









The Destwin Manual Series

Before Getting Started

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Destwin® Manual Series © 2012 Destwin, LLC



Destwin® is on Youtube! Watch a video presentation of this training manual at:

www.youtube.com/DestwinSupport

If you have any questions, please don't hesitate to contact to us:

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Toll Free: 877-DESTWIN (877-337-8946)

Local: 203-459-0619 FAX: 203-261-5061

http://www.destwin.com

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Basic Customer Questionnaire

Welcome to the Destwin Fuel Dealer Solution!

This is the first part of the Destwin Manual Series, which is your gateway to understanding the Destwin Fuel Dealer Solution. Entitled "Before Getting Started," part 1 explains everything we need from new customers to ensure a speedy site installation. After reviewing this document, if you have any remaining questions, please feel free to contact us.

The very first thing we need from new clients is a filled-out Basic Customer Questionnaire. This questionnaire is one of the first documents we send to you, which we send by email. You may also find a copy of it here, beginning on the next page for your easy reference.

Let's take a close look at the Basic Customer Questionnaire. The first two items ask your company name and the name of your storefront. Personnel contacts are next. Please pay particular attention to the Destwin Manager contact, because this is the individual whom we will be in contact with most often. Next we ask your company website URL and what customer login URL you would like. We recommend the customer login URL to be *myaccount.yourwebsite.com*.

Next we ask for your DNS contact information. You can have your tech manager look at this.

The second page is dedicated to payment processing information. What we need here is the name of your credit card gateway provider, if you have one, and whether or not you would like to accept E-Checks on your Destwin site. If you would like to, we also need basic information like your bank's name, relevant routing number, Federal Employer ID, etc. Lastly, if your credit card gateway is either Authorize.net or NMI, please fill in your API login Id & password.



internet services provider.

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Destwin Fuel Dealer Solution Basic Information Questionnaire

Thank you for choosing the Destwin Fuel Dealer Solution! To speed your project and facilitate its implementation, we need certain information from you, detailed below. Additional follow-up questions may be necessary. If your Sales Order shows multiple store fronts, you should complete a questionnaire for each store front. If you have any questions while completing the form, please don't hesitate to contact us.

Full Company Name	e:		· · · · · · · · · · · · · · · · · · ·	······································	
Storefront Name (if	more than	one):			
Personnel Contacts	6				
Title	Name		Phone		E-mail
Destwin Manager*					
*Destwin Manager – other applicable posi		be the person who will be the	primary point of conta	act and prima	ry user. Please also fill out
President					
CFO					
IT Manager					
Office Manager					
Web site information	n				
What is the address	s (URL) of	your current web site?			
The new Destwin por recommend the Dest	rtion of you twin portion	web site, please indicate that an web site will need its own UF of your site begin with – myad lly recommend the URL for th	RL, unique from your eccount. For example,	existing web s if your web sit	ite. We generally e address is
Please enter the Ul	RL for the I	Destwin portion of your site			
DNS contact inform Who currently provid		S service?			
Company Name		Contact	Phone		E-mail

If you have questions about or need assistance completing this questionnaire, please don't hesitate to contact us.

If you don't know your DNS provider, it's usually either the hosting provider of your website, your email provider, or other



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Yes or No

Payment Processing

These questions will help streamline the payment process integration with Destwin, and provide you the opportunity to begin setting up credit card and e-check processing if your company does not presently do so.

Does your company already accept credit card payments? (please circle)

If yes, who provides your payment gateway?					
Please be sure to fill in the appropriate credit card gateway informaccount and need assistance setting up a merchant account ple				erch	ant
Do you currently accept electronic checks on-line? (please of	ircle)		Yes	or	No
f yes, please skip the next question and fill out the last section o	f this page.				
If you do not accept electronic checks on-line, do you want t	o? (please	circle)	Yes	or	No
f yes, we'll contact you shortly to explain how e-checks work and credit card gateway for use with the Destwin platform. Please se eventually need.					
Credit Card Gateway & E-Check Processing Information This section provides us with the information we need to integrat	e your e-cl	necks payments in	to the Destwin pl	atfor	m.
Do you process electronic checks through your bank? (pleas	se circle)		Yes	or	No
f yes, please fill out the following table. If no, please write "n/a" ir	the table	and continue.			
What is the name of your bank?					
What is your company name as it appears on your bank statements?					
What is the bank account # which will receive deposits?					
What is the routing # for the same account?					
What is your company Federal Employment Identification N	umber?				
Do you process electronic checks through your credit card g	ateway? (olease circle)	Yes	or	No
	redit card (gateway provider.			
authorize.net Users	redit card (gateway provider.			
f yes, please fill out the following information according to your cathorize.net Users What is your API login ID?	redit card (gateway provider.			
Authorize.net Users What is your API login ID?	redit card (gateway provider.			
Authorize.net Users What is your API login ID? What is your transaction key?	redit card (gateway provider.			
Authorize.net Users	redit card (gateway provider.			

