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Destwin Fuel Dealer Solution Setup Guide

Login and Basic Site Setup

Version 1.0 for Dealer Management Console Version 1.3

September 4, 2009

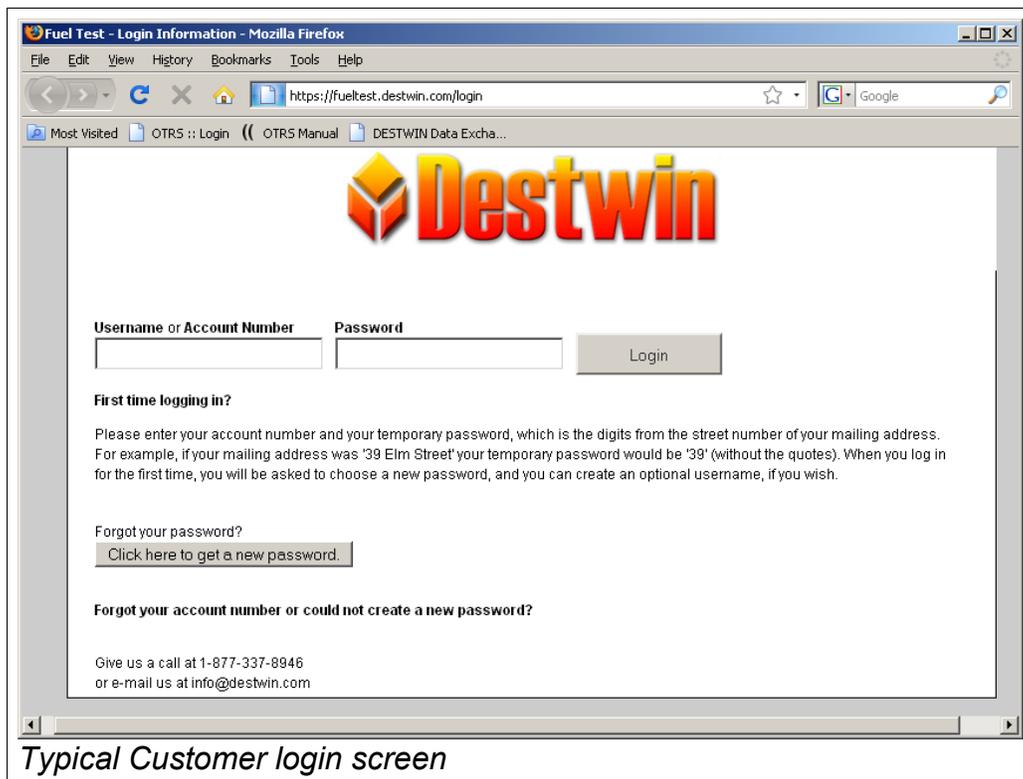
Introduction

Thanks for choosing the Destwin™ Fuel Dealer Solution to help manage your business. The purpose of this document is to provide some basic information to explain how to access and setup certain aspects of the system. Destwin personnel are available throughout the setup process to answer any questions you might have about this document or any aspect of the system. You can also send e-mails to support@destwin.com.

The Destwin Fuel Dealer Solution will allow you to:

- Create and offer Price Protection contracts through your web site
- Accept orders and process payments through your web site
- Monitor Futures prices and update your pricing at your discretion
- Allow customers to access their account information through your web site
- Manage your Oil Purchases
- Manage your Risk

The Destwin Fuel Dealer Solution is a web based business application that is accessed through a web browser. The “Customer” section of the site is accessed through password protected “My Account” link on your home page. The “Admin” section of the site is also accessed via secure logins with login credentials and passwords established for the individuals within your organization who will be responsible for the site and for your CSRs.



Login Instructions

Administrator

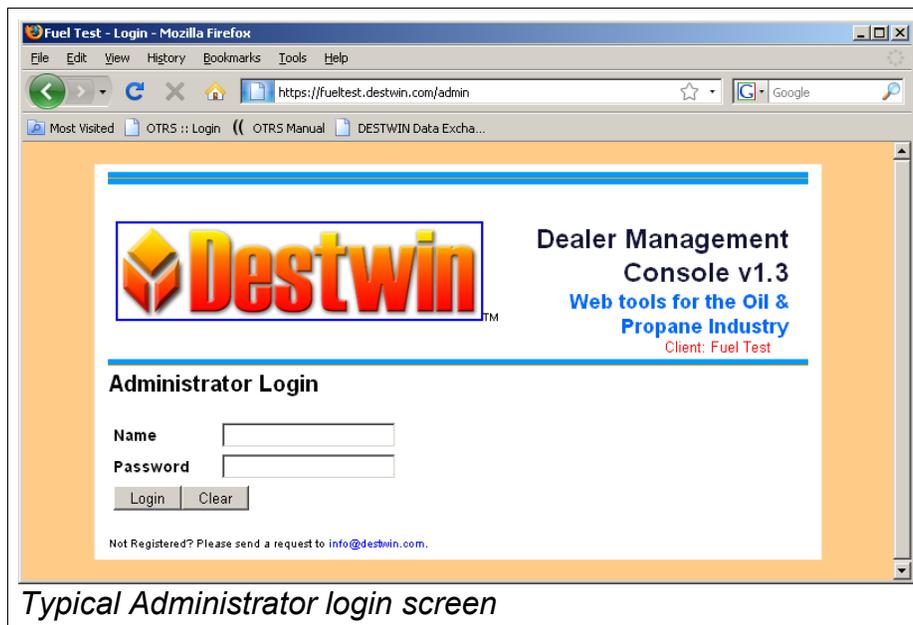
The Destwin Fuel Dealer Solution resides on servers at a commercial web hosting facility. Your site can be accessed by entering the IP address that has been provided to you into the address bar of your web browser. We recommend you have whoever handles your DNS point your chosen Destwin URL to this IP address as early in the process as possible and avoid using the IP address.

