

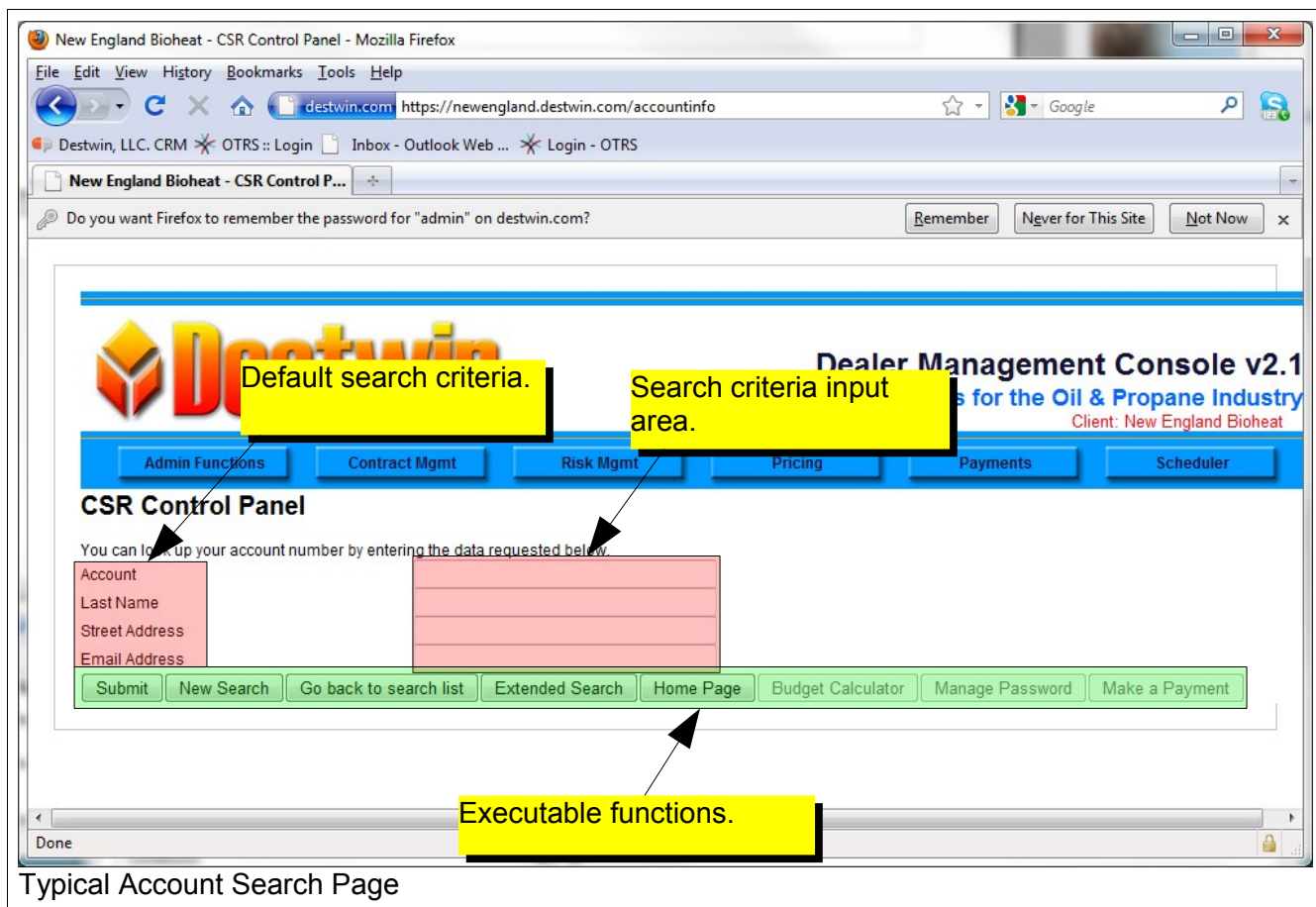
Destwin® Fuel Dealer Solution Quick Reference Guide  
Console Version 2.0  
How to Use Account Search  
03-DEC-11

This Quick Reference Guide describes how to use Account Search to access customer account information and assist customers with their account information, using the customer portal, or resetting their password. The Account Search function is generally available to all system users.

