

# Phoenix SQL®

## Reference Guide





*Leading The Way in Fueling Innovation Worldwide*

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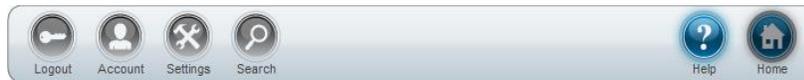
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## 1 Welcome to Phoenix SQL

### 1.1 Terminology

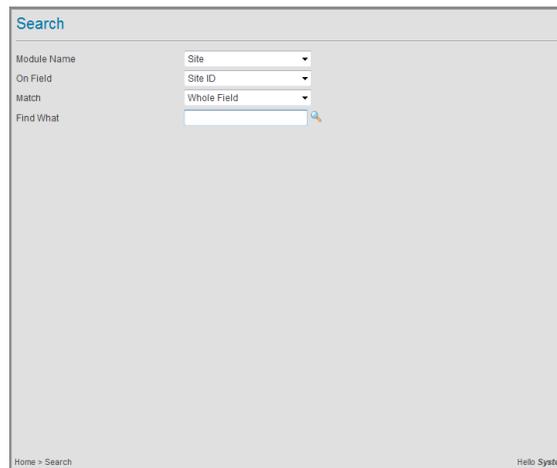
Placed throughout the Phoenix SQL Reference Guide are the terms **Main Toolbar** and **Ribbon Bar**. The **Main Toolbar** is always displayed while logged into Phoenix.



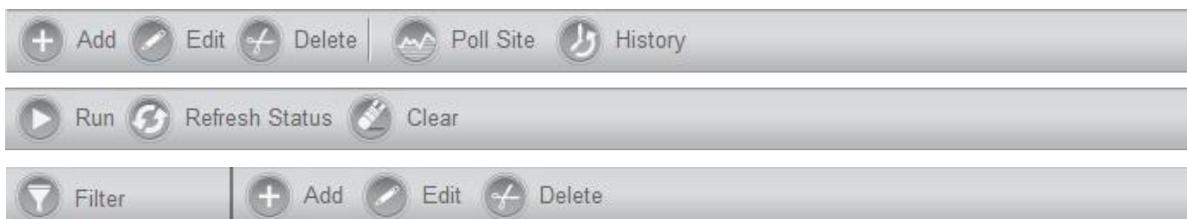
- Logout/Login is used to exit Phoenix and log back in as needed.
- Account leads to a personalized settings page where preferences can be customized, including:
  - Change user **Password** by typing in the old and confirming the new.
  - Select **Session Time** before Phoenix logs out after the selected inactivity period.
  - Select **Page Size** at which Phoenix will display the selected number of records in a data grid. This setting applies to **Card Info** and **Transaction Views**.

Click **Apply** to confirm these changes.

- **Settings** leads to the System Setup section under the Administration screen.
- **Search** allows for the search of card management data within the database.
  - First, select a **Module Name** (i.e. Accounts, Cards, Sites and/or Transactions).
  - The **On Field** is dependant upon which Module Name is chosen. For example, if Sites is chosen under the Module Name field, one of the following fields can be chosen: Site Name, Phone, Address, City, State, Zip Code or Short Name.
  - The **Match** field sets the parameters of the search to be expanded or limited to either the Whole Field, Start of Field or Any Part of Field.
  - **Find What** is the search field. Once the desired item has been entered, click on the magnifying glass to the right of the field.
- **Help** is specific to the current page being viewed.
- **Home** leads to the **PhoenixHome Page**. The version and serial number of the application are displayed here.



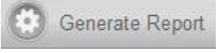
The **Ribbon Bar** is the smaller toolbar and is displayed on every page, providing actions applicable to the page being viewed. Some of the views seen are shown here:



## 1.2 Icons

Icon	Description	Icon	Description
	Logs user in and out of Phoenix as needed.		Access the personalized settings page to change password, session time and page size.
	Access "System Setup" section under the Administrator tab.		Search card management data within Phoenix®.
	Access Help Menu specific for current page being viewed.		Access the Phoenix® Home Page.
	Confirm changes.		Cancel changes.
	Add information for a new contact, user, user group, etc.		Change the information in an already-existing entry.
	Permanently delete an entry.		Access Product Activation page for additional purchased features.
	Manually download all of the transactions that have taken place at a specific fueling site.		Display the results of the polled and imported information.
	Run Backup, Restore, Poll, Event		Monitor the status of an ongoing operation.

	Open a browser page that allows for the selection of a date range for which data will be cleared.		
	Change the card type used on any of the existing cards.		Change the accounts that specific card numbers are assigned to.
	Display card activity status.		Update card utilities.
	Resend all lost card and System Account information back to the Fuel Site Controller.		Backup cards from one or more fueling sites.
	Restore Site configuration back to the Site and import transactions from the USB key.		Import a backup card file from the Fuel Site Controller.
	Filter data according to selected options.		Export selected data to a file generated by Phoenix SQL®.
	Select All accounts, cards, events, etc.		Unselect all accounts, cards, events, etc.
	Reprice transactions for the selected accounts and date range.		Clear all the accumulated values in a field.

	<p>Generate selected report.</p>		<p>Send error report via e-mail.</p>
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## Phoenix Start-up

This section is a guide for the Phoenix SQL installation process.

### 1.2.1 Component Considerations

Before performing the actual installation, first decide where the Phoenix database will reside. Install a free version of Microsoft's SQL Server Express 2005 (provided on the Phoenix installation CD) on the same machine the Phoenix Web services will be installed, or point Phoenix at an existing installation of Microsoft's SQL Server (Express or Enterprise versions 2005/2008/2012/2014) already installed on a machine in the company network.

Next, decide where the Phoenix Service Engine component will be installed. This component must have direct access to the SQL Server for database management and have connection-point access to each fuel site that will be managed. This can be done using a serial COM port for direct connections, a modem for dial-up access, or TCP/IP connectivity using your company LAN. Due to security issues, the use of public Internet to access fuel site controllers is not recommended. Finally, because Phoenix is a Web-enabled application, the PC chosen for Phoenix installation must have IIS (Internet Information Services) 7.5 or higher enabled and must be securely managed behind a corporate firewall.

#### Note for Current Phoenix for Windows Users:

After installing Phoenix SQL, there is a database migration utility that will import existing Phoenix for Windows® data. Once complete, depending on how Phoenix is used, some modifications may need to be made to the imported data with respect to Accounts and their associated Cards.

### 1.2.2 Installation Prerequisites

Follow these steps to install Phoenix SQL on your machine(s):

1. Insert the Phoenix SQL Installation CD.
2. The Phoenix Installation Wizard should auto-run.

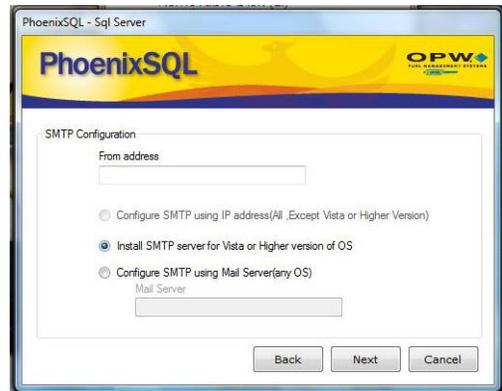
**NOTE:** Before installing, you must first exit all other open applications.

3. Click **Next** to allow Phoenix to install the prerequisites needed to operate.
4. Click **Next** and follow the Phoenix SQL Installation Wizard process.
5. At the "Select SQL Server Option" page, you are given the following options:
  - **Install SQL Server 2005 Express Edition:** Select this option if you do not have access to a remote installation of SQL Server Express or Enterprise Editions.
  - **Select SQL Server:** Select this option if an existing installation of SQL Server 2005 Express Edition, or SQL Server 2008 was installed on this machine, or if a remote version is available on the company network. Select the server name from the populated list, enter the appropriate Username and Password by providing the administrator credentials that give rights to allow a Database to be created.
6. Click **Next** and setup will auto-run the SQL Server install. After all third-party applications have finished installing, click **Next** to continue.

### 1.2.3 Installing Phoenix SQL®

Installation of the different options of Phoenix SQL begins at the *Software Setup* screen.

1. Start at the top of the list and select **Phoenix SQL** and click “Install.”
2. Follow the prompts to move forward with the installation.
3. Accept the End-User License Agreement, then click **Next**.
4. Select an Installation Type option:
  - **Typical:** (Recommended) This is the default **Installation Type**.
  - **Custom:** (For advanced users) Enter the *Website Name/Virtual Directory Name* and determine the *Destination Path* using the **Browser** button on the right.
5. Click **Next**.
6. Enter the Phoenix Database Name.
7. Click **Next**.
8. Create a password (minimum of six characters) for the *Sysadmin* user of Phoenix SQL.  
**IMPORTANT:** Remember this password! When logging into Phoenix SQL for the first time, the username *Sysadmin* and the password you created must be used.
9. Click **Next** and follow the prompts to move forward with the installation.
10. The next prompt will ask for the *SMTP Configuration From Address*:  
 This is the email address that will be seen when the Service Engine and/or Phoenix SQL sends an email.
  - **Configure SMTP using IP address:** Recommended by default if using an operating system older than Vista.
  - **Install SMTP server for Windows® 7 or higher version of OS:** Recommended by default if using a Windows® 7 (or higher) operating system.
  - **Configure SMTP using Mail Server (any OS):** If selected, a Mail Server name is required.
11. Click **Next** and follow the prompts to move forward with the installation.
12. Phoenix SQL has been successfully installed! A Phoenix SQL desktop icon will come into view.
13. Click **Close**. Proceed with the Phoenix SQL Service Engine Installation.



### 1.2.4 Installing Phoenix SQL® Service Engine

1. If installing the Service Engine component on the same machine, select **Service Engine** and click **Install**. If installing Service Engine on a secondary machine, exit the installation, move to that machine and restart the installation again.
2. The option of Installation Type will be given:
  - **Typical:** (Recommended) Allow this to be the default **Installation Type**.
  - **Custom:** For advanced users, if chosen, enter the *Destination Path* using the **Browser** button on the right.  
Click **Next**.
3. The next screen displays/requires the following Database details: **Server Name**, **User Name**, **Password** and **Phoenix Database** name.



**IMPORTANT:** You must provide this information if you are installing the Service Engine on a separate machine.

4. Click **Next**.
5. The **Email Configuration** setup determines who will receive notification if the *Service Engine* fails or shuts down.

**NOTE:** The **To:** field is required.

6. Click **Next** to install.
7. **Service Engine** has successfully installed.
8. Click **Close**.

## 1.3 Activating Phoenix SQL® after Purchase

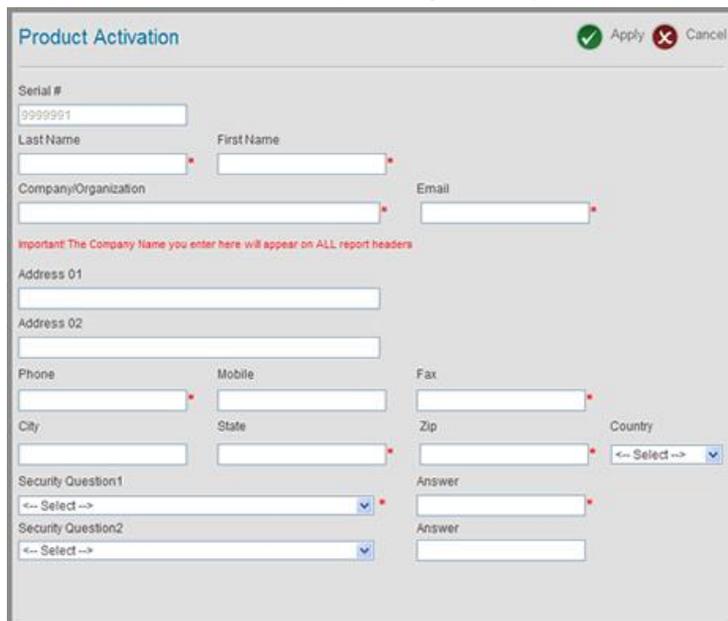
Whenever Phoenix SQL is installed, it first opens as a DEMO version providing a 60-day, two-site configurable version.

Once purchased, Phoenix SQL can be **Activated** for use with purchased features.

To activate Phoenix SQL, log in as “sysadmin” and click the **Account** button on the Main Toolbar. When the *Account* page is displayed, click the **Activate** button on the *Ribbon Bar*. This leads to the product activation page.

Fill in the required information and click **Apply** to Activate Phoenix.

When entering the required data, be sure to enter the Company Name as it is to be displayed. The name entered here will be displayed as part of the header on ALL Phoenix Reports.



**Product Activation** [Apply] [Cancel]

Serial #  
9999991

Last Name \* First Name \*

Company/Organization \* Email \*

Important: The Company Name you enter here will appear on ALL report headers

Address 01  
Address 02

Phone \* Mobile \* Fax \*

City \* State \* Zip \* Country [Select]

Security Question1 [Select] \* Answer \*

Security Question2 [Select] \* Answer \*

Once Phoenix is activated for use, the **Activate** button on the *Ribbon Bar* becomes **Upgrade**. This option is now available when additional features are purchased in the future.

## 1.4 Running Phoenix® Migration Utility

Before proceeding with the Migration Utility process, first log into Phoenix and activate the purchased serial number (see above). **Without a purchased copy of Phoenix, it is not possible to migrate the existing P4W database.** To purchase, login as “Sysadmin” and go to “My Account” page to activate. Click “Account on bottom toolbar.

**NOTE:** To migrate a database to use with Phoenix SQL it must be available on the machine where Phoenix SQL is installed. If it resides on another machine or network you will need to find the location of the database and copy this file to the local machine where Phoenix SQL is installed

1. In order to migrate an existing Phoenix for Windows® database, run the Phoenix installation. At the Software Setup screen, select Phoenix Migration Utility and click **Install**.
2. Once a database has been migrated in Phoenix, the following changes should be made to ensure correct card management and site setup:

**Account/Site Contact Managers:** Under this version of Phoenix, an *Account Contact* and *Site Manager* must be assigned to each *Account* and *Site* respectively from an *Address Book* that is now available. This data does not exist in the Phoenix for Windows® database. Phoenix assigns the only available entry of "Tech Support" to each *Account* and *Site* configured within the database. It is recommended that *Address Book* entries be created for these contacts so they can be associated to their respective *Accounts* and *Sites*.

**R/W ChipKey® Users:** If using a System2 or FSC3000 with ChipKey® Mileage Reasonability, you must edit all defined cards that are R/W ChipKey®s and the checkbox **Is R/W ChipKey®** must be enabled.

**Maintenance Card Account Users:** If the built-in Maintenance Cards account was used to manage cards in Phoenix for Windows® and that account contained “Single” cards, these “Single” cards must be re-assigned to a new or existing account.

- i. Log in to Phoenix SQL. If it is desired to place these “Single” cards in a new Account, click on the **Accounts** menu on the left to add a new account.
- ii. Once the re-assigned location for Single cards is decided, select the *Global Cards* account from the Cards Info page, **View by Account** dropdown menu and click **Edit**.
- iii. On the **Ribbon Bar**, click the **Reassign Account** button.
- iv. In the message that comes into view, select the **Cards Defined** as “Single” and reassign them to a new account.

## 1.5 Access Phoenix® Remotely

During the Phoenix SQL installation process, when prompted for Typical or Custom install, the option to select a Virtual Directory for the remote access of Phoenix will also be presented. The default name of this virtual directory is “PhoenixSQL”. This name must be referenced when attempting to log into Phoenix for another machine using a web-based browser.

The address entered into the browser to access Phoenix is:

<Phoenix Machine  
IP>/PhoenixSQL/Login.aspx–



## 2 Administration Menu

The Administration Menu provides options that can be used to create/maintain the Address Book, Groups, Users and setup-related information used for reference and configuration throughout the application.

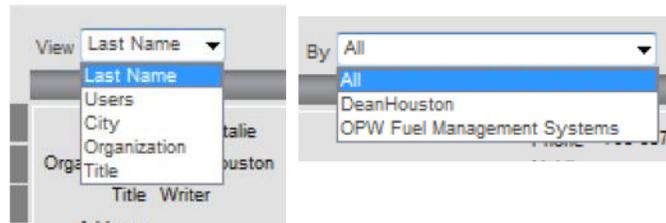
The Administration Menu is comprised of the following links:

- Address Book
- Groups
- Users
- System Setup
- System Error Log
- User Audit Trail
- Card Defaults
- Fuel Zones



### 2.1 Address Book

The Address Book stores all contact information used by Phoenix SQL, including system users, site managers, card-account administrators or those that may need to be contacted when an alarm error condition arises.



A key component of the Address Book is the View dropdown menu. This allows the information to be sorted and viewed according to one of five parameters: Last Name, Users, City, Organization and Title. City, Organization or Title selections are most beneficial, as another level of sorted options becomes available titled “By” when they are chosen, allowing for a further refined search. These options can be used to define a Group or the subset of a Group by such distinct parameters as Region, District, City, Business Name, etc., which allows the administrator/user to compartmentalize the Address Book in any manner needed.

#### 2.1.1 Address Book Configuration - Add, Edit, Delete

The **Add**, **Edit** and **Delete** functions are initiated by clicking on their respective buttons on the Ribbon Bar at the bottom of the frame.



The **Add Address Book** page allows for the addition of information for a new contact. Required fields for any Address Book entry are indicated by asterisks (\*). These fields are First Name and Last Name of the new contact.

The new entry is entered in the Address Book only when the **Apply** button is clicked and a message box s “Your Record has been saved successfully” is displayed. Clicking the **Cancel** button terminates the operation and leads back to the main Address Book page.

The **Edit Address Book** page allows for the change of information in an already current Address Book entry. To access the Edit Address Book page, click on the entry to be edited in the Address Book; its background will turn orange and then click the **Edit** button on the Ribbon Bar.

The edited entry is updated in the Address Book only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully.” Clicking the **Cancel** button terminates the operation and directs back to the main Address Book page.

The **Delete** function allows an entry to be permanently removed from the Address Book. This function is accessed by first clicking the entry to be deleted so that its background turns orange, then clicking the **Delete** button on the Ribbon Bar.

Upon clicking **Delete**, a message box asking “Delete Current Record?” is displayed. Click “Yes” to permanently delete the record or click “No” to cancel the action and maintain the current information.

## 2.2 Groups

The **Groups** module in the Administration Menu allows for the categorization of user-defined Groups. Clicking Groups in the Administration Menu allows for the view of the Group Name, the Site and Account access levels of all Groups, as well as the number of members in each specific Group.

