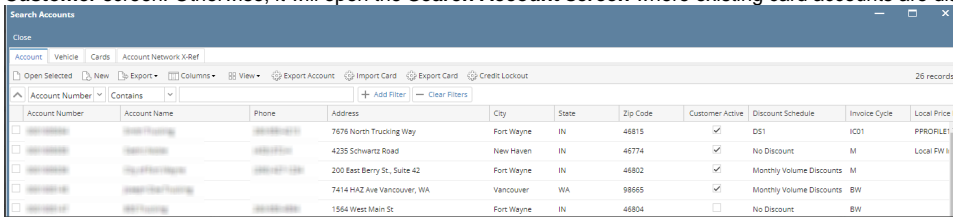


How to Add a Card Fueling Account

1. From **Card Fueling** module, click **Card Accounts**. If this is the first record you are creating, it will open the **Accounts** screen, then the **Search Customer** screen. Otherwise, it will open the **Search Account** screen where existing card accounts are displayed.



Search Accounts

Close

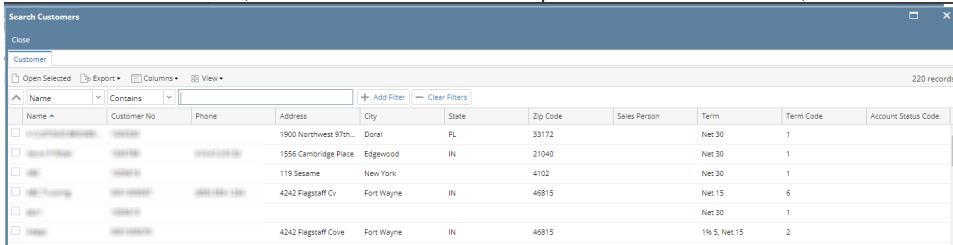
Account Vehicle Cards Account Network X-Ref

Open Selected New Export Columns View Export Account Import Card Export Card Credit Lockout 26 records

Account Number Contains Add Filter Clear Filters

Account Number	Account Name	Phone	Address	City	State	Zip Code	Customer Active	Discount Schedule	Invoice Cycle	Local Price Profile
100-100000	ABC Trucking	100-100-1000	7676 North Trucking Way	Fort Wayne	IN	46815	<input checked="" type="checkbox"/>	DS1	IC01	FFR001LE
100-100001	ABC Trucking	100-100-1001	4235 Schwartz Road	New Haven	IN	46774	<input checked="" type="checkbox"/>	No Discount	M	Local Price
100-100002	ABC Trucking	100-100-1002	200 East Berry St, Suite 42	Fort Wayne	IN	46802	<input checked="" type="checkbox"/>	Monthly Volume Discounts	M	
100-100003	ABC Trucking	100-100-1003	7414 HAZ Ave Vancouver, WA	Vancouver	WA	98665	<input checked="" type="checkbox"/>	Monthly Volume Discounts	BW	
100-100004	ABC Trucking	100-100-1004	1564 West Main St	Fort Wayne	IN	46804	<input type="checkbox"/>	No Discount	BW	

2. In **Account Search** screen, click the **New** toolbar button to open the new **Account** screen, then the **Search Customer** screen.