FirstData and Chase Paymentech Users

Please contact your bank to request a "Var Coding Sheet" (they'll know what this is) and send that to us.

If you use a credit card gateway not mentioned here, we will contact you with further instructions.

Backend Supplemental Form

Next, we need you to return to us the Backend Supplemental Form. Which Backend Supplemental Form you fill out is determined by your backend database service provider. If your backend is ADD Systems, we will need to arrange an RDP session with you to install the upload script on your server. If your backend is either Automated Wireless, Blue Cow, Cargas, FDMS, K-Systems, SYMAT, Total Energy, or Versyss, you will need to contact them to order the Certified Destwin Interface. Please continue reading according to which backend system you have.

ADD Systems Customers

On the following page you'll find the ADD Systems E3 Questionnaire. If you have a different version of ADD Systems, please fill this out as best you can. The first question we ask is which sub-version of ADD E3 you have. Next, we ask if you have an ODBC connection. An ODBC connection allows our engineers at Destwin to access your database management system.

If you have SmartConnect installed, Destwin is able to communicate with your database in real time. In this case please fill out the last three SmartConnect questions. If you do not have SmartConnect, our engineers will need to arrange with your technical contact for whats called an "RDP session" in order to install the Destwin upload script on your server. On the page immediately following the ADD Systems E3 Questionnaire is a documen that explains the prerequisites for successful completion of the upload script installation. Meanwhile, if you would like to learn more about SmartConnect licenses, the ADD Systems E3 Questionnaire provides related information for reference only.



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Destwin Fuel Dealer Solution ADD Systems E3 Questionnaire

This questionnaire has been designed for customers who use ADD Systems E3 as their back-office system and will help us gather some of the basic information we need to implement the interface from E3 to Destwin and in the case of systems with SmartConnect, from Destwin to E3.

Important: The ADD Systems E3 interface without SmartConnect is a one-way interface where data is sent from E3 to Destwin but not from Destwin to E3. In order to implement a two way interface, SmartConnect is required.

What Sub-version of ADD E3 do you have?	
Note - versions earlier than 7.0 may not be supported.	
Do you currently have an ODBC connection? (please circle)	Yes or No
Note - an ODBC connection is required before Destwin can implement the ir	nterface. Please contact us with questions
Questions specific to Smart Connect	
Questions specific to Smart Connect Do you presently have Smart Connect installed?	Yes or No
Questions specific to Smart Connect Do you presently have Smart Connect installed? If yes, what version of Smart Connect is installed?	Yes or No

URL	
Server IP Address	
Company ID	

Note - if you don't have SmartConnect, but would like to know more, please see the SmartConnect license chart below.

Note - whoever installed Smart Connect for you should have provided or be able to provide this information.

Note - please make sure that the URL above is accessible from outside the internal network.

General SmartConnect License Information

SmartConnect comes standard as the "Customer Look-up Business Edition". Additional licenses may be required to implement the two way interface. The table below describes which license(s) is/are required for which data exchange.

License	New Customer Sign-up	Will Call Orders	Payments	Sales Tax	Contracts
SmartConnect API Customer Look-up Business Edition (Default License, comes with Smart Connect) Needed to find the applicable tax amount on a tank and for Destwin to calculate sales tax on orders if applicable.	~	✓	√	~	√
SmartConnect API Delivery Ticket Create Business Edition Needed to log will call orders into ADD Systems E3		✓			
SmartConnect API Payment Entry Business Edition Needed to send payment information for payments received in Destwin to ADD Systems E3			✓		

SmartConnect API Customer Add & Modify Bus Edition Needed to send new customer information for customers who sign up in Destwin to ADD Systems E3	✓		
SmartConnect API Plan Price Maintenance (SLPP) Needed to send basic contract information from Destwin to ADD Systems E3 for contracts that have been created in Destwin. Note that this function does not cover all possible aspects of the SLPP system within E3, e.g. within the SLPP screen there will be a prebuy checkbox, Smart Connect cannot set that nor other prebuy specific fields. The primary ability afforded by this license is to save contracts. SLPPs within ADD Systems cannot be deleted nor can they be modified using SmartConnect.			√

Note - Destwin recommends the purchase of all of the above licenses for a full implementation.

