

Destwin Fuel Dealer Solution Quick Reference
 Console Version 2.0
 How to Set Pricing on Contracts
 01-JAN-12

This Quick Reference describes how to set the price on contracts. Generally, administrator permissions are required to perform this function. This document covers the following topics, page numbers in parentheses:

- Margin Matrix Summary (page 2)
- Pricing Groups (pages 3-5)
 - Edit a Pricing Group
 - Viewing and Modifying Rules of a Pricing Group
 - Setting a Pricing Rule
- Global Pricing Rules (page 6)
- Pricing Rule Parameters (pages 6-7)
- Costs (page 7)
- Futures (page 8)
- Weighted Average Strip Cost Automatic Update (page 10)

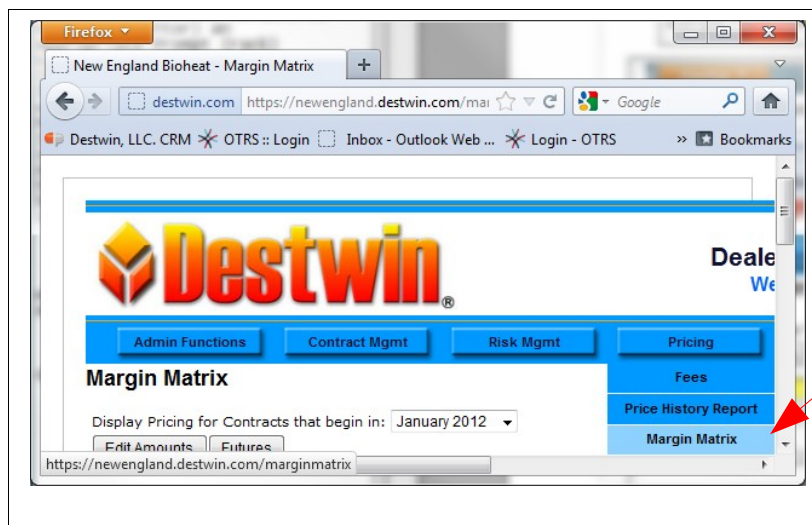
Oil Price Protection Plans Available For 01/03/2012

Plan	Available Pricing Options	Not to exceed	Fee / gal	Select
Capped Price	Pre-payment (Best Price)	\$3.859	\$0.20	
	12 Equal Monthly Payments	\$3.909	\$0.25	<input type="button" value="Next Step"/>
	Pay as delivered	\$4.009	\$0.25	

Base Price Per Gallon is set in the Margin Matrix.

	Available Pricing Options	Currently at	Fee	Select
Flex Price	Monthly Budget	\$4.120	None	<input type="button" value="Next Step"/>

Sample Price Protection Page



The Margin Matrix is accessed from the Pricing top menu drop down.

Margin Matrix Summary

The **Edit Amounts** button is used to place the Margin Matrix in Edit Mode. In Edit Mode input fields may be edited and saved.

The **Futures** button is used to access the Nymex Futures screen for Heating Oil futures.

The **Display Pricing for Contracts** that begin in: drop down may be used to select an alternative start month for a contract price. The default is the current month.

A quantity discount for Will Call orders may be set in the **Will Call Order Discount** table. See the help document named: **How to Set Up the Request Delivery / Will Call / Order Fuel Page for more information.**

Margin Matrix

Display pricing for Contracts that begin in: January 2012

Edit Amounts Futures

Pricing Groups					
Name	Margin	Base Price	Effective Price	Edit	Delete
Comm Spot Price	\$0.400	\$3.169	\$3.569	Edit	Delete
Comm Contract Price	\$0.250	\$3.169	\$3.419	Edit	Delete
Fixed Price	\$3.290	\$3.169	\$6.459	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	\$3.169	\$4.169	Edit	Delete

* denotes default group

denotes retail group

Add a group

The **Pricing Groups** table shows existing groups. The default group is applied to any contract or payment option other than retail for customers who have not been specifically assigned to a different group. The retail group is applied to any retail contract or payment option.