In most cases the Account Search page is set as the default landing page for users. If you need assistance setting your default landing page, contact Destwin.

If you need to access the Account Search page from within the Dealer Console, click on Account Dashboard button (sometimes also called Account Search).





Executable functions:

**Submit** – executes search based on criteria input.

**New Search** – refreshes screen and search criteria.

**Go back to search list** – returns to the prior search results.

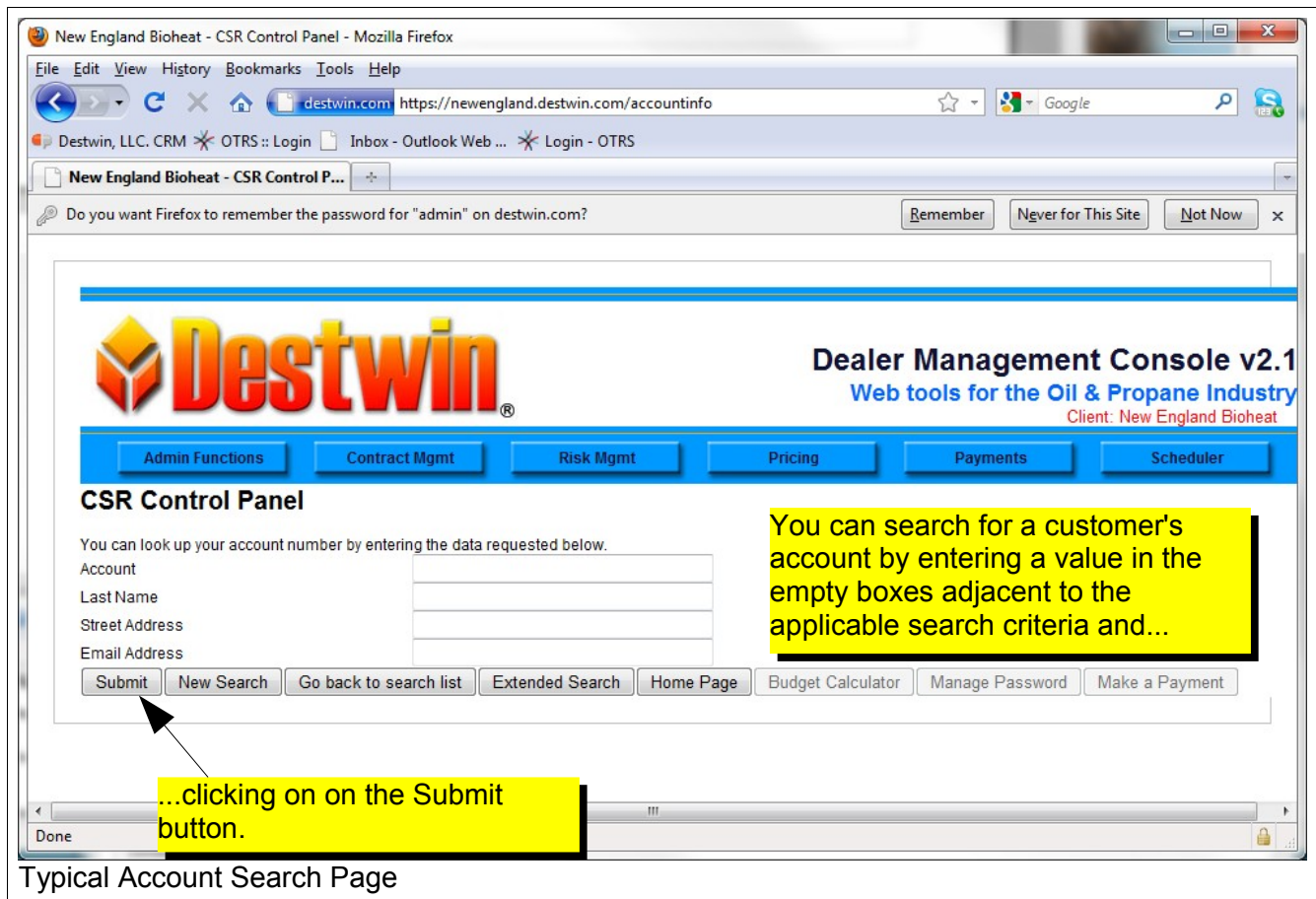
**Extended Search** – provides access to extended search functions (not generally used).