Other Smart Connect Licenses (for informational purposes only).

- SmartConnect API Customer Look-up Business Edition
- SmartConnect API Delivery Ticket Business Edition
- SmartConnect API Payment Entry Business Edition
- SmartConnect API Service Order Business Edition
- SmartConnect API Automatic Resource Follow-up Bus. Ed.
- SmartConnect API Customer Add & Modify Bus Edition
- SmartConnect API Phone Pops Business Edition
- SmartConnect API Plan Price SLPP
- SmartConnect API Create Log Entries

Please note: the information provided above is based on our best efforts to determine at this time the requisite SmartConnect licenses required for data generated by Destwin to be received by ADD Systems E3. This information is subject to change without notice. Destwin is not responsible for the function or utility of products supplied by third parties including ADD Systems and such products must be purchased separately and from these third parties and are NOT included in Destwin products.

Destwin Prerequisites: Upload Script Installation

For ADD Systems E3 Backend

Revised: 2011-07-28

Required Items:

Computer

Windows XP or higher

Microsoft Excel 2003 or higher

Make sure Excel is activated if it is a new install

ADD Energy must be installed on the system and properly configured

This ensures that the Sybase drivers will be available for Excel to access the ODBC connection. In order to establish a connection with the database the script needs to know where the database server is. The script locates the database server through a Server Name which normally becomes available automatically after the installation of ADD Energy. You should have been prompted to enter information relating to ODBC and the database during the installation.

The way to test if ADD Energy is properly configured is to try to log into ADD Energy and perform tasks that a CSR would normally perform. If you can access customer information then that means ADD Energy is properly configured.

Windows Login Account that has the necessary privileges to schedule a program to run when the account is logged off.

Usually Destwin is provided with an administrator level account.

The alternative to that is to create a Windows login with only user level access but with the added privilege to schedule a task without being logged in. However the process of setting up a login with such specific permissions differs depending on the version of Windows

(7, XP, Server 2005). The specifics of how to do this if possible will be up to your IT Staff.

Remote Desktop Connection to the computer that will house the upload script.

We require a way to access the upload script without the need of human intervention every time. This will facilitate maintenance of the script.

Guide to choosing a computer within your network

An ADD Systems deployment may have a Raven Server, The Raven Server is a popular candidate to house the upload script due to the fact that the network's firewall is already configured to allow connections to it from the outside world.

Alternate methods to allow access through the firewall:

- VPN You can provide Destwin with a Virtual Private Network connection if your company has one
- LogMeIn Some users use a proprietary software called LogMeIn. If you have that set up on the server and provide us with a LogMeIn account that will also work.

Login for the ADD Systems database

Permissions for ADD Systems to issue a read only login to the database for Destwin . We will contact ADD Systems and they will contact you to get an OK.

Optional Requirements

If you do business within states that have complicated tax laws, e.g. New York, and wish to enable will call ordering for taxable customers or to post data back to the backend from Destwin. Contact us to determine whether SmartConnect will be needed to process taxes for will call orders.

You will need to order SmartConnect from ADD Systems.

Refer to the Destwin <=> SmartConnect Capabilities Chart for details about licenses (found on ADD Systems E3 Questionnaire form).

For Requirements relating to setting up SmartConnect with Destwin refer to the Destwin Prerequisites : ADD Systems SmartConnect

All Other Backends

If your backend runs on any of the following systems, you will need to order from your backend system provider the Certified Destwin Interface which enables a connection to Destwin. After your backend provider enables your backend to integrate with Destwin, the installation will be very smooth.

- Automated Wireless (AWE)
- Blue Cow
- Cargas
- FDMS
- K-Systems
- SYMAT
- Total Energy
- Versyss

Please peruse the following backend supplemental forms to find the form relevant to your backend provider. On the form, you'll see we have provided for your convenience your provider's contact information. Beneath that we ask for the name and contact information of your technical contact there. Most important, please inform us when you expect the backend system connection to be ready. And lastly, we need to know the IP address from which data will be uploaded to Destwin.



http://www.destwin.com



AWE Backend Data Connection to Destwin

Before your new Destwin site can be installed, you must first arrange with your backend system provider to connect to Destwin's interface. Please complete this form so we know you've made this arrangement and there is a date by which your backend is expected to be ready to connect to Destwin. Please let us know if we may assist you in any way.

