

This Quick Reference Guide describes the standard options that are available on the Order Fuel page and how to manage the content and certain behavior of this page.

This document has the following parts:

- Part 1 – Standard Account Behavior Options
- Part 2 – Controlling Page Content & Behavior
- Part 3 – Pricing
- Appendix A - Coupons

Part 1 - Standard Account Behavior Options

The Order Fuel Page can be configured to treat different customers differently. The standard options are:

1. Treat as a Request Delivery page – normally applied to automatic delivery customers.
2. Treat as Order Fuel page, no payment required – normally applied to will call customers who are approved for credit.
3. Treat as Order Fuel page, payment required – normally applied to will call customers who are not approved for credit.

Regardless of the behavior, all requests or orders processed through this page on the customer portal are written to the Will Call log available in the Dealer Management Console.

Before Getting Started

Before getting started there is a configuration named [userInfoWillCall](#) that controls whether or not the Order Fuel page is accessible to customers. If set to 0, customers can not access the page but you can through the CSR Dashboard. This mode is useful when setting up and testing the page before making it live to customers.



Configurations are accessed from the Configurations menu from Admin Functions.

53	userInfoWillCall	1	Set to 1 to enable Will Call ordering, 0 to disable.
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UserInfoWillCall Configuration

For more information about how to edit Configurations, see the help document named **How to Edit Configurations**.

Part 2 - Controlling Page Content Request Delivery Page

Order Fuel Here

Product: #2 Fuel Oil

Current Tank Reading: No Gauge

Other Comments or Information:

Submit

Typical Request Delivery page

The type of fuel for a customer's account is known and displayed to the customer.

The customer may select their current tank reading from a drop down list (see below),

The customer may enter comments in the comments area.

When the customer clicks on Submit, they will receive an acknowledgment message. The order request is written to the Will Call log for follow-up or processing.

Home / Logout My Account Info Make A Payment

Order Fuel Here

Product: #2 Fuel Oil

Current Tank Reading: No Gauge

Other Comments or Information:

Submit

Tank reading drop down choices.

Typical Request Delivery page, tank reading option selected

Order Fuel Page

Order Fuel Here

We noticed that you're not on [EZ Delivery...](#)
CLICK HERE to enroll and earn \$25 off this order!

Please select the number of gallons you would like to have delivered.

Thank you for your order! Your credit card will be authorized for the gallons ordered.

Today's Price	\$4.170 per gallon
Your Tank Capacity	260 gallons
Fill Tank?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Coupon Code	<input type="text" value="Enter Code"/>
Total Price	\$1,084.20
Name	<input type="text" value="DIA SMITHSON"/>
Phone Number	<input type="text"/>
Email Address	<input type="text" value="robert@destwin.com"/>
Other Comments or Information	<input type="text"/>

Typical Order Fuel Page

Targeted Marketing Message created using Marketing Tools.

Advanced Site Parameter (ASP) named: **Heading text for will call page**

ASP named: **Will call billing message**

Price per gallon comes from the Margin Matrix Retail group.

Tank capacity comes from backend system account data.

Fill Tank Yes / No option is a configurable ASP named: **Will Call - set fill tank to yes by default?**

Coupon Yes / No option is a configurable ASP named: **Will call coupons enabled?**
(see Appendix A for more information)

Order Fuel Here

We noticed that you're not on [EZ Delivery...](#)
CLICK HERE to enroll and earn \$25 off this order!

Please select the number of gallons you would like to have delivered.

Thank you for your order! Your credit card will be authorized for the gallons ordered.

Today's Price	\$4.170 per gallon
Your Tank Capacity	260 gallons
Fill Tank?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Enter Gallons	<input type="text" value="200"/>
Coupon Code	<input type="text" value="Enter Code"/>
Total Price	\$834.00

Typical Order Fuel Page with Fill Tank option set to No

If the Fill Tank option is set to 'No' by the customer, they may enter the desired gallons for the order in the Enter Gallons box.

