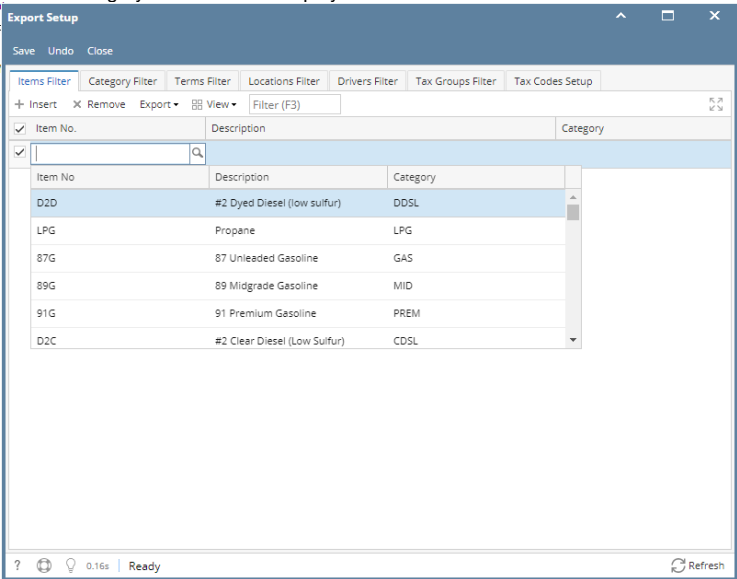


How to use Export Setup

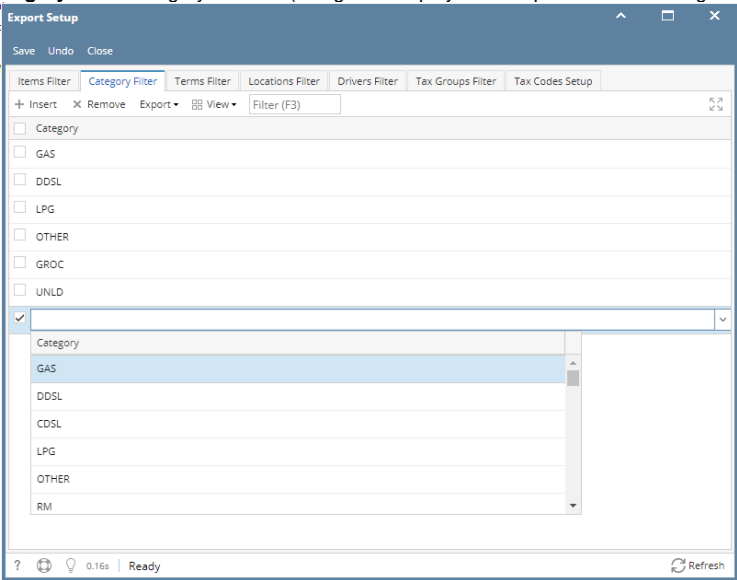
- 1. From Energy Track Module click **Export Setup**.
 - a. Select **Item No.** under items filter tab (items displayed in dropdown are all items available in inventory) and upon item is selected, Description and Category of item will be displayed



The screenshot shows the 'Export Setup' window with the 'Items Filter' tab selected. The dropdown menu is open, displaying a list of items. The status bar at the bottom indicates 'Ready' and '0.16s'.

| Item No. | Description | Category |
|----------|------------------------------|----------|
| D2D | #2 Dyed Diesel (low sulfur) | DDSL |
| LPG | Propane | LPG |
| 87G | 87 Unleaded Gasoline | GAS |
| 89G | 89 Midgrade Gasoline | MID |
| 91G | 91 Premium Gasoline | PREM |
| D2C | #2 Clear Diesel (Low Sulfur) | CDSL |

- i.
 - b. Select **Category** under category filter tab (categories displayed in dropdown are all categories of item)



The screenshot shows the 'Export Setup' window with the 'Category Filter' tab selected. The dropdown menu is open, displaying a list of categories. The status bar at the bottom indicates 'Ready' and '0.16s'.

| Category |
|----------|
| GAS |
| DDSL |
| CDSL |
| LPG |
| OTHER |
| RM |

- i.
 - c. Select **Terms** under terms filter tab (terms displayed in dropdown are all terms in common info > terms)

Export Setup

Save Undo Close

Items Filter Category Filter **Terms Filter** Locations Filter Drivers Filter Tax Groups Filter Tax Codes Setup

+ Insert X Remove Export View Filter (F3)

☐ Term

☐ Net 30

☐ Due on Receipt

☐ Net 15

☐ 1% 10, Net 30

☐ 1% 5, Net 20

☐ 1% 5, Net 15

☐ APR, Net 180

☐ APR, Net 90

☐ APR, Net 30

☒ **Net 30**

Term Name

Net 30

1% 5, Net 15

1% 5, Net 20

1% 10, Net 30

Due on Receipt

Net 15

Refresh

i.

d. Select **Location** under location filter tab (locations displayed in dropdown are all locations in common info > Company Locations)

Export Setup

Save Undo Close

Items Filter Category Filter Terms Filter **Locations Filter** Drivers Filter Tax Groups Filter Tax Codes Setup