Search Customers

Close

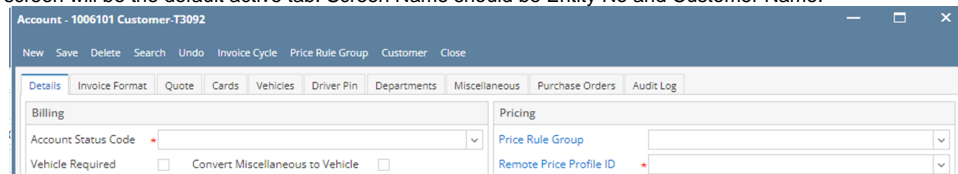
Customer

Open Selected Export Columns View 220 records

Name Contains Add Filter Clear Filters

Name	Customer No	Phone	Address	City	State	Zip Code	Sales Person	Term	Term Code	Account Status Code
100-100000	100000	100-100-1000	1900 Northwest 97th...	Doral	FL	33172		Net 30	1	
100-100001	100001	100-100-1001	1556 Cambridge Place	Edgewood	IN	21040		Net 30	1	
100-100002	100002	100-100-1002	119 Sesame	New York		4102		Net 30	1	
100-100003	100003	100-100-1003	4242 Flagstaff Cv	Fort Wayne	IN	46815		Net 15	6	
100-100004	100004	100-100-1004						Net 30	1	
100-100005	100005	100-100-1005	4242 Flagstaff Cove	Fort Wayne	IN	46815		1% 5, Net 15	2	

3. In **Search Customer** screen, select customer then click **Open Selected** toolbar button. This will display the new **Account** screen. **Details** tab screen will be the default active tab. Screen Name should be Entity No and Customer Name.



Account - 1006101 Customer-T3092

New Save Delete Search Undo Invoice Cycle Price Rule Group Customer Close

Details Invoice Format Quote Cards Vehicles Driver Pin Departments Miscellaneous Purchase Orders Audit Log

Billing

Account Status Code

Vehicle Required ☐ Convert Miscellaneous to Vehicle ☐

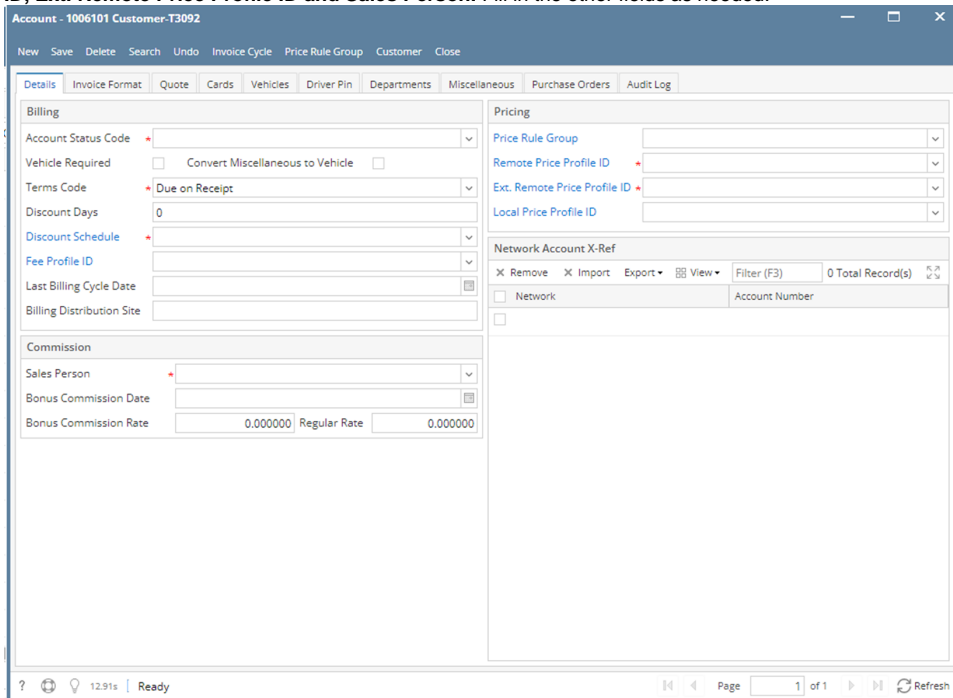
Pricing

Price Rule Group

Remote Price Profile ID

Remote Price Profile ID

4. In **Details** tab screen and enter the following required fields: **Account Status Code**, **Terms Code**, **Discount Schedule**, **Remote Price Profile ID**, **Ext. Remote Price Profile ID** and **Sales Person**. Fill in the other fields as needed.