To access the Admin section of Destwin using the IP address:

1. in the address bar of your browser enter: `https://XX.XX.XXX.XXX/admin` (*enter the number that has been supplied to you OR after the IP address has been pointed to your Destwin domain name, enter that domain name, e.g. myaccount.mysite.com*)
2. You should receive a pop-up asking for extra Authentication, enter:
User Name: staff
Password: hello
3. You may receive this pop-up more than once. If you do, just repeat the above entries.
4. You may receive a notice of a Certificate exception. You can go ahead and add a temporary certificate.

Note, once the Destwin domain name has been assigned to the IP address and you are ready to go live, we will remove the software that requires the extra authentication.

After you have successfully added a temporary certificate you should reach the Destwin Administrator login screen:



5. In the Name field enter the User Name that has been assigned to you.

6. In the Password field enter the Password that has been assigned to you.
7. Click on the Login button.

After logging in you should arrive at the Dealer Management Console. The content of the landing page for the Console can be set to a number of different screens. A typical landing page might be the Daily Sales Activity report as shown below.

Destwin Dealer Management Console v1.3
Web tools for the Oil & Propane Industry
Client: Fuel Test

Admin Functions | Contract Mgmt | Risk Mgmt | Pricing | Payments | Scheduler

Daily Sales Activity From: 1 week ago To: Refresh Data

Date	Capped Price Contracts				Prebuy Contracts				Fixed Price Contracts				Total	Daily Volume	
	#	Volume	Avg Price	Avg Fee	#	Volume	Avg Price	Avg Fee	#	Volume	Avg Price	Avg Fee			
2009-09-04		0				0				0				0	0
2009-09-03		0				0				0				0	0
2009-09-02		0				0				0				0	0
2009-09-01		0				0				0				0	0
2009-08-31		0				0				0				0	0
2009-08-30		0				0				0				0	0
2009-08-29		0				0				0				0	0
2009-08-28		0				0				0				0	0
TOTALS	0	0	0.000	0.000	0	0	0.000	0.000	0	0	0.000	0.000	0	0	0

Cumulative Count of Each Contract Type:

Fixed Price	Pre-Buy Price	Flex Price	Capped Price	Cap Price	Fixed / Prebuy	SmartCap™	New Contract
609	157	138	1753	0	1037	124	0

Typical default landing page after administrator login

To navigate through the Console, position the mouse over one of the one of the blue buttons in the upper menu bar. Sub-menu drop downs will appear for additional options within that section of the program.

Destwin Dealer Management Console v1.3
Web tools for the Oil & Propane Industry
Client: Fuel Test

