

TRUCKS

Description

Create a record for each Common Carrier and each of your company trucks (or one truck to represent all of them if you don't want to track them separately). Tax ID codes are entered in this record for Fuel Tax Reporting.

How They are Used

A Truck number can be entered on each Bill of Lading to track who hauled the fuel from the terminal. Many States require Carrier reports if your company hauls fuel. Fuel Manifest Reports can be run to track loads hauled by each truck and driver. Truck numbers can also be entered on Sales Invoices. Carriers are also required on Fuel Tax Reports - whether it is your own trucks or Common Carriers. Tax ID numbers are entered in this record.

Freight Calculations

Freight rates can be set up by common carrier, transport or bobtail. A code in the Truck File determines which type of truck picked up and delivered the fuel. If you are linked to the General Ledger, in-house truck records will have a Freight income GL account. Common carrier truck records will have a pending freight GL account. These accounts are used if you are using the freight calculations in the BOL module and adding it to fuel cost.

Menu Select

From the Master File Maintenance submenu, select - *Trucks*.

Add Chg Delete Trucks

Truck Report

Quit

ADD CHG DELETE TRUCKS

Menu Select

From the Trucks submenu, select - *Add Chg Delete Trucks*.

Truck Number.

Enter a new truck code. View existing truck records by clicking the magnifying glass or pressing F2. The truck number can be up to six characters - like a short name or abbreviation (MTC - My Transport Company).

The screenshot shows a software window titled "Truck File Maintenance". The form contains the following fields and values:

Truck:	1		
Name:	TRANSPORT 1		
Frt Company:	MY OIL COMPANY, INC.		
Truck FEIN:	59-1234597	Fax No.:	
Truck Code:	T	Tran. Mode:	J
Model Year:	2005	Make:	FORD
Model:		License:	
Email:			
Rate Schedule:	301	SurCharge %:	
Gas Minimum:	7000	Diesel Minimum:	8000
Billing Code:		Vendor No:	
GI Frt. Income:	60600-	Freight Income:	
GI Pend. Frt.:	-		

At the bottom of the form, there are buttons for "Edit", "New", "Prev", "Next", "Delete", and "Egt".

Name.

Enter a description for the truck.

Frt Company.

Enter the name of the freight company (can be the same as 'Name')

Truck FEIN.

Enter the Tax ID required by your State fuel tax reports.

In Texas it is your Texas Taxpayer number or the common carrier's.

Fax Number.

Enter the fax number of the Common Carrier - used in a custom feature for faxing load requests to common carriers.

Truck Code.

This code is the type of carrier. Some freight calculations use this to get the correct freight rate.

C = Common Carrier

T = Transport

B = Bobtail

P = Customer Pickup

COMMON CARRIERS

Enter C for Common Carrier trucks.

Company Name

Enter the transportation company name. (Ex. Mission Transport).

FEIN

Enter the carrier's TAX ID number for tax purposes, if needed. In some States, this is their Federal number, in other States, it is their State ID number.

GL Pending Freight

Leave blank if you are NOT calculating freight in the BOL module and adding it to inventory cost. This GL number is used ONLY for COMMON CARRIERS (Truck type C) and only if you are calculating freight in the BOL module and adding the freight to the rack price increasing the value of the fuel inventory. This account will be credited when BOLs are updated.

TRANSPORTS

Enter T for your transport trucks.

Company Name

Enter your company name.

FEIN

Enter your FEIN number for tax purposes, if needed. (Florida requires this information.)

Transportation Mode

Enter the Federal Transportation Mode for this truck (J is for truck).

GL Freight Income

Leave blank if you are NOT calculating freight in the BOL module and adding it to inventory cost. This GL number is used ONLY for your company-owned TRANSPORT and BOBTAIL trucks (Truck type T or B) and only if you are calculating freight in the BOL module and adding the freight to the rack price increasing the value of the fuel inventory.

BOBTAILS

Enter B for your bobtail trucks.

Rate Per Mile

Enter an assigned fixed freight rate per mile for this truck. Leave this field blank

if you are using the Freight Rate File in the Rack Price Module to calculate freight expense.

Company Name

Enter your company name.