Groups			
Group Name	Site	Account	Members
Customer S...		Manage	0
Engineerin...	Manage	Manage	0
Sales	View	Manage	0
Tech Servi...	Manage	View	0

### 2.2.1 Group Configuration – Add, Edit, Delete

The **Add**, **Edit** and **Delete** functions are initiated by clicking on their respective buttons on the Ribbon Bar at the bottom of the frame.



The **Add Group Configuration** page adds the information for a Phoenix SQL user group, with unique selectable access permissions.

First, click the **Add** button on the Groups home page. Enter a Group Name, then select the “Phoenix SQL Level Access For Group” by selecting the Sites or Accounts checkbox, or both. Then select whether the group has the ability to Manage, Edit or View any information for that Group. Finally, select which Sites and Accounts this Group will have access to in the Site Access and Account Access lists. The newly defined Group is created only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” is displayed. Clicking the **Cancel** button terminates the operation and directs back to the main Groups page.

The **Edit Group Configuration** page allows for the change of information in an already-existing Group entry. To access the Edit Group Configuration page, click on the entry to be edited on the Groups page so that the background turns orange, then click the **Edit** button on the Ribbon Bar before changing the pertinent information.

The edited entry is updated only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” is displayed. Clicking the **Cancel** button terminates the operation and directs back to the main Groups page.

The **Delete** function allows an entry to be removed permanently from the Groups home page. This function is accessed by first selecting the Group to be deleted, turning its background to orange, then clicking the Delete button on the Ribbon Bar.

Upon clicking Delete, a message box asking “Delete Current Record?” is displayed. Click “Yes” to permanently delete the entry, or click “No” to cancel the action and maintain the current information.

## 2.3 Users

The **Users** section in the Administration Menu allows an administrator to view the details of all Phoenix SQL users.

In order to create a User, an Address Book entry for that user must be created first.

Name	Organization	Location	Phone	Group
Hill, Natalie	DeanHouston	Hodgkins	708-387-8272	Admin
Support, Tech		Hodgkins, IL	708-485-4200	Tech Support

Clicking **Users** in the Administration Menu leads to a list of all current Phoenix SQL users.

### 2.3.1 User Info Configuration – Add, Edit, Delete

The **Add**, **Edit** and **Delete** functions are initiated by clicking on their respective buttons on the Ribbon Bar at the bottom of the frame.



The **Add User Info Configuration** allows information for a current Phoenix SQL user to be added.

Using the Name dropdown menu at the top of the page allows for the selection of an entry from the Address Book to define who will be given login access to the Phoenix SQL application. After the name is selected, the remaining fields will be populated with the selected user's information.

The data found in the Address, Phone, Mobile, Fax, Email and SMS areas populates from the information found in the Address Book and is in "read-only" format.

- Upon selection of the Address Book entry, a username is automatically created for the selected user. It can be used as is, or modified. Next, create a **Password** for this new user and then enter it again in the confirm password textbox.
- Choices in the **Language** dropdown menu are US English and Spanish. The administrator can select the preferred language and Phoenix will display this language upon login.
- The **Session Time** dropdown menu allows for the selection of the time, in minutes, that Phoenix SQL can remain idle before it automatically logs off. Choices are 20, 30, 40, 50 or 60 minutes.
- The **Page Size** dropdown menu allows for the selection of the number of Phoenix SQL records that will be displayed on a single data-grid view. Choices are 25, 50, 75, 100, 150 and 200 records.
- The **Group** dropdown menu allows the administrator (or a group manager) to choose which Phoenix SQL group the User belongs to. Groups are created to control access rights within Phoenix SQL, as they can be defined to allow Manage, Edit or View rights to features within Phoenix SQL.
- The **Status** option allows the administrator to set whether the selected user is Active or Inactive within Phoenix SQL, by clicking the appropriate radio button. Choosing Inactive will disable the user's ability to log into Phoenix SQL.
- **Login/Access Method** allows for the definition of how the user is allowed to log in to Phoenix SQL, either as a Phoenix SQL Named User or through Windows® Authentication. If Windows® Authentication is used, the username must be the same as the one used under normal Windows® Login.

When adding a user, entries are saved only when the **Apply** button is clicked and a message box indicating "Your Record has been saved successfully" appears. Clicking the **Cancel** button terminates the operation and leads back to the main Users page.

The **Edit User Info Configuration** page allows the administrator to edit the information for a selected user. To access the Edit User Info Configuration page, click on the entry to be edited on the user's page so that the background of that entry turns orange and then click the **Edit** button on the Ribbon Bar.

The data found in the Address, Phone, Mobile, Fax, Email and SMS fields is populated from the information found in the Address Book and is in “read-only” format.

When editing User Info, the only selectable options are: the user’s associated group, their current status, preferred Language, user session idle-time and the number of records displayed in a single data-grid view. The edited entry is updated only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears. Clicking the **Cancel** button terminates the operation and leads to the main Users page.

The **Delete** function on the Users page allows a selected record to be removed permanently from the User table. Once a User is deleted they no longer have access to the Phoenix SQL application. To Delete a user, select their record on the Users page, turning its background color orange, then click the Delete button on the Ribbon Bar. Upon clicking Delete, a message box asking “Delete Current Record?” will appear. Click “Yes” to permanently delete the record or “No” to cancel the action and maintain the current information.

## 2.4 System Setup

System Setup in the Administration Menu allows for the set up and view of parameters for 15 unique areas. Some of these settings define control rules used within Phoenix SQL and others are values used throughout the application to provide clarity of referenced information. They are as follows:

- Password Requirements
- Fuel Site Controller
- General Setup
- Bad Odometer Tracking
- User Strings
- Reasonability
- Products
- Product Restriction
- Quantity Restriction
- Message Prompts
- ChipKey® Odometer Lower Limits
- ChipKey® Odometer Upper Limits
- ChipKey® Daily Limits
- ChipKey® Methods
- Card Status

Use the +/- radio button to view/hide/edit the information for each specific parameter.

Use the scroll bar on the right side of the page to view the parameters at the bottom of the page.

Based on how cards are managed and the version of the software being used in the Fuel Site Controller, some of the values/settings in these areas are not referenced/used within the application.

System Setup
<input type="radio"/> Password Requirements
<input type="radio"/> Fuel Site Controller
<input type="radio"/> General Setup
<input type="radio"/> Bad Odometer Tracking
<input type="radio"/> User Strings
<input type="radio"/> Reasonability
<input type="radio"/> Products
<input type="radio"/> Product Restriction
<input type="radio"/> Quantity Restriction
<input type="radio"/> Message Prompts
<input type="radio"/> ChipKey Odometer Lower Limits
<input type="radio"/> ChipKey Odometer Upper Limits
<input type="radio"/> ChipKey Daily Limits
<input type="radio"/> ChipKey Methods
<input type="radio"/> Card Status

### 2.4.1 Password Requirements

The **Password Requirements** section allows for the selection of the number of characters and password strength required in a user's Phoenix SQL application password. Five is the minimum number of characters required for a Password entry. All entered strings lower than five will not be accepted, and the maximum number of characters in a password is 20. This is a required field, marked by the red asterisk (\*).

Changing Password length requirements will not affect existing Passwords. It will only impact Passwords that are changed or created after the new Password length requirements are initiated.

Password Strength is determined by choosing one of three buttons: Strong, Moderate or Weak.

- A **Strong Password** must have a combination of an upper-case letter, lower-case letter, special character and number. **Example:** Fuel\$123
- A **Moderate Password** must have a combination of any two from the following list: upper-case letter, lower-case letter, special character and number. **Example:** password123
- A **Weak Password** can have any one of the following: upper-case letter, lower-case letter, special character and number. **Example:** password

Password Requirements are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears. Clicking the **Cancel** button terminates the operation and leads back to the main System Setup page.

### 2.4.2 Fuel Site Controller

The **Fuel Site Controller** section in System Setup allows for the choice of which driver/vehicle account cards are operational and lets Phoenix SQL know whether a Fuel Site Controller uses cards.

Select “Fuel Site Controllers use Account Cards” when driver/vehicle cards are used and utilized for the authorization/isolation by accounts. When managing cards, which Driver cards are allowed to fuel can be controlled when swiped in conjunction with a vehicle assigned to the same account. A group of cards can also be enabled or disabled for use all at once by invalidating an Account record and sending it to the FSC. Selecting the “Fuel Site Controllers do NOT use Account Cards” option tells Phoenix SQL that any Driver card can obtain fuel when used with any Vehicle card.

Checking the “Auto flag all new and modified cards for update” checkbox tells Phoenix SQL that any newly added card, or a card with modified parameters, must be sent to the FSC during the “next card update process.” If this option is not selected, the “Update Card” checkbox on the card configuration page **MUST** be checked or the changes will not be sent to the Fuel Site Controllers.

Fuel Site Controller parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears. Clicking the **Cancel** button terminates the operation and leads back to the main System Setup page.

### 2.4.3 General Setup

The **General Setup** section of System Setup tells Phoenix SQL how fuel volumes and vehicle travel distances will be displayed on reports and whether Phoenix should auto-generate PINs for newly added cards.



The top checkbox is used to determine whether fuel volumes will be displayed in gallons or liters. Check the box if gallons are preferred, leave the checkbox blank if liters are preferred.

The second box is used to determine whether travel distances will be referenced in miles or kilometers. Check the box if miles are preferred, leave the checkbox blank if kilometers are preferred.

The “Auto generate PIN when adding new card” checkbox tells Phoenix to automatically generate a PIN for every new card that is entered.

General Setup parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears. Clicking the **Cancel** button terminates the operation and leads back to the main System Setup page.

### 2.4.4 Bad Odometer Tracking

The **Bad Odometer Tracking** section in System Setup allows for the definition of odometer entries being made, i.e. which should be considered bad and which could possibly affect the accuracy of reported fuel usage.



Generally, there are three (3) ways that drivers can attempt to cheat an odometer entry prompt:

- Single Digit Entries. **Example:** 1
- Same Digit Entries. **Example:** 11111
- Sequential Value Entries. **Example:** 12345

In order to thwart these attempts at odometer manipulation, Phoenix SQL allows for the setting of which types of bad odometer readings will be monitored by selecting any combination of the Single Digit Entries, Same Digit Entries or Sequential Value Entries checkboxes.

If the “Entry Does Not Meet Defined Ranges” checkbox is checked, Phoenix SQL will flag any odometer entries that do not meet the MPG range defined for the vehicle’s card.

Bad Odometer Tracking parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears. Clicking the **Cancel** button terminates the operation and leads back to the main System Setup page.

### 2.4.5 User Strings

The **User Strings** section of System Setup allows for the creation of custom labels for specific fields used within the Phoenix SQL application. The **User Strings**, **Account Form Labels**, **Card Window Labels** and **Transaction Window Labels** consist of user-defined fields that can be populated with identifying labels up to 20 characters in length. Some of these fields are available in Phoenix for the capture of unique data according to needs. Others allow for the assignment of labels to fields that are associated with FSC card manager fields.

Text entered in the **Miscellaneous Entry Title** field allows for the definition of an accurate reference label to the numeric data collected by the FSC's Miscellaneous prompt.

The **Accounts Form** has four user fields and the **Card Form** has two user fields that help in the gathering of useful information. Some suggested labels for these fields are Discount Rate, Paid Through Date, Review Date, Alternate Contact Name, or whatever serves the best purpose.

Card1 Title and Card2 Title in the **Transaction Window Labels** area allows for what the card number represents to be clearly defined, such as: Employee, Driver, Bus, Tractor or Vehicle. Card1 Short Name and Card2 Short Name fields are tied to the names associated to cards stored on Fuel Site Controller. Some examples of short name labels are: Driver Name, Employee Name, Vehicle License, Vehicle Make or Vehicle Type.

User Strings parameters are saved only when the **Apply** button is clicked. Clicking the **Cancel** button terminates the operation and leads back to the main System Setup page.

### 2.4.6 Reasonability

The **Reasonability** section of System Setup is used to set a Reasonability range for the miles traveled when a vehicle enters the fueling site to refuel. An entry is deemed reasonable when the difference between the current entry and the previous entry is within the programmed range.

System Codes for as many as 15 different Reasonability options can be entered. The System Code for a specific vehicle must be determined and entered when that vehicle's card record is created.

**Example:** If the current odometer reading of a vehicle is 12,625 miles and the previous entry was 12,500, and the vehicle's System Code allows a minimum Reasonability range of 150 miles and a maximum Reasonability range of 400 miles, then a 125-mile difference is not a reasonable odometer entry and fueling will be denied.

If the Reasonability feature of the Fuel Site Controller is enabled, you should enter the current value of the vehicle's odometer in the Odometer text box when creating a new vehicle card record.

System Code	Description	System Code	Description
00	No Restrictions	08	50 - 1000
01	0 - 100	09	100 - 200
02	0 - 250	10	100 - 400
03	0 - 500	11	100 - 700
04	0 - 1000	12	100 - 1000
05	50 - 150	13	150 - 400
06	50 - 300	14	150 - 700
07	50 - 600	15	150 - 1000

Reasonability parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears. Clicking the **Cancel** button terminates the operating and leads back to the main System Setup page.

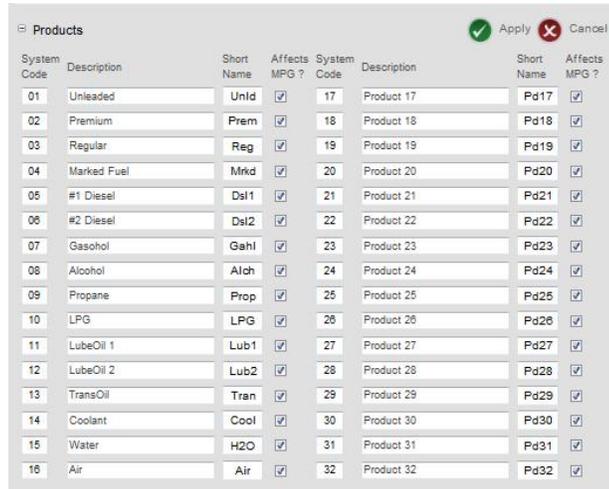
### 2.4.7 Product

The **Product** section under System Setup allows for the entering of names for up to 32 different products that will be monitored and reported on by Phoenix SQL.

Some Fuel Site Controllers only support 16 different product types.

The Product type should be entered in the Description box next to the System Code that that Product type is to be linked to. **Example:** Unleaded, Diesel, Propane, Alcohol, Water, Air, Lube Oil, etc. In the Short Name box, an abbreviated form of the product should be entered. **Example:** UNL (Unleaded), DSL (Diesel), H2O (Water), etc.

Checking the **Affects MPG?** box allows Phoenix SQL to accept transactions containing the specific System Code when calculating the MPG for a vehicle associated card. If the **Affects MPG?** check box is left unchecked, when calculating the MPG, Phoenix SQL will ignore the transactions containing the specific System Code.



System Code	Description	Short Name	Affects MPG?	System Code	Description	Short Name	Affects MPG?
01	Unleaded	Unld	<input checked="" type="checkbox"/>	17	Product 17	Pd17	<input checked="" type="checkbox"/>
02	Premium	Prem	<input checked="" type="checkbox"/>	18	Product 18	Pd18	<input checked="" type="checkbox"/>
03	Regular	Reg	<input checked="" type="checkbox"/>	19	Product 19	Pd19	<input checked="" type="checkbox"/>
04	Marked Fuel	Mkrd	<input checked="" type="checkbox"/>	20	Product 20	Pd20	<input checked="" type="checkbox"/>
05	#1 Diesel	Dsl1	<input checked="" type="checkbox"/>	21	Product 21	Pd21	<input checked="" type="checkbox"/>
06	#2 Diesel	Dsl2	<input checked="" type="checkbox"/>	22	Product 22	Pd22	<input checked="" type="checkbox"/>
07	Gasohol	Gahl	<input checked="" type="checkbox"/>	23	Product 23	Pd23	<input checked="" type="checkbox"/>
08	Alcohol	Alch	<input checked="" type="checkbox"/>	24	Product 24	Pd24	<input checked="" type="checkbox"/>
09	Propane	Prop	<input checked="" type="checkbox"/>	25	Product 25	Pd25	<input checked="" type="checkbox"/>
10	LPG	LPG	<input checked="" type="checkbox"/>	26	Product 26	Pd26	<input checked="" type="checkbox"/>
11	LubeOil 1	Lub1	<input checked="" type="checkbox"/>	27	Product 27	Pd27	<input checked="" type="checkbox"/>
12	LubeOil 2	Lub2	<input checked="" type="checkbox"/>	28	Product 28	Pd28	<input checked="" type="checkbox"/>
13	TransOil	Tran	<input checked="" type="checkbox"/>	29	Product 29	Pd29	<input checked="" type="checkbox"/>
14	Coolant	Cool	<input checked="" type="checkbox"/>	30	Product 30	Pd30	<input checked="" type="checkbox"/>
15	Water	H2O	<input checked="" type="checkbox"/>	31	Product 31	Pd31	<input checked="" type="checkbox"/>
16	Air	Air	<input checked="" type="checkbox"/>	32	Product 32	Pd32	<input checked="" type="checkbox"/>

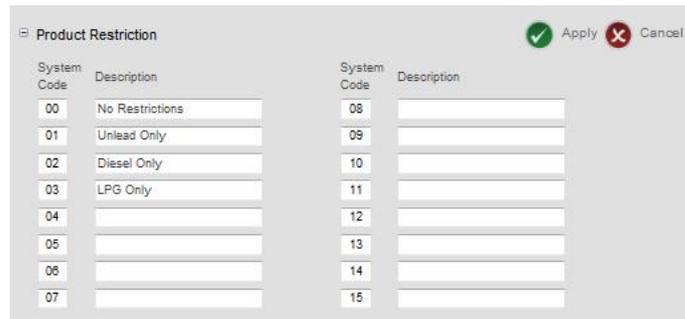
If an **Affects MPG?** check box is cleared it will not affect existing transactions that are contained in the Phoenix SQL database. Changing the status of the **Affects MPG?** check box only affects transactions polled after the field is changed. Product parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears. Clicking the **Cancel** button terminates the operation and leads back to the main System Setup page.

### 2.4.8 Product Restriction

The **Product Restriction** section in System Setup contains codes that are used to limit the products that can be used by a vehicle. These settings are references to those configured in the Fuel Site Controllers at the fueling locations.

Phoenix SQL recognizes up to 16 two-digit System Codes that can be created in the Product Restriction section. Next to the desired System Code, a phrase that defines the parameters of the Product Restriction should be entered.