Admin Functions | Contract Mgmt | Risk Mgmt | Pricing | Payments | Scheduler

Daily Sales Activity From: To: Refresh Data

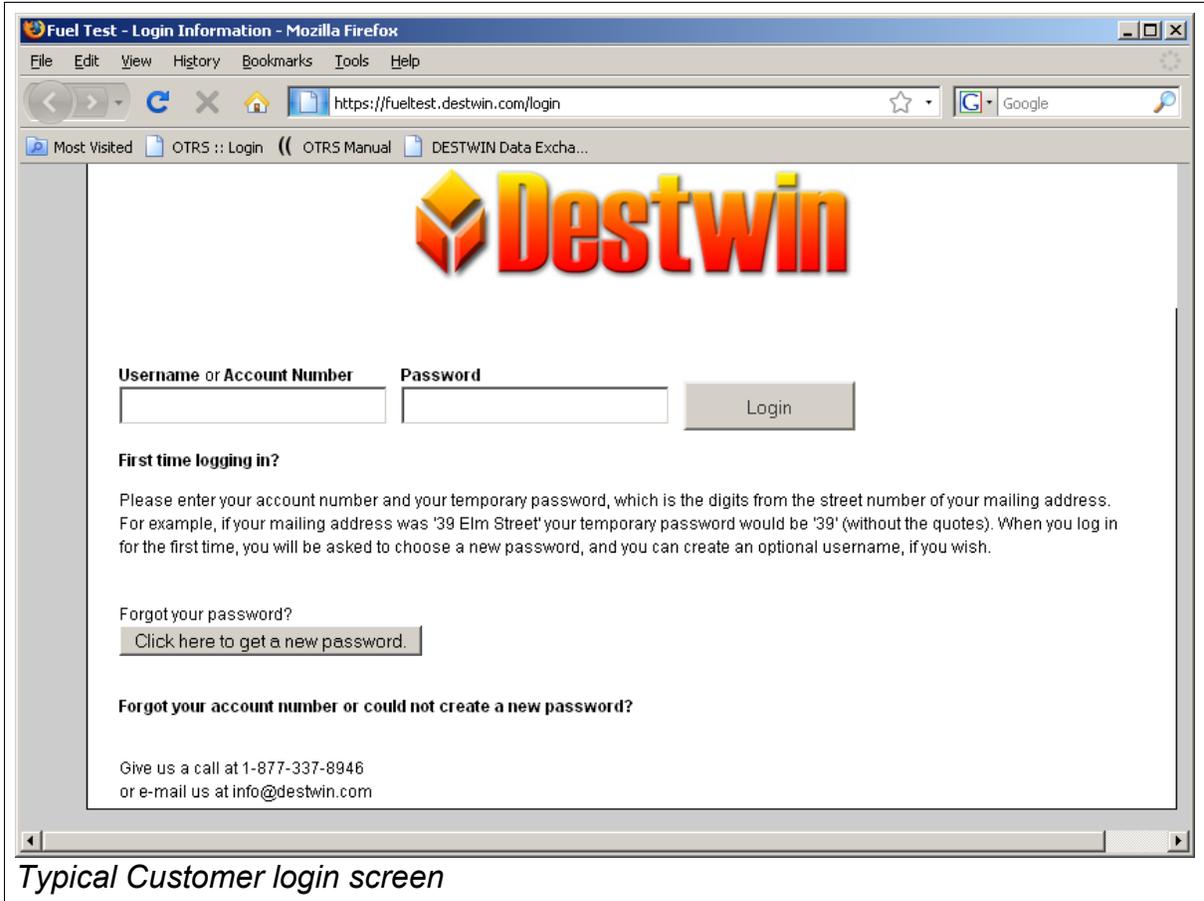
Summary Report
Purchase Report
Daily Sales Activity
Download Reports

Administrator screens navigation

Login Instructions

Customer

Your customers will access their login page from a link on your home page that will bring them to a Destwin Login page that will look something like this:



As shown in the sample page above, customers are supplied with 'First time logging in' instructions.

Basic Site Setup

There are a number of parameters and setup options that are required for proper operation of your site. Most of these setup screens are accessed from the **Admin Functions** drop down of the control panel. Here is a brief explanation of these:

Advanced Functions – this accesses other aspects of the system that Destwin sets up. You do not need to access these functions.

Categories – this controls some of the Destwin menu functions. Destwin will set these up. You do not need to access these functions.

Configurations – Contains some basic site setup information specific to your company that you may sometimes need to access and edit but for the most part, once set, you will not have to change. Destwin will review these with you and set these for you during the initial installation process. You should consult Destwin before making any changes to these settings.

Set-Up – Site Parameters, Advanced Site Parameters, Heat Curve, and Setup Svc Plans will be discussed below.

Documents – Destwin utilizes an extensive document management system to control and display much of the text that appears on the site and system e-mails. These Documents are accessed and edited through the Documents link. A separate Quick Reference Guide is available that explains how to edit and save a Document.

The screenshot shows the Destwin Dealer Web interface in a Mozilla Firefox browser window. The page title is "Fuel Test - Daily Sales Activity - Mozilla Firefox". The address bar shows "https://fueltest.destwin.com/dailysalesreport". The page features the Destwin logo and a navigation bar with buttons for "Admin Functions", "Contract Mgmt", "Risk Mgmt", and "Pricing". Below the navigation bar, there is a sidebar menu with "Advanced Functions" expanded, showing options like "Categories", "Configurations", "Set-Up", "Documents", "E-Mail", "Customer Usage", "Account Search", "Content Management", "Help", and "Logout". The main content area displays a table titled "Activity" with columns for "Capped Price Contracts" and "Prebuy Contracts". The table has columns for "Volume", "Avg Price", "Avg Fee", and "#". The data shows zero values for all metrics. Below the table, there is a "Cumulative Count of Each Contract Type:" section with buttons for "Fixed Price", "Pre-Buy Price", "Flex Price", "Capped Price", "Cap Price", and "Fixed".