Summary Table of Advanced Site Parameters that affect the Order Fuel page

Label*	Type	Description
General		
<i>Enable Will Call orders?</i>	Yes / No	Set to enable or disable will call ordering
<i>default gallons for will call order</i>	Content	Numeric value
<i>minimum gallons for will call order</i>	Content	Optional numeric (gallons) value
<i>Will Call - set fill tank to yes by default?</i>	Yes / No	If set to 'Yes' supersedes <i>default gallons on will call order</i> ASP.
<i>Will Call - do not ask customer if they want to fill tank?</i>	Yes / No	Enable or disable question that asks customer if they want to fill their tank
<i>Will call coupons enabled?</i>	Yes / No	Enable (Yes) or disable (No) coupon capability
Content & Messaging		
<i>Heading text for will call page</i>	Content	See page 2 above
<i>Will call billing message</i>	Content	See page 2 above
<i>will call confirmation message document name</i>	Content	Destwin system document name for confirmation message
<i>Emails addresses to send a notification about will call request (separated by a comma)</i>	Content	Used to set e-mail recipients for internal notification e-mail.
Payment, Fees, and Processing		
<i>Will call without payment?</i>	Yes / No	Allow all customers to process will call orders without payment
<i>will call page detects delivery type of location</i>	Yes / No	If set to yes, automatic delivery customers are processed to Request Delivery page, non-automatic to Order Fuel.
<i>will call/fuel request allowed when user has a contract?</i>	Yes / No	If set to yes, automatic delivery customers on a price protection plan are processed to Request Delivery page, non-automatic to Order Fuel.
<i>allow user to mark that a will call order is an emergency?</i>	Yes / No	Allow a user to mark an order for emergency delivery, used in conjunction with emergency fee.
<i>Fee for emergency will call?</i>	Content	Optional dollar value
<i>Fee for will call under certain gallons?</i>	Content	Optional dollar value
<i>Charge a fee for will call orders below this amount</i>	Content	Optional numeric (gallons) value
<i>Fee for will call under certain gallons (lower level)?</i>	Content	Optional dollar value
<i>Charge a fee for will call orders below this amount (lower level)</i>	Content	Optional numeric (gallons) value

<i>allow user to request a heater priming on will call order?</i>	Yes / No	Enable or disable optional priming service
<i>Priming fee for adding will calls</i>	Content	Optional dollar value
<i>allow user to apply their credit balance toward fuel order?</i>	Yes / No	If set to 'Yes' customer may apply an existing credit balance to their order.
<i>Do authorization for fill tank on will call order?</i>	Yes / No	For credit card processing payment submitted is processed as authorization only.
<i>Do full capture on will call order instead of usual authorization only?</i>	Yes / No	For credit card processing payment submitted is processed as full charge (sale).
<i>Require user to check a box indicating they read the terms?</i>	Yes / No	Enable or disable check box for customer
<i>will call terms document</i>	Content	Destwin System Document name for terms. Used in conjunction with ' <i>Require user to check a box indicating they read the terms?</i> '
<i>Send confirmation email after contract is marked processed?</i>	Yes / No	If set to No, confirmation e-mail is sent upon Submit on Make a Payment page, otherwise confirmation e-mail is sent only after order has been marked as Processed.

*The exact label on your site may differ from the label name shown in this table. If you need assistance or have questions, contact Destwin.

If your system does not have one or more of the above Advanced Site Parameters, contact Destwin and it can be added to your site.

