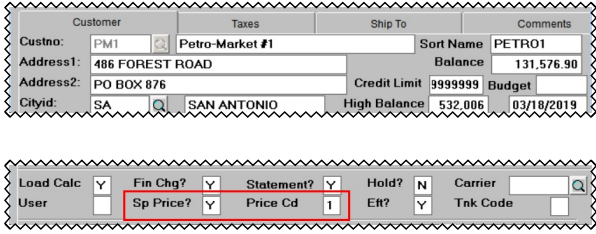


# Customer Rack Price Quote Email

Price quotes can be emailed to customers based on the Special Price setup. If a customer does not have this setup, they cannot receive a quote by email.

<p><b>Step 1</b> <i>AR, Customer Setup, Customers</i></p>	
<p>Customers with special price setup can receive a price quote.</p> <p>Verify that the 'Special Price' field in customer setup is set to 'Y'. Price Cd is usually set to 1.</p>	 <p>The screenshot shows a customer setup form with the following details:</p> <ul style="list-style-type: none"> <li><b>Customer:</b> PM1, Taxes: Petro-Market #1, Ship To: [blank], Sort Name: PETRO1</li> <li><b>Address1:</b> 486 FOREST ROAD, Balance: 131,576.90</li> <li><b>Address2:</b> PO BOX 876, Credit Limit: 9999999, Budget: [blank]</li> <li><b>Cityid:</b> SA, SAN ANTONIO, High Balance: 532,006, 03/18/2019</li> <li><b>Options:</b> Load Calc: Y, Fin Chg?: Y, Statement?: Y, Hold?: N, Carrier: [blank], Sp Price?: Y, Price Cd: 1, ER?: Y, Tnk Code: [blank]</li> </ul>

## Step 2

*AR, Customer Setup, Customers, Customer Send File, Your Email Record*

This email address identifies the Mail Account used to send emails. This single email address is used for email types of Invoices, Credit Cards, EFTs and Special Prices.

1. Add an ID number. This ID will identify each mail account and/or mail server.
2. Enter a description.
3. Enter the mail server:
  - a. Google - smtp.gmail.com
  - b. Outlook - smtp.live.com
4. Enter your email address.
5. Enter your email password.
6. If your email is Outlook, enter 'Y'. Otherwise, enter 'N'.
7. Authentication is 'Y'.
8. Use SSL (Secured Sockets Layer) is 'Y'.
9. Email Port is usually 465 for Google and 25 for Outlook.
10. From Email Addresses is the address listed as the Sender in the email. Enter the valid email address(s) that will appear on the email. The email address can be different for each type. More than one address can be entered on each type and should be separated by a comma.
11. CC Email Addresses will send a copy to the email addresses listed. Enter the valid email address(s) that will be included in the CC of each email. The email address can be different for each type. More than one address can be entered on each type and should be separated by a comma.

Click Exit.

The screenshot shows a web form titled "Your Email Addresses" with the following fields and callouts:

- 1**: Idno: MAIN
- 2**: Name: Main Email
- 3**: Mailserver: smtp.gmail.com
- 4**: Username: no-reply@petro-data.com
- 5**: Password: PassWord5
- 6**: Outlook: N
- 7**: Authen: Y
- 8**: Use SSL: Y
- 9**: Emailport: 465
- 10**: From Email Addresses: billing@petro-data.com
- 11**: CC Email Addresses: accounting@petro-data.com

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

### Step 3

*AR, Customer Setup, Customers, Customer Send File, Add Customer Email Records*

For every customer to receive an email, enter the email address that will receive each of these types of documents. More than one address can be entered on each type and should be separated by a comma.

1. Enter the customer number.
2. If appropriate, enter the Ship To location.
3. Enter the main email address for this customer.
4. The system will ask you if you want to use this same email address for all document types. Click the appropriate response.
5. Confirm or enter the email address(s) to use for each document type.
6. Enter the PDF directory for all PDF reports created by the system. Typical value is P:\pdf\ plus your customer number. {P:} should be your network drive.

Customer Send File

Cust No. PM1 Petro-Market #1

Ship To

Fax:

Email: jim@petro-data.com

CC:

Invoice Send Type E jim@petro-data.com , billing@petro-data.com

Sp Price Report E jim@petro-data.com

EFT Send Type E jim@petro-data.com

AR Send Type E jim@petro-data.com

CrCard Send Type E jim@petro-data.com

Cardlock Send Type E jim@petro-data.com

Rack Price Type E jim@petro-data.com

Save PDFs Y

PDF Dir p:\pdf\PM1\

FTP Dir

Edit New Next Prev Delete Duplicate Exit

Default Email

Use this email for all document types?