+ Insert X Remove Export View Filter (F3)

☐ Location

☐ 0002 - Indianapolis

☐ 0004 - South Bend

☒ **0001 - Fort Wayne**

Location Name

0001 - Fort Wayne

0002 - Indianapolis

0003 - Illinois

0004 - South Bend

0005 - Chatham

Diageo - London

0.16s Ready Refresh

i.

e. Select **Drivers** under driver filter tab (drivers displayed in dropdown are salespersons with driver type in sales)

Export Setup

Save Refresh Undo Close

Items Filter Category Filter Terms Filter Locations Filter **Drivers Filter** Tax Groups Filter Tax Codes Setup

+ Insert X Remove View Filter (F3)

☐ Sales Rep

☒ **Jeff the Driver**

☐ Sales Rep

Jeff the Driver

Martin

Bob Smith

Steven Colernie

Edited

i.

- f. Select **Tax Group** under tax group filter tab (tax group displayed in dropdown are all tax group under common info > tax group)

The screenshot shows the 'Export Setup' window with the 'Tax Groups Filter' tab active. The 'Tax Group' dropdown is open, displaying a list of tax groups. The status bar at the bottom indicates 'Ready'.

| Tax Group |
|-------------|
| OH |
| IN-Checkoff |
| Fuel |
| expense tax |
| MN |
| MN-002 |

- i. **Save** button and details will be saved.

1. From Energy Track Module click **Export Setup**.

- a. Select **Item No.** under items filter tab (items displayed in dropdown are all items available in inventory) and upon item is selected, Description and Category of item will be displayed

The screenshot shows the 'Export Setup' window with the 'Items Filter' tab active. The 'Item No.' dropdown is open, displaying a list of items. The status bar at the bottom indicates 'Ready'.

| Item No. | Description | Category |
|----------|-------------------------|----------|
| D2D | #2 Dyed Diesel (low ... | DDSL |
| LPG | Propane | LPG |
| 87G | 87 Unleaded Gasoline | GAS |
| 89G | 89 Midgrade Gasoline | MID |
| 91G | 91 Premium Gasoline | PREM |
| D2C | #2 Clear Diesel (Low... | CDSL |

- i. **Category** under category filter tab (categories displayed in dropdown are all categories of item)

Export Setup

Save Refresh Undo Close

Items Filter **Category Filter** Terms Filter Locations Filter Drivers Filter Tax Groups Filter Tax Codes Setup

+ Insert X Remove View Filter (F3)

☐ Category

☐ GAS

☒

| Category |
|-------------|
| GAS |
| DDSL |
| CDSL |
| LPG |
| OTHER |
| RM |

? ? ? Edited

i.

c. Select **Terms** under terms filter tab (terms displayed in dropdown are all terms in common info > terms)

Export Setup

Save Refresh Undo Close

Items Filter Category Filter **Terms Filter** Locations Filter Drivers Filter Tax Groups Filter Tax Codes Setup

+ Insert X Remove View Filter (F3)

☐ Term

☐ 12/31/2017A

☐ Against Irrevocable letter of credit

☒

| Term Name |
|---|
| 12/31/2017A |
| -Scpg 10, Net 30 |
| Against Irrevocable letter of credit |
| Net cash against invoice, within 30 days of delivery |
| Net cash 75 days after bill of lading date |
| Net cash against documents upon first presentation |

? ? ? Ready

i.

d. Select **Location** under location filter tab (locations displayed in dropdown are all locations in common info > Company Locations)

Export Setup

Save Refresh Undo Close

Items Filter Category Filter Terms Filter **Locations Filter** Drivers Filter Tax Groups Filter Tax Codes Setup

+ Insert X Remove View Filter (F3)

☐ Location

☐ 0001 - Fort Wayne

☒ **0001 - Fort Wayne**

| Location Name |
|-------------------|
| 0001 - Fort Wayne |
| Utretch |

? Ready

- i.
- e. Select **Drivers** under driver filter tab (drivers displayed in dropdown are salespersons with driver type in sales)

Export Setup

Save Refresh Undo Close

Items Filter Category Filter Terms Filter Locations Filter **Drivers Filter** Tax Groups Filter Tax Codes Setup

+ Insert X Remove View Filter (F3)