Add a pricing rule

Pricing Rules Parameters	
Maximum number of discounts that can be applied at a time	1
Maximum discount that can be applied at time	\$ 0.80
Maximum number of premiums that can be applied at a time	
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)	\$3.169	(includes diff)
Prompt (rack)	\$3.6200	(rack)

Edit Amounts Futures

Sample Margin Matrix Screen

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
Loyalty Discount	\$-0.15	Capped Price Flex Price	Edit	Delete
Small Tank Premium	\$0.05	Capped Price Flex Price	Edit	Delete

The **Global Pricing Rules** table summarizes the rules that have been established for discounts or premiums.

The **Pricing Rules Parameters** table shows the restrictions that may be set to globally limit application of premiums or discounts.

The **Costs** table shows the current weighted average strip cost setting and the Prompt (rack) cost. The latter is input by the user in Edit mode.

Pricing Groups

Pricing Groups may have their own specific rules, i.e. you may set premiums or discounts that will apply only to qualifying members. To access the Pricing Rules screen, click on the desired **Group Name**.

Pricing Groups					
Name	Margin	Base Price	Effective Price	Edit	Delete
Comm Spot Price	\$0.400	\$3.169	\$3.569	Edit	Delete
Comm Contract Price	\$0.250	\$3.169	\$3.419	Edit	Delete
Fixed Price	\$3.290	\$3.169	\$6.459	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	\$3.169	\$4.169	Edit	Delete

* denotes default group
denotes retail group
Add a group

A group may be deleted by clicking on the **Delete** link for that group.

Settings for a group may be changed by clicking on the **Edit** link for that group.

You may add a group by clicking on the **Add a group** button.

Tech Note

In most cases you would use Global Pricing Rules to apply premiums or discounts to group members rather than creating a special pricing group.

Edit a Pricing Group

Click on the Close Window button to exit (without saving).

New England Bioheat - Manage - Mozilla Firefox

destwin.com https://newengland.destwin.com/margingroup?action=edit&c_id=38&view=

Name: Res Contract Price

Margin Desired: \$ 1

Margin over: Strip Cost

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)

Make this the 'retail' group?

Submit

You may set a margin (dollar value) over any of the margin over drop down options.

To create a group for a specific subset of accounts use the **Accounts belong to this group drop down**. If this is done, do not make this the default group or the retail group.

You may assign a group to be the default or retail group using the applicable Yes or No radio buttons.

To save your changes, click on the **Submit** button.

Typical Edit box for a Pricing Group

Name: Res Contract Price

Margin Desired: \$ 1

Margin over: Strip Cost

Accounts belong to this group if they have a 'customer_group' value of: Select Base Price (required)

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

Make this the 'retail' group?

Submit

Typical Edit box for a Pricing Group with Margin over options displayed.

The value in the **Margin Desired** field will be added to the selected cost in the **Margin over** drop down to determine the base price for the Pricing Group.

Strip Cost uses the weighted average strip cost based on the Nymex feed for Heating Oil Futures.

Rack Price uses the cost as set in the Costs table (see page 2).

Retail Price sets the cost to 0 so that the entry in the **Margin over** box is effectively the price.

Backend may be selected to use a price as established in the backend system. **Note – not all backend systems are supported. Contact Destwin for details about your specific backend system.**

Viewing and Modifying Rules of a Pricing Group

To view and edit the Pricing Rules for a Pricing Group, click on the Group name. Click on the name again to close the display.

* Res Contract Price \$1.000 \$3.169 \$4.169 Edit Delete

Pricing Rules				
Name	Price Adjustment	Applicable Contracts	Edit	Delete
ALL FIXED + 5 CENTS	\$0.05		Edit	Delete
Barre Price	\$0.10	Capped Price	Edit	Delete
HIGH WKF => 8.0	\$0.05	Flex Price	Edit	Delete
LOW WKF 2.0 - 3.99	\$-0.05	Capped Price	Edit	Delete
VERY LOW WKF < 2.0	\$-0.07	Capped Price	Edit	Delete
Add a pricing rule				

Typical Pricing Group with Pricing Rules displayed.