**Example:** Unleaded Only, Diesel Only, No Restrictions or All Unleaded.



System Code	Description	System Code	Description
00	No Restrictions	08	
01	Unleaded Only	09	
02	Diesel Only	10	
03	LPG Only	11	
04		12	
05		13	
06		14	
07		15	

Product Restriction codes can be used against accounts affecting all associated cards, or they can be assigned on a card-by-card basis.

Product Restriction parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears. Clicking the **Cancel** button terminates the operation and leads back to the main System Setup area.

### 2.4.9 Quantity Restriction

The **Quantity Restriction** section of System Setup allows for the limiting of the quantity dispensed per fueling transaction. Phoenix SQL recognizes up to 16 two-digit Quantity Restriction codes.

Next to the selected System Code, a Description such as the number of gallons that will be allowed per transaction can be entered, e.g. 20, 40, 60...260, 280, 300.

System Code	Description	System Code	Description
00	No Restriction	08	160
01	25	09	180
02	40	10	200
03	60	11	220
04	80	12	240
05	100	13	260
06	120	14	280
07	140	15	300

Quantity Restrictions parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears. Clicking the **Cancel** button terminates the operation and leads back to the main System Setup page.

### 2.4.10 Message Prompts

The **Message Prompts** section of System Setup is used to view/configure prompts that are available for use on System2 and FSC3000 Fuel Site Controllers running the Multi-trucking software package. This section is used to configure and reference how these prompts are used at the fueling locations.

The **Type** field indicates how the prompt will be displayed on the terminal when presented. “?” = a Yes/No prompt; “N” = Numeric, “A” = Alphanumeric; and “H” =

Hidden. The Length field defines the number of characters allowed during entry of the specific prompt.

Prompt Id	Prompt	Type	Length	Prompt Id	Prompt	Type	Length
A	Refer Fuel Y/N	?	1	K	Driver License #	A	20
B	Mileage	N	6	L	Vehicle License State	A	2
C	Trip #	A	12	M	Vehicle License #	A	20
D	Trip Leg	A	2	N	Trailer License State	A	2
E	PIN	H	8	O	Trailer License #	A	20
F	Employee Id	A	16	P	Driver Name	A	16
G	Vehicle Id	A	12	Q	Purchase Order #	A	8
H	Trailer Id	A	12	R	Control #	A	12
I	Refer Hours	N	7	S	Pro #	N	12
J	Driver License State	A	2	T	Extra Prompt	N	9

Message Prompt parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears. Clicking the **Cancel** button terminates the operation and leads back to the main System Setup page.

### 2.4.11 ChipKey®

The ChipKey® from OPW Fuel Management Systems is a fuel management and security device. ChipKey®s are tiny, durable databases that stand up to abuse or harsh environments. They work with OPW Fuel Management Systems Fuel Island Terminals equipped with ChipKey® readers. Like magnetic

or optical cards, ChipKey@s are inserted into the FIT to activate a pump. Like any key, ChipKey@s are security devices, preventing unauthorized access.

When used with the System and FSC3000 Odometer Reasonability software packages, the Read-Write (R/W) ChipKey@ lets the Fuel Site Controller detect faulty odometer entries. The FSC's Odometer Reasonability feature limits customer mileage entries, which are stored in the ChipKey@.

### 2.4.12 ChipKey® Odometer Lower Limits

Phoenix SQL allows for Upper and Lower ChipKey® limits with 15 unique settings for each range to be configured. These ChipKey® Codes with Description (value) should be set up to match the configuration used in the FSCs.

**ChipKey® Odometer Lower Limit** is the parameter that establishes the low-end range for the miles traveled when a vehicle Odometer entry occurs. ChipKey® Odometer Lower Limit

parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears. Clicking the **Cancel** button terminates the operation and leads back to the main System Setup page.

ChipKey Code	Description	ChipKey Code	Description
01	50	09	100
02	0	10	100
03	0	11	100
04	0	12	100
05	50	13	150
06	50	14	150
07	50	15	150
08	50		

### 2.4.13 ChipKey® Odometer Upper Limits

The **ChipKey® Odometer Upper Limit** is the parameter that establishes the upper end range for the miles traveled when a vehicle Odometer entry occurs.

ChipKey® Odometer Upper Limit parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears. Clicking the **Cancel** button terminates the operation and leads back to the main System Setup page.

ChipKey Code	Description	ChipKey Code	Description
01	100	09	200
02	250	10	400
03	500	11	700
04	1000	12	1000
05	150	13	400
06	300	14	700
07	600	15	1000
08	1000		

### 2.4.14 ChipKey® Daily Limits

**ChipKey® Daily Limits** establishes the number of times in a day that a specific ChipKey® can be used to fuel. These are fixed values within the FSC and cannot be changed within Phoenix SQL.

The “00” ChipKey® Code is generally used as a default setting that puts no limits on the number of daily fuelings for a specific ChipKey®.

ChipKey Code	Description
00	No Daily Limit
01	Allow a single fueling daily
02	Two fuelings allowed daily
03	Three fuelings allowed daily
04	Four fuelings allowed daily
05	Five fuelings allowed daily
06	Six fuelings allowed daily
07	Seven fuelings allowed daily
08	Eight fuelings allowed daily
09	Nine fuelings allowed daily

### 2.4.15 ChipKey® Methods

**ChipKey® Methods** allows ChipKey®s to be programmed to respond in one of five ways when a bad odometer entry is given. These methods are fixed and cannot be changed. These Methods are:

**Method 0:** Bypass. The FSC accepts all odometer entries as reasonable and fueling is always allowed.

**Method 1:** This is the most restrictive Method. After three bad odometer entries, the ChipKey® is invalidated and fueling is not allowed. The fueling system does not accept the ChipKey® until it is reprogrammed. The bad-entry counter is automatically reset to zero after a good odometer entry. The fueling system will not update the odometer reading on the ChipKey® unless it is reasonable.

**Method 2:** Same as Method 1, except for the following two exceptions:

- After the third bad odometer entry the system logs the mileage into the fueling system’s transaction database as “<<<” in the mileage field.
- Fueling is allowed, but only for the current transaction.

ChipKey Code	Description
00	Bypass, all odometer entries are valid
01	Restrictive, after 3 bad entries key is invalid
02	After 3 bad, receipt prints "<<<". Fueling only allowed for current transaction
03	Fueling allowed, 3 bad diff entries prints "===" (key not updated)
04	Fueling allowed, 3 bad diff entries (same as 3), 2 of 3 same

**Method 3:** This Method always permits fueling, but bad entries are logged in two ways:

- If all three bad entries are different, the transaction is flagged on the receipt and on the report with “= = =” in the mileage field. The odometer reading inside the ChipKey® is not updated, but the ChipKey® Bad Entry log is reset to zero. Three additional bad readings for a transaction must be entered to be flagged again.
- If two of the three bad entries are the same, the symbol “>>>” is printed in the mileage field and the odometer value in the ChipKey® is updated with the value that was entered twice.

**Method 4:** This is the same as Method 3, except:

- If two of the three bad entries are the same, the twice-entered value is printed in the mileage field and the odometer value in the ChipKey® is updated with the value. The bad-entry counter is reset to zero after a good odometer entry.

### 2.4.16 Card Status

The **Card Status** section in System Setup allows for the definition of each fueling card as **Valid** (allowed to dispense fuel) or **Invalid** (not allowed to dispense fuel).

Phoenix SQL allows for 15 specific Card Status System Codes and Descriptions, with “00” the default setting for Valid and “01” the default setting for Invalid. “02” can be assigned by the FSC when configured. Other reasons can be defined as needed based on cards are managed. Codes “14” and “15” are assigned by Phoenix SQL based on Account management.

System Code	Description	System Code	Description
00	Valid	08	
01	Invalid	09	
02	Invalid, 3 bad Pins	10	
03	Invalid, Balance Due	11	
04	Invalid, Manager Disapproved	12	
05	Locked Out - Bad Credit	13	
06	Locked Out - Card Lost	14	Associated Account has been
07		15	Account Deleted, Card Orpha

**Examples:** Balance Due, Bad Credit, Manager Disapproval, etc.

Card Status parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears. Clicking the **Cancel** button terminates the operation and leads back to the main System Setup page.

## 2.5 System Errors Log

The **System Errors Log** section of the Administration Section is presented in list form and provides diagnostic information on any internal errors that can occur within the Phoenix SQL application.

User Name	Module	Date	Exception
<input type="checkbox"/> nhill	.Net SqlClient Data Provi...	03/04/2011	Error converting data type varchar to uniqueide...
<input type="checkbox"/> nhill	.Net SqlClient Data Provi...	03/04/2011	Error converting data type varchar to uniqueide...
<input type="checkbox"/> nhill	.Net SqlClient Data Provi...	03/04/2011	Error converting data type varchar to uniqueide...
<input type="checkbox"/> nhill	.Net SqlClient Data Provi...	03/28/2011	Error converting data type varchar to uniqueide...

Use the scroll bar on the right side of the page to view all System Errors that have occurred.

Categories within the System Errors Log include User Name, Module, Date and a brief description of the Exception event. Upon request, a System Error can be exported or Emailed to OPW Tech Service that provides information on the System Error that has taken place.

An Email can only be sent by Phoenix SQL if the system has been configured for SMTP mailing.

To send an Email, the addressee **DOES NOT** need to be in Phoenix SQL's Contact List, which is the case only for this particular Phoenix SQL operation.

## 2.6 User Audit Trail

The **User Audit Trail** section in System Setup tracks accountability within the system. It tracks the Add, Edit and Delete operations that have been executed by Group level users of Phoenix SQL.

Action	User Name	Date Time	Record	Previous Data
ATG Transactions - ATG Data - Delivery - Add	nhill	4/15/2011 1:35:54 PM	1	<a href="#">Previous Data</a>
ATG Transactions - ATG Data - Delivery - Add	nhill	4/15/2011 12:13:00 PM	1	<a href="#">Previous Data</a>
ATG Transactions - ATG Data - Inventory - Add	nhill	4/15/2011 11:46:42 AM	1	<a href="#">Previous Data</a>
FSC Transactions - Transaction Info - Add	nhill	4/15/2011 11:09:41 AM	Site: 808, Date: 04/01/2011, Trans#: M001	<a href="#">Previous Data</a>
Administration - Card Defaults - Edit	nhill	4/13/2011 12:09:20 PM	Single	<a href="#">Previous Data</a>

Use the scroll bar on the right side of the page to view all operations that have occurred.

The User Audit Trail allows for the display of the details for Action, User Name, Date/Time, Record and any Previous Data for a specific Add/Edit/Delete operation that has occurred.

Only Phoenix SQL users with Administrative clearance are allowed to clear the User Audit Trail or make any other modifications. Clicking the **Clear** button on the Ribbon Bar at the bottom of the User Audit Trail page opens an Audit Trail Date Range browser page that allows for the selection of the date range for which Audit Trail data will be cleared, via the Start and End Date fields. When the Start and End Dates are determined, click the **Apply** button to complete the operation. Clicking the **Cancel** button will terminate the operation.



## 2.7 Card Defaults

The **Card Defaults** section within System Setup allows access to the **Card Configuration**, **Verify Prompts (Card Related Prompts)** and **[Read/Write] Chipkey Configuration** sections where default values for selected card operations can be entered.

By setting Card default values, every time “Add” is selected on the Card Info page, after the card type is selected all configured values are pre-loaded in the Card Add page.



Any changes made to the Card Default settings only affects new cards.

Any modifications of these Card Defaults areas are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been updated successfully” appears. Clicking the **Cancel** button terminates the operation and leads back to the main System Setup page.

### 2.7.1 Card Configuration

The **Card Configuration** section within Card Defaults allows for the setting of the five Card Configuration default values.

Fill in all pertinent fields using the dropdown menu lists to select default values for Card Status, Product Restriction, Quantity Restriction, Reasonability and Fuel Zone.

Use the scroll bar on the right of side of the page to view all available options.

Optional information can be filled in for any of the remaining fields.

- The **Expiration Date** area is used to enter a date when the card will expire and no longer be operational on the Fuel Site Controllers. To set an Expiration Date, check the box and use the Calendar to select the date.
- **PIN** is the Personal Identification Number assigned to a particular card. PINs can be up to six numbers long with no letters allowed.
- **Odometer** is the latest odometer reading entered by the cardholder. This field is not editable if the selected Card Type is Driver.

If the Reasonability feature of the Fuel Site Controller is enabled, a value must be entered in the Odometer field when creating a new card. This forces the Fuel Site Controller to prompt for the Odometer and update the Controller’s card-record entry.

- **Daily Allocation** is the volume of fuel that can be drawn against a particular card in a single 24-hour period, from midnight to 11:59 p.m.
- **Monthly Allocation** is the volume of fuel that can be drawn against a particular card each month, from midnight of the first day of the month to 11:59 p.m. on the last day of the month.
- **Estimated MPG** is the expected miles per gallon that a vehicle will deliver.

- **MPG Range** is used as a plus/minus tolerance that is allowed for Estimated MPG value. If configured, an odometer entry can be considered “bad” if the calculated MPG for a transaction is outside of the configured MPG Range.

The **Card Switches** area allows for the indication of unique operational characteristics that can exist for a particular card.

- **Second Language** activates a card’s second language for use in prompts and on receipts, if the Phoenix SQL and Fuel Site Controller have been programmed with a second language.
- **Update Card** tells Phoenix SQL to send the card’s configured information to each site automatically the next time a card update operation is completed.
- **Allow Misc. Entry** tells the Fuel Site Controller to prompt for a miscellaneous keyboard entry.
- **Odometer Entry** tells the Fuel Site Controller to prompt for an odometer entry that allows cardholders to enter an odometer reading when the Odometer Reasonability feature of the Fuel Site Controller is disabled or not in use for this card.
- **Is R/W ChipKey®** tells Phoenix that this card’s record is configured as a read/write ChipKey® card and allows the Fuel Site Controller to detect faulty odometer entries. The FSC then compares cardholder mileage entries to the value stored in the ChipKey to ensure it meets the Reasonability range that has been programmed.

Card Configuration parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been updated successfully” appears. Clicking the **Cancel** button terminates the operation and leads back to the main System Setup page.

### 2.7.2 Verify Prompts

The **Verify Prompts (Card Related Prompts)** section in Card Defaults contains message prompts that are displayed for users of the FSC3000 and System2/Multi-Trucking version of Fuel Site Controllers.

The Multi-trucking network version of OPW-FMS Fuel Site Controller software allows fueling systems to communicate with most major commercial fueling networks. When these networks are enabled, do not alter the meaning of the default prompt.

Reference the Fuel Site Controller User/Configuration Guide for more information on how the meaning of prompts should be altered on the FSC when different networks are in use.

Up to seven possible prompts can be defined for a card type, three of which can be configured as Verified Prompts. The Verified Prompts can be viewed as another form of PIN-type validation, because the validated entries are specific to the card being used.

Verified Prompts card-record fields are: **Verify Letter [L1], Verify Letter [L2], Verify Letter [L3], Entry 1, Entry 2, and Entry 3.** The **Verify Letter** fields allow for the selection of prompts that will be verified and the **Entry** fields that are used to define the data that is verified by the cardholder’s response. The Entry fields do not require data when defining card defaults; these values should be added when adding a card to Phoenix SQL.

The **Prompt Sequence** field must be configured with at least the letters that relate to those selected in the **Verify Letter** fields to determine the order in which the prompts will be

displayed. If the letter is not configured in the Prompt Sequence field, Verify Prompt will not be presented.

Verify Prompts (Card Related Prompts) parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been updated successfully” appears. Clicking the **Cancel** button terminates the operation and leads back to the main System Setup page.

### 2.7.3 [Read/Write] ChipKey® Configuration

The **[Read/Write] ChipKey® Configuration** section in Card Defaults is used to set limits for Read-Write (R/W) ChipKey@s with Mileage Reasonability. These values only need to be configured if using FSC3000 or System2 Fuel Site Controllers with the R/W ChipKey® Mileage Reasonability software installed at the fueling locations.

Values for the six fields are entered (use the dropdown menu lists to select values for the last four of these) according to these parameters:

- **Warning Limit for Odometer:** This is a service warning for mileage. When the entered mileage reaches the configured value, the Fuel Island Terminal will display a “time for service” message before prompting the pump number. This message is designed to remind the driver that the vehicle is due for mileage related maintenance.
- **No Fuel Limit for Odometer:** When the driver enters an odometer reading that meets or exceeds the no-fuel mileage, the FIT will display a “service overdue” (or related) message. At this time, fueling is prohibited and the invalidated ChipKey® must be reprogrammed.

The Warning and No Fuel Limit entries are typically entered at the card level and are not configured for card defaults.

- **Lower Odometer & Upper Odometer:** These values allow for the definition of a (+/-) window of acceptable odometer entries based on the value currently stored on the ChipKey®. If the entered odometer does not fall within this window, the rules defined by the **Method To Force** field determine how bad entries are handled.
- **Daily Fuelings:** The number of times a day the ChipKey® can be used to fuel.
- **Method of Force:** Allows ChipKey@s to be programmed to respond in one of five ways to bad odometer entries. These methods are fixed and cannot be changed. The methods are as follows:
  - **Method 0:** Bypass. The FSC accepts all odometer entries as reasonable and fueling is always allowed.
  - **Method 1:** This is the most restrictive Method. After three bad odometer entries, the ChipKey® is invalidated and fueling is not allowed. The fueling system does not accept the ChipKey® until it is reprogrammed. The bad-entry counter is automatically reset to zero after a good odometer entry. The fueling system will not update the odometer reading on the ChipKey® unless it is reasonable.
  - **Method 2:** Same as Method 1, except for the following two exceptions:
    - After the third bad odometer entry, the system logs the mileage into the fueling system’s transaction database as “<<<” in the mileage field.
    - Fueling is allowed, but only for the current transaction.
  - **Method 3:** This Method always permits fueling, but bad entries are logged in two ways:
    - If all three bad entries are different, the transaction is flagged on the receipt and on the report with “= = =” in the mileage field. The odometer reading inside the ChipKey® is not updated, but the ChipKey® Bad Entry log is reset to zero. Three additional bad readings for a transaction must be entered to be flagged again.

- If two of the three bad entries are the same, the symbol "> > >" is printed in the mileage field and the odometer value in the ChipKey® is updated with the value that was entered twice.
- **Method 4:** This is the same as Method 3 except:
  - If two of the three bad entries are the same, the twice-entered value is printed in the mileage field and the odometer value in the ChipKey® is updated with the value. The bad-entry counter is reset to zero after a good odometer entry. [Read-Write] ChipKey® Configuration parameters are saved only when the **Apply** button is clicked and a message box indicating "Your Record has been updated successfully" appears. Clicking the **Cancel** button terminates the operation and leads back to the main System Setup page.

