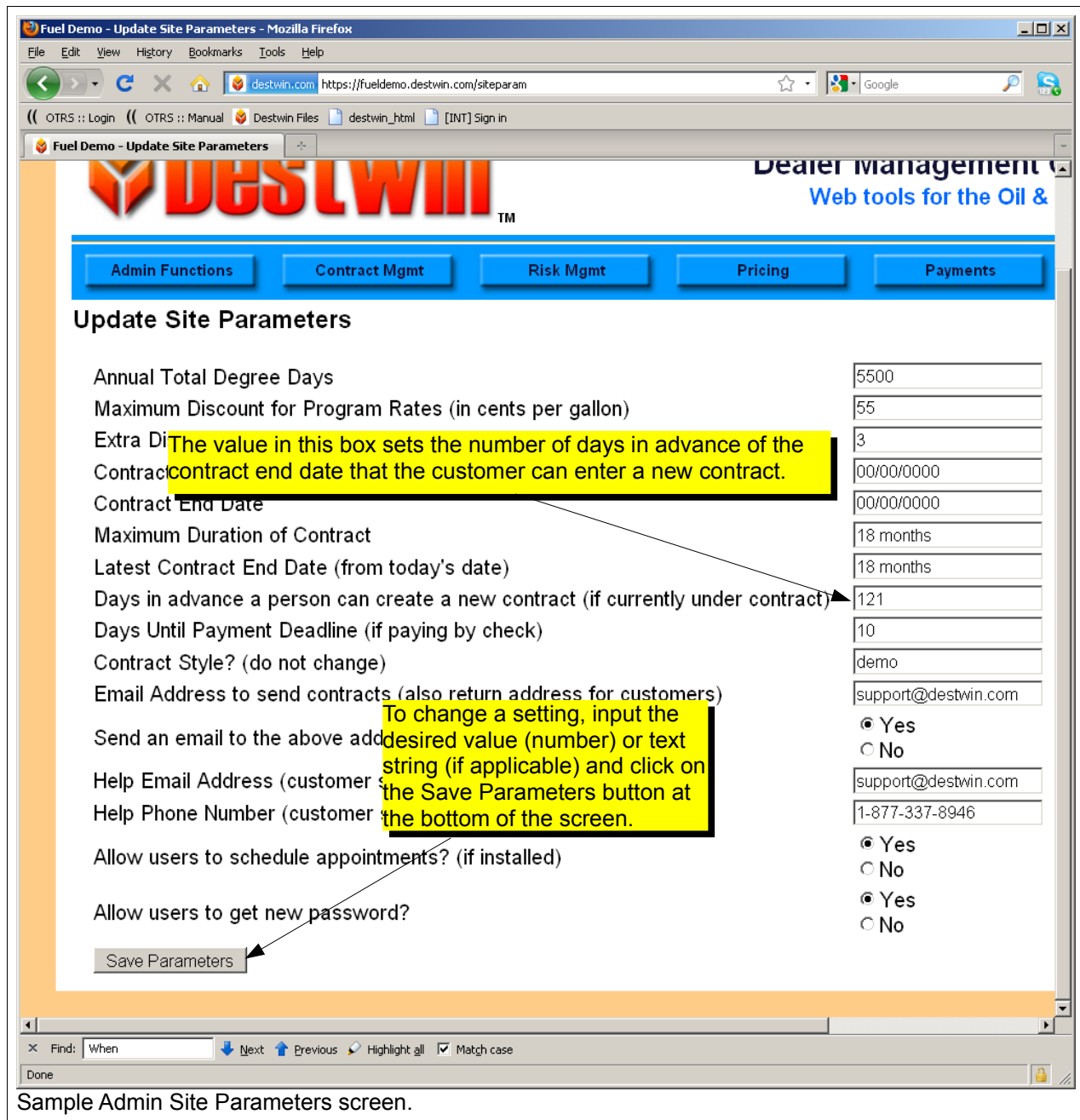
☐ No

☒ Yes

Find: When Next Previous Highlight all Match case

https://fueldemo.destwin.com/siteparam

Sample Admin screen with Site Parameters highlighted for selection.



As set above, once a customer is within 121 days of their existing contract end date they will be able to enter a new contract.

Message:

Advanced Site Parameter:

Message to show customer before they can create another contract

Update Advanced Site Parameters

Fields below this point are instantly set when you "leave" them. To edit, just click the value you want. "Yes" and "No" values toggle when you click them, and You do not need to click the "Save Parameters" button above.

Select Parameter Type To View: Not Selected

Look for this Advanced Site Parameter.

Message to show customer before they can create another contract

Edit Box
Change the text, numbers, or characters inside the Edit Box, click on the Save button to update, save and exit the Edit Box or the Cancel button to exit the Edit Box without saving.

Please note that there are gallons remaining on your existing Oil Price Protection Plan. Any new Oil Price Protection Plan will take effect once all gallons are used on your existing Oil Price Protection Plan. To proceed with selecting a new Oil Price Protection Plan, press Continue. Otherwise, press Cancel.

Please note that there are gallons remaining on your existing Oil Price Protection Plan. Any new Oil Price Protection Plan will take effect once all gallons are used on your existing Oil Price Protection Plan. To proceed with selecting a new Oil Price Protection Plan, press Continue. Otherwise, press Cancel.

Save Cancel

Allow CSR to adjust fee per gallon?	Yes
Allow CSRs to create a new contract even if currently	Yes

Find: create another contract Next Previous Highlight all Match case Done

Sample Admin screen with particular Advanced Site Parameter in Edit Mode.

Tech Tip

Press Ctrl-F to pop-up or activate a find function built into your browser to search for any character string to quickly find this particular parameter you are looking for. You can use the Ctrl-F function to search for any text string at any time.