A rule may be deleted by clicking on the **Delete** link for that rule.

Settings for a rule may be changed by clicking on the **Edit** link for that rule.

You may add a rule by clicking on the **Add a pricing rule** button.

Setting a Pricing Rule

Click on the Close Window button to exit (without saving).

New England Bioheat - Discount Rule - Mozilla Firefox

destwin.com https://newengland.destwin.com/discountrule?action=ed

Name: HIGH WKF => 8.0

Field: WorkingK

Operator: >=

Compare Value: 8.0

Price Adjustment: \$ + 0.05 (e.g. +0.04 for a 4 cent increase, -0.10 for a 10 cent discount)

Group: ☒ Capped Price ☐ Flex Price ☐ New Contract

Apply to Contracts:

Submit

Use the **Name** field to create /edit a descriptive name for the rule.

Set the **Field** from the database on which to base the rule by choosing from the available fields in the drop down list.

Select the **Operator** for the rule from the drop down list (see table below for a list of operators).

Set the **Compare Value** field for the value or values for the **Operator**.

Set the **Price Adjustment** in cents and the operand (+ for premiums, or – for discounts) to be applied to the base price for qualifying members.

Pricing Rule Edit screen

To save your changes, click on the **Submit** button.

Select the contract or contracts to which to apply this rule.

Pricing Rules Operator Summary Table

Operator	Description
'<'	Less than
'<='	Less than or equal to
'='	Equal to
'>='	Greater than or equal to
'>'	Greater than
'!='	Not equal to
'in'	Specify specific matching values, e.g. to specify a list of qualifying zip codes use 'in'. Separate multiple entries with a comma, e.g. 06468, 06604, 06480
'between'	Specify a range of values in between an upper and lower limit, e.g. to set a rule that qualifies all accounts whose selected field value is between 200 and 500. Separate the entries with a comma, e.g. 200, 500

Global Pricing Rules

Global Pricing Rules work like Pricing Rules except that they apply to all Pricing Groups.

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
Loyalty Discount	\$-0.15	Capped Price Flex Price	Edit	Delete
Small Tank Premium	\$0.05	Capped Price Flex Price	Edit	Delete

Sample Global Pricing Rules table

A rule may be deleted by clicking on the **Delete** link for that rule.

Settings for a rule may be changed by clicking on the **Edit** link for that rule.

See the section above (Setting a Pricing Rule) for a description of how to set a pricing rule.

Pricing Rule Parameters

Pricing Rule Parameters are used to set limitations on premiums or discounts.

Pricing Rules Parameters	
Maximum number of discounts that can be applied at a time	1
Maximum discount that can be applied at time	\$ 0.80
Maximum number of premiums that can be applied at a time	
Maximum premium that can be applied at time	\$ 0.00
Minimum price that a contract can be sold	\$ 0.00

Sample Pricing Rules Parameters

Pricing Rules Parameters are edited by setting the Margin Matrix into Edit mode (see Margin Matrix Summary section above in this document for more information).

Pricing Rules Parameters	
Maximum number of discounts that can be applied at a time	<input type="text" value="1"/>
Maximum discount that can be applied at time	\$ <input type="text" value="0.80"/>
Maximum number of premiums that can be applied at a time	<input type="text"/>
Maximum premium that can be applied at time	\$ <input type="text" value="0.00"/>
Minimum price that a contract can be sold	\$ <input type="text" value="0.00"/>

Sample Pricing Rules Parameters in Edit mode

In Edit mode the value fields within the Pricing Rules Parameters table may be edited. Click in the desired box and enter a new value. Updated values are saved by clicking on the **Save Margin Matrix** button that is available toward the top and bottom of the Margin Matrix screen when in Edit mode.

