User Guide
PRO

V1.1 - 12/7/2018

FUEL®
REFUELLING SOLUTIONS

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Document Control Information

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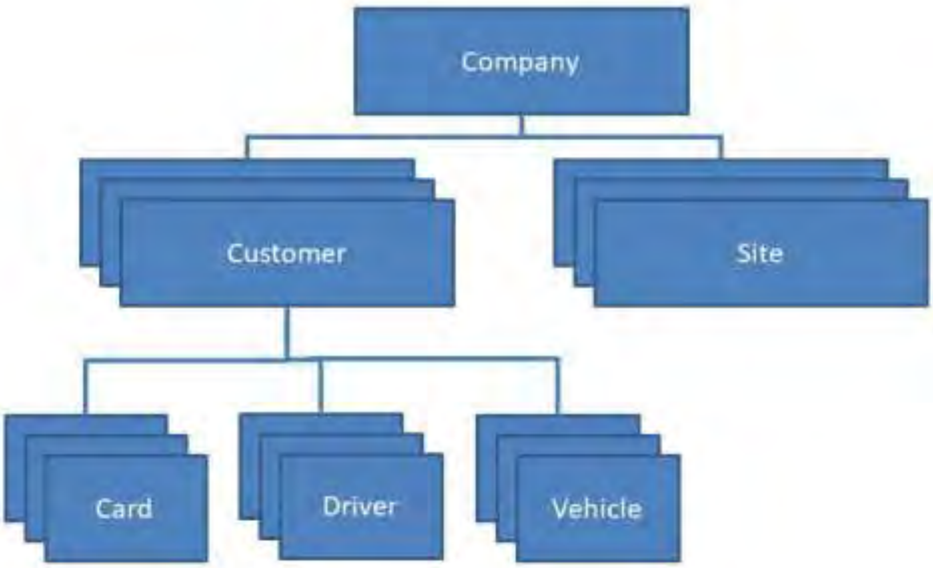
Overview

iFUEL Pro is a cloud based database which collects and sorts information. As a database it is sorted into categories, connected as per the flow chart below shows.

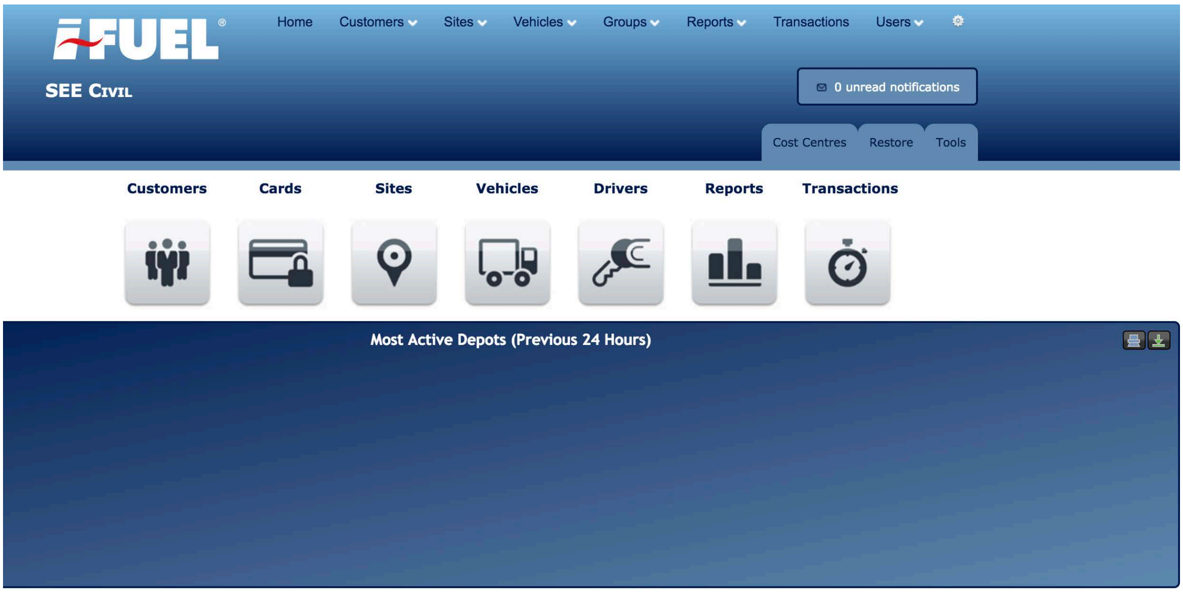


A company owns the customer and the site, and the customer owns the cards, the drivers and the vehicles. All cards will work on all sites, regardless of customer. It should be noted that Cards, Drivers and Vehicles cannot be assigned to multiple customers.

This document will show how to create these fields, and how they can be manipulated to suit needs for your application.

Home Page

The homepage for your company profile provides a general overview of sites activity and hourly transactions in a graphic format for the past 24 hours.

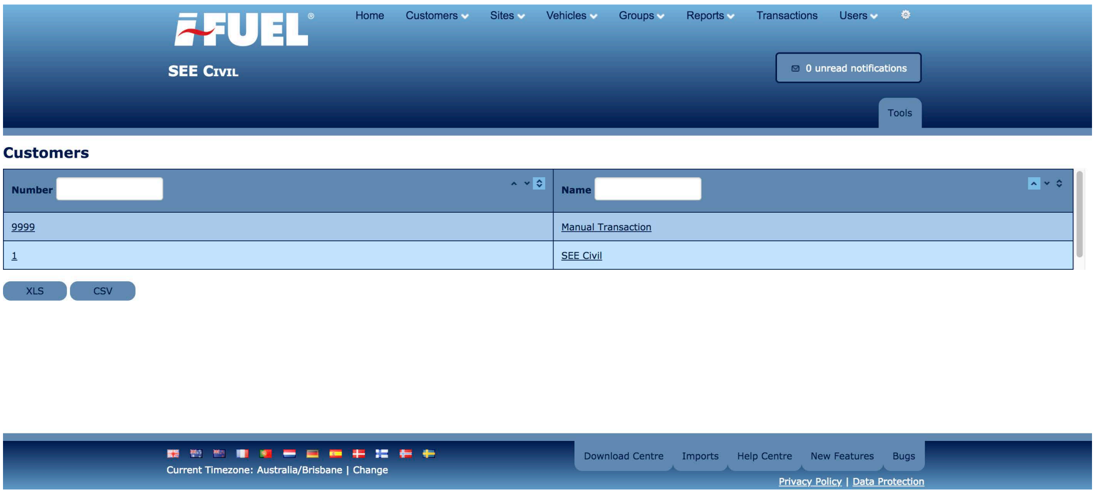


Each of the clickable dialogues above the graphs will be detailed in this guide.

Customers

The Customers page is setup to allow the administrator a view of all the customers linked to the company. While the name “Customer” is used, these entries can represent company divisions, subcontractors etc.

Add Customer



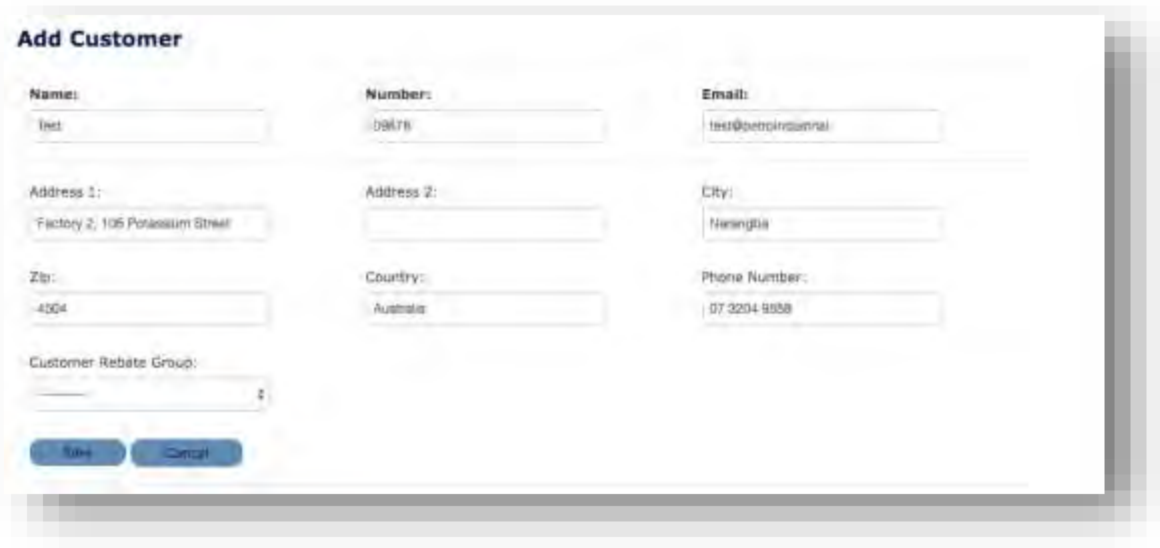
⇒ To add a customer, simply **click** the *Add Customer* box

⇒ Fill out the fields on the form

⇒ Fields in bold text (*Name*, *Number* and *Email*) are mandatory fields

⇒ The *Number* field is chosen by you, and can be any number you choose.

⇒ Customer Rebate will apply a rebate group to the customer.

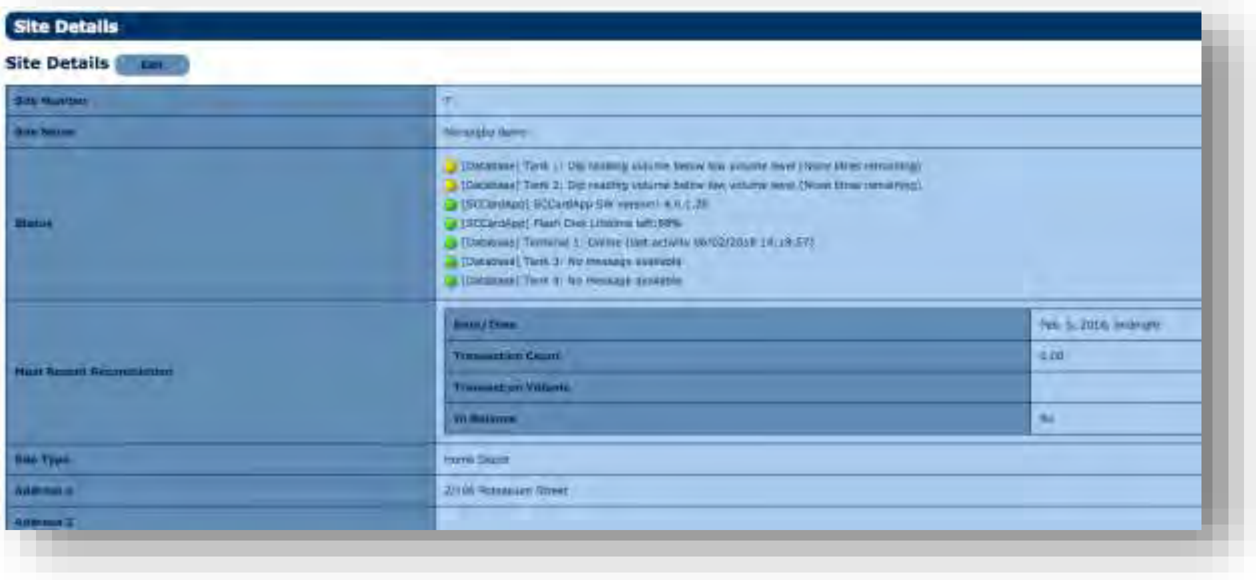


Site

The Site page has several collapsible menus to sort and display the information regarding your tank site.

Site Details

Here you will find a readout of the basic details of your site. Site name, status, address and most recent reconciliation can be seen here.