1. Please contact your backend system provider to tell them to connect to Destwin:

AWE
http://www.automatedwireless.com/
Phone: 973-663-6990

2.	Who is your project ma	nager or technical contact at the above vendor?
	Name: _	
	Email: _	
	Phone: _	

- 3. When is the estimated completion date for your backend system connection to Destwin?
- 4. What is the IP address for the data upload to Destwin's server (required for firewall exemption)?

Important, please note:



http://www.destwin.com



Blue Cow Backend Data Connection to Destwin

Before your new Destwin site can be installed, you must first arrange with your backend system provider to connect to Destwin's interface. Please complete this form so we know you've made this arrangement and there is a date by which your backend is expected to be ready to connect to Destwin. Please let us know if we may assist you in any way.

1. Please contact your backend system provider to tell them to connect to Destwin:

Blue Cow http://www.bluecowsoftware.com Phone: (888) 499-BLUE (2583)

	vviio io your project inc	anager or teermiear contact at the above ver	1401.
	Name: _		
	Email: _		
	Phone:		-
3.	When is the estimated Destwin?	completion date for your backend system of	onnection to

4. What is the IP address for the data upload to Destwin's server (required for firewall

Who is your project manager or technical contact at the above vendor?

Important, please note:

exemption)?



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Cargas Backend Data Connection to Destwin

Before your new Destwin site can be installed, you must first arrange with your backend system provider to connect to Destwin's interface. Please complete this form so we know you've made this arrangement and there is a date by which your backend is expected to be ready to connect to Destwin. Please let us know if we may assist you in any way.

1. Please contact your backend system provider to tell them to connect to Destwin:

Cargas Systems http://www.cargas.com Phone: 888-611-3138

2.	Who is your project ma	anager or technical contact at the above vendor
	Name: _	
	Email: _	
	Phone:	

- 3. When is the estimated completion date for your backend system connection to Destwin?
- 4. What is the IP address for the data upload to Destwin's server (required for firewall exemption)?

Important, please note:



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http://www.destwin.com



FDMS Backend Data Connection to Destwin

Before your new Destwin site can be installed, you must first arrange with your backend system provider to connect to Destwin's interface. Please complete this form so we know you've made this arrangement and there is a date by which your backend is expected to be ready to connect to Destwin. Please let us know if we may assist you in any way.

1. Please contact your backend system provider to tell them to connect to Destwin:

FDMS http://www.fueldatasystems.com/ Phone: 800-447-7870

2.	Who is your project ma	anager or technical contact at the above vendor?
	Name:	
	Email: _	
	Phone:	

- 3. When is the estimated completion date for your backend system connection to Destwin?
- 4. What is the IP address for the data upload to Destwin's server (required for firewall exemption)?

Important, please note:



http://www.destwin.com



to

K-Systems Backend Data Connection to Destwin

Before your new Destwin site can be installed, you must first arrange with your backend system provider to connect to Destwin's interface. Please complete this form so we know you've made this arrangement and there is a date by which your backend is expected to be ready to connect to Destwin. Please let us know if we may assist you in any way.

1. Please contact your backend system provider to tell them to connect to Destwin:

K-Systems, Inc http://www.ksystemsinc.com/fueloil/ Phone: 800-221-0204

2.	2. Who is your project manager or technical contact at the above vendor?		
	Name:		
	Email:		
	Phone:		
3.	When is the estimated completion date for your backend system condestwin?	nnection	

4. What is the IP address for the data upload to Destwin's server (required for firewall

Important, please note:

exemption)?



http://www.destwin.com



SYMAT Backend Data Connection to Destwin

Before your new Destwin site can be installed, you must first arrange with your backend system provider to connect to Destwin's interface. Please complete this form so we know you've made this arrangement and there is a date by which your backend is expected to be ready to connect to Destwin. Please let us know if we may assist you in any way.

1. Please contact your backend system provider to tell them to connect to Destwin:

SYMAT Phone: 617-480-4737

2.	Who is your project manager or technical contact at the above vendor?		
	Name: _		
	Email: _		
	Phone:		
When is the estimated completion date for your backend system connection Destwin?			

4. What is the IP address for the data upload to Destwin's server (required for firewall

Important, please note:

exemption)?



http://www.destwin.com



Total Energy Backend Data Connection to Destwin

Before your new Destwin site can be installed, you must first arrange with your backend system provider to connect to Destwin's interface. Please complete this form so we know you've made this arrangement and there is a date by which your backend is expected to be ready to connect to Destwin. Please let us know if we may assist you in any way.