Tech Tip

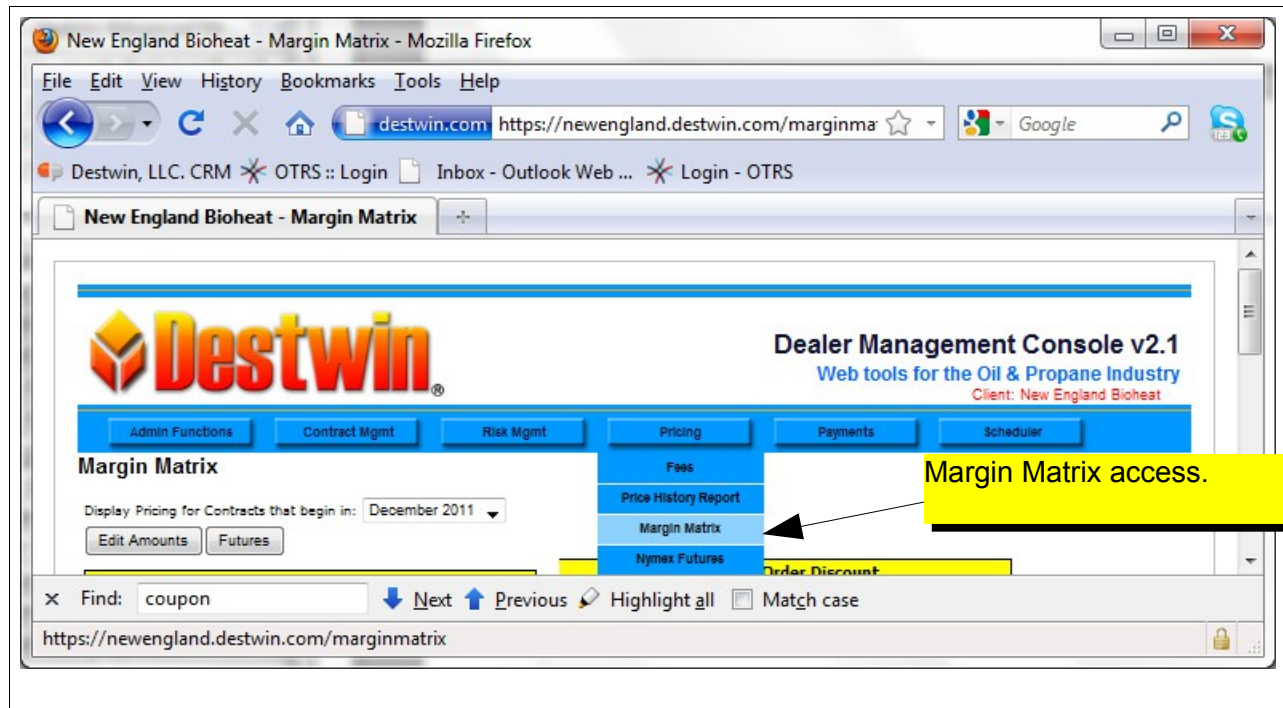
Use **CTRL-F** to open a search function within your browser and search for text appropriate for a given label of an Advanced Site Parameter (ASP) to find a given ASP.

Summary

1. The Fuel Dealer should contact Destwin to establish general behavior with regard to which customers see which page or pages. The **Standard Behavior Options** are described on page 1 of this document.
2. Certain page content and page behavior can be managed directly by the fuel dealer through Advanced Site Parameters or use of Marketing Messages.

Part 3 – Pricing

Pricing is set in the Margin Matrix.



Setting a Base Price

The screenshot shows the Margin Matrix page. The top navigation bar includes buttons for Admin Functions, Contract Mgmt, Risk Mgmt, Pricing, Payments, and Scheduler. The Pricing button is highlighted, and a dropdown menu is open, showing options: Fees, Price History Report, Margin Matrix, and Nymex Futures. The Margin Matrix option is selected, and a yellow callout box with an arrow points to it, containing the text "Margin Matrix access." The browser window title is "New England Bioheat - Margin Matrix - Mozilla Firefox" and the address bar shows "https://newengland.destwin.com/marginma".

Margin Matrix

Display Pricing for Contracts that begin in: December 2011

Edit Amounts Futures

Pricing Groups					
Name	Margin	Base Price	Effective Price	Edit	Delete
Comm Spot Price	\$0.400	\$3.209	\$3.609	Edit	Delete
Comm Contract Price	\$0.250	\$3.209	\$3.459	Edit	Delete
Fixed Price	\$3.290	\$3.209	\$6.499	Edit	Delete
Special Group 1	\$0.750	\$3.620	\$4.370	Edit	Delete
# Res Spot Price	\$0.550	\$3.620	\$4.170	Edit	Delete
* Res Contract Price	\$1.000	\$3.209	\$4.209	Edit	Delete

denotes default group
* denotes retail group
Add a group

Will Call Order Discount	
Gallons	Discount
150	\$0.00

Global Pricing Rules				
Name	Price Adjustment	Applicable Contracts	Edit	Delete
Employee Discount	\$-0.10	Capped Price Flex Price	Edit	Delete
In Town	\$-0.05	Capped Price Flex Price	Edit	Delete

The base price on the Will Call order page comes from the retail group.

Pricing Groups					
Name	Margin	Base Price	Effective Price	Edit	Delete
Comm Spot Price	\$0.400	\$3.209	\$3.609	Edit	Delete
Comm Contract Price	\$0.250	\$3.209	\$3.459	Edit	Delete
Fixed Price	\$3.290	\$3.209	\$6.499	Edit	Delete
Special Group 1	\$0.750	\$3.620	\$4.370	Edit	Delete
# Res Spot Price	\$0.550	\$3.620	\$4.170	Edit	Delete
* Res Contract Price	\$1.000	\$3.209	\$4.209	Edit	Delete

Click on the Edit link to open an edit box for the Retail Pricing group

Name: Res Spot Price

Margin Desired: \$ 0.55

Margin over: Rack Price

Accounts belong to this group if they have a 'customer_group' value of:

Make this the default group? (if account does not belong to any other group, fall back to this one)

☐ Yes ☒ No

Make this the 'retail' group?