Location

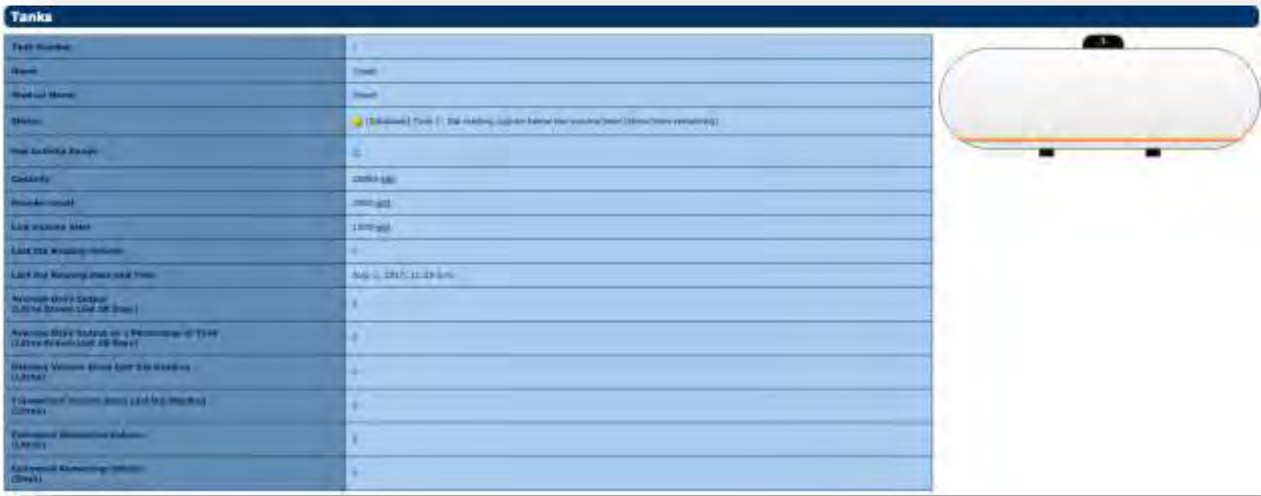
If configured with a latitude and longitude, your site page will show a Google map location for your site

Terminals

Here you will find information like Terminal number, date and time of last transaction and status of any terminals on the site.

Tanks

Information displayed here is related to the tanks on the site. Product names, status and even the reorder level and low volume alert are all displayed here.

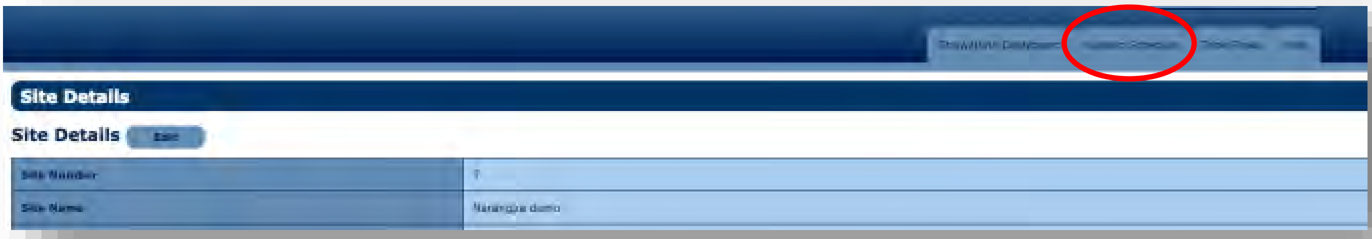


Transactions, Deliveries, Dip Reading and Reconciliations

Here you will find a log of transactions, deliveries, dip readings and reconciliations.

Set Auto Dip Schedule

⇒ To set an auto dip schedule, you first **click** the *Autodip Schedule* button on the Site Page

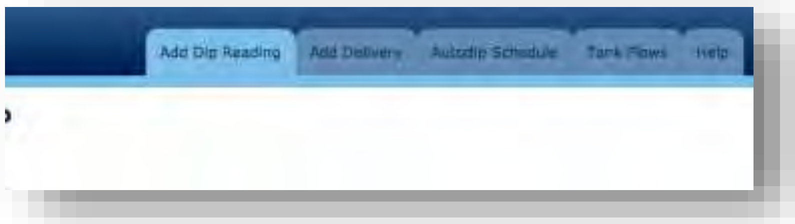


⇒ From here You can now set up three automatic dip readings to be recorded by iFUEL®.

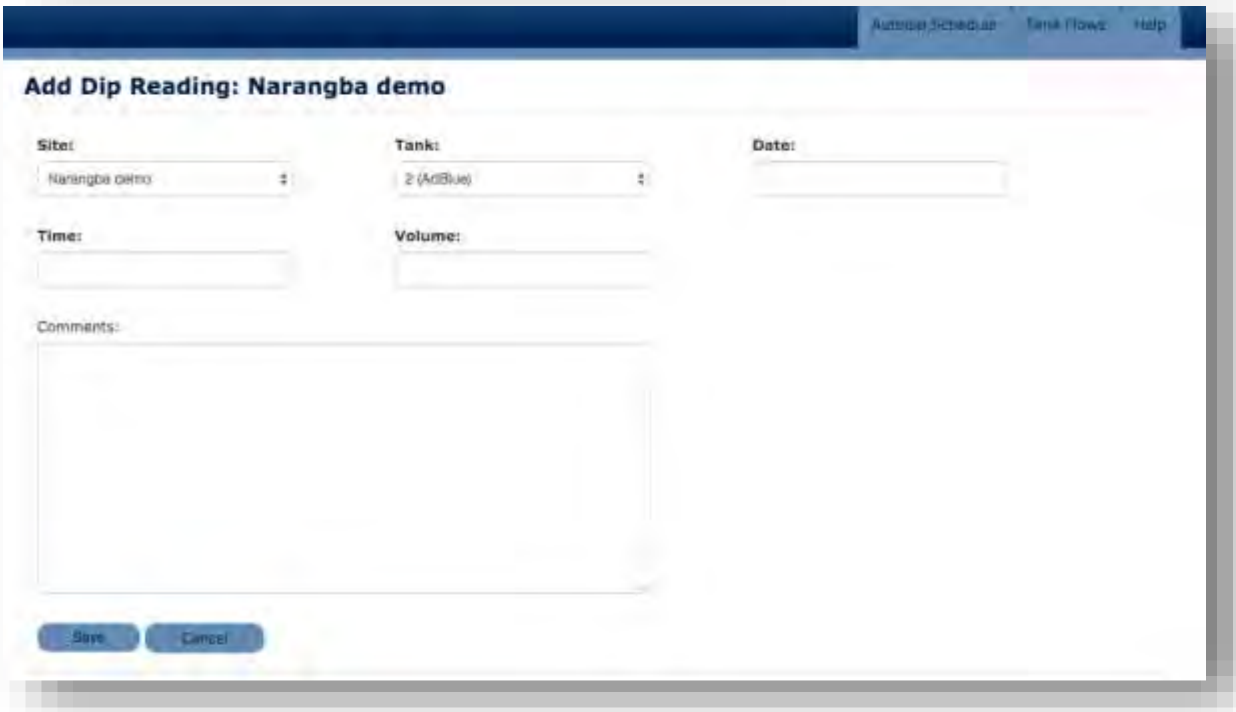
⇒ Once you enter your required timings, make sure to check that the *Is Used* checkbox is selected

⇒ **Click** *Save* when finished

Add Dip Reading



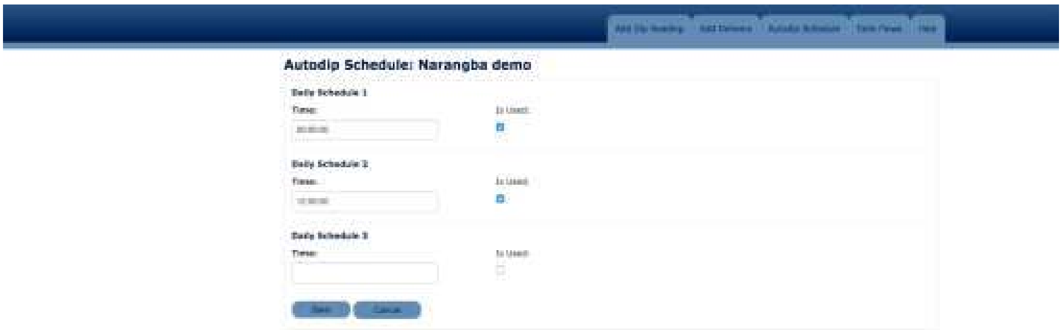
⇒You can manually enter a dip reading into iFUEL by clicking Add Dip Reading under the Autodip Schedule page



⇒ Remember that fields with bolded titles are mandatory
⇒ *Site* is a dropdown box to select which site the tank is based
⇒ *Tank* selects the tank number
⇒ *Date* is where you would enter the date the reading took place
⇒ *Time* is where you would enter the time the reading took place
⇒ *Volume* is where you record the dip reading
⇒ *Comments* is a field for recording anything of note during the reading

Add Delivery

⇒ **Click *Add Delivery***



⇒ Enter the corresponding details for your delivery. Tank number, time, date and volume

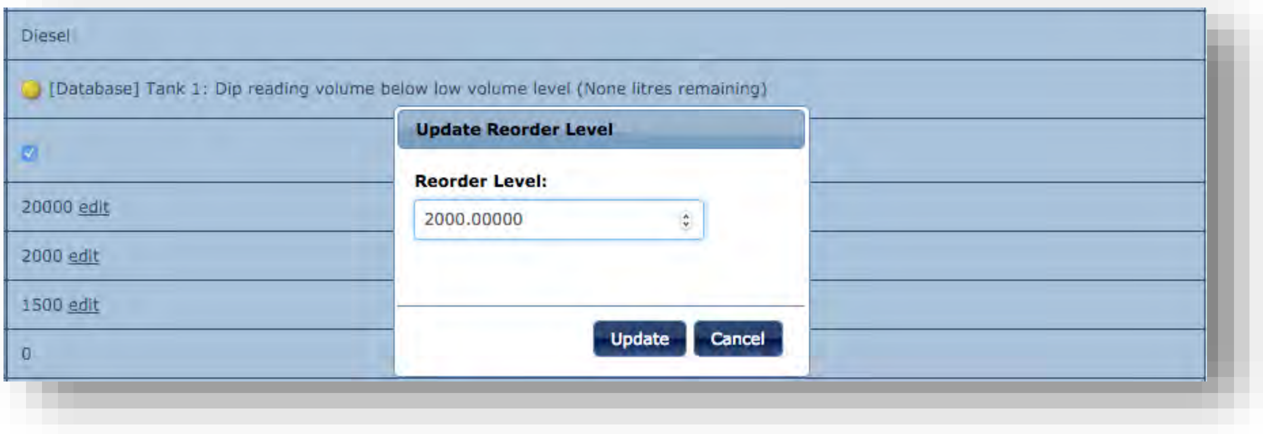
⇒ **Click** *Save* when finished

FUEL REFUELLING SOLUTIONS

Set SFL Recorder and Low-Level Alerts

⇒ You can set the values for tank capacity, reorder level and low volume alerts through the site details page, underneath the tanks dropdown menu.

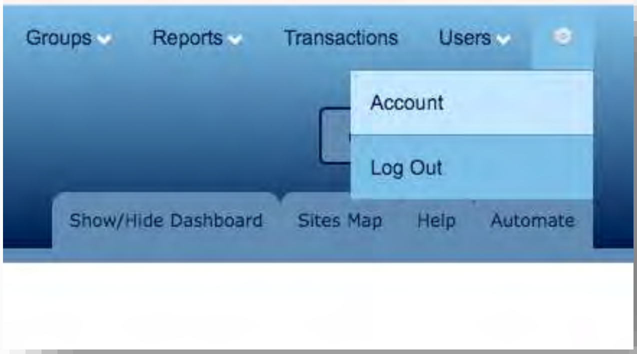
⇒ Simply **click** the *Edit* option to open a numeric field to edit the value



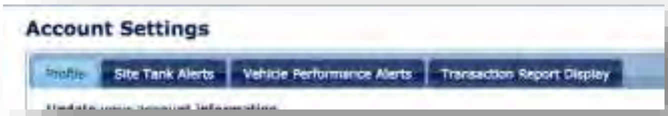
⇒ **Click** *Update* to apply your changes

Setting up Alert Notifications

If you want to receive email alerts for when a tanks level drops below the reorder or low volume level, you must first set up the notification alert.