1. Please contact your backend system provider to tell them to connect to Destwin:

Total Energy http://www.marketlinecomputers.com/ Phone: (201) 768 - 8887 ext. 18

۷.	Who is your project manager or technical contact at the above vendor?		
	Name: _		
	Email: _		
	Phone:		
3.	When is the estimated Destwin?	completion date for your backend system connection to	

4. What is the IP address for the data upload to Destwin's server (required for firewall

Important, please note:

exemption)?



http://www.destwin.com



Versyss Backend Data Connection to Destwin

Before your new Destwin site can be installed, you must first arrange with your backend system provider to connect to Destwin's interface. Please complete this form so we know you've made this arrangement and there is a date by which your backend is expected to be ready to connect to Destwin. Please let us know if we may assist you in any way.

1. Please contact your backend system provider to tell them to connect to Destwin:

Versyss Phone: 860-669-4575

2.	2. Who is your project manager or technical contact at the above vend		
	Name:		
	Email:		
	Phone:		

- 3. When is the estimated completion date for your backend system connection to Destwin?
- 4. What is the IP address for the data upload to Destwin's server (required for firewall exemption)?

Important, please note:

Payment Options

The Destwin Fuel Dealer Solution offers your customers 2 convenient ways to pay. The first is with a credit card, and the second is with e-checks, which work just like checks but are electronic. As you likely are aware, you must have a gateway account to be able to accept credit cards online. E-checks may also be processed through a gateway, but it typically is easier and more straightforward to deposit e-checks directly into your bank account. Please view the following slides for more information about gateways and e-checks.

Gateways

Destwin integrates with all major gateways. The most common gateways used with Destwin are Authorize.net, FirstData, and NMI. If you do not have an existing gateway account, please ask us about our Destwin Gateway Service. Each of these gateways and the Destwin Gateway Service are discussed in more detail for your information.

Authorize.Net

If you have an existing Authorize.net gateway account, we need you to provide your Authorize.net API login and transcation key. You may find your API login ID by visiting their website, logging into your account, clicking the "Settings" button, and finding the "API login ID" link beneath the Security Settings. If you don't know your transaction key, you likely will need to contact us to proceed.

First Data

If you have an existing FirstData gateway account, we need you to provide your PEM file. You may find this information by visiting their website, logging into your account, selecting "Download Center" from the "Support" menu tab, clicking "Download Now," entering your tax ID, and clicking the "For API" Download button.

NMI

If you have an existing NMI gateway account, we need you to provide your NMI login ID and password. This may be the same login and password you use to access your account, but we recommend you create for Destwin a unique login ID and password. In this way you can control how much access Destwin is granted. To create a unique login ID and password for Destwin, please visit their website and login to your account. Please contact us if you have questions about this.

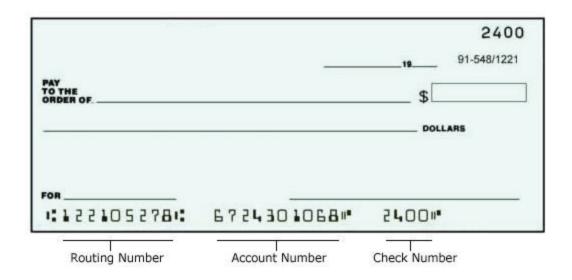
Destwin Gateway Service

If you do not have an existing gateway account, you're welcome to either explore the gateways mentioned above or take advantage of the Destwin Gateway Service. To install the Destwin Gateway, we need you to provide us what is called a "VAR Coding Sheet." The VAR Coding Sheet is given to you by your bank – the one which will receive your customers' credit card payments – and then is used by our engineers to set-up the gateway. Please note that there is a small fee for this service.

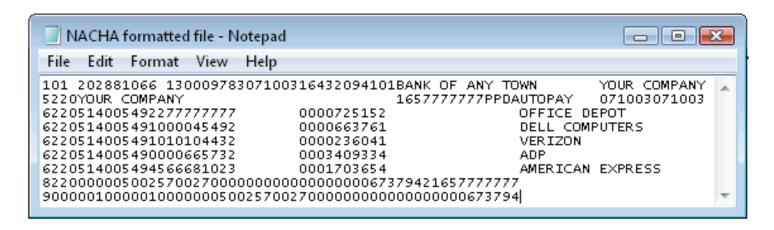
E-Checks

E-checks are the second method customers may use to pay you. From the homeowner's perspective, they work just like paper checks, because the homeowner pays with their checking account information.