Pricing Rules Parameters Summary Table

Name	Input field
Maximum number of discounts that can be applied at a time	Number
Maximum discount that can be applied at time	Dollar
Maximum number of premiums that can be applied at a time	Number
Maximum premium that can be applied at time	Dollar
Minimum price that a contract can be sold	Dollar

Costs

The Cost table is used to enter or edit the dealer current Prompt (rack) price. This field is only used a Margin Over option has been set to Rack Price for any of the programs. Typically this would be used for setting the Retail group price.

Costs		
Avg weighted 12 month strip cost (includes diff)	\$3.169	(includes diff)
Prompt (rack)	\$3.6200	(rack)

Costs Table in Normal Mode

Costs are edited by setting the Margin Matrix into Edit mode (see Margin Matrix Summary section above in this document for more information).

Costs		
Avg weighted 12 month strip cost (includes diff)	\$3.169	(includes diff)
Prompt (rack)	\$ 3.6200	(rack)

Costs Table in Edit Mode

In Edit mode the Prompt (rack) field within the Costs table may be edited. Click in the box and enter a new value. The updated value is saved by clicking on the **Save Margin Matrix** button that is available toward the top and bottom of the Margin Matrix screen when in Edit mode.

Futures

Margin Matrix

Display Pricing for Contracts that begin in: January 2012

[Edit Amounts](#)

[Futures](#)

To access the Futures page, click on the Futures button located towards the top and bottom of the Margin Matrix when in normal mode.

The NYMEX Futures page is broken into three tables:

NYMEX Futures

The first or top table shows 18 months of NYMEX futures.

Heating Oil														
	Delay	Symbol	StartDate	EndDate	High	Low	Average	Total	Contracts					
	0.18201	HO	2/1/2012	4/1/2013	3.0448	2.931	2.981	44.712	15					
Month	Feb 12	Mar 12	Apr 12	May 12	Jun 12	Jul 12	Aug 12	Sep 12	Oct 12	Nov 12	Dec 12	Jan 13	Feb 13	
Symbol	HOG2	HOH2	HOJ2	HOK2	HOM2	HON2	HOQ2	HOU2	HOV2	HOX2	HOZ2	HOF3	HOG3	
Volume	14	23800	12015	9413	15723	5786	2442	880	322	296	1624	35	9	
OpenInterest	84457	54233	25493	19698	36058	10245	4295	7587	3052	2195	16563	2903	224	
Date	1/3/2012	1/3/2012	1/3/2012	1/3/2012	1/3/2012	1/3/2012	1/3/2012	1/3/2012	1/3/2012	1/3/2012	1/3/2012	1/3/2012	1/3/2012	
Time	18:13:21	17:26:10	17:26:10	17:26:10	17:26:10	17:26:10	17:26:10	17:26:10	17:26:10	17:26:10	17:26:10	17:26:10	17:26:10	
Open	3.0422	2.9148	2.9152	2.9014	2.88	2.9	2.8913	2.8964	2.9082	2.9192	2.916	2.974	2.8688	
High	3.0448	3.0364	3.0167	2.9898	2.9741	2.9665	2.9595	2.9639	2.9746	2.9797	2.9889	2.9865	2.9785	
Low	3.0422	2.9148	2.9152	2.9014	2.88	2.8837	2.8816	2.8964	2.9082	2.9192	2.916	2.974	2.9785	
Settle	3.0382	3.0288	3.0094	2.9869	2.9676	2.9607	2.9595	2.9639	2.9716	2.9797	2.9845	2.9865	2.9785	
PreviousClose	3.0382	2.9059	2.8866	2.8633	2.8459	2.8427	2.8437	2.8489	2.8575	2.8662	2.8714	2.8734	2.8654	
PercentChange	0.23	4.233	4.261	4.331	4.287	4.151	4.079	4.037	3.99	3.943	3.935	3.933	3.944	
Change	0.007	0.123	0.123	0.124	0.122	0.118	0.116	0.115	0.114	0.113	0.113	0.113	0.113	
Last	3.0448	3.0288	3.0094	2.9869	2.9676	2.9607	2.9595	2.9639	2.9716	2.9797	2.9845	2.9865	2.9785	

NYMEX Futures Feed first 13 of 18 months displayed

The second or middle table shows what the weighted average strip cost would be if you clicked on the Update Systems Futures button.