⇒ Go to the cogwheel in the upper right corner of the screen and **click** *Account* to enter your personal settings



⇒ Under Account Settings, **click** the *Site Tank Alerts* tab

⇒ Under Site Tank Alerts, you can now select a company, then site, then tank to open its notifications settings in the far-right side of the screen.

⇒ Here you can select to have an email be sent (to the email linked to iFUEL®) or a notification to be added in the iFUEL® notifications centre.

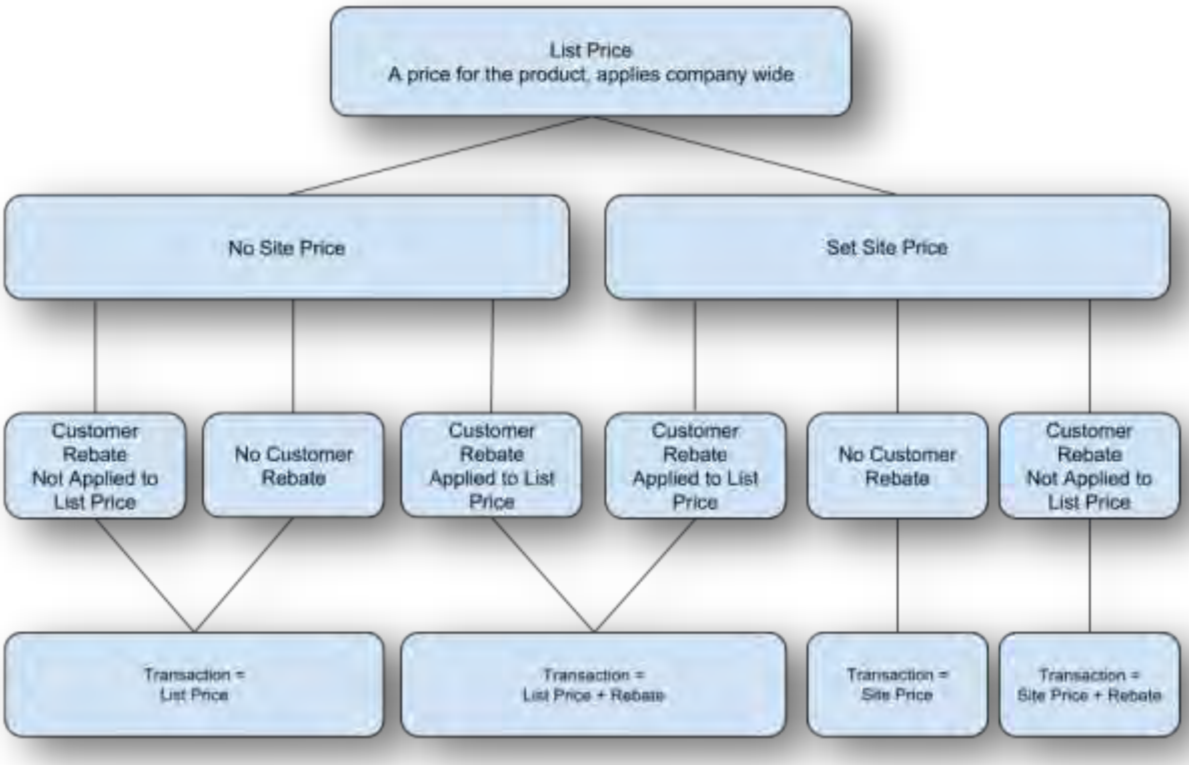
⇒ Remember that the values for these alerts are set on the site page under the Tank drop down menu.

Pricing Lists

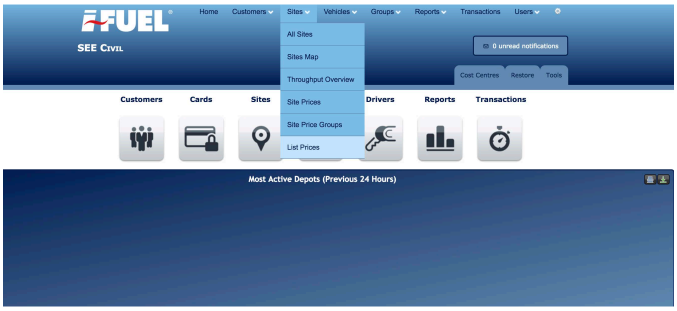
When it comes to adding prices onto product with iFUEL®, there are a few options that all work together to provide total control over how you handle your own pricing structure. There are three components to setting up pricing

- ⇒ List Price – This is a price measure used to apply a cost to an entire company. You can set up individual price lists for different products.
- ⇒ Site Price – This is a price measure that is applied to sites.
- ⇒ Customer Rebate – This is a price measure to control pricing for customers

Below you will see a flow chart, as to how these features connect and work together. Understanding how these components correlate is important when it comes to making your own pricing.

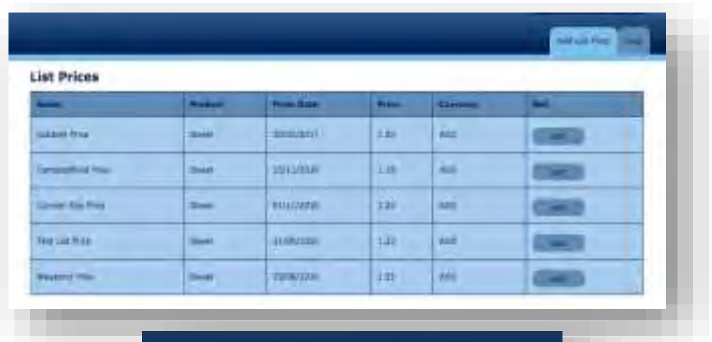


List Pricing

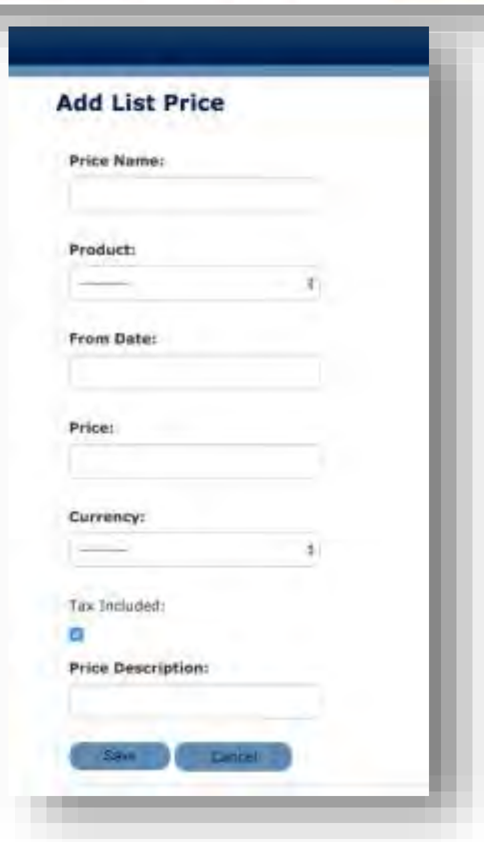


The first step in creating any pricing structure is to have our starting value. You create that value in the List Prices option.

⇒ Bring down the Sites drop down menu and **click** *List Prices*



⇒ Here is where any existing list prices for product can be found. It is recommended when the base price is to be updated, the previous product entry is updated with the new price. **Click** *Add List Price* to add a new product.



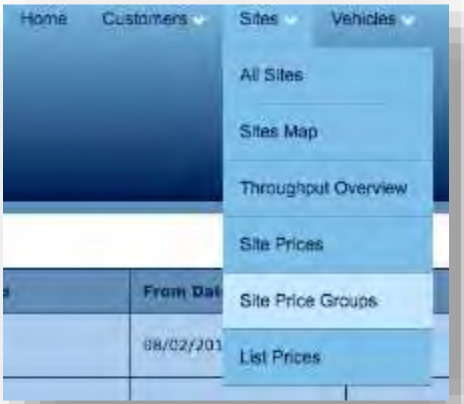
⇒ From here information can be added to create the List Price. This list will be the price for the product selected for the entire company. Remember all bold fields are mandatory.

⇒ The edit screen will use the same page to allow editing of the list price. This should only be used if an error is made in adding a price.

⇒ If the List Price must be updated, do not edit an old entry. Create a new price. Doing so will change all transactions prior to the new list price date to a value of zero.

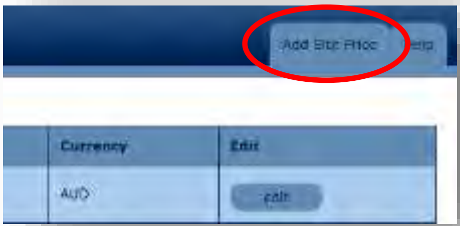
Site Price

A site price can be set to create a price for a product held at a site.



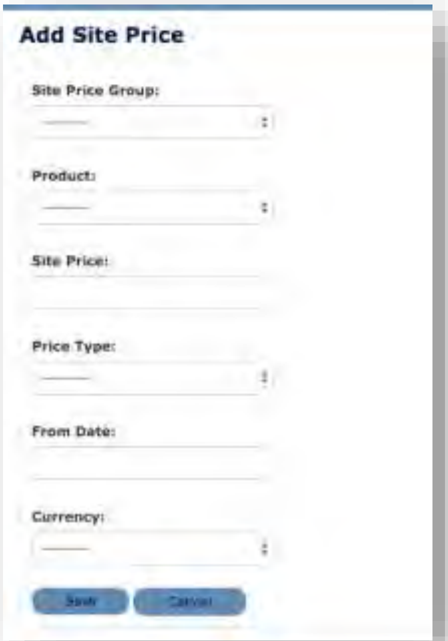
⇒ Before creating a Site Price, a Site Price Group must be created. **Click** site price group under the Sites dropdown menu.

⇒ From there **click** *Add Site Price Group*, and fill out the fields (Name, Description).



⇒ With the group created, go back to the dropdown menu for Sites and **click** *Site Prices*.

⇒ Under the Site Prices page, **click** the *Add Site Price Tab*



⇒ From here information can be added to create the site price. This entry must be linked with a Site Price Group.

⇒ *Site Price Group* is the group that the rebate falls under.

