

## Customer Setup

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When you add a new customer in Petro-Data, follow this checklist. Not every setup option is required.

### Setup Process:

1. Add a Customer ID *(Required)*
2. Add Customer Email information *(Required if you will email documents to them)*
3. Add a Customer Rack *(Required if other customers have a rack definition)*
4. Add Customer Special Prices *(Required)*
5. Create a Credit Card Dealer *(Required if you will receive credit card data from your fuel vendor)*

### Step 1 - Add Customer ID

AR, Customers, Customer Send File, Your Email Record

### General Customer Information

1. Create or enter a customer number. This can be alpha or numeric.
2. Enter the customer name
3. Enter a name for sorting the customer on various reports.
4. Enter the customer address lines 1 & 2.
5. Optional: Enter the customer's credit limit.
6. Optional: Enter the customer's Monthly Budget amount
7. Optional: Enter a CityID only if you will bill freight by city.
8. Enter the City name of the customer's address.
9. Enter the state.
10. Enter the zip code.
11. Optional: Enter the customer's primary phone number.
12. Optional: Enter the customer's secondary phone number.
13. Optional: Enter the customer contact.
14. Optional: Enter the customer's fax number.
15. Optional: Enter the contact's title.
16. Optional: Enter the customer's email address.
17. Optional: Enter the fuel vendor to be used by this customer.
18. Optional: Enter the customers PO number.
19. Enter Y/N to create the Texas Load Fee for this customer.
20. Enter Y/N to create finance charges for this customer.
21. Enter Y/N to create A/R Statements at end of month for this customer.

The screenshot displays the 'Customer File Maintenance' window. The 'Customer' tab is active, showing fields for Customer ID (1), Name (2), Sort Name (3), Address (4), Credit Limit (5), Budget (6), City (7), State (9), Zip (10), Phone (11), Contact (13), Title (15), Vendor (17), and Email (16). The 'Taxes' tab shows 'Petro-Market #1' (2). The 'Ship To' tab shows 'FOREST' (7) and 'FOREST COUNTY' (32). The 'Comments' tab shows 'PETRO1' (3). The 'High Balance' is 532,006 (8) and the 'Lst Pay' is 10/08/2018 (10). The 'Lst Sale' is 03/18/2019 (18). The 'Load Calc' is Y (19), 'Fin Chg?' is N (20), 'Statement?' is Y (21), 'Hold?' is N (22), 'Carrier' is blank (23), 'User' is blank (24), 'Sp Price?' is Y (25), 'Price Cd' is 1 (26), 'Elt?' is Y (27), and 'Tnk Code' is blank (28). The 'Comment' field (29) contains '3' (31) and 'COD' (31). The 'Salesman' is 'JB' (33) and 'Joe Black' (33). The 'Location' is '1' (35) and 'GL CODE FOR LOCA' (35). The 'Email Statmnt?' is Y (37) and 'Term Loc' is blank (38). The 'Ship To' field (30) contains 'FOREST' (32) and 'FOREST COUNTY' (32). The 'Industry' is 'STORES' (34) and 'C STORE/SERVICE' (34). The 'Orgdate' is blank (36). The 'Term Loc' field (38) contains '1' (38).

22. Optional: Enter Y/N to designate the customer is On Hold.
23. Optional: Enter the main fuel transport carrier for this customer.
24. Optional: Enter a user defined reporting code for this customer.
25. Optional: Enter Y/N to use special prices for this customer.
26. Optional: Enter the special priced code for this customer if the you chose 'Y' for Sp Price.
27. Enter Y if you plan to use EFTs for customer drafts.
28. Optional: Tank Code is Y for a Propane Tank Rental or K for Keep Propane Tank Full.
29. Optional: Enter a Comment Code for this customer's A/R Statement.
30. Optional: Enter the Ship To location for this customer.
31. Enter the Terms for this customer.
32. Optional: Enter the Territory to which the customer is assigned.
33. Optional: Enter the Salesman assigned to this customer.
34. Optional: Enter the Industry assigned to this customer.
35. Optional: Enter the default Location number for this customer.
36. Optional: Enter the Original Date when the customer is added to the system.
37. Optional: Enter Y/N to Email Statements to this customer.
38. Optional: Enter the default Terminal Location for this customer.