Weighted Average Strip Cost Calculator based on Delayed NYMEX Futures Costs													
Month	Feb 12	Mar 12	Apr 12	May 12	Jun 12	Jul 12	Aug 12	Sep 12	Oct 12	Nov 12	Dec 12	Jan 13	Feb 13
Gallage	15.90%	13.49%	8.49%	2.50%	2.57%	0.18%	0.44%	2.69%	7.25%	11.15%	16.49%	18.85%	15.90%
Heat Curve													
Futures Cost	3.0448	3.0288	3.0094	2.9869	2.9676	2.9607	2.9595	2.9639	2.9716	2.9797	2.9845	2.9865	2.9785
Diff. Cost	0.1250	0.1250	0.1250	0.1250	0.1250	0.1250	0.1250	0.1250	0.0000	0.0000	0.0000	0.0000	0.0000
Total Cost	3.1698	3.1538	3.1344	3.1119	3.0926	3.0857	3.0845	3.0889	2.9716	2.9797	2.9845	2.9865	2.9785
Percent Cost	16.47%	13.91%	8.70%	2.54%	2.60%	0.18%	0.45%	2.72%	7.05%	10.86%	16.09%	18.40%	n/a
Update System Futures													

Weighted Average Strip Cost Calculator based on Delayed NYMEX Futures Costs – first 13 of 18 months displayed.

The Percent Cost values come from the Heat Curve that is entered under the Admin Functions – Setup – Heat Curve menu.

Within this table any of the Futures Cost and Diff Cost fields may be edited.

The third or bottom table shows the weighted average strip cost that is currently in use by the system.

Costs													
Jul 12	Aug 12	Sep 12	Oct 12	Nov 12	Dec 12	Jan 13	Feb 13	Mar 13	Apr 13	May 13	Jun 13	Jul 13	TOTALS
0.18%	0.44%	2.69%	7.25%	11.15%	16.49%	18.85%	15.90%	13.49%	8.49%	2.50%	2.57%	0.18%	100.00%
3.0621	3.0591	3.0629	3.0662	3.0708	3.0778	3.0902	3.0822	3.0622	3.0397	2.9771	2.9771	2.9771	
0.1250	0.1250	0.1250	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	
3.1871	3.1841	3.1879	3.0662	3.0708	3.0778	3.0902	3.0822	3.0622	3.0397	2.9771	2.9771	2.9771	
0.18%	0.44%	2.71%	7.02%	10.81%	16.02%	18.38%	n/a	n/a	n/a	n/a	n/a	n/a	\$3.1690

Weighted Average Strip Cost Calculator based on Current System Futures Costs – last 13 of 18 months displayed.

The Fuel Dealer can compare the current value to the corresponding value in the middle table immediately above this to see if the price will go up or down before deciding to Update the system with the latest cost information.

Jun 13	Jul 13	TOTALS
2.57%	0.18%	100.00%
2.9771	2.9771	
0.0000	0.0000	
2.9771	2.9771	
n/a	n/a	\$3.0590
Jun 13	Jul 13	TOTALS
2.57%	0.18%	100.00%
2.9771	2.9771	
0.0000	0.0000	
2.9771	2.9771	
n/a	n/a	\$3.1690

Middle table value – what the price would be.

Bottom table value – what the price currently is.

Expanded view of far right Totals column of Futures screen.

Weighted Average Strip Cost Automatic Update

There are three Advanced Site Parameters that may be set to make pricing on your portal Price Protection page update automatically. The three Advanced Site Parameters are:

Update Nymex when customer accesses pricing?	Yes / No (toggle setting)
Only auto update nymex if price has gone up?	Yes / No (toggle setting)
If nymex drops by this amount or more, do not auto update futures	0.99

The first two settings will implement the behavior as described. The third setting establishes a threshold, if set to zero, this has the same effect as if the second parameter were set to Yes.

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.

The Auto-update itself is triggered when a customer visits the Price Protection page.