⇒ *Product* indicates which product the rebate is for

⇒ *Site Price* is the value to be set

⇒ *Price Type* is a drop-down box that shows how the value will affect the list price

⇒ *From Date* is to select the date the price starts from

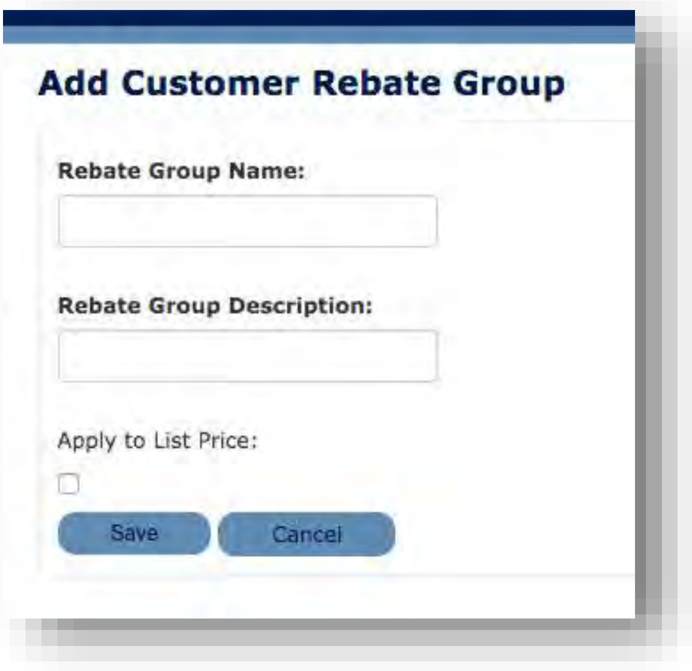
⇒ *Currency* is the currency type the rebate works under

Customer Rebate

Like a site, pricing rules can be created for customers as a Customer Rebate

⇒ **Click** *Customers* at the top of the screen and select *Customer Rebate Group.*

⇒ Create a Customer Rebate Group, just like a Site Price Group

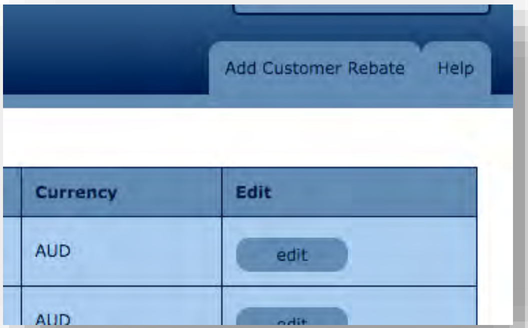


⇒ Under the Customer Rebate Groups screen You then **click** *Add Customer Rebate Group*

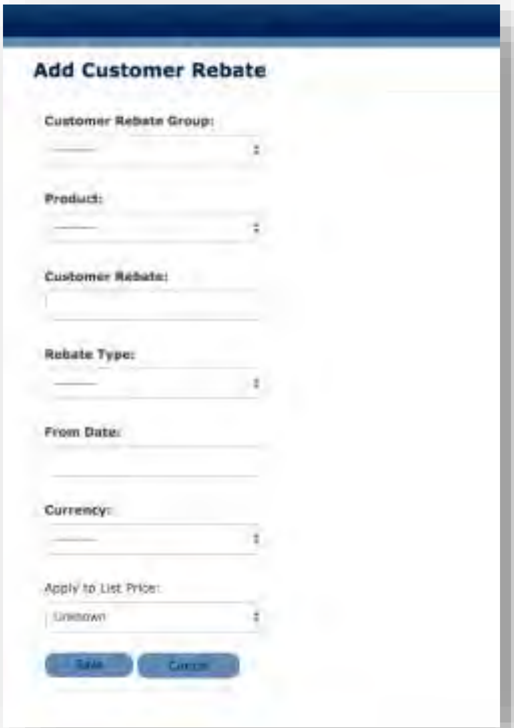
⇒ When adding details, take note of the Apply to List Price checkbox.

⇒ **If left unticked, this will not apply the Rebates linked to this group to List Price.** Refer to the flowchart at the start of the section if you don't know what this means.

⇒ Now go back to the Customer Menu and **click** *Customer Rebates*



⇒ Under the Customer Rebates screen, you then **click** *Add Customer Rebate.*



⇒ From here You can add the details for the discount/rebate. As always, the fields titled in bold are mandatory fields.

⇒ *Customer Rebate Group* is the group that the rebate falls under. This drop-down box will display any groups made for this customer.

⇒ *Product* indicates which product the rebate is for

⇒ *Customer Rebate* is the value of the rebate

⇒ *Rebate Type* is a drop-down box that shows the options for how the Customer Rebate value will affect either the list price or site price

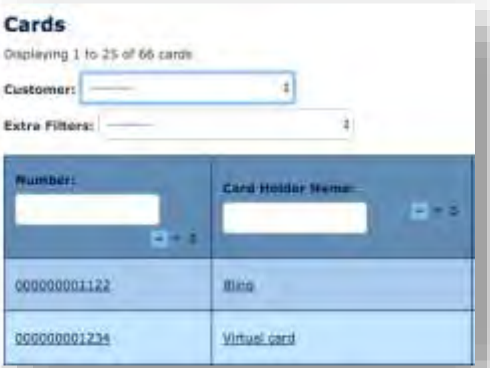
⇒ *From Date* is to select the date the rebate starts from

⇒ *Currency* is the currency type the rebate works under

⇒ *Apply to List Price* must be selected if you wish the Rebate to apply to the list price. Refer to the Flow Chart at the start of the section to clarify your need.

Cards

The Cards page displays all current cards belonging to the company, filtering options and the link to create a new card

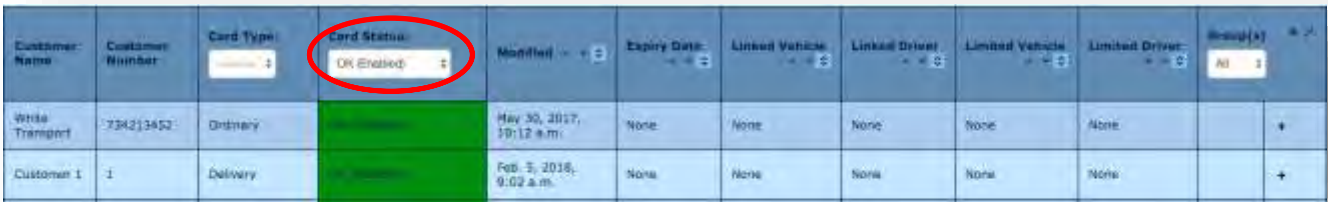


Search Cards

Cards can be searched for via their number or by Card Holder Name. They can also be filtered by customer and extra filters.

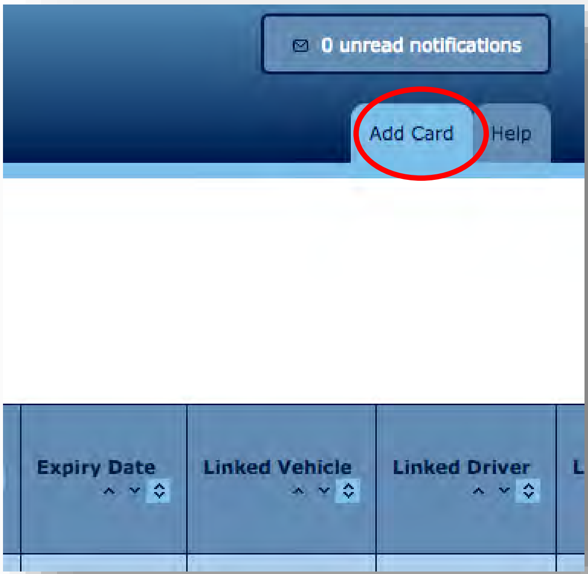
Card Information

Important card information can be seen on this page, sorted into columns. These columns can be sorted via ascending or descending order. Also note that the table will only display cards that are enabled by default. This can be changed via the selection menu circled below.

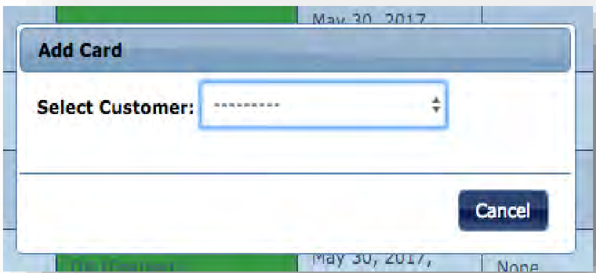


Add Card

To add a card, you simply follow a few steps



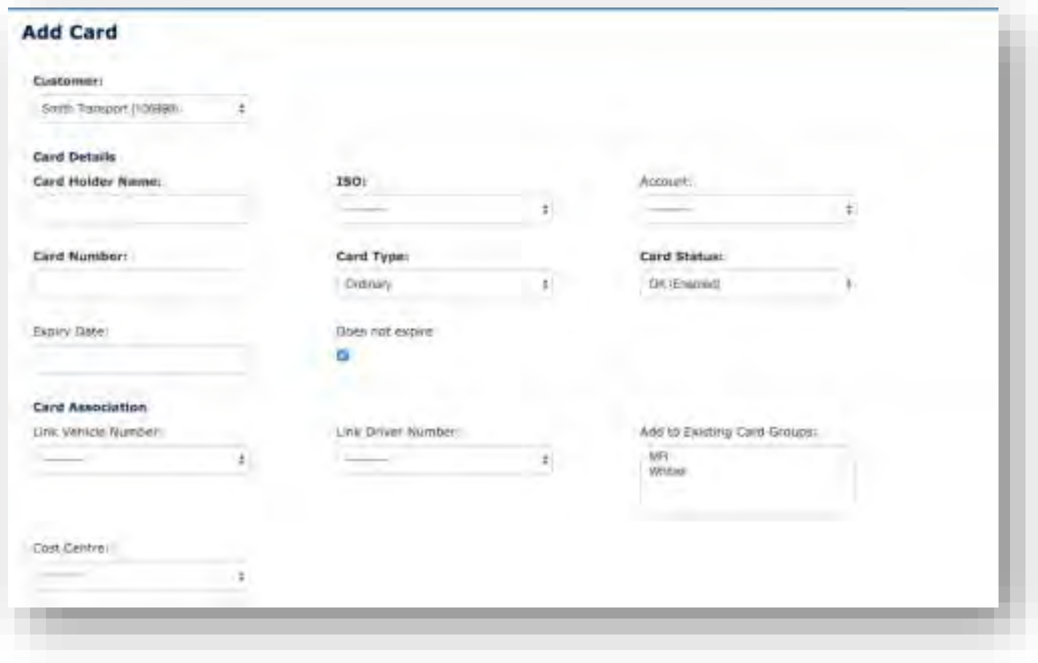
⇒ **Click** *Add Card*



⇒ Use drop down box to select Customer

⇒ Once the customer is selected, the screen will auto load the next page

Fill out the details as needed. Remember the bold fields are mandatory



⇒ *Customer* can be changed here via dropdown box

⇒ *Card Holder Name* should match the name of the operator

⇒ Under the *ISO* drop down, always use the 777777 option

⇒ *Account* is a field tied to the ISO and is auto filled.

⇒ *Card Number* will match the number on the back of the iFUEL® Pro

Tag ⇒ For Card Type, 3 categories are used.

- Ordinary (a card to authorise transactions)
- Service (for service technicians to access pump settings, e.g. K-Factor)
- Delivery (for product delivery)

⇒ *Card Status* is a dropdown box to select the cards status

⇒ *Expiry Date* defaults to the "does not expire" checkbox, but a date can be added

⇒ *Link Vehicle and Driver Number* fields allow the card to be linked directly to an existing vehicle or driver entry in the customer database.

⇒ *Add to existing card groups* will allow the card to be sorted into a group

Card Association

Card Associations are rules that can be added to link Cards, Drivers and Vehicles together. Adding drivers and vehicles is detailed further in this document.

When Driver and Vehicle entries are added to the database, you can edit a Card entry and use these drop-down boxes to directly link these elements together. Note that only Driver and Vehicle entries linked under the same customer as the card will be visible in the drop-down boxes.

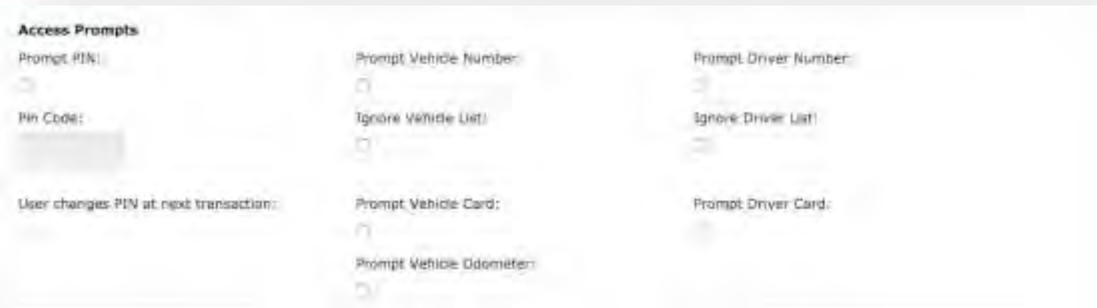
It is here where you can also add the card to an existing card group for sorting as well.

Cost Centres can be used to associate selected members of your fleet, which you may find useful when running transaction reports.