E-checks can be processed 2 ways. The first is through a gateway like those just described. However, applying for e-check gateway capability is much more onerous than applying for a credit card gateway only. This is because, for gateway companies, credit cards and e-checks have different risk profiles. Because of this, we typically recommend you use the 2nd method of processing e-checks: through what is called a Nacha file. It works like this: a homeowner pays you with an e-check, Destwin generates for you a Nacha file, and you submit that Nacha file to your bank through their preferred method of doing so, which is typically through their secure website.



An e-check, above, conveniently uses the same information as a paper check.



An example of a NACHA file, above.

SSL Certificate

An SSL certificate is an essential part of conducting transactions online. This certificate provides a secure connection by encrypting sensitive data as it passes through cyberspace. To obtain your site's SSL certificate, please return to us the SSL certificate form, which you may also find on the following page. After completing the form, you have two options for purchasing an SSL certificate. The first is through Destwin – in which we will procure and install it automatically – the second is to buy it through a third party and then send it to us for installation.

For your information, Destwin may process 3 kinds of secure data. The first is credit card information. The second is customer bank information, which is used to process e-checks. The third is a customer's social security number, if they submit a credit application.



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SSL Certificate Instructions

SSL (Secure Sockets Layer) Certificates provide encryption and authentication for secure data transactions. To process secure information such as credit card information, you must have an SSL Certificate installed on the Destwin portion of your web site. Destwin can procure and install an SSL Certificate for you or you may elect to purchase it yourself and provide it to Destwin so that we can install it. SSL Certificates are generally purchased for a one year period and are subject to renewal. Longer terms are available. The cost of the SSL Certificate is not included in your setup fee or your Destwin monthly fee. Please contact Destwin for current pricing.

If you decide to have Destwin procure and install your certificate, the following information about your organization is required.

Country	
State	
City	
Organization Name	
Domain name for certificate (this is the same as the URL you listed on the Destwin Questionnaire)	
e-mail (see below)	

When we order the SSL Certificate, the certificate provider will send an e-mail to the e-mail address you provide. Only certain specific e-mail addresses ending in your domain name may be used. The following prefixes are acceptable:

admin administrator hostmaster root webmaster postmaster

You may also use the e-mail address on file as the Administrative Contact for your domain name registration.

Typically two e-mails will be sent from the SSL provider after we submit the order for the Certificate; the first e-mail requires a reply, then a second e-mail with the Certificate will be sent to the same e-mail address and we need you to forward that to us so that we can install it.

Set-up a Destwin Test Account

In order to ensure a speedy installation and data validation process, it's required you create an account in your backend system so Destwin may verify the integrity of data at all points in the entire system. Please use this information to create the account:

Sue Destwin
887 Main Street
Suite D
Monroe CT, 06468
203-459-0619
support@destwin.com

Set-up Your DNS Record

And finally, Destwin requires that you add a DNS CNAME record for your Destwin portal URL.

This is because the Destwin Fuel Dealer Solution application runs on secure file servers at a commercial web hosting facility that is protected by and accessed through a firewall. As part of our service under your order for the Destwin Fuel Dealer Solution, we will take over and manage your DNS for you. If so, we will implement the changes as required on the following page. We will need the cooperation of whoever currently manages your DNS to be able to take over current management of your DNS.

If Destwin does not manage your DNS, we will provide a form like the one on the following page with specific information about your website and the updates we need you to make to your DNS record. Please contact us with any questions your may have about this.



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DNS Information for the Destwin Fuel Dealer Solution™

The Destwin Fuel Dealer Solution application runs on secure file servers at a commercial web hosting facility that is protected by and accessed through a firewall. As part of our service under your order for the Destwin Fuel Dealer Solution, we will take over and manage your DNS for you. If so, we will implement the changes as required below. We will need the cooperation of whoever currently manages your DNS to be able to take over current management of your DNS.

If Destwin does not manage your DNS, we will provide a form like the one below with specific information about your web site and we need you to make the update described below to your DNS record:

Please create a CNAME record for the Destwin portal URL and assign it to the target address beside it.			
	Storefront	Destwin portal URL	Target address
	Your Company name	myaccount.your_website.com	shortname.accts.destwin.com

Storefront: this is your company name

Destwin portal URL: this is the URL you selected on your Questionnaire

Target address: Destwin will provide the shortname for you to complete this change.