**Home Page** – returns user to their Dealer Management Console home page, in most cases this is the Account Search page.

**Budget Calculator** – calculates budget information for an account if your system is configured to offer budgets. (Activated after an account has been selected).

**Manage Password** – provides capability to reset a customer account password. (Activated after an account has been selected).

**Make a Payment** – provides direct access to Make a Payment page. (Activated after an account has been selected).



### Tech Tip

If you know the customer's Account number that is often a good way to look up an account. Because account numbers are unique, you will find one and only one matching result. If you do not know the customer's account number, searching the Last Name criteria will generally find the account but since last names are not unique you may find multiple matches. The system will supply a list of all cases where the text entered in the field occurs within your customer database. The most common search criteria used are Account and Last Name, but you may also use the other defaults and if necessary, the Extended Search function. Generally the Extended Search function is used for purposes other than direct customer support, e.g. to perhaps find all occurrences in the database for members of a particular zip code or division.

You can look up your account number by entering the data requested below.

Account

Last Name Smith

Street Address

Email Address

To search by last name, enter a name in the Last name field and click on the Submit button.

You can look up your account number by entering the data requested below.

Account

Last Name Smith

Street Address

Email Address

Account	Name	Select
30977	Henry Smith	<input type="radio"/>
33976	CARMELO SMITHWICK	<input type="radio"/>
36388	DIA SMITHSON	<input type="radio"/>
36634	JED SMITHWICK	<input type="radio"/>
37956	ADA SMITHERS	<input type="radio"/>
800023	Sam Smith	<input type="radio"/>
800053	John Smith	<input type="radio"/>
800076	Bob Smith	<input type="radio"/>
800090	Taylor Smith	<input type="radio"/>
800094	mark smith	<input type="radio"/>
800118	Taylor Smith	<input type="radio"/>
800128	Taylor Smith	<input type="radio"/>
800177	Taylor Smith	<input type="radio"/>
800182	Ben Smith	<input type="radio"/>
800197	Taylor Smith	<input type="radio"/>
800198	Taylor Smith	<input type="radio"/>
800203	Taylor Smith	<input type="radio"/>
800210	Robert Smith	<input type="radio"/>
800211	Rick Smith	<input type="radio"/>
800216	Robert Smith	<input type="radio"/>

To select an account to view from a search results list, click on the radio button next to that account. This will immediately open a view to that customer's account in the Customer Portal (see below).

Search results in sample database for accounts that contain – smith – in the Last Name field.

From this screen you may browse through the portal to view information the same as your customer. You can answer questions about their account data, assist them in paying their bill, scheduling appointments, ordering fuel, etc....

...or you can use any of the executable functions described on page 1 of this document...

...or you can reset the customer's password for the by using the default password for their account (if applicable and available) or entering any value for the. To reset a customer's password either leave the default (if applicable), or enter a value and click on the Reset button. Be sure to tell the customer their new password.

#### Tech Tip

When you reset a customer's password, it resets their account to it's original condition and the customer will be required upon login to repeat the first time login process. They will need to enter an e-mail address and reset their password.

## Some Comments about passwords.

While the risk of fraud on your site is relatively minimal, it is still appropriate to implement good practice with regard to protecting customer passwords. You should take reasonable measures to ensure that the person you are talking to on the phone is in fact the account holder or authorized to access the account. Unless you have absolutely verified the customer's identity we recommend you never give a customer their password, instead, reset the password to something the customer should know about their account, for example the numeric portion of their billing street address or the last four digits of the phone number on their account. They should know these things without you having to provide the specific information. You can tell a customer "I am going to set your password to your house number on your address." Then after doing this, ask them to try to log in.