Currently only cards may be linked to cost centres but this functionality may be expanded to vehicles, drivers, sites and more based on user requirements and demand.

Set Prompts

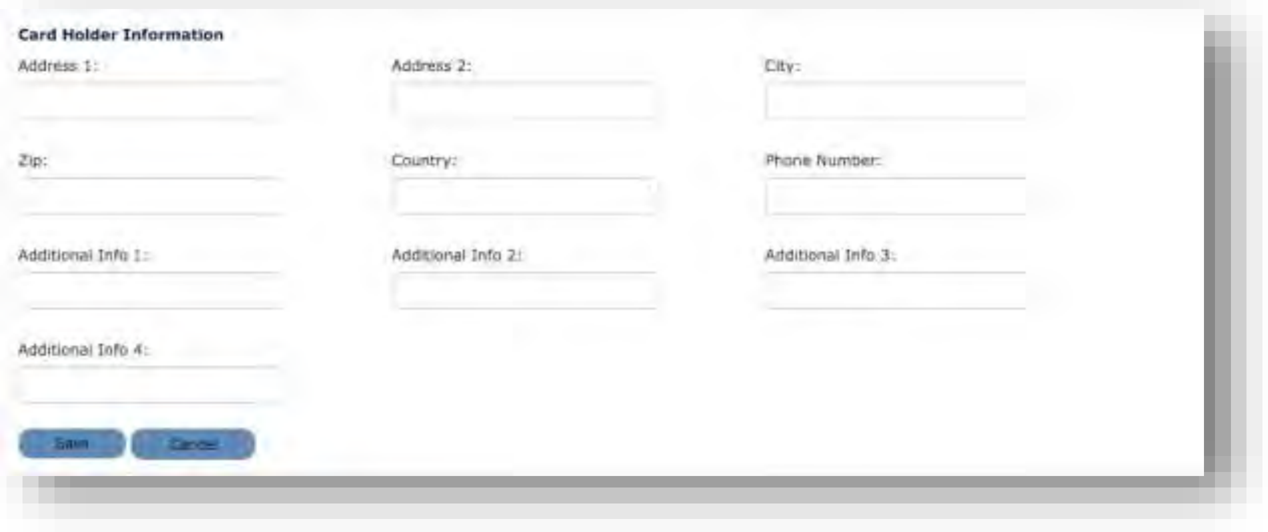
If additional information is required before authorizing a transaction, (like an odometer reading) this can be configured under the Access Prompt options.



⇒ Prompt PIN will request a PIN code to be entered after swiping a Tag
⇒ Pin Code is where the PIN code can be set

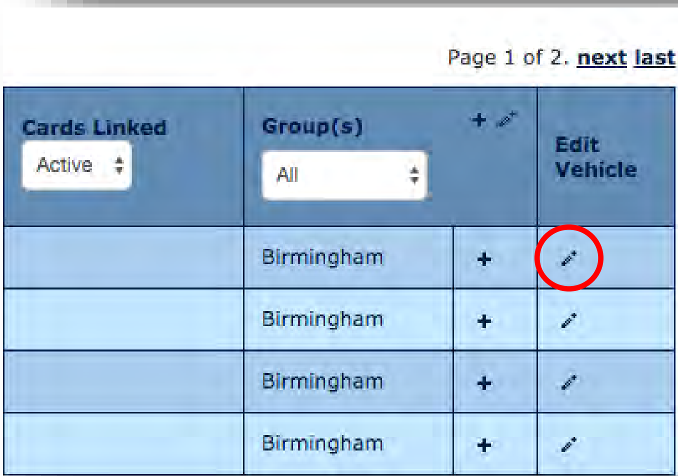
Add Card Holder Information

Here you can add details for the operator the card will be allocated to. These fields are optional. Under these fields you have the option to save the card to your database.

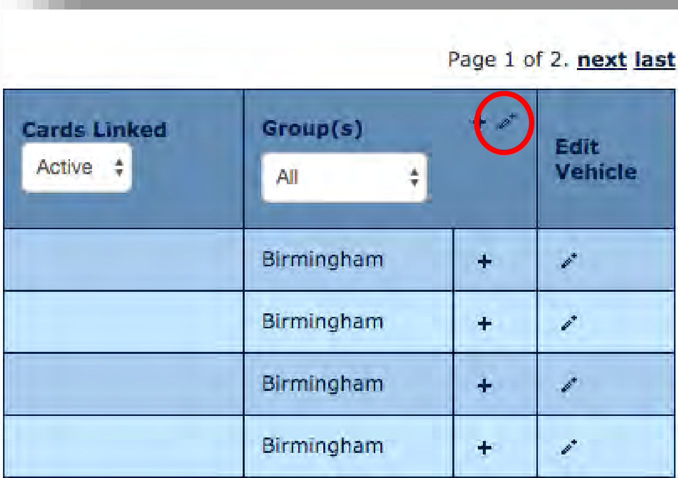


Vehicles

This page shows all the currently added vehicles in the database under the company profile. Here you will find fields to allow for searches under the columns, and filter arrows for descending and ascending lists.



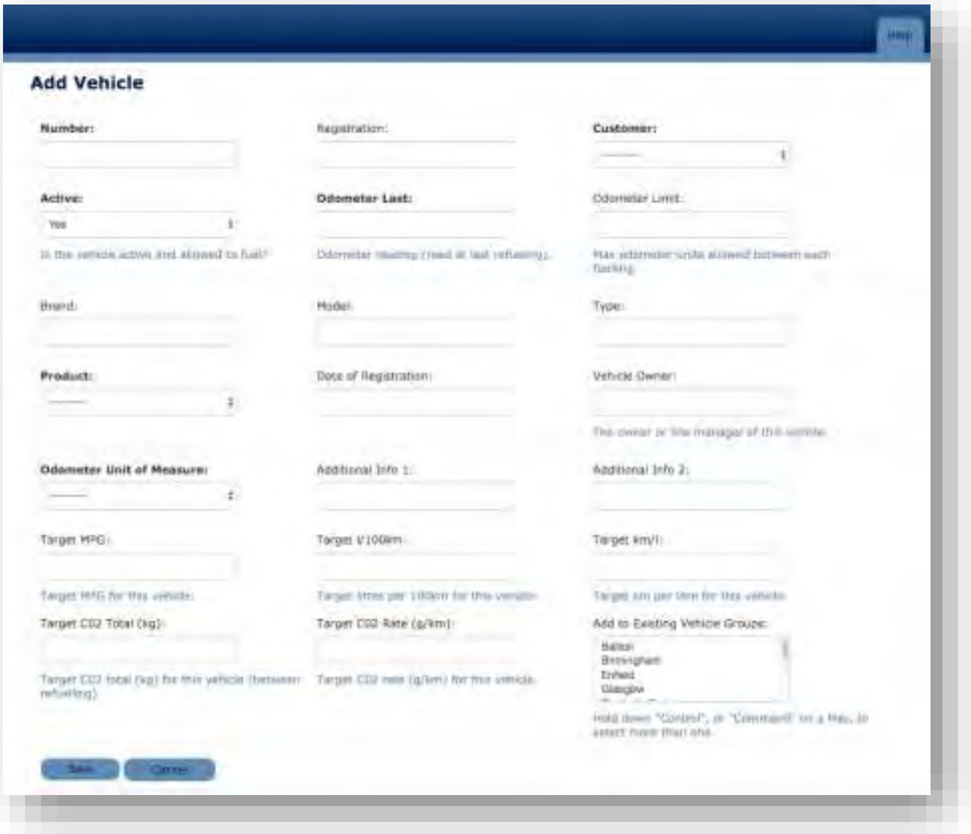
Currently existing vehicles can be edited by **clicking** the ✎ icon on the far right of the display



Groups can also be added quickly and edited by **clicking** the + to add and ✎ to edit

Add Vehicles

Adding a vehicle can be done by **clicking** the *Add Vehicle* button near the top of the page.



Just like when adding a card, the fields titled in bold are mandatory.

- ⇒ *Number* is an identifier that you can choose. Note you can add letters
- ⇒ *Customer* is a dropdown box to select which Customer will be allocated this vehicle entry.
- ⇒ *Active* is a selection for if the vehicle is currently allowed to draw fuel
- ⇒ *Odometer Last* is the odometers current reading. This field will update once a vehicle is added to the database and if odometer readings are received by the terminal during authorization.
- ⇒ *Odometer Limit* is a value which can be set for authorization. If an odometer reading is requested at the terminal and a value is entered that is above or below this value (relative to the last reading) then the terminal will reject the request.
- ⇒ *Product* is what product the vehicle is using.
- ⇒ *Odometer Unit of Measure* confirms your required odometer measurement

Performance Metrics

When adding or editing a vehicle, you can set parameters for tracking a vehicles MPG, Fuel Efficiency and Target C02. When using the reports feature, these fields, if populated, will give a clear readout if vehicles are exceeding their emissions or efficiency targets.

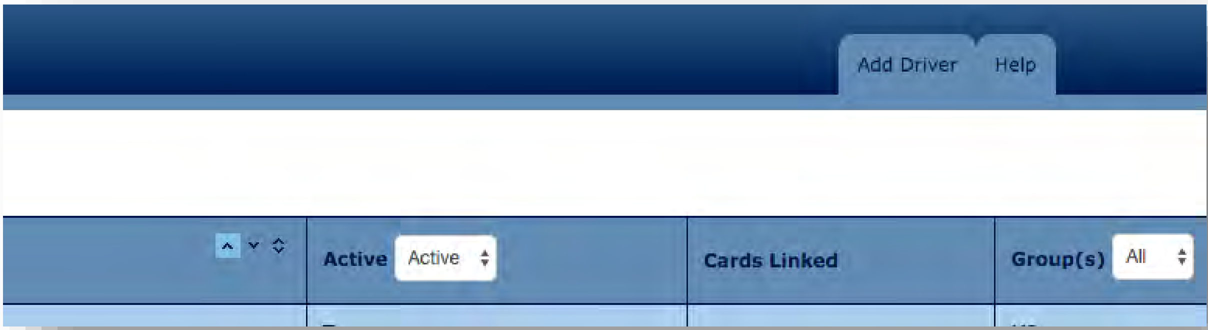
Drivers

Under Drivers, you will find all the entries that have been added under this category. From this screen you can

⇒ Search for drivers by name or number
⇒ Filter by Active or Inactive status
⇒ See any linked cards
⇒ Edit or add their driver details
⇒ Edit or add any groupings that apply

Add Driver

You can add a new entry by **clicking** the *Add Driver* tab



⇒ The fields in bold are mandatory to complete the entry

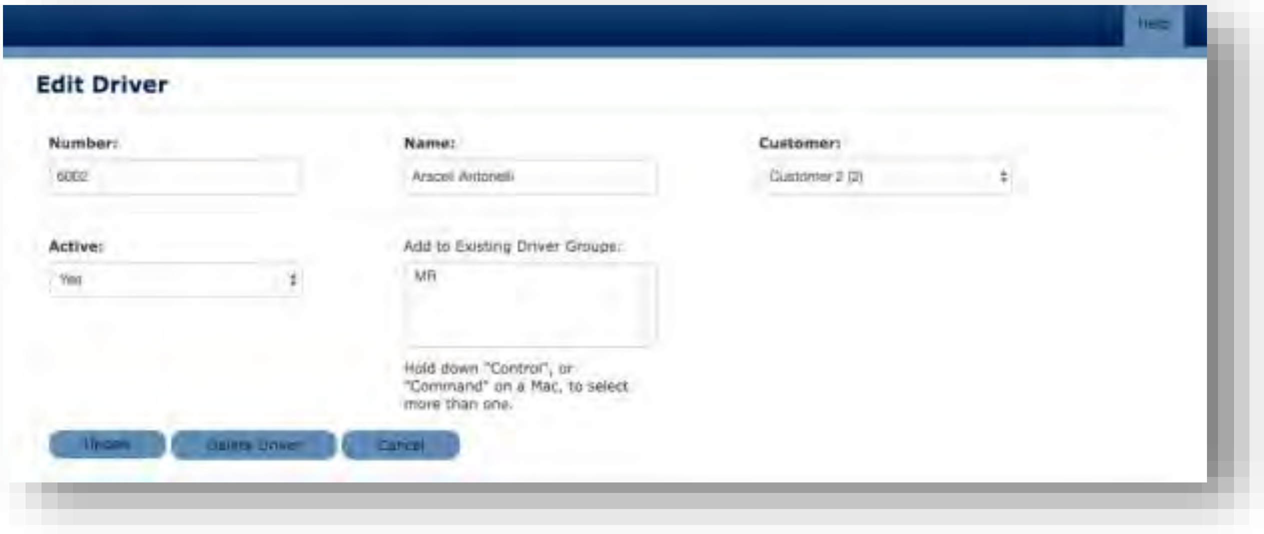
⇒ *Number* is an identifier that you can choose
⇒ *Name* is the name of the driver
⇒ *Customer* is a drop-down box to select which Customer owns this driver
⇒ *Active* confirms if the driver is currently active in the database
⇒ *Add to Existing Group* will place the new driver in a group you have created.
⇒ **Click** *Save* when finished.