## 2.8 Fuel Zones

The **Fuel Zone** section in System Setup allows for the configuration of lists typically related to geographic areas that can be assigned to cards in order to limit where a card is allowed to be used. This feature has been provided to help define rules as to where a card can fuel, but also to help control the amount of cards that are managed at a specific site.

Fuel Zones	
Fuel Zone Id	Zone Name
1	West Coast
2	East Coast

### 2.8.1 Fuel Zone Configuration – Add, Edit, Delete

The **Add, Edit** and **Delete** functions are initiated by clicking on their respective buttons on the Ribbon Bar at the bottom of the page.

The **Add Fuel Zone Configuration** is used to add new Fuel Zones to Phoenix SQL. First, click the **Add** button on the Fuel Zone homepage. Enter a Fuel Zone Name, and then check the appropriate Site ID/Site Name checkboxes to assign the desired Fueling Sites. Although Fuel Zones by default limit the region(s) in which a card can fuel, there can be the need to define fuel zones that overlap locations. Phoenix allows for this by enabling multiple Fuel Zones to be assigned to the same site.

At least one checkbox must be selected for each new Fuel Zone that is created.

Add Fuel Zone Configuration parameters are saved only when the **Apply** button is clicked and a message box indicating "Your Record has been saved successfully" appears. Clicking the **Cancel** button terminates the operation and leads back to the main System Setup page.

The **Edit Fuel Zone Configuration** allows for the addition or removal of sites to the selected Fuel Zone. To access the Edit Fuel Zone Configuration page, check the box for the entry to be edited on the Fuel Zone page so that background of that entry turns orange and click the **Edit** button on the Ribbon Bar.

Edit Fuel Zone Configuration parameters are saved only when the **Apply** button is clicked and a message box indicating "Your Record has been saved successfully" appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and leads back to the main System Setup page.

The **Delete** function in Fuel Zones allows a Zone to be removed permanently from the Fuel Zone home page. This function is accessed by first clicking the Fuel Zone to be deleted; its background will change to orange, then clicking the Delete button at the bottom of the page. Upon clicking Delete, a message box asking "Delete Current Record?" will appear. Click "Yes" to permanently delete the record or click "No" to cancel the action and maintain the current information. If "Yes" is clicked, another message box saying "Your Record has been deleted successfully" will appear.

## 2.9 Price Zones

Price Zones	
Price Zone Id	Zone Name
1	Central
2	Midwest

The **Price Zones** option in the Administration menu lets you configure groups of sites in relation to pricing. All sites of a price zone can have pricing updates sent to their Fuel Site Controllers as a group.

**Note:** Before you can configure Pricing at least one Price Zone must be configured.

### 2.9.1 Price Zone Site Configuration – Add, Edit, Delete

The **Add**, **Edit** and **Delete** functions are initiated by clicking on their respective buttons on the Ribbon Bar at the bottom of the page.

The **Add Prize Zone Site Configuration** is used to add new Price Zones to Phoenix SQL. First, click the Add button on the Price Zone homepage. Enter a **Price Zone Name**, and then check the appropriate **Site ID/Site Name** checkboxes to assign the desired Fueling Sites.

Add Price Zone Site Configuration parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears. Clicking the **Cancel** button terminates the operation and leads back to the main System Setup page.

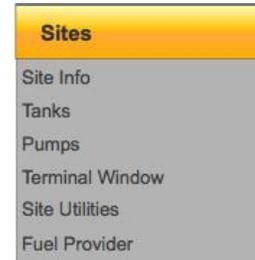
The **Edit Price Zone Site Configuration** allows for the addition or removal of sites to the selected Price Zone. To access the Edit Price Zone Site Configuration page, check the box for the entry to be edited on the Price Zone page so that background of that entry turns orange and click the **Edit** button on the Ribbon Bar.

**Edit Price Zone Site Configuration** parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and leads back to the main System Setup page.

The Delete function in Price Zones allows a Zone to be removed permanently from the Price Zone home page. This function is accessed by first clicking the **Price Zone** to be deleted; its background will change to orange, then clicking the **Delete** button at the bottom of the page. Upon clicking Delete, a message box asking “Delete Current Record?” will appear. Click “Yes” to permanently delete the record or click “No” to cancel the action and maintain the current information. If “Yes” is clicked, another message box saying “Your Record has been deleted successfully” will appear.

### 3 Sites Menu

The **Sites Menu** module is used to enter complete information for all Fuel Site Controller sites that Phoenix SQL will communicate with, in order to manage Cards/Accounts and Transaction data. It is also used to configure the Site's tanks and pumps, if the Site has an OPW-model Automatic Tank Gauge system or a third-party Automatic Tank Gauge system that can support the Veeder-Root TLS350 protocol. Sites that are configured in Phoenix SQL with Automatic Tank Gauges, will be polling the daily Inventories and Delivery history data, which can be used for reporting purposes.



If there is a site that does not have Automatic Tank Gauge equipment installed, configure the site's tanks and pumps so the capability of reporting on tanks can be retained. It would then be possible to input the daily stick inventory readings and deliveries manually into Phoenix SQL.

This setup will allow reports to be run on this manually entered data into the Phoenix SQL database, so tanks can be manually reconciled through the Phoenix SQL software.

The Sites Menu is comprised of the following links:

- Sites Info
- Tanks
- Pumps
- Terminal Window
- Site Utilities
- Fuel Provider

#### 3.1 Site Info

The **Site Info** section of the Sites Menu gives at-a-glance information on all configured sites. The Site ID, Site Name, Address, System Type and Contact information for each site can be viewed.

Site ID	Site Name	Address	System Type	Contact
001	OPW		ART System FSC3000, ...	Hill Natalie
002	22		System2: Multi-truck...	Hill Natalie
009	Mike's Lube	9876 Petro Plaza	System2: Multi-truck...	Smith Joe
123	Joe's		System2: Multi-truck...	Smith Joe
808	Highlands	2376 Grey St.	ART System FSC3000, ...	Smith Joe
999	enewer		No FSC/Integrated FS...	Hill Natalie

A logged-on Administrator-level user can view all of the site's information. A logged-on Group-level user can only view the information for sites for which they've been given access. If the logged-on user is an Administrator, the following operations are allowable:

- Can Add a new site
- Can Edit and Delete any site
- Can Poll the site and see its History

If the logged-on user is a Group-level user, the access level of the Site Group will determine how the User can or cannot have the proper access level to perform the Adding, Editing or Deleting of Sites within their assigned Site Group.

A Site Group level user with **Manage** access rights can perform all Site Group level functions (Add, Edit and Delete) of any site within the Site Group that the Site Group level user is assigned to. Sites can also be polled, and History statuses of the Sites within their Group can be viewed.

The Site Group Access Levels are created by the Phoenix SQL Administrator.



The **Add, Edit, Delete, Poll Site** and **History** buttons are located at the bottom of the Site Info page.

### 3.1.1 Add Site Configuration

The **Add Site Configuration** section is accessed by clicking the **Add** button on the Ribbon Bar at the bottom of the Site Info page and exists to enter all of the pertinent information about a single site.

This information is contained in four unique sections within Add Site Configuration: General Site Information, Communication Setup, FSC: Miscellaneous and ATG: Miscellaneous. Use the +/- radio button to view/hide the information for each specific section.



There are specific areas in the General Site Information, Communication Setup and FSC: Miscellaneous sections of the Add Site Configuration section, marked by an asterisk (\*), that require information to be entered before a new Site Configuration can be completed. They are:

- In **General Site Information**: Site ID, Site Name and Site Manager
- In **Communication Setup**: FSC Type, Password 1, Password 2 and Password 3

These are passwords that are configured in Fuel Site Controllers.

- In **FSC: Miscellaneous**: Short Name

All changes to any of the four areas within the Add Site Configuration section are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and returns the user to the main Site Info page.

### 3.1.2 Add Site Configuration – General Site Information

The **General Site Information** section of Add Site Configuration is used to enter the information for a new site.

Required fields are indicated by an asterisk (\*) with **Site Manager** selected from the choices found in the dropdown menu. **Site ID** is a three-digit number from 000-998 with 999 reserved for off-site fueling. **Site Name** can be any combination of lower-case and upper-case letters and numbers up to 50 characters. The **Notes** field can have added information, such as additional site contacts, emergency contacts listed, tech support contacts, etc.

The Add Site Configuration operation can only be completed when the required fields, marked by an asterisk (\*), in **Communication Setup** (FSC Type, Password 1, Password 2 and Password 3) and **FSC: Miscellaneous** (Short Name) are also populated. Use the +/- radio button to expand/contract those specific sections.

Use the scroll bar on the right side of the page to view information found at the bottom of the page.

The Add Site Configuration parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears; click **OK** to close the message box.

**Reminder:** All required fields must be populated in Communication Setup and FSC: Miscellaneous for the parameters to be saved.

Clicking the **Cancel** button terminates the operation and leads back to the main Site Info page.

### 3.1.3 Add Site Configuration – Communication Setup

The **Communication Setup** section of Add Site Configuration is used to enter the communication parameters for a new site, enabling Phoenix SQL to “talk” with the site. Required fields in the FSC Communications Setup/FSC Configuration area are indicated by an asterisk (\*) with the FSC Type selected from the choices found in the dropdown menu.

Use the scroll bar on the right side of the page to view information found at the bottom of the page.

Once the FSC Type is selected, the Connection Method dropdown menu will become active. Choices in the Connection Method menu are **Direct Connect**, **Dial-Up** and **Network TCP/IP**.

Selecting Direct Connect, Dial-Up or Network TCP/IP will activate their appropriate fields and dropdowns, in which the proper parameters for the system being added must be chosen or inserted.

The Modem Init field only becomes active when the Dial-Up Connection Method is selected; a Phoenix SQL default value will populate that field.

Selecting Dial-Up will activate the Pre-Dial String and Post-Dial String fields. These are used if the fueling site has a data switchbox. These characters are sent out through communication ports before the modem is dialed and after the modem connects, respectively. The switchbox uses the character strings in place of a physical switch to select a device. Strings will vary from user to user.

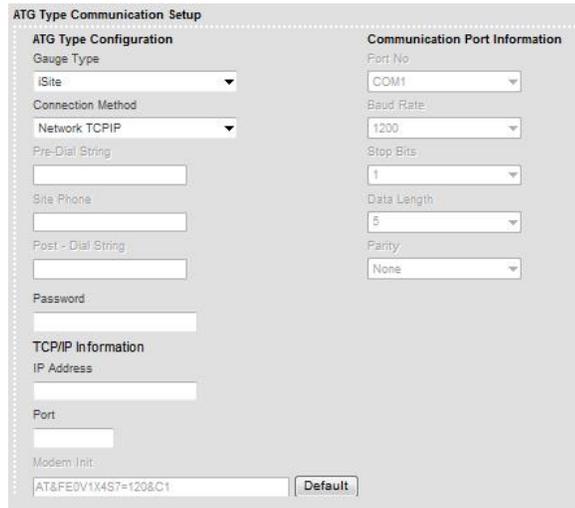
Selecting any of the Connection Methods will activate the three Password Fields:

- **Password 1** is the **Remote** password used for either a Network TCP/IP or a dial-in modem connected to the Fuel Site Controller. The factory default password is usually “hello”.
- **Password 2** is the Show password. This password feature is only available with System2 Fuel Site Controllers. When the **Show** password mode is enabled in the FSC and a remote connection is being utilized using the **Remote** password, a \$ prompt will be displayed on the terminal chat screen. This will prevent any information from being viewed unless the **Show** password is entered to gain access to the show/view mode of the System2 FSC. This feature is not supported in the FSC3000 controllers. The factory default password is “hello”.

- **Password 3** is the Privileged password. This password allows for high-level program access and control, including editing. If a PCI-compliant version of the FSC3000 firmware is in use, Password 3 is the **Partial Access** password setting used in the FSC3000 controller. The factory default password is "hello".

To activate the fields in the ATG Type Communication Setup/ATG Type Configuration area, the Gauge Type must be selected in the dropdown menu.

Once the Gauge Type is selected, the Connection Method dropdown menu will become active. Connection Method choices are **Direct Connect**, **Dial-Up**, **FSC Pass-through Port** and **Network TCP/IP**. Selecting any of the Connection Methods will activate the appropriate fields and dropdown menus, in which the proper parameters must be chosen/inserted for the system being added.



The Modem Init field only becomes active when the Dial-Up Connection Method is selected and a Phoenix SQL default value populates that field.

If there is no ATG equipment at the Site and it is desired to manually input daily Inventory Stick readings and Delivery ticket information into the Phoenix SQL software for reporting purposes, set the Gauge type to “**No Gauge**.” The Site Tanks and Pumps will still be required to be configured for this No Gauge Site, in order to manually input the Inventory and Delivery data.

The Add Site Configuration operation can only be completed when the required fields on **General Site Setup** (Site ID, Site Name and Site Manager) and **FSC: Miscellaneous** (Short Name) are also populated. Use the +/- radio button to expand/contract those specific sections.

The Add Site Configuration parameters are saved only when the **Apply** button is clicked and message box indicating “Your Record has been saved successfully” appears; click **OK** to close the message box.

**Reminder:** All required fields must be populated in the General Site Setup and FSC: Miscellaneous for the parameters to be saved.

Clicking the **Cancel** button terminates the operation and returns the user to the main Site Info page.

### 3.1.4 Add Site Configuration – FSC: Miscellaneous

The **FSC: Miscellaneous** section of Add Site Configuration is used to assign a Short Name that identifies the site, perform card updates (if any exist) after the transaction poll, and “Clear” the Fuel Site Controller’s transaction memory after the poll process is complete.

**Poll** refers to retrieving or downloading the Fuel Site Controller’s stored transaction data and storing this data in the Phoenix SQL program.

First, a **Short Name** for the fuel site that is used in the Fuel Site Controller must be entered in the blank field marked by an asterisk (\*). This Short Name cannot exceed 12 characters, including spaces. This entry can be alphanumeric. It is then possible check the **Update Card After Poll** or **Clear Transaction After Poll** boxes.

Update Card After Poll should be checked if updating the account/cards once the site has been polled is desired. Clear Transactions After Poll should be checked if clearing the card transactions after the site has been polled is desired.

The Add Site Configuration operation can only be completed when the required fields on General Site Setup (Site ID, Site Name and Site Manager) and Communication Setup (FSC Type, Password 1, Password 2 and Password 3) are also populated. Use the +/- radio button to expand/contract those specific sections.

The Add Site Configuration parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears; click **OK** to close the message box.

**Reminder:** All required fields must also be populated in the general Site Setup and Communication Setup for the parameters to be saved.

Clicking the **Cancel** button terminates the operation and returns the user to the main Site Info page.

### 3.1.5 Add Site Configuration – ATG: Miscellaneous

The **ATG: Miscellaneous** section of Add Site Configuration allows for the identification of the Primary Fuel Provider for a site and the status of the tank gauging system at the site. The **Primary Fuel Provider** is selected from the dropdown menu. Check the **Gauge has reconciliation enabled** box if the site has a gauge type such as EECO 2000, SiteSentinal® 1, iSite, etc. This option is used only if the Tank Gauge equipment is equipped with its own reconciliation software interface.

The Add Site Configuration parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and leads back to the main Site Info page.

### 3.1.6 Edit Site Configuration

The **Edit Site Configuration** page is accessed by clicking the **Edit** button on the Ribbon Bar at the bottom of the Site Info page and allows for the change of information in an already-existing Site entry. Use the +/- radio button to view/hide the information for each specific section.

The required fields, marked by an asterisk (\*), in the **General Site Information** (Site ID, Site Name, and Site Manager), **Communication Setup** (FSC Type, Password 1, Password 2 and Password 3) and **FSC: Miscellaneous** (Short Name) must all be populated before any changes to any section can be completed.



The Edit Site Configuration parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and returns the user to the main Site Info page.

### 3.1.7 Site Info – Delete Entry

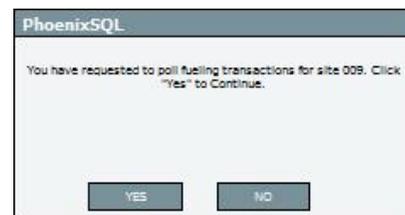
The **Delete** function allows an entry to be removed permanently from the Site Info home page. This function is accessed by first clicking the Site to be deleted; its background will turn orange, then clicking the Delete button at the bottom of the page. Upon clicking Delete, a box asking “Delete Current Record?” will appear. Click “Yes” to permanently delete the record, or “No” to cancel the action and maintain the current information.



### 3.1.8 Site Info – Poll Site

The **Poll Site** function within Site Info exists to manually download all of the transactions that have taken place at a specific fueling site. This information is retrieved from the Fuel Site Controller and then stored in the Phoenix SQL database.

Once the transactions have been polled and stored in the database, the new transaction data can be viewed, reports run or exported.



This function is activated by first clicking the Site to be polled; its background turns orange, then clicking the **Poll Site** button at the bottom of the page. Upon clicking Poll Site, a box noting “You have requested to poll fueling transactions for site (Site ID). Click “Yes” to continue the operation or “No” to terminate the operation and return to the main Site Info Page.

### 3.1.9 Site Info – History

The **History** function within Site Info allows for the results of the polled and imported fuel transactions, inventories, and deliveries from a selected site to be displayed.

This function is activated by first clicking the Site whose History is to be viewed; its background will turn orange, then clicking the **History** button at the bottom of the page. This will open up an Import Summary window displaying a table with the data import results of each site that was polled.



## 3.2 Tanks

The **Tanks** section of the Sites Menu identifies which fuels are in which underground storage tanks at a site. If logged-on as an Administrator, it is possible to:

- Add a new Tank
- Edit or Delete any Tank

If logged-on as a Site-Group user with View or Edit access, the capabilities are:

- Cannot Add a Tank site within the Site Group
- Add, Edit or Delete a Tank to a Site within the assigned Site Group only.
- Choose the Site/Tanks to be viewed by choosing the desired Site ID from the dropdown menu.

Site ID	Tank ID	Product	Tank Type
001	1	Unleaded	Standard
009	2	Regular	Standard/Primary
808	1	Unleaded	Standard

### 3.2.1 Tank Configuration – Add, Edit, Delete (to be used with ATG sites)

The **Add**, **Edit** and **Delete** functions are initiated by clicking on their respective buttons on the Ribbon Bar at the bottom of the page.

**Add Tank Configuration** in the Tanks section exists to Add information for new storage tanks at a specific site. The Tank Configuration section for the Site needs to match the Automatic Tank Gauge tank configuration and information must be entered into all of the four required dropdown menus in the Tank Information area, which are marked by an asterisk (\*). These are Site ID, Tank ID, Tank Type and Product.