Customer File Maintenance

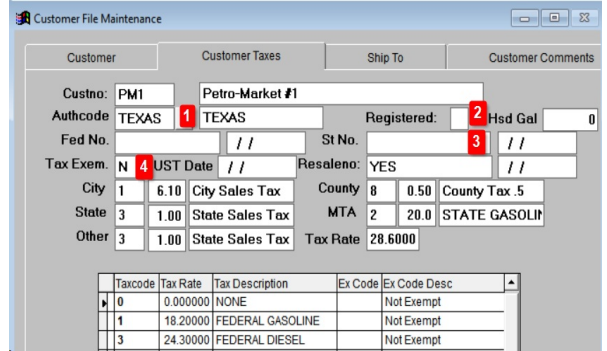
Customer		Taxes		Ship To		Comments	
Custno:	PM1	Petro-Market #1		Sort Name	PETRO1		
Address1:	486 FOREST ROAD			Balance	532,006.20		
Address2:	PO BOX 876			Credit Limit	99999	Budget	
Cityid:	FOREST	FOREST CITY		High Balance	532,006	03/18/2019	
State:	TX	Zip	78001	Lst Pay.	10/08/2018	Lst Sale	03/18/2019
Phone 1:	210-223-8762			Phone 2:	- -		
Contact:	LOUIS LOOFT			Fax:	210-490-4152		
Title:				Email:	jim@petro-data.com		
Vendor:	BRAND	Brand Fuels		Ponum			
Load Calc	Y	Fin Chg?	N	Statement?	Y	Hold?	N
User		Sp Price?	Y	Price Cd	1	Eft?	Y
						Tnk Code	
Comment				Ship To			
Terms:	3	COD		Territory	FOREST	FOREST COUNTY	
Salesman	JB	Joe Black		Industry	STORES	C STORE/SERVICE	
Location	1	GL CODE FOR LOCA		Orgdate:	/ /		
Email Statmnt?	Y	Term Loc					

Edit New Next Prev Delete Tax Shipto Exit

### Customer Tax Setup

1. Enter the Tax Authority Code for this customer.
2. Optional: Enter Y/N if the customer is Registered.
3. Optional: Enter the State License number
4. Enter Y if the customer is tax exempt.

Tax setup is listed at the bottom based on the Tax Authority entered.



Customer File Maintenance - Customer Taxes

Customer: PM1 Petro-Market #1

Authcode: TEXAS 1 TEXAS Registered: 2 Hsd Gal: 0

Fed No.: // St No.: 3 //

Tax Exem: N 4 UST Date: // Resaleno: YES

City: 1 6.10 City Sales Tax County: 8 0.50 County Tax: 5

State: 3 1.00 State Sales Tax MTA: 2 20.0 STATE GASOLIH

Other: 3 1.00 State Sales Tax Tax Rate: 28.6000

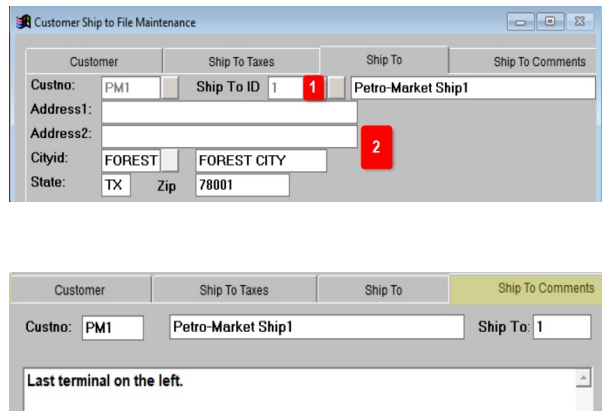
Taxcode	Tax Rate	Tax Description	Ex Code	Ex Code Desc
0	0.000000	NONE		Not Exempt
1	18.20000	FEDERAL GASOLINE		Not Exempt
3	24.30000	FEDERAL DIESEL		Not Exempt

### Customer Ship To Data

This is necessary if the customer has more than one location where fuel is received.

1. Enter a Ship To number. Start with '1'.
2. Enter the address of this Ship To location.

You can also add Comments for the Ship To location.