☒ Yes ☐ No

You may set a margin over any of the margin over drop down options.

Edit box of a Pricing Group

New England Bioheat - Manage - Mozilla Firefox

destwin.com https://newengland.destwin.com/margingroup?action=edit&c_id=1

Name: Res Spot Price

Margin Desired: \$ 0.55

Margin over: Select Base Price (required)

Accounts belong to this group if they have a 'customer_group' value of:

Make this the default group? (if account does not belong to any other group, fall back to this one)

☒ Yes ☐ No

Make this the 'retail' group?

☒ Yes ☐ No

Done

Edit box with Margin Over drop down options displayed.

Tech Tip

Whatever Margin Over option is chosen, after you have set your price, be sure to access selected customer accounts through the portal to view, check, and confirm pricing.

Usually the Will Call order price is set as a Margin over the Rack Price, Retail Price (0), or Backend.

If over Rack Price, be sure to set (and monitor) an appropriate Prompt (rack) cost in the Margin Matrix (see below).

If over Retail Price (0), you will be setting the price in the Margin Over box.

If over Backend, you will be setting the price based on data Destwin receives from the backend. **Note – not all backend systems are supported. Contact Destwin for details about your specific backend system.**

Costs

Avg weighted 12 month strip cost (includes diff) \$3.209 (includes diff)

Prompt (rack) \$ 3.6200 (rack)

Save Margin Matrix Reset Exit Edit Amounts

Margin Matrix Costs Table in Edit Mode

To edit Rack Cost, enter edit mode, change the Prompt (rack) cost as desired and click on the Save Margin Matrix button when done.

Setting a Quantity Discount

Margin Matrix

Display Pricing for Contracts that begin in: December 2011

Edit Amounts Futures

Pricing Groups

Name	Margin	Base Price	Effective Price	Edit	Delete
Comm Spot Price	\$0.400	\$3.209	\$3.609	Edit	Delete
Comm Contract Price	\$0.250	\$3.209	\$3.459	Edit	Delete
Fixed Price	\$3.290	\$3.209	\$6.499	Edit	Delete
Special Group 1	\$0.750	\$3.620	\$4.370	Edit	Delete
# Res Spot Price	\$0.550	\$3.620	\$4.170	Edit	Delete
* Res Contract Price	\$1.000	\$3.209	\$4.209	Edit	Delete

* denotes default group
denotes retail group
Add a group

Will Call Order Discount

Gallons	Discount
150	\$0.00

Global Pricing Rules

Name	Price Adjustment	Applicable Contracts	Edit	Delete
Employee Discount	\$-0.10	Capped Price Flex Price	Edit	Delete
In Town	\$-0.05	Capped Price Flex Price	Edit	Delete
InActive Customer	\$-0.10	Flex Price	Edit	Delete
Large Tank Discount	\$-0.05	Capped Price Flex Price	Edit	Delete

A quantity discount level may be set in the Will Call Order Discount table. To modify the gallon threshold and the discount amount click on the **Edit Amounts** button to enter edit mode.

Maximum premium that can be applied at time \$ 0.00

Minimum price that a contract can be sold \$ 0.00

Costs

Avg weighted 12 month strip cost (includes diff) \$3.209 (includes diff)

Prompt (rack) \$ 3.6200 (rack)

Save Margin Matrix Reset Exit Edit Amounts

Bottom of Margin Matrix screen in edit mode

After completing edits to the Will Call Order Discount table, be sure to click on the Save Margin Matrix button when done.

Appendix A - Coupons Setup

DESTWIN FDS allows customers to enter a coupon code on the Order Fuel page if this function is enabled. FDS keeps track of the entry and applies the appropriate discount to the current order and re-calculates the amount due immediately on the Order page. Any account that uses a particular coupon code may only do so once.

There is not a user interface for an administrator to set up a coupon in this version so Destwin Support will do this for you. The information as described below is needed:

Field	Description
Start Date	The earliest date the coupon will be accepted.
End Date	The latest date the coupon will be accepted.
Amount	The fixed dollar amount (redemption value) of the coupon. (Note, at this time only fixed dollar values are supported).
Code	Whatever string of characters you want to have the customer enter to qualify their coupon. We suggest 6 - 8 characters, no special characters.
Minimum	Minimum gallon requirement. This is an optional setting, if no minimum is set, this field is ignored.