Admin Functions drop down

The screenshot shows the Destwin Dealer Web interface in a Mozilla Firefox browser window, similar to the previous one. The "Admin Functions" menu is expanded, and the "Set-Up" option is selected. The "Set-Up" sub-menu is visible, showing options for "Site Parameters", "Advanced Site Parameters", "Heat Curve", and "Setup Svc Plans". The main content area displays the same "Activity" table as in the previous screenshot, with zero values for all metrics. Below the table, there is a "Cumulative Count of Each Contract Type:" section with buttons for "Fixed Price", "Pre-Buy Price", "Flex Price", "Capped Price", "Cap Price", and "Fixed".

Admin Functions – Set-Up sub-menu options

E-mail –

- Bulk e-mail – not currently active.
- E-mail Management – lets you view and download customer e-mails.
- Password Management – lets you view and reset customer passwords.

Customer Usage – provides a report that you can download and export to a spreadsheet that allows you to review who has been accessing and using the system based on login information.

Account Search – a search utility for accessing customer account information and accessing the Customer pages of the site as if you were that customer.

Content Management - this accesses other aspects of the system that Destwin sets up. You do not need to access these functions.

Help – not currently active.

Logout – to logout out of your session and the Destwin Dealer Console.

The screenshot shows a web browser window titled "Fuel Test - Daily Sales Activity - Mozilla Firefox" with the URL "https://fueltest.destwin.com/dailysalesreport". The page features the Destwin logo and a navigation menu with "Admin Functions", "Contract Mgmt", "Risk Mgmt", and "Pricing". Below the menu is a table titled "activity" with columns for "Categories", "Configurations", "Volume", "Avg Price", "Avg Fee", and "#". The "E-Mail" category is expanded to show sub-menu options: "Bulk Email", "Customer Usage", "Email Management", "Account Search", and "Password Mgmt". The "Help" row is highlighted in yellow. Below the table is a section for "Cumulative Count of Each Contract Type:" with buttons for "Fixed Price", "Pre-Buy Price", "Flex Price", "Capped Price", "Cap Price", and "Fixed".

Admin Functions – E-mail sub-menu options

Setup – Site Parameters

The Site Parameters screen controls a number of parameters that affect the operation of various functions within your application.

Parameter	Value
Annual Total Degree Days	5600
Maximum Discount for Program Rates (in cents per gallon)	55
Extra Discount for Pre-Buy if paid by check (in cents per gallon)	3
Contract Start Date	00/00/0000
Contract End Date	+18 months
Maximum Duration of Contract	18 months
Latest Contract End Date (from today's date)	18 months
Days in advance a person can create a new contract (if currently under contract)	121
Days Until Payment Deadline (if paying by check)	10
Contract Style? (do not change)	demo
Email Address to send contracts (also return address for customers)	support@destwin.com
Send an email to the above address when contract submitted?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Help Email Address (customer service, etc)	support@destwin.com
Help Phone Number (customer service, etc)	1-877-337-8946
Allow users to schedule appointments? (if installed)	<input checked="" type="radio"/> Yes <input type="radio"/> No
Allow users to get new password?	<input checked="" type="radio"/> Yes <input type="radio"/> No

Site Parameters

Annual Total Degree Days – enter the number of degree days appropriate for you.

Maximum Discount for Program Rates (in cents per gallon) – this parameter controls the additional discretionary discount you can allow your CSRs to provide above and beyond any other discounts.

Contract Start Date – this parameter controls the start date for your contracts. Some possible settings are:

- today - contract starts the day it is entered
- tomorrow - contract starts the day after it is entered
- 00/00/0000 - contracts start the first day of the month following the day it is entered
- 06/01/2009 – example of specific fixed contract start date, all contracts on this setting will start on the specific date - 01-JUN-09. Contracts entered after 01-JUN-09 will start the day they are entered.

Contract End Date – this parameter controls when contracts will end. Typically this is set to some number of months, e.g. a setting of +12 months would have your contracts expire 12 months after the *Contract Start Date*.

Maximum Duration of a Contract – this is a maximum default number that is controlled by Destwin and can not be changed.

Latest Contract End Date (from today's date) - this is a maximum default number that is controlled by Destwin and can not be changed.

Days in advance a person can create a new contract (if currently under contract) – input the number of days in advance the contracts expiration that a customer will be allowed to enter a new contract.

Days Until Payment Deadline (if paying by check) – enter the number of days you will allow your customers to pay for a contract before you will consider the contract invalid if that customer is paying by check.

Contract Style? (do not change) – this is a Destwin setting that should not be changed.

Email Address to send contracts (also return address for customers) – this is an internal e-mail address within your organization that you may set. Customer contracts will be sent to this e-mail address provided the next parameter is set to Yes.

Send an email to the above address when contract submitted? - set this parameter to 'Yes' if you want contracts sent to the e-mail address above, set to 'No' to disable this function.

Help Email Address (customer service, etc) – e-mail address that will appear on your website for customers to write to for customer service issues.