Tank Information	
Site ID	808 Highland
Tank ID	5
Tank Type	Blended
Product	<-- Select -->
Blend Information	
Primary Tank ID	<-- Select -->
Secondary Tank ID	<-- Select -->
Primary Blend Percentage	<-- Select -->
Manifold Master Tank ID	<-- Select -->

**Site ID** contains all of the configured tanks for a specific site. Select the Site to which a new tank is to be added.

If the Site was configured in the Sites Info window without an ATG selection, it will not appear in the Site ID dropdown list!

**Tank ID** lists the Tanks located at a specific site, by number.

If a new tank is being added, it is automatically assigned the next available Tank ID number in the sequence; this function can be overridden if a different number is desired. The same Tank ID cannot be assigned to two different Tanks.

Depending on the configuration of the fueling site, **Tank Type** choices can include Standard, Standard/Primary, Standard/Secondary, Manifold Master, Manifold Slave, Manifold Master/Primary, Manifold Master/Secondary and Blended. Tanks must be assigned to one of the following types:

- **Standard Tank** is a stand-alone independent tank not associated to any other tank, reconciled by itself.
- **Standard Primary Tank** is a stand-alone tank used for direct product draw. It is also used to provide the primary percentage of fuel used in a blended product.
- **Standard Secondary Tank** is a stand-alone tank used for direct product draw. It is also used to provide the secondary (or lower) percentage of fuel used in a blended product.

**Manifold Tank Groups** are when two or more tanks are physically connected (manifolded) and a larger “tank group” is created. Groups are configured within the tank gauge system, so fuel movement is treated

as a single entity. Although the tank gauge reports volume/inventory for each tank within the group, deliveries are only reported to a single tank (the Manifold Master) in the group.

Phoenix SQL supports tank groupings with the following tank types:

- **Manifold Master Tank** is the main tank in a manifold group that the Site's tank gauge system reports deliveries to. In most cases it is the lowest Tank number defined in a group.
- **Manifold Slave Tank** is all the other tanks in a group that are connected to a Manifold Master. The Tank Gauge system reports inventory only to slave tanks.
- **Manifold Master Primary Tank** is similar to a Manifold Master Tank, except it provides direct product draw and is a blended product's primary fuel percentage.
- **Manifold Master Secondary Tank** is similar to a Manifold Master Tank, except it provides direct product draw and is used as the secondary (or lower) percentage of fuel used in a blended product.
- **Blended Tank** is a virtual tank that does not exist in the ground or within the tank gauge system. It represents the pairing of two tanks where the products are blended together to create a third. All pairings consist of one Primary and one Secondary tank type. These pairings could consist of a Standard Primary and Standard Secondary or a Manifold Master Primary and a Standard Secondary depending on how the particular site is configured.

**Product** is the type of Products that are available at a particular fueling site, such as Premium, Unleaded, Regular, #1 Diesel, Propane, LPG, Lube Oil, Water, Air, etc. Only upon selecting Manifold Slave or Blended in the Tank Type dropdown menu do any of the dropdown menus in the Blended Information area become active.

Manifolded Tanks are two or more tanks that are connected by a piping system, allowing them to share product, often for blending applications. **Example:** Blending regular unleaded gasoline with premium unleaded gasoline to make mid-grade unleaded gasoline.

When selecting **Manifold Slave** as the Tank Type, the Manifold Master Tank ID dropdown menu becomes active. Then select the Tank ID for the Manifold Master tank.

The Manifold Master Tank is the tank from which the Manifold Slave Tank will receive product; the Manifold Master tank must be configured before the Manifold Slave Tank is configured.

When selecting **Blended** as the Tank Type, the Primary Tank ID, Secondary Tank ID and Primary Blend Percentage dropdown menus become active. When configuring a Blended Tank, the configured Primary and Secondary tanks that will be used to create the blend must be associated and the Blend Percentage of the fuel taken from the Primary Tank set, which will be providing the larger portion of the blend to the smaller portion of the blend coming from the Secondary Tank. Available Blend Percentage choices in the dropdown menu are 51% to 75%.

If the Blend Percentage is 50% it does not matter which tank is designated as the Primary Tank. Add Tank Configuration parameters are saved only when the **Apply** button is clicked and a message box indicating "Your Record has been saved successfully" appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and leads back to the main Sites page.

The **Edit Tank Configuration** function exists to change the information for an already-existing Tank at a fueling site. This function is accessed by first clicking the Tank to be edited; its background will turn orange, then clicking the **Edit** button at the bottom of the page.

Upon clicking Delete, a box stating “Deleting a tank will cause all associated delivery and inventory information to be deleted as well. It is recommended to archive the tank data before deleting. Lost data cannot be recovered! Delete Tank? Click ‘OK’ to continue.” Click “Yes” to permanently delete the record, or click “No” to cancel the action and maintain the current information. If “Yes” is clicked, a message box saying “Your record has been deleted successfully” will appear; click **OK** to close the message box.

### 3.3 Pumps

(to be used with ATG sites)

The **Pumps** section of the Sites Menu allows for the identification of the Pumps that are configured for Tanks at a site. If the logged-on user is an Administrator, it is possible to:

Site ID	Pump ID	Hose 1	Hose 2	Hose 3	Hose 4
001	01	Tank 1 - Unleaded			
001	02	Tank 1 - Unleaded			

- Add a new Pump
- Edit or Delete any Pump

If the logged-on user has Site View or Edit Group Access, the capabilities are:

- Cannot Add a new Pump
- If the logged-on user has Site Manage Group Access it is possible to Add, Edit or Delete a Pump.

The Site/Pumps are viewed by choosing the desired Site ID from the dropdown menu. Once the Site is selected from the Site ID dropdown menu, the configured pumps for that chosen site are displayed. The Pump ID and the product grade(s) that are mapped to each hose position of the displayed pump(s) will be displayed.

#### 3.3.1 Pump Configuration – Add, Edit, Delete

The **Add**, **Edit** and **Delete** functions are initiated by clicking on their respective buttons on the Ribbon Bar at the bottom of the page.

**Add Pump Configuration** in the Pumps section exists to Add information for new pumps at a specific site, as well as the hoses associated with the pumps. To Add a Pump Configuration, information must be entered into both of the two required dropdown menus in the Pump area, which are marked by an asterisk (\*). These are Site ID and Pump #.

**Pump**

Site ID: 808 Highland \*

Pump #: 01 \*

**Hose Mapping**

Hose 1	Tank 1 - Unleaded	Hose 5	Select Product
Hose 2	Tank 1 - Unleaded	Hose 6	Select Product
Hose 3	Tank 1 - Unleaded	Hose 7	Select Product
Hose 4	Tank 1 - Unleaded	Hose 8	Select Product

- **Site ID** lists all fueling sites in the system; choose the site that the new pumps will be added to.
- **Pump #** is a number that identifies a specific pump at a fueling site, ranging from 01-99 in the dropdown. A new pump is automatically assigned the next available pump number. This action can be overridden, if desired.

Once the Site ID is selected, the dropdown menus in the Hose Mapping area will become active. Use the dropdown menus to select the product that will be used in **Hose 1**, **Hose 2**, **Hose 3**, etc.

Not all Pumps will make use of eight hoses; select the products for only the number of hoses that a Pump will be utilizing. The pump/hose configuration needs to match the pump/hose configuration of the Fuel Site Controller the Phoenix SQL will be polling data from. At least one hose must be selected in order to complete the configuration process.

Add Pump Configuration parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and leads back to the main Sites page.

The Edit Pump Configuration function allows for the changing of information for an already-existing Pump configured for an existing Phoenix SQL Site. This function is accessed by first clicking the Site ID where the Pump is located to be edited; its background will turn orange, then click the **Edit** button at the bottom of the page.

To Edit a Pump Configuration, make certain that the correct information is entered into both of the two required dropdowns in the Pump area, which are marked by an asterisk (\*). These are Site ID and Pump #. Once the Site ID is selected, the dropdown menus in the Hose Mapping area will become active. Use the dropdown menus to select the Hose information that will be edited, if any.

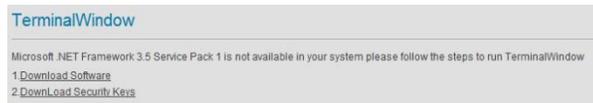
Edit Pump Configuration parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and leads back to the main Sites page.

The **Delete** function in Pumps allows a Pump Configuration listing to be removed permanently from the Pumps home page. This function is accessed by first clicking the Pumps to be deleted; their backgrounds will turn orange, then clicking the Delete button at the bottom of the page. Upon clicking Delete, a box asking “Delete Current Record?” will appear. Click “Yes” to permanently delete the record, or click “No” to cancel the action and maintain the current information.

If there is no Automatic Tank Gauge at the Fuel Site, tank stick inventories and deliveries can be manually input for reporting purposes, if desired. Tanks and pumps must still be configured in this section.

### 3.4 Terminal Window

The **Terminal Window** is used to open live communication to the site controller via DOS terminal emulation. The terminal window allows for the change of settings of the fuel site controller, such as the price, add a pump or change display messages.



Before the Terminal Window can be accessed, **the Security Keys must be Downloaded.**

Microsoft .NET Framework 3.5 Service Pack 1 must be installed on the local PC before running the Terminal Window. Click **Download Software** and follow the necessary installation process.

1. To install, click on the **Download Security Keys** link.
2. Open/Save the Security Keys file.
3. To extract all files, follow the prompts of the installation wizard to proceed with the file extraction.



Make sure “show extracted files” is checked.

4. Click on Security Keys file, and click on InstallTerminalWindowLicenseKey.
5. Run to install security keys. When done, all windows can be exited.

To open the Terminal Window, click the **Open Terminal** link. A new browser window will open. Select the site to connect to and enter the site's password. Here it is possible to change the settings of the fuel site controller using the command-line specific commands.

The **Capture to File** option saves all the data going through the terminal in a .txt file for later reference.

[OpenTerminal](#)

[DownLoad Security Keys](#)

### 3.5 Site Utilities

The **Site Utilities** page within the Sites section allows users logged in as Administrators to see all of the sites that are configured in the Site ID dropdown menu. If logged on as a Group-level user, the only sites that will be seen in the Site ID dropdown menu are those that are accessible within the Group.

Site ID	Site Name	Address	System Type	Contact
001	OPW		ART System FSC3000, ...	Hill Natalie
002	Z2		System2: Multi-truck...	Hill Natalie
009	Mike's Lube	9876 Petro Plaza	System2: Multi-truck...	Smith Joe
123	Joe's		System2: Multi-truck...	Smith Joe
808	Highlands	2376 Grey St.	ART System FSC3000, ...	Smith Joe
999	eneww		No FSC/Integrated FS...	Hill Natalie

The Site Utilities page also allows for the performance of a Site Backup (Fuel Site Controller configuration) from all System2 Fuel Site Controllers. Note that PCI-compliant FSC3000 systems do not support this feature.

The site configuration can be Restored back to the Site and transactions imported from the USB key used with Integrated FSC3000 sites.

If requested by Tech Support personnel, the communications log from a specific site and date can be Emailed. Site ID is a required field indicated by an asterisk (\*).

#### 3.5.1 Site Utilities – Run Backup

The **Backup** operation in Site Utilities backs up all configurations found within a site's Fuel Site Controller.

When connecting to the FSC3000 with Multi-Trucking software 1.9A or higher, the Backup/Restore feature is no longer available.

Site ID: 001 xxxxxxxxxxxxxx \*

Backup

Restore

Import Poll File

Choose TRN File:

Email Log File

Select Date:

To execute the Backup operation, a fueling site must be selected from the Site ID dropdown menu, the Backup button must be chosen and **Run** must be clicked at the bottom of the page. After clicking Run, a message box stating, "You are about to perform a System Backup of site ####. Fueling will be suspended at the site during this time. Click 'Yes' to continue." Click "Yes" to continue the operation or click "No" to terminate the operation and return to the main Site Utilities page.

When/if the Backup operation is accepted, the status of the ongoing operation can be monitored by clicking on the **Refresh Status** button at the bottom of the page. To halt the viewing of status information for the Backup operation, click on the **Clear** button at the bottom of the page.

#### 3.5.2 Site Utilities – Run Restore

The **Restore** operation in Site Utilities restores all configurations found within a site's Fuel Site Controller. This process is normally used if the FSC lost all configuration data due to battery or hardware failure/replacement.

When connecting to the FSC3000 with Multi-Tracking software 1.9A or higher, the Backup/restore feature is no longer available. To run the Restore operation, a

Site ID: 001 xxxxxxxxxxxxxx \*

Backup

Restore

Import Poll File

Choose TRN File:

Email Log File

Select Date:

fueling site must be selected from the Site ID dropdown menu, the Restore button must be chosen and **Run** must be clicked at the bottom of the page.

After clicking “Run,” a message box stating, “You are about to perform a System Restore to site ###. This operation should NOT be performed unless the site is being restored after service. Warning: All Cards and Fueling Transactions will be lost! Click ‘Yes’ to continue.” Click “Yes” to continue the operation or click “No” to terminate the operation and return to the main Site Utilities page.

When/if the Restore operation is accepted, the status of the ongoing operation can be monitored by clicking on the **Refresh Status** button at the bottom of the page. To halt the viewing of status information for the Restore operation, click on the **Clear** button at the bottom of the page.

### 3.5.3 Site Utilities – Import Poll File

The **Import Poll File** operation within Site Utilities is designed for those who have an integrated system and need to import transactions stored on a USB key and in the form of a .trn file.

To see the results of importing a .trn file, go to the corresponding Site page and view the History.

To Import a Poll File select a site from the site ID dropdown menu and click the **Import Poll File** button. This will activate the Choose TRN File field. Click the **Browse** button to select the desired .trn file, then click on it so that it populates the Choose TRN Field. Click the **Run** button at the bottom of the page to import the poll file. A message box will appear with the following message “Please wait TRN file will be uploaded.” Once completed, the next message box will display “Import TRN file is completed successfully,” click **OK** to close it.

### 3.5.4 Site Utilities – Email Log File

The **Email Log File** operation within Site Utilities displays site communication log files, which are recorded by the Phoenix SQL system by day, by site.

A log file includes all of the interaction between the Phoenix SQL system and the Fuel Site Controller as it occurs.

This operation allows for the choice of the site and date of the log file that it is desired to email. The Email Log File allows for the forwarding of an Email to tech service or any individual who requested the specific information. The log file is also Emailed to you.

To execute the operation, select the appropriate site from the Site ID dropdown menu, which is a required field marked by an asterisk (\*), click the **Email Log File** button, which activates the Select Date field and then select the date of the log files to be emailed by clicking on the Calendar icon.

The Select Date field can only be populated by selecting a date from the Calendar icon.

After the date is entered, click the **Run** button to complete the Email Log File operation.

### 3.6 Fuel Provider

The **Fuel Provider** page within the sites section displays a list of the Fuel Providers that are available to be assigned to any fueling site configured in Phoenix SQL, as well as up to five products that are supplied by each provider.

Fuel Provider						
Fuel Prov Id	Name	Address1	Address2	City	State	Zip Code
1	Joe's Fuel	111 PetroL...		Oil City	Texas	11111
2	JD Cutler...	3651 Haywa...		LaGrange	IL	60525

#### 3.6.1 Fuel Provider Configuration – Add, Edit, Delete

The **Add**, **Edit** and **Delete** functions are initiated by clicking on their respective buttons on the Ribbon Bar at the bottom of the page.

**Add Fuel Provider Configuration** in the Fuel Provider section allows for the adding of information for new fuel providers at a specific fueling site, as well as up to five products that are supplied by each provider.

Name	JD Cutler's Fuel *	Product 1	
Address 01	3651 Hayward St	Product 2	
Address 02		Product 3	
City	LaGrange	Product 4	
State	IL	Product 5	
Zip Code	60525	Fax Number	
Country	USA	Phone 1	
Contact Name	Joe Doe *	Phone 2	
Email		Memo	

To Add a Fuel Provider Configuration, information must be entered into both of the two required menu-item selections, which are marked by an asterisk (\*). These are Name and Contact Name.

- **Name** is the name of the company that is providing fuel.
- **Contact Name** is the name of the main contact person at the company.
- Examples of **Products** that can be listed in the Product 1-5 fields are Unleaded Regular, Diesel, Ethanol, LPG, etc.

Add Fuel Provider Configuration parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and returns the user to the main Site page.

The **Edit Fuel Provider Configuration** function is used to change/modify the information for an already-existing Fuel Provider at a fueling site. This function is accessed on the Fuel Provider home page by first clicking the Fuel Provider ID that is to be edited until its background turns orange, then clicking the Edit button at the bottom of the page.

To Edit a Fuel Provider Configuration, make certain that the correct information is entered into both of the two required dropdown menus in the Pump area, which are marked by an asterisk (\*).

Edit Fuel Provider Configuration parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and returns the user to the main Sites page.

The **Delete** function in Fuel Provider allows a Fuel Provider Configuration listing to be removed permanently from the Fuel Provider home page.

This function is accessed by first clicking the Fuel provider listing to be deleted; its background will turn orange, then clicking the Delete button at the bottom of the page. Upon clicking Delete, a box asking “Delete Current Record?” will appear. Click “Yes” to permanently delete the record, or click “No” to cancel the action and maintain the current information.

### 3.7 Pricing



The **Pricing** option of the Sites menu is where pricing information for **Price Zones** is configured.

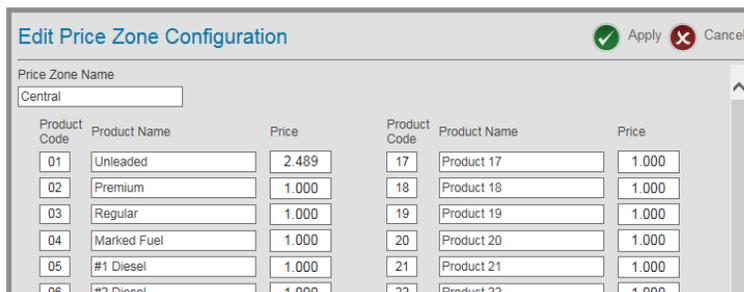
Before you can configure **Pricing** at least one **Price Zone** must be configured in Administration > Price Zones.

There are two (2) panels on the **Pricing** screen:

The left panel shows all of the current Price Zones that have been configured in the system. Click an entry in the left panel to select it so its background turns orange. The Status panel will appear on the right.

The Status panel on the right shows the Site IDs of the Sites in the Zone, the Date of a pricing change and the Status of that change. If the Status shows as "Not Send" the latest pricing for that Prize Zone has not yet been sent to that site. Click the **Price Send** button in the Ribbon Bar to send the latest pricing to all sites in the Price Zone.