Yes No

### Step 3

*Jobber, File Maintenance, Inventory*

If you will include freight charges or freight surcharges in your special price setup, be sure the items exist in your Inventory setup.

The items for this document are GASFRT, DIEFRT, GASFRTSUR and DIEFRTSUR. Your inventory items may have a different name.

Inventory File Maintenance

Location 1

Description GASOLINE FREIGHT

Other Descr

Misc GI 13000-200 Store 1 - Inventory

Item GASFRT

Hold

Stock M

UPC Code

Dept No 9999

Category 9999

Inventory File Maintenance

Location 1

Description DIESEL FREIGHT

Other Descr

Misc GI 13000-200 Store 1 - Inventory

Item DIEFRT

Hold

Stock M

UPC Code

Dept No 9999

Category 9999

Only 2 examples are listed here.

#### Step 4

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

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

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 one vendor or 'ALL' for all vendors.
10. Enter one terminal or 'ALL' for all terminals.
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.
15. Enter 'Y' if you will bill Freight in the BOL.
16. Choose Gross or Net gallons (G/N) to use in the freight calculation.
17. Enter the Inventory location and item for the freight charge.
18. Repeat the same in Bill Frt Adj if you want to calculate a freight surcharge.
19. Bill Other 1 & 2 can be used to bill other charges as needed.

Special Price File Maintenance

Location 9 Terminal View All  
Custno PM1 Petro-Market #1  
Shipto  
Item E87 Fuel Type E87  
Price Type U Racktype N Tax Type GAS  
Spec Code  
Price Origin B Billcode N  
Vendor ALL Terminal ALL Fixed Terminal N  
Profit/Gal 0.01000 Exp Date / /  
Frit Type C Frit Rate 100.00000 Other Fuel Tax  
Code 1 Code 2 Zone  
No Quote No Tax

Line Item Charges

Bill Frt?	Y 15 (G/N)	G 16	Loc 1 17	Item GASFRT 17	FG
Bill Frt Adj?	N 18		Loc	Item	
Bill Other 1?	N 7	Oth Chg 1 19 0.000000	Loc	Item	
Bill Other 2?	N	Oth Chg 2 0.000000	Loc	Item	

Tot Markup 0.01000

Edit New Next Prev Delete Duplicate Exit

## Step 5

### Jobber, Rack Prices, Daily Fuel Price Report

Email the rack price quote to your customers.

1. Choose Email as your printer type.
2. Click Calculate Prices.
3. Click Show Errors.
4. Choose your Rack Date.
5. Enter the cut-off hour of your rack.
6. Enter the price date. This is usually the day after Rack Date.
7. Choose a sort option.
8. Click Customer Quotes to send emails to your customer. Leave this unchecked to print a report for your internal use.
9. Click Total Price Only. This sends a single price to your customer instead of the detailed breakdown of cost plus taxes plus freight.
10. Click Print to create the email.

Special Price Report

Printer: Email File **1**

**2**  Calculate Prices **3**  Show Errors Freight Surcharge: 1.0000

Rack Date: 07/06/2019 **4** Cut Off Hour: 18 **5**

Price Date: 07/07/2019 **6** Best Prices: 0

**7** Sort Option:  Customer by Fuel Type  Vendor and Terminal

**8**  Customer Quotes Cust No: [ ] [ ]

**9**  Total Price Only Report Code: [ ]

Show Other Charges  Show Special Charges

Vendor: [ ] Terminal: [ ]

**10** [Edit] [Print] [Display] [Exit] [Save Opt]

The email screen will display.

1. Verify the email account setup.
2. The PDFs for email will be listed in the bottom of the screen.
3. Click Start to begin sending emails

Send Email

Printer: Email File **1**

Your Email: 28 **1** no-reply@petro-data.com

Custno: BLUE Shipto: 1 Blue Farm

Module: SPE Batch: 20190707 Send Code: E

DocNum: 20190707 Date: 07/07/2019 Amount: 0.00

Send From: no-reply@petro-data.com

Emailaddr: jim@petro-data.com **3** Start

Cemail: billina@petro-data.com Print

Subject: Fuel prices for Blue Farm Display

Attachment: p:\pdf\BLUEPRICE\_BLUE\_07072019.PDF Exit

Body Msg: Optional text is entered here Delete

Email Count: 2

Show All Show Sent Show Not Sent

Module	Company	Shipto	Refdate	Refnum	Amount	Code	Status
SPE	Blue Farm	1	07/07/2019	20190707	0.00	E	OPEN
SPE	Petro-Market #1		07/07/2019	20190707	0.00	F	OPEN

At the end, the system will display a message that the email process is Complete.

Click Exit.

Email is Complete. Press Exit to go back to menu.