Help Phone Number (customer service, etc) – phone number that will appear on your website for customers to call for customer service issues.

Allow users to schedule appointments? (if installed) - set this parameter to 'Yes' if you want customers to be able to schedule appointments using the Destwin Scheduler. Note the Scheduler module must be installed, configured, set up, and enabled for customers to utilize this function. Set to 'No' to disable this function.

Allow users to get new password? - set this parameter to 'Yes' if you want customers to be able to reset their own passwords. Set to 'No' to disable this function.

Once you have entered all Site Parameters as desired, click on the Save Parameters button to record your entries. Entries do not take effect until you have clicked on the Save Parameters button.

Setup – Advanced Site Parameters

There are essentially two types of Advanced Site Parameters, Text and Yes/No toggle. When setting and editing Advanced Site Parameters, edits take effect immediately. Unlike the Site Parameters screen that has a Save Parameters button, Advanced Site Parameters change as soon as the edit is saved.

Text Parameters are changed by clicking on the blue text field. This opens a window that includes the original text. Within this window the text can be edited. Once complete, click on the Save button at the bottom of the window to update the Parameter and exit edit mode. Click on the Cancel button to exit without saving.

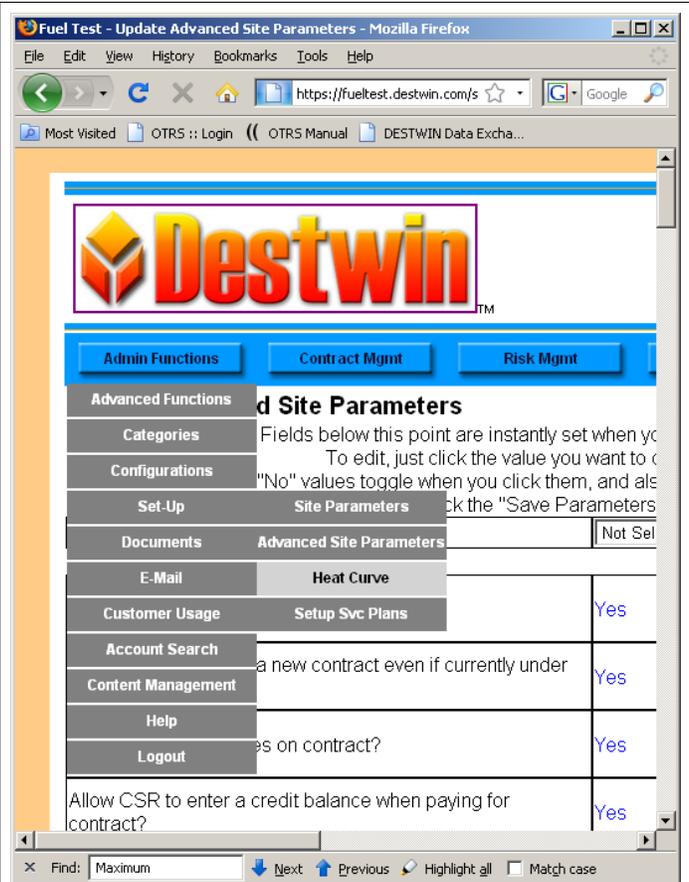
Yes/No toggle parameters are changed by clicking on the current setting.

Destwin Advanced Site Parameters control the behavior of many aspects of your site. For the most part, Advanced Site Parameters have descriptive names that describe their function. This Setup Guide will not discuss in detail every Advanced Site Parameter. You can if you wish experiment with these during the process of setting up your site and you can always contact Destwin Support if you have any specific questions about any Advanced Site Parameter.

There are certain Advanced Site Parameters that are critical to contracts and budget calculations. These are discussed in a separate setup guide specifically for contracts.

Setup – Heat Curve

The heat curve is an important element of your site. You should enter a heat curve that is appropriate for your business. To edit the your heat curve, go to Admin Functions / Set-Up / Heat Curve.



The screenshot shows a web browser window titled "Fuel Test - Update Advanced Site Parameters - Mozilla Firefox". The address bar shows "https://fueltest.destwin.com/s". The page content includes the Destwin logo and a navigation menu with buttons for "Admin Functions", "Contract Mgmt", and "Risk Mgmt". Below the menu, there's a table of parameters. The "Heat Curve" parameter is highlighted, and its value is set to "Yes".