To edit the pricing of the selected Price Zone click the **Edit** button on the Ribbon Bar. The Edit Price Zone Configuration screen will come up.



Make all applicable changes to products in the Price column.

**Edit Price Zone Configuration** parameters are saved only when the **Apply** button is clicked and a message box comes into view that shows, "Your Record has been saved successfully." Click **OK** to verify. Click the **Cancel** button to stop the operation and return to the main System Setup page.

## 4 Accounts

The **Accounts** menu provides options that can be used to delineate fuel usage by Division, Building, Organization, Customer or any other Phoenix SQL user-defined grouping that will have its own account cards that will require separate account reporting.



The Accounts menu is comprised of the following links:

- Accounts Info
- Deleted Accounts

### 4.1 Accounts Info

The **Accounts Info** area of the Accounts menu provides a complete at-a-glance list of the accounts that are enabled in the Phoenix SQL system. If the logged-on Phoenix SQL user is an Administrator, the following options are available:

Account Number	Name	Contact	Phone	# of Cards	Last Used	Status
1234	Eddie's Shipping	Smith Joe	888-123-4567	2		Valid
Global Card	Global Card			0		Valid
Site 1	Joe's Fuel	Smith Joe	888-123-4567	3		Valid
St. Louis - MO	J & J Transport			0		Valid

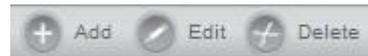
- Add a new Account
- Edit or Delete any Account

If the Logged-on user is a Group-level user, the following options are available:

- Cannot add an Account
- Can Edit or Delete an Account based on their security access level within the Group

Clicking Accounts Info in the Accounts menu allows the user to view a list of current accounts along with Account Number, Name, Contact, Phone, # of Cards, Last Used and Status for each Account.

**Add, Edit or Delete** user Accounts within the Phoenix SQL application by clicking on the appropriate Add, Edit or Delete button at the bottom of the page.



#### 4.1.1 Add Account Configuration

Additional sections can appear in the Account Configuration section depending on the initial Phoenix SQL setup. For instance, if any of the FSC types are set to either of the System2® Multi-Trucking or the ARTWare® FSC3000 FSC types under the Site Info's Communication Setup under FSC Type, the following sections will become available:

- **FSC Account** section will appear in the **Account Configuration** section. FSC uses Account Cards if enabled under the Administration > System Setup > Fuel Site Controller.
- **Verified Prompts** section will appear in the **Account Configuration** section under Miscellaneous Account Data.

The **Add Account Configuration** section is accessed by clicking the **Add** button on the Accounts page, and allows for the entering of all pertinent information for a new account.

This information is contained in unique sections within Add Account Configuration: Account Information, Account Contact, FSC Account, Miscellaneous Account Data, and Verified Prompts. Use the +/- radio button to view/hide the information for each specific section.

There are specific areas in the **Account Information** section of Add Account Configuration, marked by an asterisk (\*), that require information to be entered before a new Account Configuration can be completed. These areas are Account ID, Account Name, Sys Acct # and Short Name. If either of these areas are left blank any information added to the rest of the Account Information section, or the **Account Contact** or **Miscellaneous Account Data** sections, will result in a message box appearing that says “Account ID/Account Name/ Sys Acct #/Short Name should not be empty.” Click **OK** to return to the Add Account Configuration section to enter the requested information and continue with the Add Account Configuration operation.

All changes to any of the areas within the Add Account Configuration section are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and leads back to the main Accounts Info page.

#### 4.1.2 Add Account Configuration – Account Information

The **Account Information** section of Add Account Configuration exists to enter the information for a new account. Use the +/- radio button to expand/contract this section.

**Account ID, Account Name, Sys Acct # and Short Name** are required fields, indicated by an asterisk (\*), and must be completed before a new Account Configuration can be completed.

- The **Account ID** can contain up to 20 characters or numbers, including spaces. Once created, accounts are sorted via Account ID number.
- The **Sys Acct #** is a unique four-digit number that will be used in the Fuel Site Controller. This will allow the user to assign cards to an account within the FSC. Typical uses of the FSC System Account are with the dual card operation that limits which driver cards can fuel vehicles that are only assigned to the same System Account. Both the Driver and Vehicle card must be assigned to the same Account in order to gain authorization for pumping. 0001-9999 is the accepted range for System Account #s.
- The **Short Name** is the System Account nine-character name field that will be used to identify the Sys Acct # used in the Fuel Site Controller.
- **Account Status** can be either **Valid** or **Invalid** by clicking the corresponding box. Accounts that are marked **Valid** allow all account cards to be used within their restriction limits, if enabled. Accounts that are marked **Invalid** means that all cards in this account can no longer initiate fueling operations **IF** the account is active on the Fuel Site Controller. If the Account is inactive on the FSC and the Account Status is set as Valid, the Phoenix SQL application will set **ALL** cards associated with the account as Invalid. Reasons an Account could be marked as Invalid include a Balance Due or Bad Credit associated with the Account.

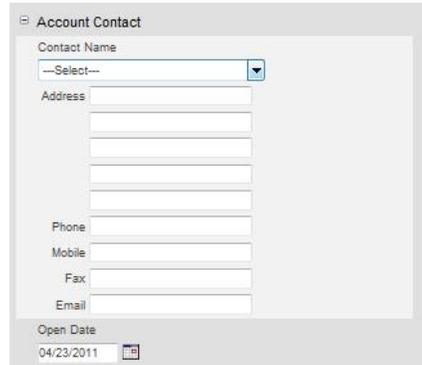
The Add Account Configuration parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and leads back to the main Accounts Info page.

### 4.1.3 Add Account Configuration – Account Contact

The **Account Contact** section of Add Account Configuration is used to enter the contact information for a new account.

The Add Account Configuration operation can only be completed when the required fields, marked by an asterisk (\*), in Account Information (Account ID and Account Name) are also populated. Use the +/- radio button to expand/contract that specific section.

The **Contact Names** contained in the dropdown menu are those that have been entered in the Address Book, found in the Administration Menu, during the Add Address Configuration operation. Once the desired Contact Name has been selected, that Contact's information (Address, Phone, Mobile, Fax, Email) will automatically populate the corresponding fields.



**Open Date** is the date that the account was created in the Phoenix SQL application; use the adjoining Calendar icon to select the proper date.

When all sections of Add Account Configuration are completed, the **Last Used** and **# of Cards** fields will appear in the Account Contact section. Last Used indicates the date of the most-recent transaction recorded for this account from any polled site. The # of Cards field displays how many cards are linked to this account at any time.

The Add Site Configuration parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears; click **OK** to close the message box.

**Reminder:** All required fields must also be populated in the Account Information section for the parameters to be saved.

Clicking the **Cancel** button terminates the operation and returns the user to the main Accounts Info page.

#### 4.1.4 Add Account Configuration – FSC Account

The **FSC Accounts** button is active when the Fuel Site Controller Uses Account Cards option is checked in the System Settings page under the Fuel Site Controller frame.

- **Product Restriction Code** retrieves these codes from System Setup page under Product Restriction frame.
- **Quantity Restriction Code** retrieves these codes from System Setup page under Quantity Restriction frame.
- **Daily Allocation** allows for the restriction of the amount of fuel dispensed in a day for a specific FSC account.
- **Monthly Allocation** allows for the restriction of the amount of fuel dispensed in a month for a specific FSC account.
- **Expiration Date** of the account. When this checkbox is selected, only the expiration date should be updated in the FSC.
- When the **Update Account** checkbox is selected, the FSC will be updated with this account upon any action with this site. If left unselected, the FSC will not be updated with this newly created or edited account.

#### 4.1.5 Add Account Configuration – Miscellaneous Account Data

The **Miscellaneous Account Data** section of Add Account Configuration exists to enter additional account information for a new account.

The Add Account Configuration operation can only be completed when the required fields, marked by an asterisk (\*), in Account Information (Account ID, Account Name, Sys Act # and Short Name) are also populated. Use the +/- radio button to expand/contract that specific section.

The **AcctUser1-4** fields can be populated by the names of approved users of the account. The **Notes** area allows space for information to be entered to help identify the account and its operation.

The titles of the AcctUser1-4 fields can be changed at the account Administrator's discretion. Some examples used for the AcctUser1-4 fields could be: Alternate Contact name, Discount Rate or Paid-Through date.

The Add Account Configuration parameters are saved only when the **Apply** button is clicked and a message box indicating "Your Record has been saved successfully" appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and returns the user to the main Accounts Info page.

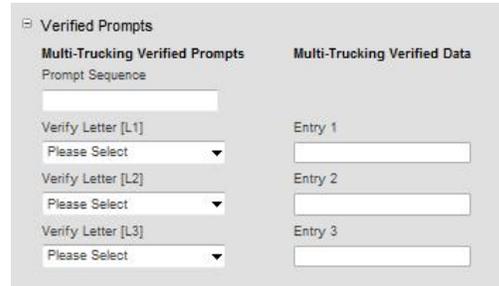
**Reminder:** All required fields must also be populated in the Account Information section for the parameters to be saved.

#### 4.1.6 Add Account Configuration – Verified Prompts

**Verified Prompts** allows the System Account to have up to three additional prompts available at the Fuel System level, which would be applied to all cards that are assigned to that System Account.

Any of these assigned prompts can have Verified data for the data entry, meaning the data Entry for the Prompt will only be accepted at the Fuel System if it matches the Verified Data Entry defined for that prompt under the Verified Data Entry selection.

When prompted at the Fuel System, prompts that do not have any verified entry configured will allow the Fuel System to accept any data entry that was entered for the prompt.



#### 4.1.7 Edit Account Configuration

The **Edit Account Configuration** page exists to change the information in an already-existing Account Configuration.

To access the Edit Account Configuration page, click on the entry to be edited on the Accounts home page; its background will turn orange, then click the Edit button at the bottom of the page. Choose any of the following areas – Account Information, Account Contact, FSC Account, Miscellaneous Data or Verified Prompts – where information needs to be edited and accessed by clicking +/- on the corresponding radio button.

The Edit Account Configuration operation can only be completed when the required fields, marked by an asterisk (\*), in Account Information (Account ID and Account Name) are also populated. Use the +/- radio button to view that specific section and ensure that the proper information is entered.



The edited entry is updated only when the **Apply** button is clicked and a message box indicating “Your Record has been updated successfully” appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and leads back to the main Accounts page.

#### 4.1.8 Accounts Info – Delete Entry

The **Delete** function allows an entry to be permanently removed from the Accounts Info section. Cards associated to the Account that are to be deleted can either be reassigned to another Account within Phoenix SQL, or deleted along with the Account. It is strongly recommended that all reporting operations for the Account and Cards are run before the deleting of the Account and/or Cards has taken place. Once these records are deleted, it will not be possible to run any reports against the deleted Account card records. This function is accessed by first clicking the Address to be deleted; its background will turn orange, then clicking the Delete button at the bottom of the page.



Upon clicking Delete, a message box asking “Delete Current Record?” will appear. Click “Yes” to permanently delete the record, or click “No” to cancel the action and maintain the current information.

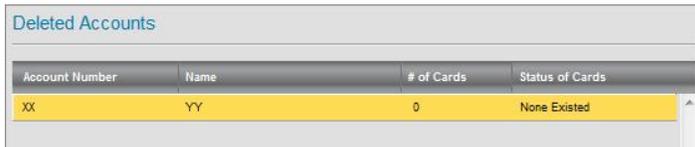


If there are no cards associated with the Account, answering “Yes” will delete the Account instantly. If there are cards associated to the Account and “Yes” is selected, a new window will appear, asking what to do with the Associated Cards for the Account that is going to be deleted. Either Deleting the Account and Cards, or Reassigning the Cards to another Account will be presented as choices. Once the reassign-card process is selected then the Account can be deleted.

If Phoenix SQL is set up to use FSC System Accounts, after deleting the Account perform a Card update to the required sites. This will ensure the FSC System Accounts are also deleted from the Fuel Site Controller and the Related Cards. If the Cards were only reassigned to another Account, then the Cards will update the FSC to the reassigned Account.

## 4.2 Deleted Accounts

The **Deleted Accounts** section of the Accounts Menu displays any accounts that have been deleted from the Accounts Info page. The record of the deleted account displays the Account Number, Account Name, # of Cards assigned to the account and the Status of the Cards (Valid/Invalid/None Existed). Any deleted Account can be restored to active status, where it will again appear in the Accounts Info listing. First, click on the Account to be restored; its background will turn orange, and then click on the **Restore** button at the bottom of the Deleted Accounts page.



Account Number	Name	# of Cards	Status of Cards
XX	YY	0	None Existed

When the Restore button is clicked, a message box stating “Your account has been restored successfully” will appear; click **OK** to close the message box. The restored Account will now appear on the Accounts Info page.



## 5 Cards

The **Cards** menu provides access to options that can be used to create/maintain any Cards that are linked to the Phoenix SQL system.

The Cards menu is comprised of the following links:

- Cards Info
- Card Utilities



### 5.1 Cards Info

The **Cards Info** section of the Cards menu displays at-a-glance information for all configured cards. Card Number, Account Name, Account Short Name and the following information for each card: Last Used, Odometer Reading, Card-User Type, Expiration Date and Account ID can be viewed.

Card Number	Name	Short Name	Last Used	Odometer	Type
1111	Phil Hughes	Phil			Driver
111999	Ralph Taylor	Ralph			Vehicle
12345	Bill Moore	Bill			Driver
555555	Mark Adams	Mark			Driver
999888	Hank Johnson	Hank			Vehicle

Use the scroll bar at the bottom of the page to view all categories.

The **View by Account** dropdown menu is used to choose how the information will be displayed. The default is **All Accounts**, which lists all cards in all accounts. Other choices are the individual accounts that exist. The **View by Type** dropdown menu displays the information by card-user Type. The default listing is **All**. Customized lists by Single, Driver or Vehicle can be used.

All logged-in users with proper Account access rights can **Add**, **Edit** or **Delete** Card listings by clicking the appropriate button at the bottom of the page.



#### 5.1.1 Add Card Configuration

The **Add Card Configuration** section within the Cards Info section allows access to the **Card Configuration**, **Verify Prompts (Card Related Prompts)** and **[Read/Write] ChipKey Configuration** sections where default values for new cards operation can be entered.

This area of Phoenix SQL can also be accessed through the Cards Defaults section in the Administration Menu.

By setting Card default values, every time an Add occurs on the User page after the card type is selected, all values are pre-loaded in each User page.

Any modifications of these Card Defaults areas are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been updated successfully” appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and leads back to the main Cards Info page.

### 5.1.2 Add Card Configuration – Card Configuration

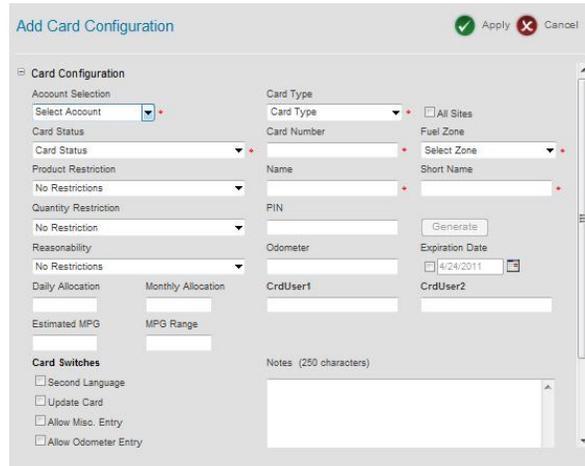
The **Card Configuration** section within the Add Card Configuration section exists to set specific details for all Cards used in the system.

Use the scroll bar on the right side of the page to view all operations that must be completed.

There are seven (7) required fields, marked by an asterisk (\*), where information must be entered in order for a new Card Configuration to be created.

These required fields are:

- **Account Selection:** Use the dropdown menu to select which Phoenix SQL Account the card will be linked to.
- **Card Type:** Use the dropdown menu to select which Card Type this is. The default option is **All**. Select one of the following options: Single, Driver or Vehicle.
- **Card Status:** Use the dropdown menu to indicate whether the Card is Valid or Invalid.



There are up to 12 reasons why a particular card can be Invalid.

- **Card Number:** Enter the unique Card Number.
- **Fuel Zone:** If the Card is allowed to fuel regardless of the geographical location of the fueling site, check the **All Sites** box. If the Card is allowed to fuel only at locations within a user-defined geographical area, choose that zone from the **Fuel Zone** dropdown menu. Examples: West Coast, East Coast, Southeast, etc.
- **Name:** The full name of the cardholder.
- **Short Name:** An abbreviated name for the cardholder. This name is used by the Fuel Site Controller when viewing transactions stored locally or printed at the Fuel Site Controller.

Choose to fill in information for any of the remaining fields:

- The **Expiration Date** area is used to enter a date when the card will expire and no longer be operational within the Fuel Site Controller. To set an Expiration Date, check the box and use the Calendar to select the date.
- **PIN** is the Personal Identification Number assigned to a particular card. PINs can be up to six (6) numbers long with **no letters** allowed.
- **Odometer** is the latest odometer reading entered by the cardholder.

The Odometer field is not editable if the selected Card Type is Driver. If the Reasonability feature of the Fuel Site Controller is enabled, enter a value in the Odometer field when creating a new card. If Reasonability is not set, the cardholder will not be prompted for an Odometer entry, even if the Allow Odometer Entry setting is enabled.

- **Daily Allocation** is the monetary value of fuel that can be drawn against a particular card in a single 24-hour period, from midnight to 11:59 p.m.
- **Monthly Allocation** is the monetary value of fuel that can be drawn against a particular card each month, from midnight of the first day of the month to 11:59 p.m. the last day of the month.
- **Estimated MPG** is active if the Calculated MPG Does Not Meet Range For Card box is checked.

- **MPG Range** is active when using Estimated MPG as a card condition. Enter a tolerance (+/-) that the actual MPG calculation can deviate from the Estimated MPG and still be considered “good.”

The **Card Switches** area allows for the indication of unique operational characteristics that can exist for a particular card.

- **Second Language** activates a card’s second language for use in prompts, on receipts, etc., when the Fuel Site Controller has been programmed with two languages.
- **Update Card** allows the system to send a particular card to each site automatically the next time a card update operation is completed.
- **Allow Misc. Entry** tells the Fuel Site Controller to prompt for a miscellaneous keyboard entry. FIT display message #29 will appear at the Fuel Island when the Card is swiped with this switch setting.
- **Odometer Entry** activates an odometer entry prompt that allows cardholders to enter an odometer reading when the Odometer Reasonability feature of the Fuel Site Controller is disabled.
- **Is R/W ChipKey** allows the Fuel Site Controller that has the ChipKey® Mileage Reasonability option to detect faulty odometer entries, which limits cardholder mileage entries that are stored in the ChipKey® to the Reasonability range that has been programmed.