Edit Driver

Just like with the Vehicle list, you can edit an already existing entry.

⇒ **Click** the ✎ symbol on the far right of the table for the corresponding entry.

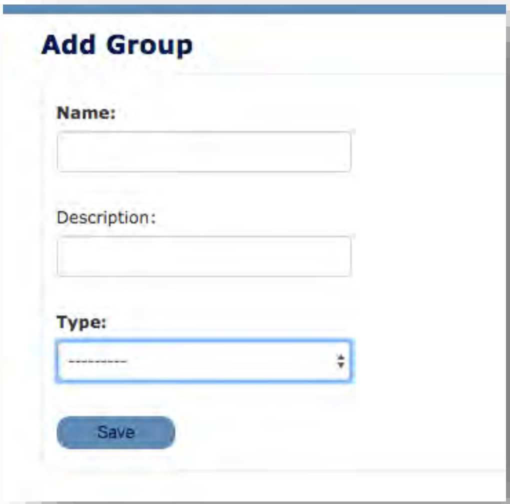
⇒ This will bring up a new page that will show the details that can be changed.



⇒ **Click** *update* to apply changes

Groups

Groups allow a user to sort their cards, drivers, sites and vehicles into quick sorting categories, essentially ‘tagging’ the database entry. This allows for quick access when filtering or generating reports. You access groups via the drop-down menu on the top of the screen



Creating a group is very quick, with a simple dialog. You simply give the group a name, and classify it as either a Card, Driver, Site or Vehicle group.

Once created, you can go to any entry for which the group would apply, and the group to the entry. For example, if You had the group MR for vehicles, you can now tag any current or new vehicle entry into iFUEL® under this category.

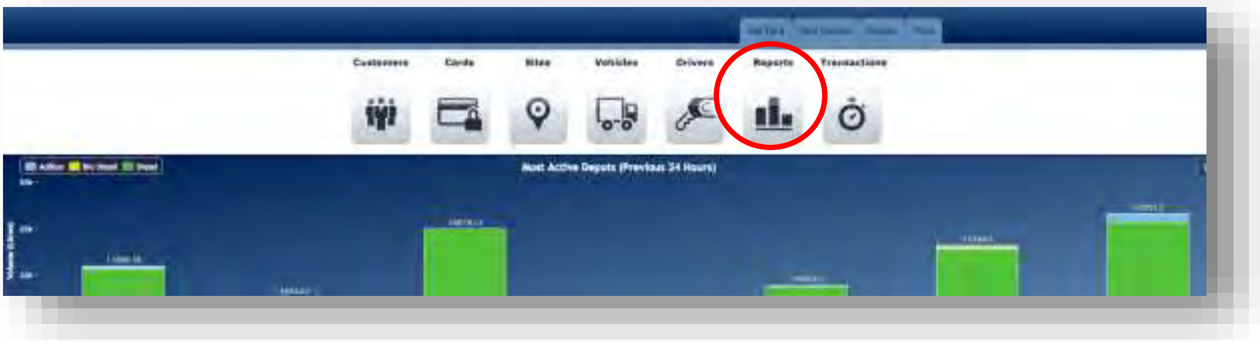
Also, important to note. Groups made under the Vehicle designation can also have performance metrics applied to them. This means any Vehicle created and placed in a group will automatically have those metrics applied to them.

If groups are used correctly, they are a powerful tool to allow quick sorting and filtering for reports and transactions, which is covered next.

Reports

Reports are how all the information captured by iFUEL® is displayed. Reports are how you see your transactions. They will display performance data on vehicles. They can be run to display failed authorization attempts. They can be run to reconcile your fuel volumes to determine stock loss. This part of the guide will go over the different report types, how to create reports and how to save and automate them.

You get to Reports by **clicking** the *Reports* button on our home page.

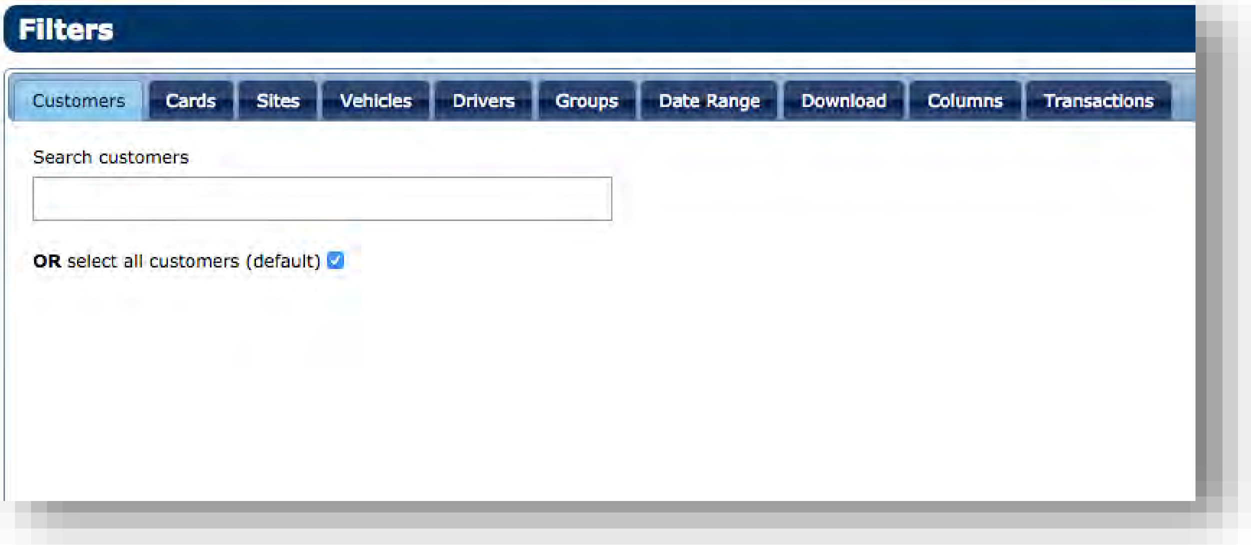


All reports are controlled by the filters drop down menu. From here you can choose from various options relating to the type of report want to generate.

All reports can also be saved, and options for the export of the report can be found at the bottom of the report. Different types of report have different options, which you will detail.

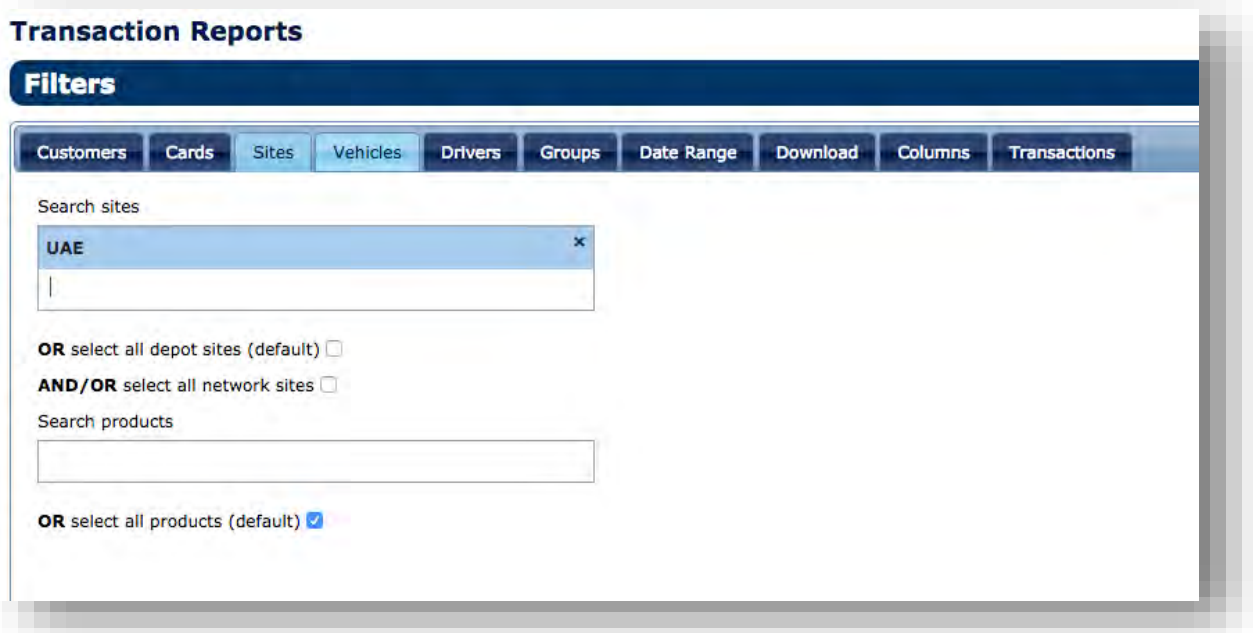
Transaction Reports - creation, saving and automating

Transaction Reports will provide information on the day to day use of the terminal. These reports can be filtered by Customer, Card, Site, Vehicle and Driver. Also, groups can be used to display all transactions recorded by the entities tagged under a group designation.

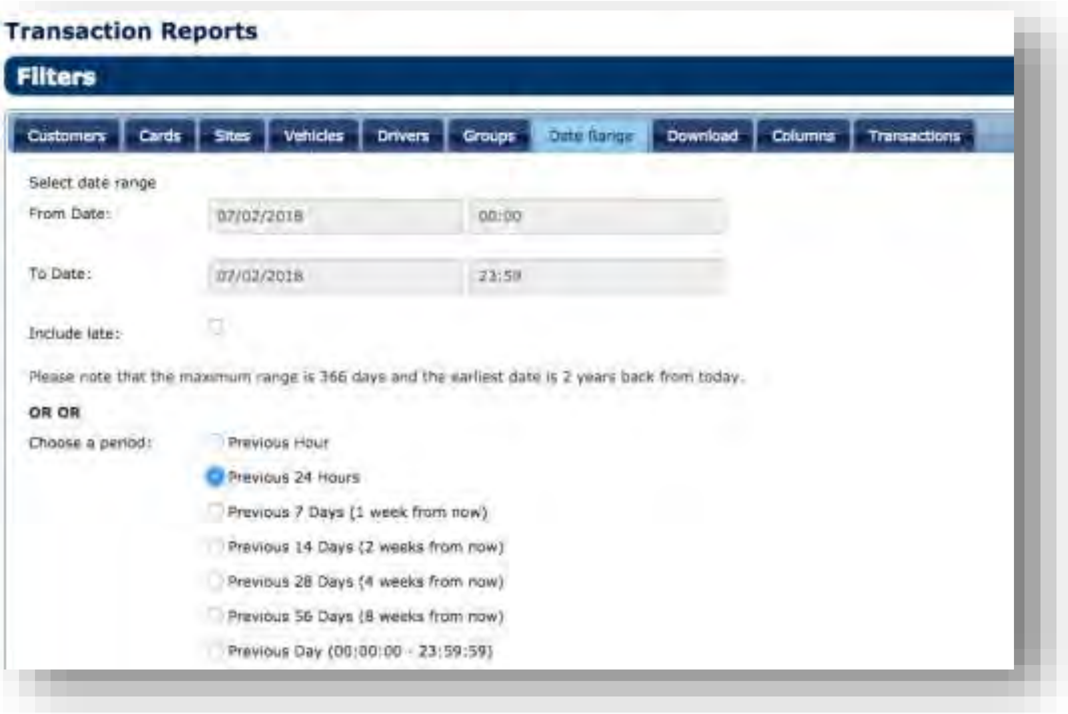


These fields will search in real time to find matches in the database under the selected category. Once it matches the entry you can click the drop-down box to confirm. You can also leave the field blank, and leave the checkbox ticked to run the report against all active under that category.