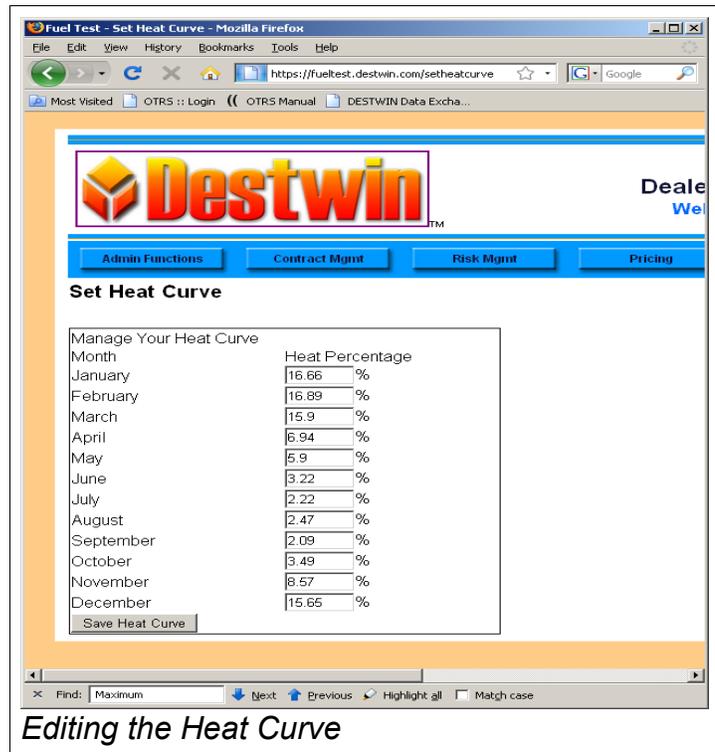
Category	Parameter Name	Value
Advanced Functions	Advanced Site Parameters	
Categories	Fields below this point are instantly set when you click on the "Save Parameters" button. To edit, just click the value you want to change.	
Configurations	"No" values toggle when you click them, and also when you click the "Save Parameters" button.	
Set-Up	Site Parameters	
Documents	Advanced Site Parameters	Not Set
E-Mail	Heat Curve	Yes
Customer Usage	Setup Svc Plans	Yes
Account Search	Can a new contract even if currently under contract?	Yes
Content Management	Can a new contract even if currently under contract?	Yes
Help	Can a new contract even if currently under contract?	Yes
Logout	Can a new contract even if currently under contract?	Yes
	Allow CSR to enter a credit balance when paying for contract?	Yes

Accessing the Heat Curve

Enter the percent for each month of the calendar year. Numbers should be entered without a % sign and as the actual value, for example to enter 10.2%, enter 10.2.

When finished entering a value for all twelve months, total all the entries. This number should equal 100.0. If it does not, please review your entries.

When complete, click on the Save Heat Curve button.



Setup – Setup Svc Plans

If you offer service plans, you can offer these in conjunction with your contracts. Click on Setup Svc Plans.

To add a new Service Plan, click on Add New Service Plan Record.

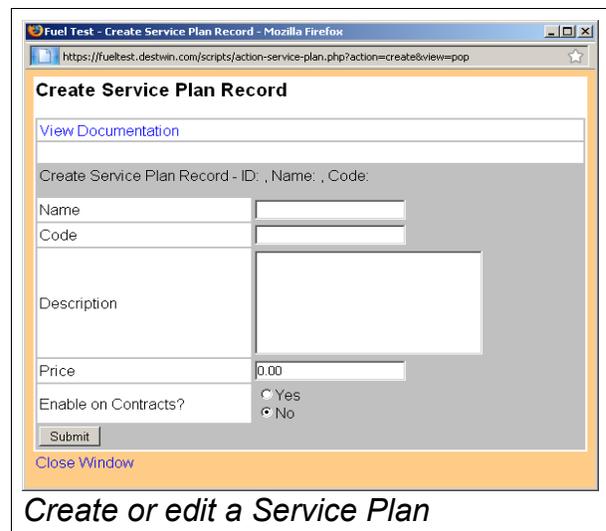
Name – enter a suitable name for the Plan. This will appear on the web site contract page.

Code – this is usually a number that identifies this particular service plan in your backend system.

Description – enter a text description for the plan.

Price – enter the annual price of the plan.

Enable on Contracts? Set to 'Yes' to enable, 'No' to disable.