FEIN

Enter your FEIN number for tax purposes, if needed. (Florida requires this information.)

GL Freight Income

Leave blank if you are NOT calculating freight in the BOL module and adding it to inventory cost. This GL number is used ONLY for your company-owned TRANSPORT and BOBTAIL trucks (Truck type T or B) and only if you are calculating freight in the BOL module and adding the freight to the rack price increasing the value of the fuel inventory.

CUSTOMER PICKUP

Enter P to use when a customer picks up their own fuel at the bulk plant.

Company Name

Enter your company name.

FEIN

Enter your FEIN number for tax purposes, if needed.

Tran. Mode.

Enter the Federal transportation mode code for this truck or barge, etc. (truck is J)

Model Year.

(Optional). Enter the Model Year of the truck (usually Transports and Bobtails only).

Make.

(Optional). Enter the Make of the truck (usually Transports and Bobtails only).

Model.

(Optional). Enter the Model of the truck (usually Transports and Bobtails only).

License.

(Optional). Enter the License Plate number of the truck (Transports and Bobtails).

Email.

(Optional). Enter the Email address of the Common Carrier.

The following fields are used when Freight and Surcharge are calculated in BOL and/or Invoicing.

Rate Schedule.

Enter a Freight schedule code if applicable, type "NONE" if there is no freight schedule for this truck..

SurCharge%.

Enter the surcharge percent to use to calculate freight surcharge when this truck number is used.

Gas Minimum.

Enter the Minimum gallons of Gasoline to bill freight. If they buy less than this, freight will be calculated on these gallons.

OPTION BUTTONS. Click on the button or press the underlined letter.

<Edit> Click on the field to be changed and change it. Or press E or click the Edit button.

<New> Click on New to enter another record.

<Next> Click on Next to display the next record.

<Prev> Click on Previous to display the previous record.

<Delete> Click to Delete to delete this record. A popup box with *'Do You Want to Delete This Record?'* displays. Click the Y button to delete the record or the N button to proceed without deleting.

<Exit> Click on Exit to quit file maintenance.

2 - TRUCK REPORT

Print this report to list and verify all trucks in the file and to use as a reference when entering BOLs.

Menu Select:

From the Master File Maintenance Submenu, select *16 - Truck File Maintenance*. From the Truck File Maintenance submenu, select *2 - Truck Report*.

BEGIN INPUT

Printer.

Enter S to print the report on the screen.
 Enter P to print to the printer and select the desired printer.
 Enter F to print to a Text File and enter the full path and desired file name.
 Enter Q to return to the menu without printing.

Enter the Date.

The current system date displays. Press *enter* to accept the default or enter a date for the report. This date has no effect on the report.

Is Everything Ok? (Y/N/P=Printer/Q=Quit).

To print the report using the selected printer or screen, press Y. To change to a different printer or print option, press P. To quit without printing enter N or Q.

Truck Number	Description	Code	Rate/Mile	Carrier No.
3	EAGLE TRANSPORT CO.,	C	0.0000	56-0816291
BOB	BOBTAIL	B	0.7500	59-1468811
COAST	COASTAL CARRIERS	C	0.0000	74-1211777
TR	IN HOUSE TRANSPORT	T	0.0000	74-1219911
TRANSP	TRANSPORT 2	C	0.0000	59-1211882

Truck File Report

CITIES

City File Maintenance is part of the FREIGHT calculation feature. City codes must be entered in the Customer File, Location File and Terminal File for the computer to determine the origin (Terminal) and destination (customer or location) of the fuel.

If you are calculating freight based on origin and destination, this part of the setup must be done.

Assign a city code (up to 6 characters) for each city where you pick up fuel and each city where you deliver fuel.

In Freight Rate File Maintenance, you will enter the freight for each origin city to destination city.

*Note 1: There are some install questions that may need to be changed if you are starting to use this module after your initial setup. Call Petro-Data for assistance*****.*

Master File Maintenance Menu Select:

From the Master File Maintenance Submenu, select - *Cities*.