Customer Ship To File Maintenance - Ship To Taxes

Customer: PM1 Ship To ID: 1 1 Petro-Market Ship1

Address1: Address2:

Cityid: FOREST FOREST CITY 2

State: TX Zip: 78001

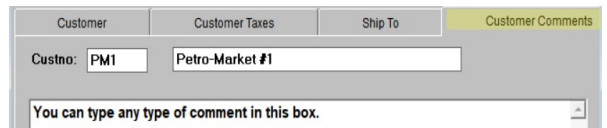
Customer: Ship To Taxes Ship To Ship To Comments

Custno: PM1 Petro-Market Ship1 Ship To: 1

Last terminal on the left.

### Customer Comments

You can enter general comments about your customer here.



Customer File Maintenance - Customer Comments

Customer: PM1 Petro-Market #1

You can type any type of comment in this box.

## Step 2

### AR, Customers, Customer Send File, Add Customer Email Records

Define the customer email address that will receive this email.

1. Enter the Customer ID. If a record does not exist, you will be prompted to add one. Click 'Yes' to the prompt.
2. The system will add the Fax number from the setup screen. Fax is only for reference and has no other function.
3. The system will add the customer email address from the setup screen. You can keep this email address or change it to what your customer has requested. Press Enter.
4. The system will prompt you to use this same email address for all the document types below. Click 'Yes' to have the automatically enter same address in all fields below or 'No' to enter an address manually.

The screenshot shows the 'Customer Send File' window with the following fields: Cust No. (PM1), Ship To, Fax, Email, CC, Invoice Send Type, Sp Price Report, EFT Send Type, AR Send Type, CrCard Send Type, Cardlock Send Type, and Rack Price Type. A red '1' is placed over the 'Petro-Market #1' text. An 'Add Record?' dialog box is overlaid on the window, containing a question mark icon and the text 'Record not found. Do you want to add it?' with 'Yes' and 'No' buttons.

The screenshot shows the 'Customer Send File' window with the following fields: Cust No. (PM1), Ship To, Fax (210-490-4152), Email (jim@petro-data.com), and CC. Red '2' and '3' are placed over the Fax and Email fields respectively.

The screenshot shows the 'Default Email' dialog box with a question mark icon and the text 'Use this email for all document types?' and 'Yes' and 'No' buttons. A red '4' is placed over the 'Yes' button.

1. Accept, change or enter an email address for those documents you will email to your customer. Each field is optional. If you will never email a certain document type, an email address is not required. You may also enter multiple addresses. Each address should be separated by a comma. Document types include:
  - a. Sales Invoice
  - b. Daily Fuel Price Quote
  - c. Customer EFT Draft
  - d. AR Statements
  - e. Credit Card Notices
  - f. Cardlock Notices
  - g. Rack Price Types
2. Enter 'Y' to have the system save the PDFs that are emailed.
3. If you save the PDFs, enter the directory where these PDFs will be stored. The most common value for directory is "**P:\PDF\**" with a subdirectory of the customer ID. **Note:** if 'P' is not your Petro-Data directory, enter the appropriate drive letter.

The FTP Directory is not used.

You are now ready to send email to your customers.

Remember to choose the 'Email' option by clicking on the Printer icon of the report to be emailed.

The screenshot shows the 'Customer Send File' window with the following fields and options:

- Cust No.:** PM1 (dropdown), Petro-Market #1 (text)
- Ship To:** (empty dropdown)
- Fax:** 210-490-4152 (text)
- Email:** larry@petro-data.com (text)
- CC:** (empty text)
- Invoice Send Type:** E (dropdown), larry@petro-data.com (text), 1 (red box), A (red box)
- Sp Price Report:** E (dropdown), larry@petro-data.com (text), B (red box)
- EFT Send Type:** E (dropdown), larry@petro-data.com (text), C (red box)
- AR Send Type:** E (dropdown), larry@petro-data.com (text), D (red box)
- CrCard Send Type:** E (dropdown), larry@petro-data.com (text), E (red box)
- Cardlock Send Type:** E (dropdown), (empty text), F (red box)
- Rack Price Type:** E (dropdown), (empty text), G (red box)
- Save PDFs:** Y (dropdown), 2 (red box)
- PDF Dir:** p:\pdf\PM1\ (text), 3 (red box)
- FTP Dir:** (empty text)

Buttons at the bottom: Edit, New, Next, Prev, Delete, Duplicate, Exit.