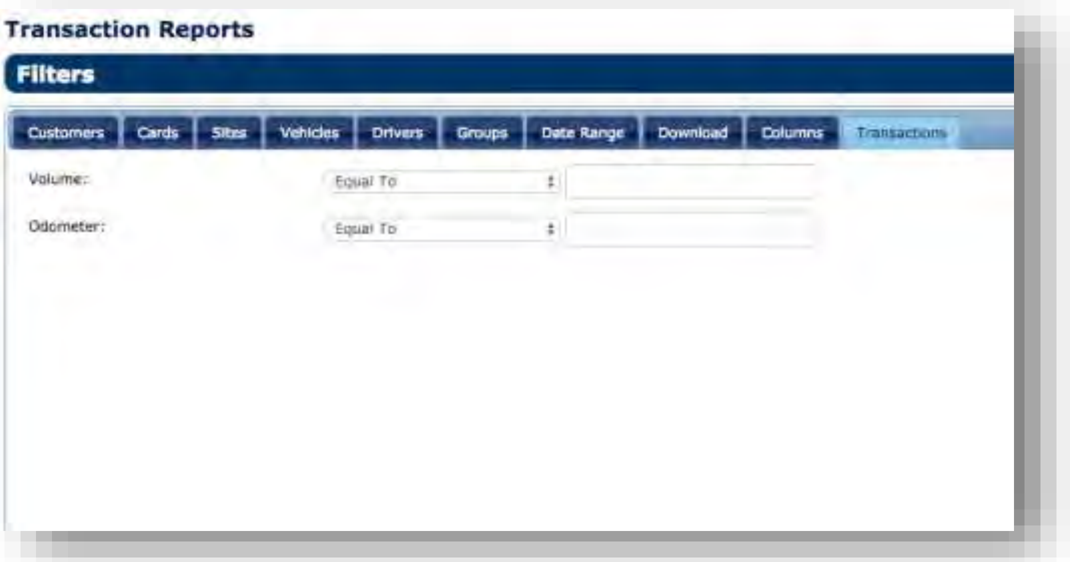
For example, here is what it looks like running a filter for all transactions under our UAE Site



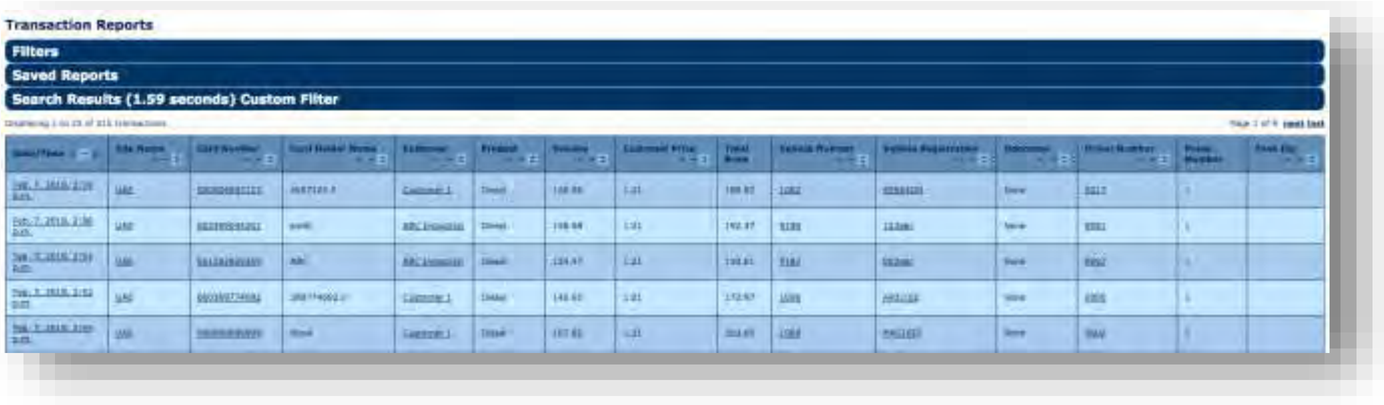
There are more filters to apply however. Date Range filters allow the user to home in a specific timeframe down to the second for the report. You can select a custom date range, or select a pre-set option from the list selection. This report will gather data for the previous 24 hours



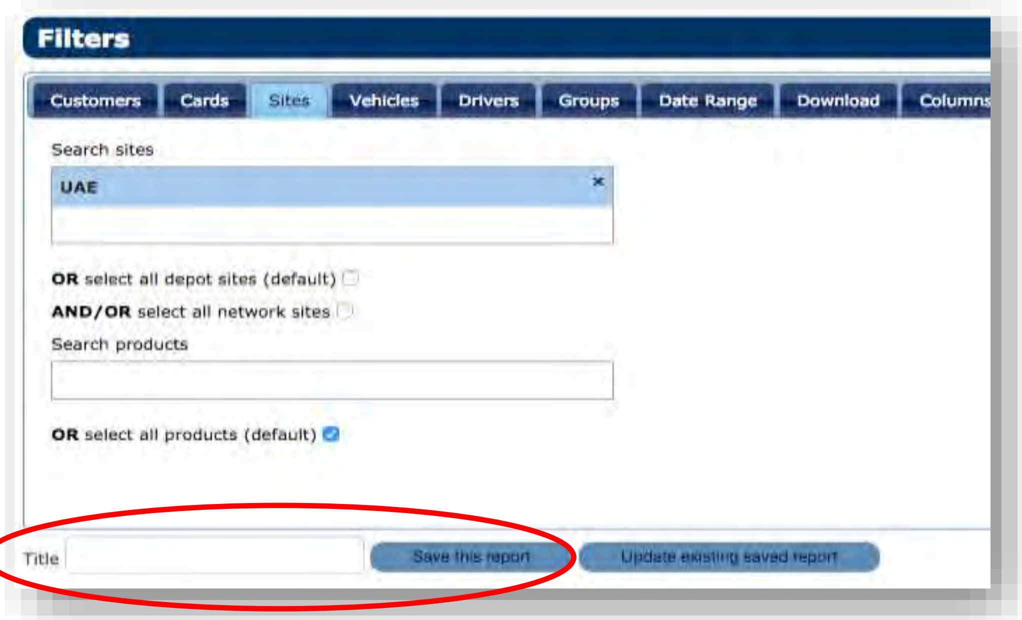
Taking it further, you could apply another filter under the Transactions tab and filter out entries below or above certain thresholds regarding the transaction volume or odometer readings. For this report it will display all transactions regardless of volume or odometer, so the fields are left blank.



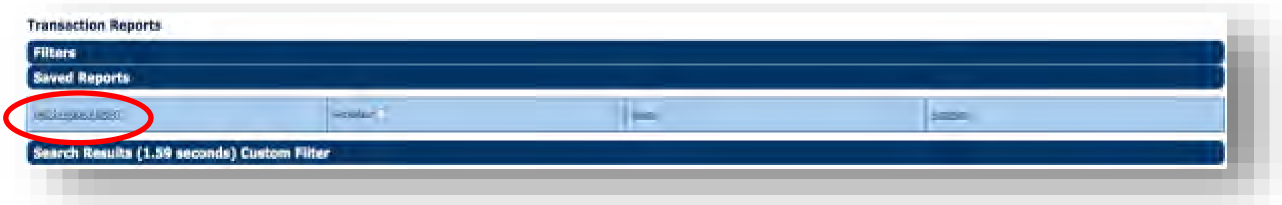
You run the report by pressing the Run Report button near the bottom right of the filters menu. This UAE Report has returned with 215 transactions for a 24-hour window. Now there are multiple ways the data can be used. It can be exported in XLS, CSV and PDF file formats.



Since this is a report that will be run often, the filter parameters can be saved to simply run it again with a single click. First go back to Filters, and open the drop-down menu.



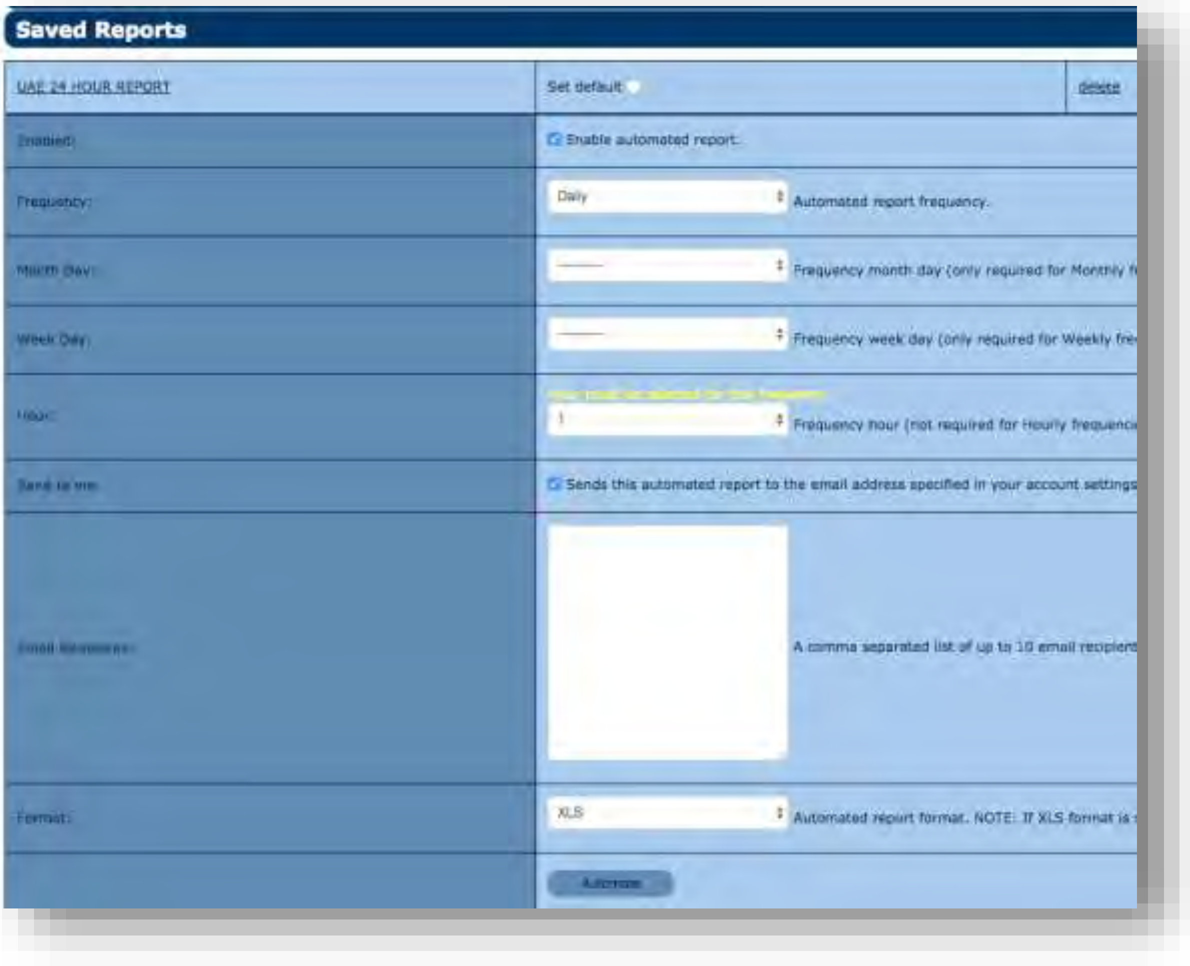
In the above highlighted field this report will be saved as UAE 24 HOUR REPORT. The saved report is then found under the Saved Reports Drop down menu



Now that the report is saved, it can be repeated with a single click. However, this also can be set up to be an automated report. This is done via the Automate option under the saved report row.