Add Chg Delete Cities

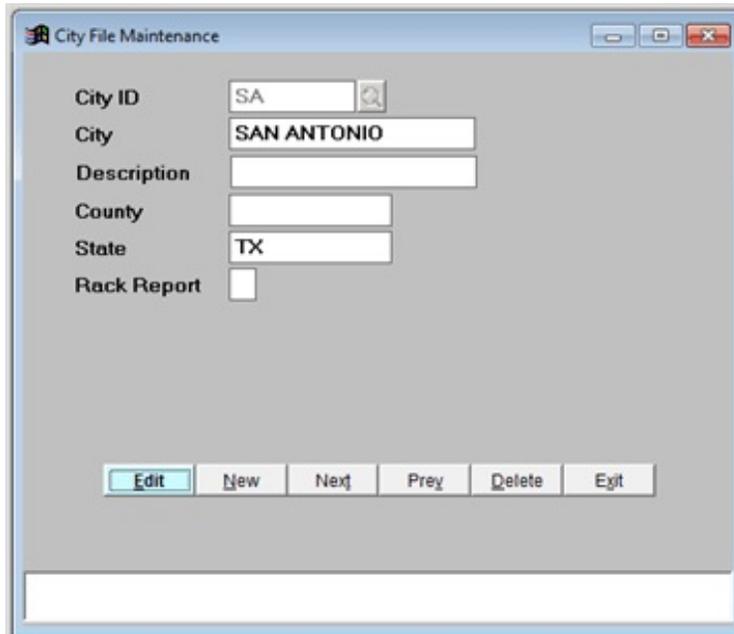
City Report

Quit

ADD CHG DELETE CITIES

Menu Select

From the Cities submenu, select - *Add Chg Delete Cities*.



The screenshot shows a window titled "City File Maintenance" with the following fields and controls:

- City ID:** Text box containing "SA" with a search icon to its right.
- City:** Text box containing "SAN ANTONIO".
- Description:** Empty text box.
- County:** Empty text box.
- State:** Text box containing "TX".
- Rack Report:** A small square checkbox.
- Buttons:** A row of buttons labeled "Edit", "New", "Next", "Prev", "Delete", and "Exit".

City ID

Enter up to a 6-Character ID for the City.

City

Enter the City name.

County

Enter County name (if known - optional).

State

Enter the 2-Character abbreviation for the STATE.

Rack Report?

Do you want this city as a destination on the rack report? (Y/N).

OPTION BUTTONS. Click on the button or press the underlined letter.

<Edit> Click on the field to be changed or click <Edit> and then the field to change.

<New> Add a NEW record.

<Next> Display the next record.

<Prev> Display the previous record.

<Delete> Delete to delete this record.

A popup box with 'Do You Want to Delete This Record? (Y or N)?' displays.

Click the 'Yes' button to delete the record or the 'No' button to cancel the delete.

<Exit> Exit/quit City file maintenance.

CITY REPORT

Print this report to list all of the City ID codes in the file.

Menu Select:

From the Master File Maintenance Submenu, select - Cities.

From the Cities submenu, select - *City Report*.

BEGIN INPUT - City Report Options

Printer.

Enter S to print the report on the screen.

Enter P to print to the printer and select the desired printer.

Enter F to print to a Text File and enter the full path and desired file name.

Enter Q to return to the menu without printing.

Enter the Date.

The current system date displays. Press *enter* to accept the default or enter a date for the report. This date has no effect on the report.

Is Everything Ok? (Y/N/P=Printer/Q=Quit).

To print the report using the selected printer or screen, press Y. To change to a different printer or print option, press P. To quit without printing enter N or Q.

City ID codes are listed in alphabetical order. Button options to print to printer, save to file, enlarge or reduce the report, and the slide bar to view the rest of the report are shown on this sample report.

Date: 06/25/2007
Time: 15:49:46

Demo Company
City Report 06/25/2007

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City ID	City	State	County
BELT	BELTWAY	TX	
CAS	CASTROVILLE	TX	
CC	CORPUS CHRISTI	TX	
COT	COTULLA	TX	
DEV	DEVINE	TX	
FOREST	FOREST CITY	TX	
HONDO	HONDO	TX	
LAVER	LA VERNIA	TX	
SA	SAN ANTONIO	TX	BEXAR
SEGUIN	SEGUIN	TX	
WACO	WACO	TX	

City File Report