### Step 3 - Add Customer Racks

*Jobber, Master File Maintenance, Special Prices, Add Customer Racks*

1. Enter or select from the lookup button an existing Customer ID number.
2. If you have multiple Ship-To locations for this customer, enter it here. Leave this blank if the customer does not have Ship-To setup in the customer master.
3. Click 'Yes' to add the record.
4. Enter the fuel vendor to be used for this customer.
5. Enter the fuel terminal to be used for this customer.
6. Click OK.

All fuel items from the Vendor Rack setup will be added.

You may keep all these items or you can selectively delete those fuel products that will never be sold to this customer.

To delete one item, click the blank box to the left of the Vendor name. The box will turn black. If you click anywhere on the screen or upon exit, this row will be permanently deleted.

In some new versions, the box is grayed out. Just delete the vendor name, terminal and fuel item manually using your Delete Key.

Customer Rack Prices

Custno PM1 Petro-Market #1

Shipto

Report Code

Vendor

Terminal

Add Record?

Record not found. Do you want to add it?

Yes No

Customer Rack Prices

Custno PM1 Petro-Market #1

Shipto

Report Code

Vendor BRAND

Terminal SA SAN ANTONIO

Ok

Customer Rack Prices

Custno PM1 Petro-Market #1

Shipto

Report Code

Vendor

Terminal SAN ANTONIO

Vendor	Terminal	Item	Del (Y/N)
BRAND	SA	B5D	
BRAND	SA	B99	
BRAND	SA	E87	
BRAND	SA	E87S	
BRAND	SA	E89	
BRAND	SA	E89S	
BRAND	SA	E93	
BRAND	SA	E93S	
BRAND	SA	ULS	

New

Add Rack

Duplicate

Delete Rack

Exit/Save

#### Step 4 - Add Special Prices

*Jobber, Master File Maintenance, Special Prices, Special Price Add and Change*

Create special price setup for each customer and each product type.

Click the 'View All' button to choose to display an existing special price record.

1. Enter the location number for the inventory item.
2. Enter the customer number.
3. If appropriate, enter the Ship To location. This can be left blank.
4. Enter the inventory item number.
5. Enter the price type. Most common value is 'U' for Mark-Up.
6. Racktype (Gross or Net) will default from the installation setup. This can be changed if needed.
7. Enter price origin of Tank, Terminal or Both.
8. Bill Code (Gross or Net) will default from installation setup. This can be changed if needed.
9. Enter a single vendor or 'ALL' for all vendors. If you choose 'ALL, you must create Customer Rack setup to control price quotes sent to your customers.
10. Enter a single terminal or 'ALL' for all terminals. If you choose one vendor and ALL terminals, prices for all terminals will print regardless of Customer Rack setup.
11. Unless otherwise instructed by Petro-Data support, Fixed Terminal should be 'N'.
12. Enter your profit per gallon.
13. Enter your freight type of Freight Table (T), Rate per Gallon (R) or Flat Charge (C).
14. If you chose Rate per Gallon or Flat Charge, enter the amount here.

Special Price File Maintenance

Location 9 **1** Terminal  **View All**

Custno PM1 **2** Petro-Market #1

Shipto  **3**

Item E87 **4** Fuel Type E87

Price Type U **5** Racktype N **6** Tax Type GAS

Spec Code

Price Origin B **7** Billcode N **8**

Vendor ALL **9** Terminal ALL **10** Fixed Terminal N **11**

Profit/Gal 0.01000 **12** Exp Date / /

Frt Type C **13** Frt Rate 100.00000 **14** Other  Fuel Tax

Code 1  Code 2  Zone

No Quote  **15** No Tax

Line Item Charges

Bill Frt? <b>16</b> <input type="checkbox"/>	Frt (G/N) G <b>17</b>	Loc 1 <b>18</b>	Item GASFR <b>18</b>	FG <input type="checkbox"/>
Bill Frt Adj? <b>19</b> <input type="checkbox"/>		Loc <input type="text"/>	Item <input type="text"/>	<input type="checkbox"/>
Bill Other 1? <b>20</b> <input type="checkbox"/>	Oth Chg 1 0.000000	Loc <input type="text"/>	Item <input type="text"/>	<input type="checkbox"/>
Bill Other 2? <b>20</b> <input type="checkbox"/>	Oth Chg 2 0.000000	Loc <input type="text"/>	Item <input type="text"/>	<input type="checkbox"/>