This will extend a collapsible menu where their multiple options.

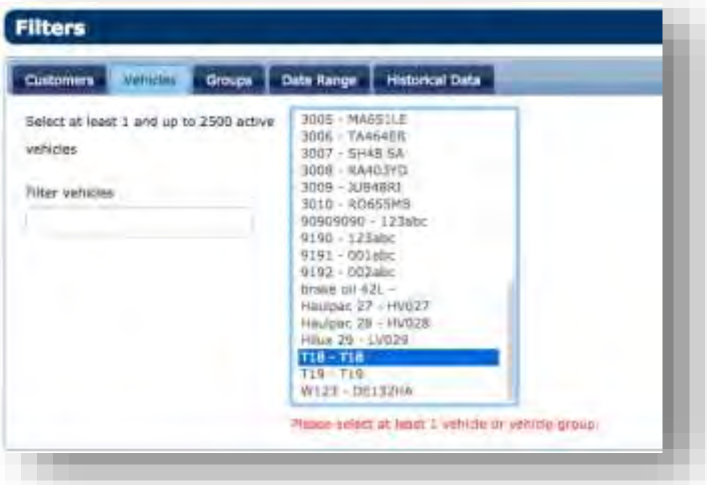
This reports automation has been configured to run daily at 1am, giving 24hrs worth of transactions. It will be sent to the email address that the user account has linked to iFUEL® and it will be sent in XLS format to be read in Microsoft Excel.



This is an easy way to set up a readout of data for record keeping or dissemination amongst other interested parties without having to give access directly to iFUEL®. Up to 10 email address can be added in the Email recipient's window.

Performance Reports

Using the techniques in generating a Transaction report, other types of report follow the same basic principles, with some minor differences. Performance Reports are a type of report that will only look at vehicle data. Only Vehicle entries in the database with filled in Performance Metrics will be presented in a Performance Report.



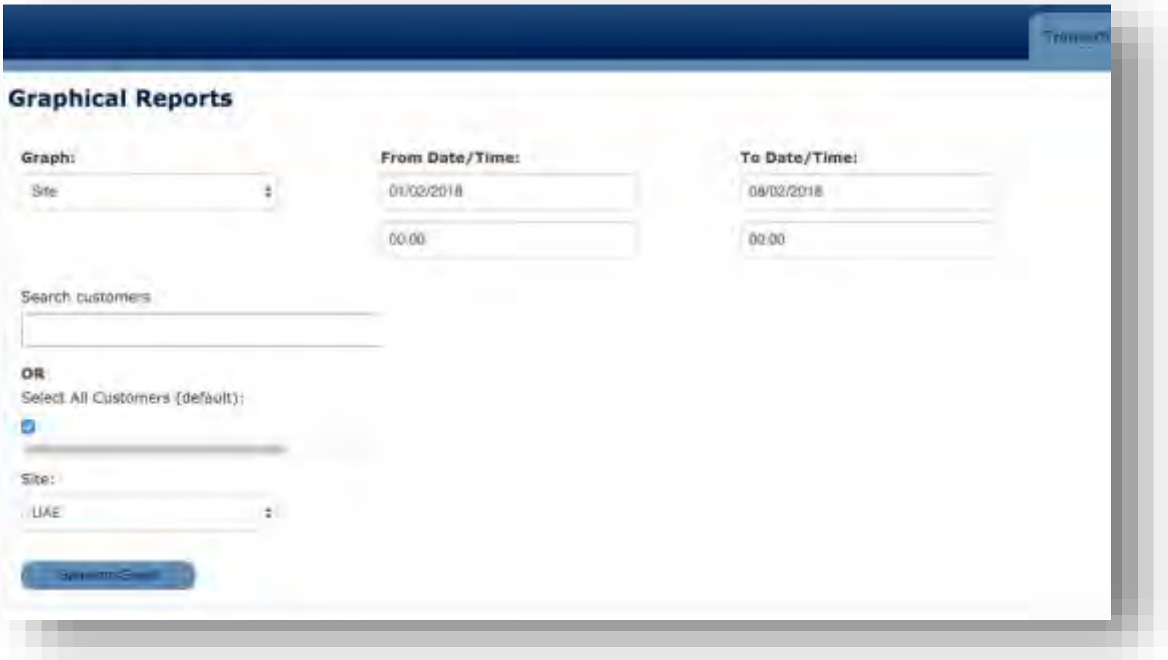
This example will run a report on the performance on vehicle - number T18 - with a 14-day date range. T18 has performance targets on its database entry.

The report will be presented with a table showing all the relevant metrics in columns with graphs underneath. See above image where the graph is displaying the l/100km measurements in graph format.

Just like with the transaction report, it can be saved and automated.

Graphical Reports

Graphical reports will display information in graph formatting once filters are selected. In the below image you will see the filters set up to run a report on the UAE site for 7 days.

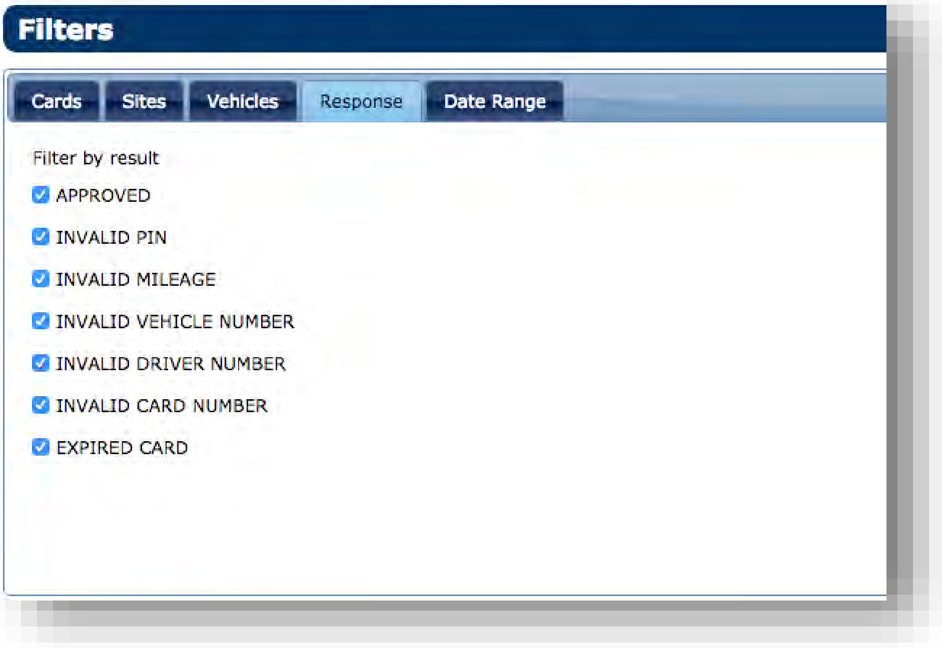


The graphs for this report display product volumes and product transaction totals. These graphs can be printed out directly or exported as png, jpg, pdf or svg files.

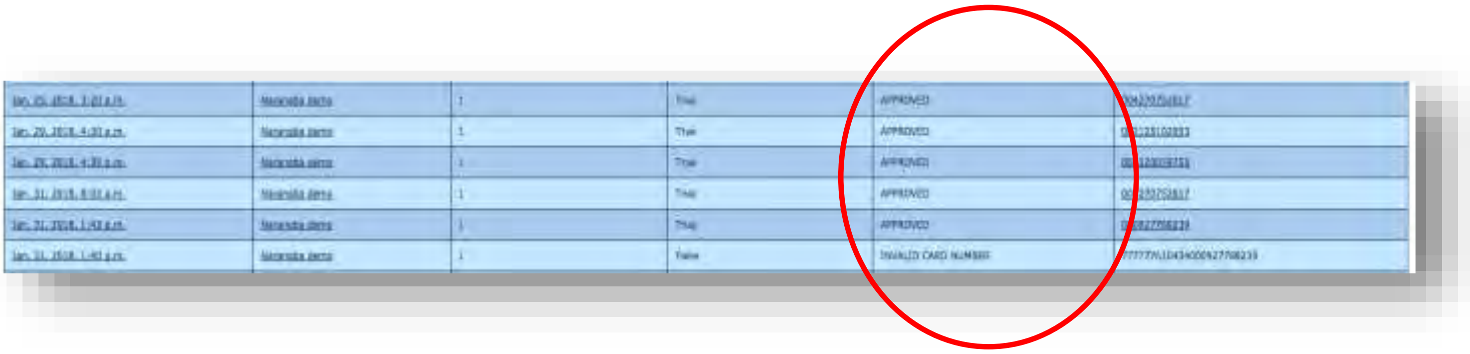
Authentication Reports

Reports can also be generated to list authorizations that are approved or rejected at the terminal. These reports are useful to help troubleshoot issues that can occur. Like all reports, filters are used to find the relevant data. For example, this reports filters are set up for a check on all authorization attempts at the Narangba Demo site.

For authentication reports the Response Tab is a filter that will choose what types of authorization results will appear. This report will request all, so all checkboxes are left selected. If this report needed only failed authorizations, the approved box would be deselected



Once the report is generated the result column will display the issue that prevented authorization.



Troubleshooting

When an error occurs at the terminal, a readout will display a message which will help diagnose the issue. Here is a list of common error readouts and how to remedy

Table (1) – Terminal Errors

Code	Reason	Remedy
CRC ERROR	Something has changed in the terminal configuration and has not been applied correctly	Call iFUEL® Support
ZERO STOP	The terminal has reached its maximum allowable consecutive zero draw transactions	Shutdown the Terminal
REJECTED	A part of the authorisation process was rejected.	An authorization report must be run to determine the issue (Refer to Table 2)

Table (2) – Authorisation Report Codes

Code	Reason	Remedy
INVALID PIN	The PIN/ID number entered is incorrect or not registered	Check if PIN/ID number is on iFUEL®.
INVALID MILAGE	The Odometer Limit value has been exceeded.	Check odometer values on iFUEL®
INVALID VEHICLE NUMBER	The Vehicle number entered is incorrect or not registered	Check if vehicle number is on iFUEL®.
INVALID DRIVER NUMBER	The Driver number entered is incorrect or not registered	Check if driver number is on iFUEL®.
INVALID CARD NUMBER	The Card scanned is not registered	Check if card number is on iFUEL®.
EXPIRED CARD	The Expiry has elapsed on the card	Check the expiry date of the Card on iFUEL®

User Controls

Account Settings

Account Settings has several tabs.

- ⇒ Profile – Holds User Info, Email Address and some checkboxes relating to performance reports.
- ⇒ Site Tank Alerts (Page 14)
- ⇒ Vehicle Performance Alerts – Works on the same principle as Tank Alerts, except for when vehicles overrun performance thresholds
- ⇒ Transaction Report Display – Controls what columns appear when opening Transaction Reports.

Users

As a Company on iFUEL®, you can add new users to access your iFUEL® profile. To add a new user, follow these steps

- ⇒ Choose Permission Level
- ⇒ Assign Company
- ⇒ Assign Username
- ⇒ User First name
- ⇒ User Last name
- ⇒ Email address
- ⇒ Language
- ⇒ Time zone
- ⇒ Contact number

P: 07 3204 2240
W: www.ifuel.com.au
E: sales@ifuel.com.au
A: Unit 2 - 11-15 Baylink Avenue, Deception Bay, QLD, 4508

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