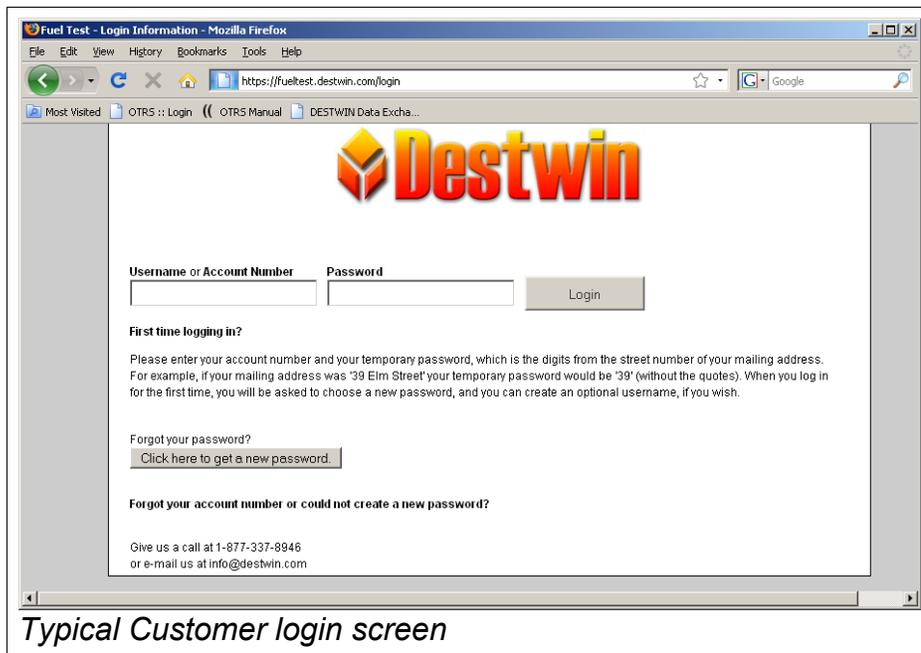


Click on the **Submit** button to save the new Service Plan Record. Click on [Close Window](#) to close the window and return to the main screen.

To edit an existing Service Plan, click on the plan Name.

Customer Site Setup

This section of the Setup Guide describes how to manage and edit much of the text that appears on the Customer side of your site.



First time logging in instruction?

This text is a Destwin Document named [firstlogin](#). See the applicable Quick Reference Guide for how to edit a document.

Phone number on this page.

Site Parameter – Help Phone Number

E-mail on this page.

Site Parameter – Help Email Address

Tech Tip

Destwin sites include a test customer login that you can use to test and review the site prior to completion of your backend system activation.

Username or Account Number: -12345

Password: customer



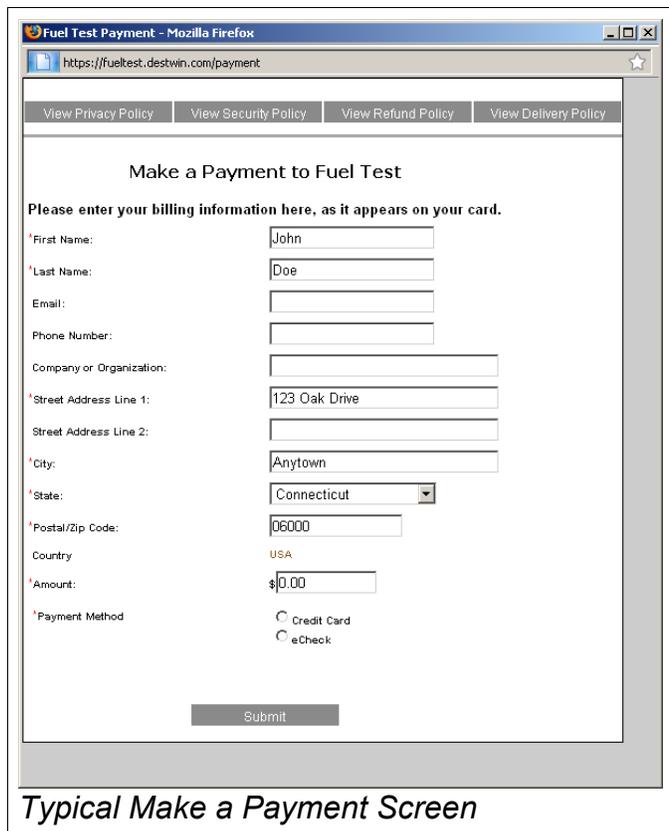
Typical Customer Account Summary Screen

The Summary screen displays customer specific account information that comes from your backend system. Contact Destwin to select the specific fields for display and their order. The screen is organized such that links to information are available in the horizontal menu bar and links for action items are in the left vertical menu bar. Once the backend interface is active you should review all the informational pages to confirm the data agrees with your backend by sampling some accounts.

The Make a Payment screen includes certain policy statements that are required for you to process on-line payments. These policies have been pre-populated. You should review these and you may edit and update these at your discretion.

To view these policies, hover the mouse over a particular policy. All these policies are Destwin documents. See the applicable Quick Reference Guide for how to edit a document.

Privacy Policy
Document name – privacypolicy



Typical Make a Payment Screen

Security Policy

Document name – securitypolicy

Refund Policy

Document name – refundpolicy

Delivery Policy

Document name – deliverypolicy

Tech Tip

To locate a document in the document list use the press CTRL-F to activate the Find function in your browser and search for a keyword.

Credit Cards and E-Checks

The ability to turn credit cards and e-checks on or off is set in the Configurations Page. Contact Destwin to activate or deactivate these capabilities.

The display order of the credit cards you accept can be changed but only by Destwin. Provide the preferred credit card order for display to Destwin and we will set this for you.