Tot Markup 0.01000

Edit **New** Next Prev Delete Duplicate Exit



15. If you want to exclude this price in the Customer Quote email, enter 'N'. To include this price in the email, leave it blank.
16. Enter 'Y' if you will bill Freight in the BOL.
17. Choose Gross or Net gallons (G/N) to use in the freight calculation.
18. Enter the Inventory location and item for the freight charge.
19. Repeat the same in Bill Frt Adj if you want to calculate a freight surcharge.
20. Bill Other 1 & 2 can be used to bill other charges as needed.

Special Price File Maintenance

Location 9 **1** Terminal  **View All**

Custno PM1 **2** Petro-Market #1

Shipto  **3**

Item E87 **4** Fuel Type E87

Price Type U **5** Racktype N **6** Tax Type GAS

Spec Code

Price Origin B **7** Billcode N **8**

Vendor ALL **9** Terminal ALL **10** Fixed Terminal N **11**

Profit/Gal 0.01000 **12** Exp Date / /

Frt Type C **13** Frt Rate 100.00000 **14** Other  Fuel Tax

Code 1  Code 2  Zone

No Quote  **15** No Tax

Line Item Charges

Bill Frt? <b>16</b> <input checked="" type="checkbox"/>	Frt (G/N) <b>17</b> <input type="checkbox"/>	Loc 1 <b>18</b>	Item GASFRT <b>18</b>	FG
Bill Frt Adj? <b>19</b> <input type="checkbox"/>		Loc <input type="text"/>	Item <input type="text"/>	
Bill Other 1? <b>20</b> <input type="checkbox"/>	Oth Chg 1 0.000000	Loc <input type="text"/>	Item <input type="text"/>	
Bill Other 2? <b>20</b> <input type="checkbox"/>	Oth Chg 2 0.000000	Loc <input type="text"/>	Item <input type="text"/>	

Tot Markup 0.01000

Edit **New** Next Prev Delete Duplicate Exit

### **Step 5 - Credit Card Dealer**

*AR, Credit Cards, Dealer File, Dealer File Maintenance*

If you get credit card monies from your fuel vendor, you will need to complete this setup for your customer/dealer.

1. Enter a Dealer Code. This can be the same as your customer ID number.
2. Enter the Dealer ID. This number is provided by your fuel vendor.
3. Enter the Customer ID.
4. Enter the fuel vendor from whom you will receive credit card monies.
5. Enter the Petro-Data GL account for Credit Card Receivable.
6. Enter the transaction type. Most common values are:
  - a. '1' - Credit card money will be reduce from fuel vendor invoices.
  - b. '5' - Credit card money will be transferred directly to your bank account from your fuel vendors. Vendor invoices will be paid in full.
7. Enter 'Y' to Input Dealer.
8. Skip the Import Code field.
9. Enter the percent of credit cards fees that **will not** be charged to your customer.
10. If you entered a credit card fee percent, enter the Petro-Data GL account number where these fees will be recorded.
11. If you chose Transaction Type 5, enter your Petro-Data GL account number for the Bank account.
12. Enter the vendor ID.
13. Optional: Enter the vendor's name.
14. Enter the 1099 Type:
  - a. Most common value is 'C' to have Petro-Data compute 1099 amounts at the end of the year.
  - b. If you plan to enter all 1099 amounts manually, enter 'M'.

The screenshot shows the 'Dealer File Maintenance' window with the following fields and callouts:

- 1: Dealer Code (PM1)
- 2: Dealer ID (000012345)
- 3: Customer No (PM1)
- 4: Vendor No (BRAND)
- 5: GL CC Account (11100-000)
- 6: Credit Type (1)
- 7: Input Dealer (Y)
- 8: Import Code (empty)
- 9: CC Fee Credit (empty)
- 10: GL Fee Account (-)
- 11: GL Bank (-)
- 12: Ap Vendor (BRAND)
- 13: Corporate Name (empty)
- 14: 1099 Total Type (C)

Buttons at the bottom: Edit, New, Next, Prev, Print, Delete, Exit.