Card Configuration parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and returns the user to the main Cards Info page.

### 5.1.3 Add Card Configuration – Verify Prompts (Card Related Prompts)

The **Verify Prompts (Card Related Prompts)** section contains messages that are displayed for Phoenix SQL Multi-Trucking and ARTWare® FSC3000 version users at Fuel Island Terminals.

The Multi-Trucking network and ARTWare® FSC3000 versions of OPW FMS Fuel Site Controller software allows fueling systems to communicate with most major commercial fueling networks.

This area contains four Multi-Trucking Verified Prompts card-record fields that must be completed: **Prompt Sequence**, **Verify Letter [L1]**, **Verify Letter [L2]** and **Verify Letter [L3]**. The last three fields are used to verify a response to one of the prompts and must be filled in through the use of the dropdown menus.

Only after the desired information is selected in each of the **Verify Letter** dropdown menus, do the corresponding **Multi-Trucking Verified Data Entry** boxes become active, at which time the desired information can be entered..

Once the information for any of the Verify Letter areas has been selected, corresponding information must be entered in the **Entry** field(s).

Verify Prompts (Card Related Prompts) parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears; click **OK** to close the message box.

In order to save any information entered in the Verify Prompts (Card Related Prompts) section, six of the required fields in the Card Configuration section (Account Selection, Card Type, Fuel Zone, Card Status, Card Number, and Name) must be completed.

Clicking the **Cancel** button terminates the operation and leads back to the main Cards Info page.

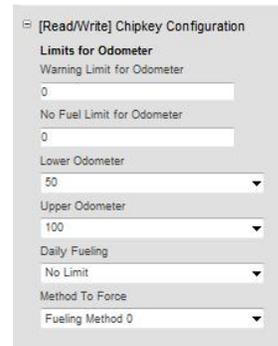
#### 5.1.4 Add Card Configuration – [Read/Write] ChipKey Configuration

The **[Read/Write] ChipKey Configuration** section of Add Card Configuration allows for the limits for Read-Write (R/W) ChipKey®s with Mileage Reasonability to be set.

The ChipKey® configuration is only supported by Fuel Site Controllers that were ordered with this feature. If the Fuel Site Controller was not ordered with this feature, then there is no need to configure these settings.

Values for the six fields must be entered (use the dropdown menus to select values for the last four of these) according to these parameters:

- **Warning Limit for Odometer:** This is a service warning for a mileage. When the mileage in the ChipKey® reaches a pre-determined mileage a “time for service” message will display before prompting the pump number. This message is designed to remind the driver that the vehicle is due for mileage-related maintenance. Fueling continues during the warning.
- **No Fuel Limit for Odometer:** When the driver enters an odometer reading that meets or exceeds the no-fuel mileage, the FIT will display a “service overdue” (or related) message. At this time, fueling is prohibited and the invalidated ChipKey® must be reprogrammed.
- **Lower Odometer:** Each ChipKey® has a specific Lower Odometer mileage limit that is determined by the user.
- **Upper Odometer:** Each ChipKey® has a specific Upper Odometer mileage limit that is determined by the user.
- **Daily Fuelings:** The number of times a day the ChipKey® can be used to fuel.
- **ChipKey Method:** Allows ChipKey®s to be programmed to respond in one of five ways to bad odometer entries.



[Read/Write] Chipkey Configuration

Limits for Odometer

Warning Limit for Odometer  
0

No Fuel Limit for Odometer  
0

Lower Odometer  
50

Upper Odometer  
100

Daily Fueling  
No Limit

Method To Force  
Fueling Method 0

**[Read-Write] ChipKey Configuration** parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been updated successfully” appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and returns the user the main Cards Info page.

### 5.1.5 Edit Card Configuration

The **Edit Card Configuration** section within the Cards Info section allows access to the **Card Configuration**, **Verify Prompts (Card Related Prompts)** and **[Read/Write] ChipKey Configuration** sections where changes can be made to already created Card Configurations.

This area of Phoenix SQL can also be accessed through the Cards Defaults section in the Administration Menu.

Changes can be made to one, some or all of the sections in Edit Card Configuration: Card Configuration, Verify Prompts (Card related Prompts) and [Read/Write] ChipKey Configuration.



Regardless of which section is edited, the seven required fields, marked by an asterisk (\*), must be populated in the Card Configuration section.

Any modifications to a Card Configuration area are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been updated successfully” appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and returns the user to the main Cards Info page.

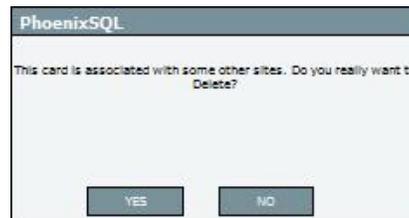
After performing any Card Edits or Additions in this section, a Card update process will be required to send the current Card and FSC Account Changes to the Fuel Site Controller(s) for the changes to take effect.

### 5.1.6 Card Configuration – Delete Entry

The **Delete** function allows an entry to be permanently removed from the Cards Info section.

This function is accessed by first clicking the Card Number to be deleted; its background will turn orange, then clicking the Delete button at the bottom of the page.

Upon clicking Delete, a message box stating “This card is associated with some other sites. Do you really want to Delete?” will appear. Click “Yes” to permanently delete the record, or click “No” to cancel the action and maintain the current information.



In order to remove the Phoenix SQL Deleted Cards from the actual Fuel Site Controller(s), a Card update process will be required for the change to take effect.

### 5.1.7 Cards Info – Reassign Account

The **Reassign Account** function within Cards Info exists to change the accounts that specific card numbers are assigned to.

To start, select the Account from which the card number is to be reassigned from the **View By Account** dropdown menu at the top of the page then click on the Card Number that is to be reassigned so that the background of that entry turns orange. When the background turns orange, the **Reassigned Account** button at the bottom of the page becomes active.

When the Reassign Account button is clicked, a second web page titled **Reassign Account(s) – Webpage Dialog** will appear. On this web page click the checkbox next to the Card Number that is to be reassigned; the background of that Card Number entry will turn orange.

More than one Card Number can be checked for reassignment at one time. The **All Cards** checkbox at the bottom of the page can be chosen if all Cards are to be reassigned to the same Account.

Use the **Assign To** dropdown menu at the bottom of the page to select which Account the Card(s) will be reassigned to.

Reassign Account parameters are saved only when the **Apply** button in the second web page is clicked and a message box indicating “Your card has been successfully assigned to the new account” appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and returns the user to the main Cards Info page.

### 5.1.8 Cards Info – Change Card Type

The **Change Card Type** function exists to change the card type used on any of the existing cards that are assigned to a specific account within the Phoenix SQL database.

Typically, this occurs if it is decided to switch from using a Single Card System setup to a Dual Card System Setup using Driver and Vehicle card records, or vice versa. This allows for the switching of card types on existing cards without having to delete and recreate new card records for the same card numbers.

The Card Info window must be accessed and **View by Account** selected. Select the account the card(s) are assigned to, then select **View by Type** and select the current type setting the card is set to: Single, Driver or Vehicle.

Once these settings are selected, the **Change Card Type** button will become selectable at the bottom of the window. Clicking on this button will display a new window of the selected Cards and a selection to change the Card type.

The selections are: Single, Driver and Vehicle.

Cards Info

View by Account: 1234, Eddie's Shipping      View by Type: Vehicle

Card Number	Name	Short Name	Last Used	Odometer	Type
111999	Ralph Taylor	Ralph			Vehicle

Reassign Account(s) -- Webpage Dialog

http://localhost/PhoenixSQL/ReassignAccount.aspx?CardType

Associated Cards:

Card Number	Name
<input type="checkbox"/> 1111	Phil Hughes
<input type="checkbox"/> 111999	Ralph Taylor

Assign To: Global Card       All Cards

Apply      Cancel

Change Card Type -- Webpage Dialog

http://localhost/PhoenixSQL/ChangeCardType.aspx?CardType

All cards in the account:

Card Number	Name
<input type="checkbox"/> 1111	Phil Hughes

Current card type-Driver

Change To: Single       Change All

Apply      Cancel

In order to activate this Change Card Type update, a Card update process will be required for the change to take affect at the Fuel Site Controller(s).

## 5.2 Card Utilities

The **Cards Utilities** are a series of operations that help to manage the account card database and observe the current status of individual card accounts.



The operations that can be performed from the Card Utilities page when clicking the appropriate button at the bottom of the screen are **Status, Update, Resend, Backup, Restore** and **Import Cards**.

- **Status:** This option is used to view the status of any Update, Resend, Restore or Backup process that is ongoing. Phoenix SQL will maintain the Status results for any of the processes that were performed. Selecting **Clear** will clear the accumulated results for the Site/Activity currently being viewed.
- **Update:** This option sends the information for newly created or modified cards and/or System Accounts to the Fuel Site Controller. It also alerts the FSC if any cards and/or System Accounts have been deleted from the Phoenix SQL system.
- **Resend:** If a Fuel Site Controller loses all of its data due to battery, power or any type of equipment failure, this option resends all of the lost card and System Account information back to the FSC. The Fuel Site Controller Card file must be empty to use this function.
- **Backup:** This option backs up cards from one or more fueling sites. It allows for the sending of information from all assigned accounts from the Fuel Site Controller to the Phoenix SQL database if information is lost from the Phoenix SQL application.
- **Restore:** This option allows for the sending of information for previously backed-up cards and accounts to a fueling site's Fuel Site Controller. The FSC Card file must be empty to use this function.
- **Import Cards:** This option is used to import the backup card file from the Fuel Site Controller for which the backup was performed. The Phoenix SQL Card and Account database will be populated with the Fuel Site Controllers Cards/Account information. This is a quick, alternate way of populating Phoenix SQL Cards/Accounts with Cards/Accounts used from any existing System2® or FSC3000 Fuel Site Controller.

To perform any of the Card Utilities operations, click on the chosen Site Name, so it turns orange.

## 6 Scheduler Menu

The **Scheduler Menu** features options that schedule processes such as Polling, Printing Report, Card Backup or any other operation that needs to be scheduled to execute automatically at a scheduled date and time.

The Scheduler Menu is comprised of the following links:

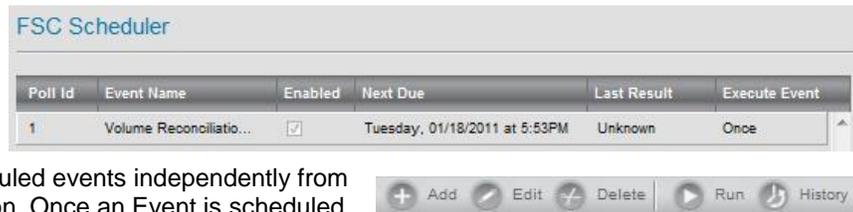
- FSC Scheduler
- ATG Scheduler



### 6.1 FSC Scheduler

The **FSC Scheduler** within the Menu is used to schedule Fuel Site Controller-related events to execute automatically. The FSC Scheduler is an

application that runs scheduled events independently from the Phoenix SQL application. Once an Event is scheduled, it is no longer required to be logged into the Phoenix SQL for the scheduled Event to execute, unless it is desired to **Run** any of the scheduled events immediately on demand. The **Add**, **Edit**, **Delete**, **Run** and **History** buttons in the Ribbon Bar at the bottom of the page performs specific functions within the FSC Scheduler.



#### 6.1.1 Add FSC Scheduler Configuration

The **Add FSC Scheduler Configuration** section within FSC Scheduler is accessed by clicking the **Add** button at the bottom of the FSC Scheduler page and allows access to the Parameters, Frequency and Poll Options sections where default values for selected Scheduler operations can be entered.

Use the +/- radio button to view/hide the information for each specific section.



There are specific areas in the Parameters section of the Add FSC Scheduler Configuration, marked by an asterisk (\*), that require information to be entered before a new FSC Scheduler Configuration can be completed. They are:

- **Name:** The user-defined name of the scheduled event. Name can be up to 50 characters long, including spaces.
- **Type:** The type of FSC Scheduler operation that is being scheduled. **Example:** Backup System, Backup Card, Poll Site, Update Card, Print Report.
- **Retries:** The number of times the system will try to meet the needs of the FSC Scheduler Configuration in case of a failure. Use the dropdown menu to select the number of Retries from 0-9.
- **Enabled:** This box needs to be checked in order for the event to execute. Unchecking this box disables the event from executing automatically.

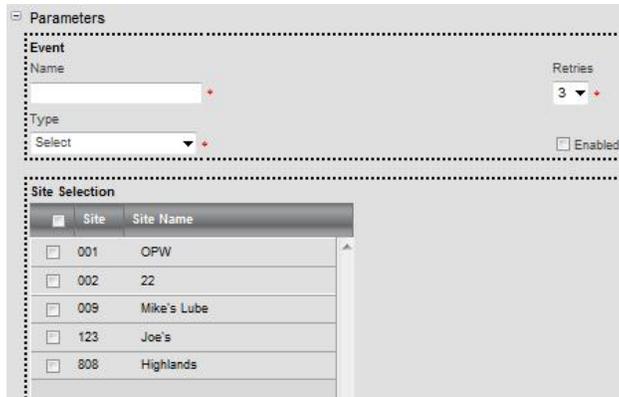
Any new **Add FSC Scheduler Configurations** are saved only when the **Apply** button is clicked and a message box indicating "Your Record has been updated successfully" appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and leads back to the main FSC

Scheduler page. Before clicking apply, the **Frequency** setup page must be completed for any new event being configured.

### 6.1.2 Add FSC Scheduler Configuration – Parameters (Backup System, Backup Card, Poll Site, Update Card, Report Options Type)

The **Parameters** section of Add FSC Scheduler Configuration allows for the entering of operational parameters for a newly scheduled FSC Scheduler operation.

Required fields are indicated by an asterisk (\*). A unique name for the event must be created (**Example:** Daily Morning Poll), then the Type of activity to take place selected from the dropdown menu. The Activities in the dropdown menu are:



Site	Site Name
<input type="checkbox"/> 001	OPW
<input type="checkbox"/> 002	22
<input type="checkbox"/> 009	Mike's Lube
<input type="checkbox"/> 123	Joe's
<input type="checkbox"/> 808	Highlands

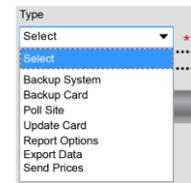
- **Backup System:** This activity gathers the configuration information from the Fuel Site Controller for the single/multiple fueling sites that are selected.
- **Backup Card:** This activity gathers the card information from the Fuel Site Controller for the single/multiple sites selected.
- **Poll Site:** This activity gathers transaction data from the Fuel Site Controller for one or more sites selected.
- **Update Card:** This activity updates card/account data to the Fuel Site Controller for one or more sites.
- **Report Options:** This activity prints information from selected reports based on a user-defined date and time.

There will be no Site dropdown menu selection for a **Print Report** event.

The final required field is **Retries**, which is the number of times the execution of a scheduled event will be retried by the Phoenix SQL application, should it fail to communicate with the Fuel Control System. If more than one site is configured for any particular event, only the Sites that Phoenix SQL has failed to establish a connection with will be retried. Once the retries limit has been reached, if unsuccessful, the **Last Result** of the event displayed in the FSC Scheduler data grid, will be displayed as a **Failed** event instead of **Success**.

The default number for retries is three, though any number for 0-9 from the dropdown menu can be selected.

If Print Report is selected as the Event type, the Retries box is “grayed” out with a “0” and does not need to be selected.



An event can only be added to the FSC Scheduler Configuration if all of the required fields are completed in the Parameters section, as well as the Date/Time setup in the **Frequency** section. Use the Calendar icon to set the date for the first time the Event should execute, along with the proper time.

**Important:** For a scheduled event to run, check the box next to Enabled on the Parameters page. Leaving this box unchecked will prevent the execution of the scheduled event.

When all the required fields are completed and one of the following processes has been chosen, **Backup System, Backup Card, Poll Site, Update Card, Export Data or Send Prices** from the Type dropdown menu, a list of sites in the **Site Selection** area will appear. Which sites will be contacted by the scheduled event must be selected. One, some or all sites can be selected to be tied to the scheduled event. To select a site, check the box next to the Site number; the background of that listing will turn orange. To select All, either check each box individually or check the All box next to Site on top of the Title Bar section.

Use the scroll bar on the right of the Site Selection area to view any sites that can extend below the bottom of the page.

The Add FSC Scheduler Configuration parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears; click **OK** to close the message box.

**Reminder:** The Date and Time fields in the Frequency section must also be populated for the parameters to be saved.

Clicking the **Cancel** button terminates the operation and returns the user to the main FSC Scheduler page.

### 6.1.3 Add FSC Scheduler Configuration – Parameters (Report Options Type)

If **Print Report** from the Type dropdown menu is selected while adding an FSC Scheduler Configuration, a **Report Selection** list will appear. To select which report will print, check the box next to the chosen report; the background of that report will turn orange.

Only one report can be selected at a time.

Use the scroll bar on the right of the Report Selection area to view any Reports that can extend below the bottom of the page.

Depending on which Report is chosen, a series of fields to be filled in will appear to the right of the Report Selection area.

In the **Example** to the right, Activity Det By Misc Keybd has been chosen. If a Standard Date to print the report is desired, click that

radio button then enter the Start Date and End Date by clicking on the respective Calendar icon. If a Relative Date to print the report is desired, click that radio button. Upon clicking the Relative Date radio button, a Report For dropdown menu will appear. Choices on that menu can range from Today and Yesterday to Current Year (or Week or Month) and Previous Week (or Month or Year). It is highly recommended to use Relative dates instead of Standard dates for any scheduled reports!

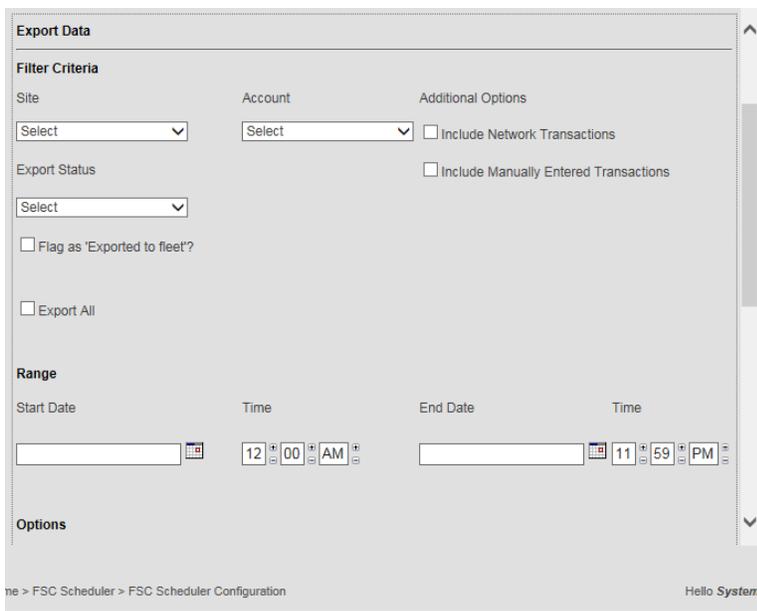
**Link to Another:** When selected this links the report to a previously scheduled event such as a Poll event. With this feature selected, then no Date or Time needs to be selected for the Frequency setting of the Report Event. The Report will run when the Linked Event (such as polling) is finished, the box to Execute only after successful completion can also be checked.