Fuel Demo Oil Price Protection Plans Available for 09/07/2009

Plan	Available Pricing Options	Fee	Information	Next Step	
Capped Price	Pre-payment (Best Price)	Not to exceed \$2.829	\$0.05 / gal	More Info	Next Step
	12 Equal Monthly Payments, includes service plan	Not to exceed \$2.879	\$0.15 / gal		
	12 Equal Monthly Payments	Not to exceed \$2.929	\$0.25 / gal		
	Pay as delivered	Not to exceed \$2.979	\$0.25 / gal		

This Plan is a really, really good deal.

This plan provides an opportunity for you to protect your heating oil purchases from increases, while also providing the benefit of lower prices should market rates fall. By choosing the Capped Price Plan, you will know in advance the highest price you will pay for your heating oil.

- **Now available with a Pre-Payment discount!**
- This plan covers a fixed quantity of gallons, up to one year of estimated usage
- Capped Price Plan is protected by a NYMEX commodity option, that works like "insurance" to protect you no matter if heating oil prices go up or down!
- Available with a 12 month budget payment plan (can also include your service plan cost)

Plan	Available Pricing Options	Fee	Information	Next Step	
Flex Price	Today's Flex Price	Currently at \$2.700	None	More Info	Next Step

Plan	Available Pricing Options	Fee	Information	Next Step	
Fixed / Prebuy	Pre-payment (Best Price)	Fixed at \$2.879	\$29.95 / yr	More Info	Next Step
	3 equal payments	Fixed at \$2.929	\$29.95 / yr		
	6 equal payments	Fixed at \$2.979	\$29.95 / yr		
	12 Equal payments, includes service plan	Fixed at \$3.029	\$29.95 / yr		
	12 Equal payments	Fixed at \$3.029	\$29.95 / yr		

Plan prices listed here are based on daily market prices and are subject to change

Have Questions?
Would you like to enroll over the phone instead?
Call us at **1-877-DESTWIN (877-337-8946)** and one of our Customer Service Representatives will be glad to assist you!

What is Oil Price Protection, and is it for me?
Oil price protection programs (which are optional) provide "tools" that can help you manage your energy costs, and do not "guarantee" the lowest price.

Typical Price Protection Plans page with More Info link selected on first plan.

Plan Name

Contract Mgmt – Contracts Setup – Contract name (Contracts Setup will be discussed in more detail in the next section of this Guide).

Available Pricing Options

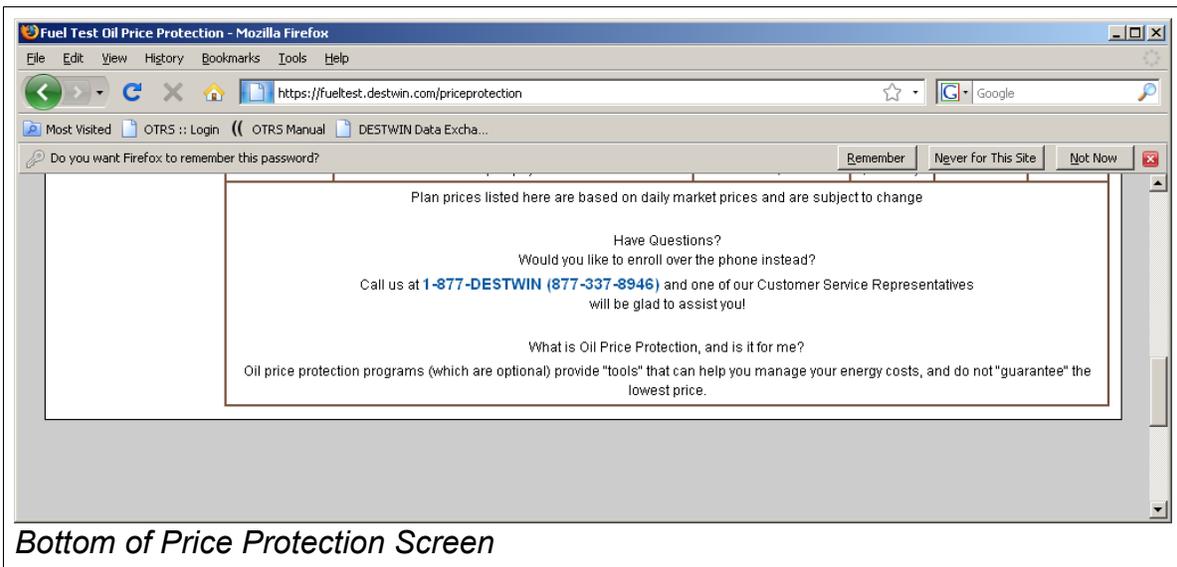
Set in Payment Options beneath specific plan in Contracts Setup.

Fee

Set in Payment Options beneath specific plan in Contracts Setup.

Information

Set in Description field for each specific contract.



Bottom of Price Protection Screen

Document name – contractinfo