☐ Sales Rep

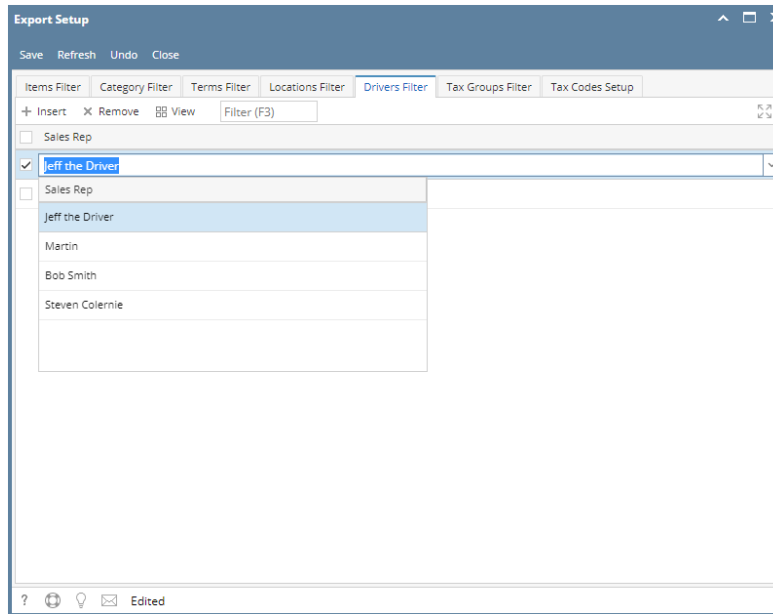
☒ **Jeff the Driver**

☐ Sales Rep

| Sales Rep |
|-----------------|
| Jeff the Driver |
| Martin |
| Bob Smith |
| Steven Colernie |

? Edited

- i.
- f. Select **Tax Group** under tax group filter tab (tax group displayed in dropdown are all tax group under common info > tax group)

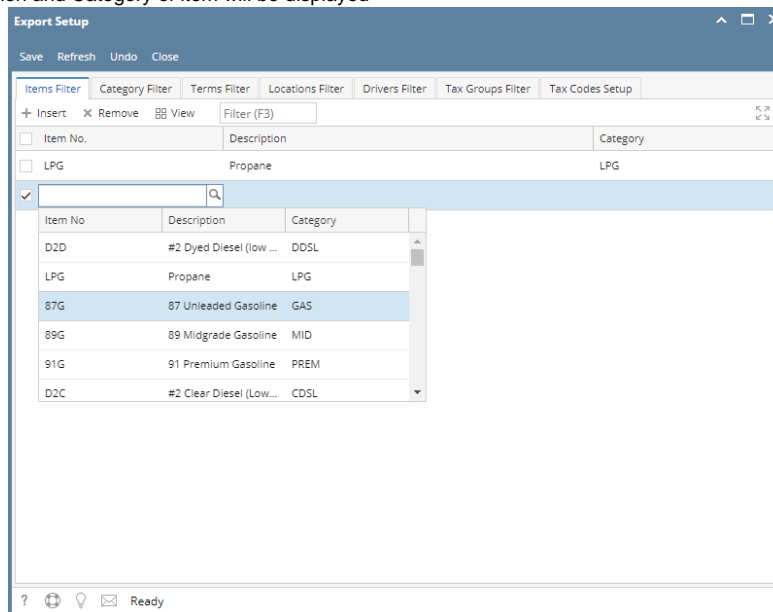


i.

2. Click **Save** button and details will be saved.

1. From Energy Track Module click **Export Setup**.

a. Select **Item No.** under items filter tab (items displayed in dropdown are all items available in inventory) and upon item is selected, Description and Category of item will be displayed



i.

b. Select **Category** under category filter tab (categories displayed in dropdown are all categories of item)

Export Setup

Save Refresh Undo Close

Items Filter **Category Filter** Terms Filter Locations Filter Drivers Filter Tax Groups Filter Tax Codes Setup

+ Insert X Remove View Filter (F3)

☐ Category

☐ GAS

☒

| Category |
|-------------|
| GAS |
| DDSL |
| CDSL |
| LPG |
| OTHER |
| RM |

? ? ? Edited

i.

c. Select **Terms** under terms filter tab (terms displayed in dropdown are all terms in common info > terms)

Export Setup

Save Refresh Undo Close

Items Filter Category Filter **Terms Filter** Locations Filter Drivers Filter Tax Groups Filter Tax Codes Setup

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☐ Term

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☒

| Term Name |
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Export Setup

Save Refresh Undo Close

Items Filter Category Filter Terms Filter **Locations Filter** Drivers Filter Tax Groups Filter Tax Codes Setup

+ Insert X Remove View Filter (F3)

☐ Location

☐ 0001 - Fort Wayne

☒ **0001 - Fort Wayne**

| Location Name |
|-------------------|
| 0001 - Fort Wayne |
| Utretch |

? Ready

- i.
- e. Select **Drivers** under driver filter tab (drivers displayed in dropdown are salespersons with driver type in sales)

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Save Refresh Undo Close

Items Filter Category Filter Terms Filter Locations Filter **Drivers Filter** Tax Groups Filter Tax Codes Setup

+ Insert X Remove View Filter (F3)

☐ Sales Rep

☒ **Jeff the Driver**

☐ Sales Rep

| Sales Rep |
|-----------------|
| Jeff the Driver |
| Martin |
| Bob Smith |
| Steven Colernie |

? Edited

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Export Setup

Save Refresh Undo Close

Items Filter Category Filter Terms Filter Locations Filter **Drivers Filter** Tax Groups Filter Tax Codes Setup

+ Insert X Remove View Filter (F3)

☐ Sales Rep

☒ **Jeff the Driver**

☐ Sales Rep

| |
|-----------------|
| Jeff the Driver |
| Martin |
| Bob Smith |
| Steven Colernie |
| |

? ⓘ ⓘ Edited

i.

2. Click **Save** button and details will be saved.