Account - 1006101 Customer-T3092

New Save Delete Search Undo Invoice Cycle Price Rule Group Customer Close

Details Invoice Format Quote Cards Vehicles Driver Pin Departments Miscellaneous Purchase Orders Audit Log

Billing

Account Status Code

Vehicle Required ☐ Convert Miscellaneous to Vehicle ☐

Terms Code

Discount Days

Discount Schedule

Fee Profile ID

Last Billing Cycle Date

Billing Distribution Site

Pricing

Price Rule Group

Remote Price Profile ID

Ext. Remote Price Profile ID

Local Price Profile ID

Network Account X-Ref

X Remove X Import Export View Filter (F3) 0 Total Record(s)

Network ☐ Account Number

Commission

Sales Person

Bonus Commission Date

Bonus Commission Rate Regular Rate

5. Navigate to **Invoice Format** tab screen and enter the following required fields: **Invoice Cycle**. Fill in the other fields as needed.

Account - 1006101 Customer-T3092

New Save Delete Search Undo Invoice Cycle Price Rule Group Customer Close

Details Invoice Format Quote Cards Vehicles Driver Pin Departments Miscellaneous Purchase Orders Audit Log

Invoice Cycle **Card**

Primary Sort Order **Card**

Secondary Sort Order **Vehicle**

Detail Display **Vehicle**

Print Price Per Gallon **Including Taxes**

Print Site Address **None**

Department Grouping **No**

Primary Department **Card**

Summary By Product ☒ Summary By Department ☐

Summary By Card ☐ Summary By Dept/Card/Product ☐

Summary By Card/Product ☐ Summary By Dept/Vehicle/Product ☐

Summary By Vehicle: ☐ Summary By Dept/DriverPin/Product ☐

Summary By Miscellaneous ☐ Summary By Dept/Product ☐

Summary By Driver Pin ☐ Print Time on the Invoice ☒ Reports ☒

Show Vehicle Description Only ☐ Print Miscellaneous Info on Invoice ☐

Show Driver Pin Description Only ☐ Page Break By Primary Sort Order ☐

Export File Mapping

Page 1 of 1 Refresh

6. Navigate to **Cards** tab screen and enter the following required details to the grid area: **Network ID**, **Card Number**, **Card Description**, **Card PIN Number** and **Last Used Date**.

Account - 1006101 Customer-T3092

New Save Delete Search Undo Invoice Cycle Price Rule Group Customer Close

Details Invoice Format Quote Cards Vehicles Driver Pin Departments Miscellaneous Purchase Orders Audit Log

Add Open Remove Add To Encoding De-Activate Card Locked Unlocked Export View Filter (F3) 0 Total Record(s)

Network ID	Card Number	Card Description	Card Pin Number	Last Used Date	Card Type	Entry Code	Dep
------------	-------------	------------------	-----------------	----------------	-----------	------------	-----

Page 1 of 1 Refresh

7. Click **Save** toolbar button to save the new card account.

Account - 1006101 Customer-T3092

New **Save** Delete Search Undo Invoice Cycle Price Rule Group Customer Close

Details Invoice Format Quote Cards Vehicles Driver Pin Departments Miscellaneous Purchase Orders Audit Log

Billing Pricing

8. Click **Close** toolbar button to close the new card account.

Account - 1006101 Customer-T3092

New Save Delete Search Undo Invoice Cycle Price Rule Group Customer **Close**

Details Invoice Format Quote Cards Vehicles Driver Pin Departments Miscellaneous Purchase Orders Audit Log

Billing Pricing

Search Accounts

Close

AccountVehicleCardsAccount Network X-Ref

Open SelectedNewExportColumnsViewExport AccountImport CardExport CardCredit Lockout

27 records (1 selected)

Account NumberContains

Add FilterClear Filters

Account Number	Account Name	Phone	Address	City	State	Zip Code	Customer Active	Discount Schedule	Invoice Cycle	Local Price P
✓ 1006101	Customer-73092						✓	DS1	IC01	