The Add FSC Scheduler Configuration parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears; click **OK** to close the message box.

**Reminder:** The date field in the Frequency section must also be populated or Link to Another must be enabled for the parameters to be saved.

Clicking the **Cancel** button terminates the operation and leads back to the main FSC Scheduler page.

### 6.1.4 Add FSC Scheduler Configuration-Parameters (Export Data Type)



If you select **Export Data** from the Type dropdown menu while adding an FSC Scheduler Configuration, a **Filter Criteria** panel will appear. The fields in this panel refine the search criteria for a specific Export Data operation. These fields are:

- **Site:** This dropdown menu is used to choose the Site from which the data will be exported. All sites can also be chosen.
- **Account:** This dropdown menu contains all of the accounts that are configured within the Phoenix SQL.

**NOTE:** Only those accounts for which the user has access to, if a Group Level user, will be displayed.

- **Export Status:** From this dropdown menu Never Exported, Previously Exported or Both/All can be chosen.

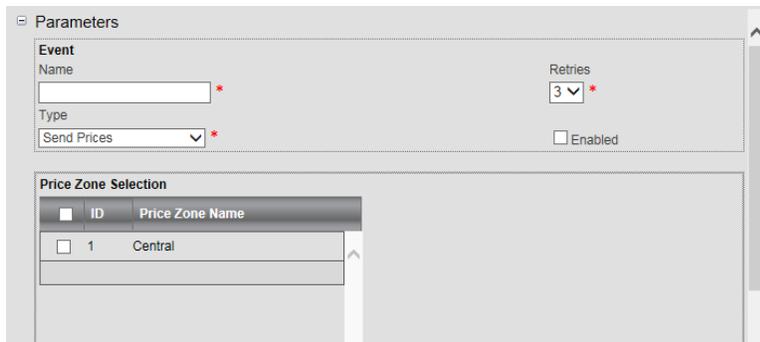
**NOTE:** If the Never Exported option is chosen, information can be retrieved for only those transactions that have not been exported previously. If the Previously Exported option is chosen, only those transactions that have been previously exported can be exported. When the Both/All option is selected, all of the transactions regardless of the exported status can be exported.

- **Flag as “Exported to Fleet”?**: Checking this box prevents transactions from being exported twice, when the “Never Exported” status is used. This is an important option when data is being exported that will be imported into a Fleet Maintenance package that can’t filter out duplicate transaction data.
- **Include Network Transactions:** This additional option should be checked when it is desired that the exported data include Network-authorized transactions. Under normal export conditions, only PCF-based transactions (those cards managed by Phoenix SQL) are exported.
- **Include Manually Entered Transactions:** This additional option should be checked when it is desired that the exported data include any transactions that have been entered manually into Phoenix SQL.
- **Export All:** Check this option if it is desired that all transactions in the Phoenix SQL database are to be exported. Checking the Export All box disables the Start Date, End Date and Time fields.

**IMPORTANT:** Depending on the number of records in the database, selecting this option can generate a very large file.

- **Start Date:** Use the Calendar icon to enter the starting date from which transactions should be exported.
- **End Date:** Use the Calendar icon to enter the ending date to which transactions should be exported.
- **Time:** The starting/ending times for the selected dates from which transactions will be exported.
- **Export File Type:** Use this dropdown menu to choose which file type the exported data will be compiled in. The CSV, Excel and XML file formats all contain the same data fields. Other formats can contain different formats and data elements than these three formats.

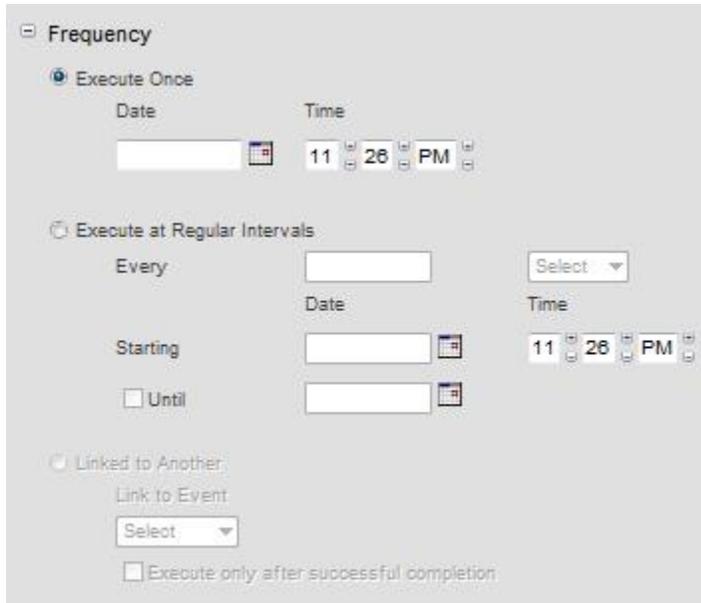
### 6.1.5 Add FSC Scheduler Configuration-Parameters (Send Prices)



If you select **Send Prices** from the Type dropdown menu while adding an FSC Scheduler Configuration, a **Price Zone Selection** list will appear. Check the box for the Price Zone to be set up for a scheduled update.

The **Add FSC Scheduler Configuration** parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears; click **OK** to close the message box.

### 6.1.6 Add FSC Scheduler Configuration – Frequency



The **Frequency** section of Add FSC Scheduler Configuration allows for the establishment of dates/times and frequencies that a scheduled event will occur. It is required to enter a value in the Date field, whether choosing a Frequency of **Execute Once** or **Execute at Regular Intervals**, in order for the new Add FSC Scheduler Configuration to be saved.

The choices in Frequency are:

- **Execute Once:** This option schedules an event to execute only once at a set date and time. If the date or time entered is earlier than the current date/time, the Phoenix SQL application will store the event but never execute it.
- **Execute at Regular Intervals:** This option allows an event to be scheduled to execute based on user-defined options that are entered in the Every field, chosen from the dropdown menu and entered in the Starting Date, Time and, if preferred, Until fields (with the Until box also checked). **Example:** An event is scheduled to execute Every 12 Days Starting on January 19, 2011, at 5 p.m. and continuing Until December 31, 2011.

The **Link to Another** area only becomes active if **Print Report** is selected as the Type in the Parameters section of Add FSC Scheduler Configuration. Link to Another ties a Print Report event to the execution of another event that has been created, which is chosen from the Link to Event dropdown. The box next to “Execute only after successful completion” should be checked if it is critical for the linked-to event to execute before this event.

Events with multiple steps fail if even one step fails to execute within the set number of Retries. If it is an absolute must that all steps in an event pass successfully, check the “Execute only after successful completion” box. If the linked event can run without the other event’s execution, leave the box unchecked.

The Frequency parameters in Add FSC Scheduler Configuration are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears; click **OK** to close the message box.

**Reminder:** The three required fields in the Parameters section (Name, Type and Entries, if applicable) must also be populated for the parameters to be saved.

Clicking the **Cancel** button terminates the operation and leads back to the main FSC Scheduler page.

### 6.1.7 Add FSC Scheduler Configuration – Poll Options

The **Poll Options** section of Add FSC Scheduler Configuration is only active when **Poll Site** is selected from the Type dropdown menu in the Parameters area. Choosing Backup System, Backup Card, Update Card or Print Report does not activate the Poll Options area.



Use the +/- radio button to view/hide the information for each specific section.

If Poll Options is active, two checkboxes that can be selected will be displayed. They are:

- **Disable Card Updates:** If this box is checked, only site polling will occur during the particular event and no updated card information will go back to the fueling site after the polling is complete. The Default setting for this activity is OFF (box unchecked), meaning that card information is updated automatically after polling.
- **Poll Tank Gauge when done with site controller:** If this box is checked, a site configured with both a Fuel Site Controller and Automatic Tank Gauge will have the FSC polled and when that activity is completed, will poll the ATG current Inventory reading and stored Delivery information for all configured tanks.

The Poll Options parameters in Add FSC Scheduler Configuration are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears; click **OK** to close the message box.

**Reminder:** The three required fields in the Parameters section (Name, Type and Entries, if applicable), as well as the applicable Date fields in the Frequency section, must also be populated for the parameters to be saved.

Clicking the **Cancel** button terminates the operation and returns the user to the main FSC Scheduler page.

### 6.1.8 Edit FSC Scheduler Configuration

The **Edit FSC Scheduler Configuration** page allows for the change of the information in an already-existing FSC Scheduler entry.

Click on the configuration to be edited on the FSC Configuration page until its background turns orange then click the Edit button at the bottom of the page, which will lead to the Edit FSC Scheduler Configuration page.

Use the +/- radio button to view/hide the information for each specific section.

The required fields, marked by an asterisk (\*), in the **Name, Type and Retries** (if applicable) fields of the Parameters section must all be populated before any changes to any section can be completed, as well as any applicable **Date** information in the Frequency section.

The Edit FSC Scheduler Configuration parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been updated successfully” appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and leads back to the main FSC Scheduler page.

### 6.1.9 FSC Scheduler Configuration – Delete Entry

The **Delete** function allows an entry to be removed permanently from the **FSC Scheduler** home page.

This function is accessed by first clicking the Event to be deleted; its background turns orange, then clicking the Delete button at the bottom of the page.

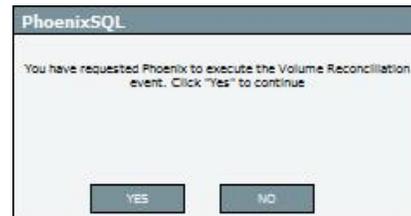
Upon clicking delete, a box asking “Delete Current Record?” will appear. Click “Yes” to permanently delete the record, or click “No” to cancel the action and maintain the current information.



### 6.1.10 FSC Scheduler – Run Event

The **Run** option allows for previously scheduled FSC Scheduler events to be executed immediately on demand.

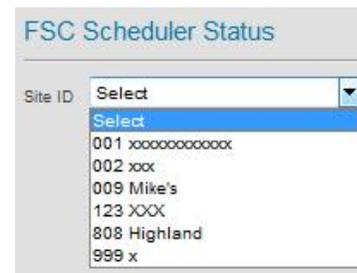
To Run an event, click on the event that will be run immediately in the FSC Scheduler menu; its background will turn orange, then click the **Run** button at the bottom of the page. At this time, a message box saying “You have requested Phoenix to execute the (Event Name) event. Click ‘Yes’ to continue.” Click “Yes” to continue the event execution or click “No” to terminate the Run event and return to the main FSC Scheduler page.



### 6.1.11 FSC Scheduler – History

The **History** function within FSC Scheduler displays whether a scheduled event executed properly on the chosen date and time for any particular Site.

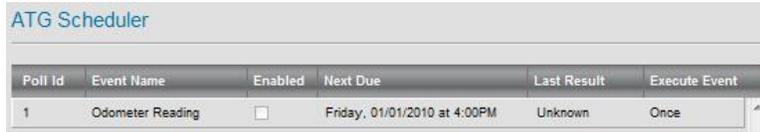
This function is activated by simply clicking the History button at the bottom of the page. This leads to an **FSC Scheduler Status** page where the site whose event history is to be viewed must be selected from the **Site ID** dropdown menu. The FSC Scheduler Status will display accumulated results for the following processes: Trans Poll, Gauge Poll, Card Update and System Backup events. The Erase button of the FSC Scheduler Status will clear all of the accumulated statuses for only the Site being viewed.



## 6.2 ATG Scheduler

The **ATG Scheduler** within the Scheduler Menu allows for the programming of Automatic Tank Gauge-related events to execute automatically. The ATG Scheduler is a “background” application, except during event creation, and runs independent of other ATG functions.

The **Add, Edit, Delete, Run** and **History** buttons in the Ribbon Bar at the bottom of the page exist to perform specific functions within the ATG Scheduler.



Poll Id	Event Name	Enabled	Next Due	Last Result	Execute Event
1	Odometer Reading	<input type="checkbox"/>	Friday, 01/01/2010 at 4:00PM	Unknown	Once

The **Add, Edit, Delete, Run** and **History** buttons in the Ribbon Bar at the bottom of the page exist to perform specific functions within the ATG Scheduler.



### 6.2.1 Add ATG Scheduler Configuration

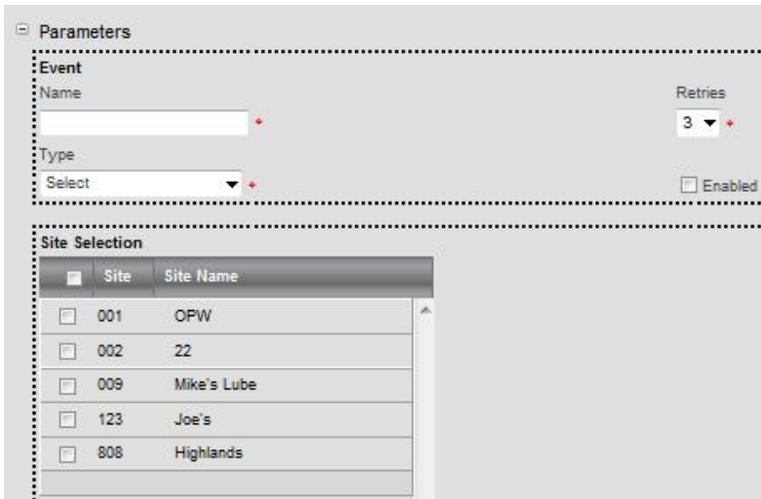
The **ADD ATG Scheduler Configuration** section within ATG Scheduler is accessed by clicking the **Add** button at the bottom of the FSC Scheduler page and allows access to the Parameters and Frequency section where default values for selected scheduler operations can be entered.

Use the +/- radio button to view/hide the information for each specific section.

There are specific areas in the Parameters section of the Add ATG Scheduler Configuration, marked by an asterisk (\*), that require information to be entered before a new FSC Scheduler Configuration can be completed. They are:

- **Name:** The user-defined name of the scheduled event. Name can be up to 50 characters long, including spaces.
- **Type:** The type of ATG Scheduler operation that is being scheduled. **Example:** Inventory, Delivery, Print, Report.
- **Retries:** The number of times the system will try to meet the needs of the FSC Scheduler Configuration in case of a failure. The number of retries from 0-9 can be selected from the dropdown menu.

Any new Add ATG Scheduler Configurations are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been updated successfully” appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and leads back to the main ATG Scheduler page.



**Parameters**

**Event**

Name:

Type:

Retries:

Enabled

**Site Selection**

Site	Site Name
<input type="checkbox"/> 001	OPW
<input type="checkbox"/> 002	22
<input type="checkbox"/> 009	Mike's Lube
<input type="checkbox"/> 123	Joe's
<input type="checkbox"/> 808	Highlands

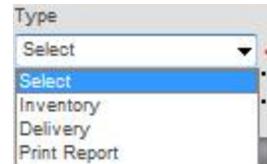
### 6.2.2 Add ATG Scheduler Configuration – Parameters (Inventory/Delivery Type)

The **Parameters** section of Add ATG Scheduler Configuration allows the operational parameters for a newly scheduled ATG Scheduler operation to be entered.

Required fields are indicated by an asterisk (\*). A unique name must be created for the Event (**Example:** Volume Reconciliation), then select the Type of activity to take place from the dropdown menu.

The activities in the dropdown are:

- **Inventory:** This activity downloads the current Inventory information for the Tank Gauges configured for one or more fueling sites.
- **Delivery:** This activity downloads the Delivery history information for the Tank gauges configured for one or more fueling sites.
- **Print Report:** This activity prints information from selected reports and prints it on a user-defined date and time.



The final requirement field is **Retries**, which is the number of times the execution of a scheduled event will be retried by the Phoenix SQL application should it fail.

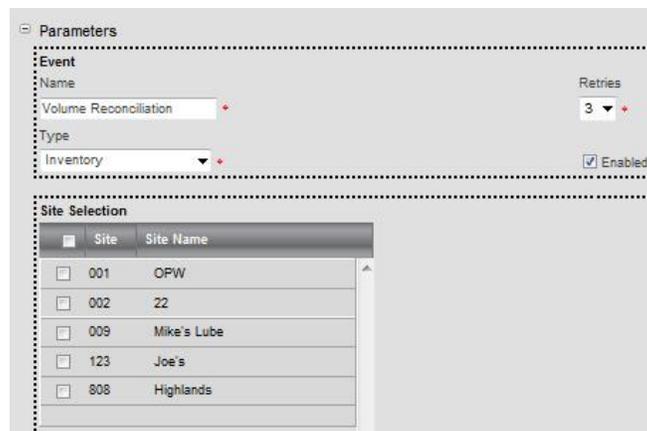
The default number for retries is three, though any number from 0-9 from the dropdown menu can be selected.

If Print Report is selected, the Entries box is “grayed” out with a “0” and does not need to be selected.

An event can only be added to the ATG Scheduler Configuration if all of the required fields are completed in the Parameters section, as well as the Date feature in the Frequency section; use the Calendar icon to choose the date.

For a scheduled event to run, check the box next to **Enabled** on the parameters page. Leaving the box unchecked will prevent the execution of the scheduled event.

When the required fields are completed and **Inventory** or **Delivery** has been chosen from the Type dropdown menu, a list of sites in the **Site Selection** area will appear. Then select which sites will be affected by the scheduled event. Select one, some or all sites to be tied to the scheduled event. To select a site, check the box next to the Site number; the background of that listing will turn orange. To select All, either check each box individually or check the All box next to the Site at the top of the section.



Use the scroll bar on the right of the Site Selection area to view any Sites that can extend below the bottom of the page.

The Add ATG Scheduler Configuration parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears; click **OK** to close the message box.

**Reminder:** The date field in the Frequency section must also be populated for the parameters to be saved.

Clicking the **Cancel** button terminates the operation and leads back to the main ATG Scheduler page.

### 6.2.3 Add ATG Scheduler Configuration – Parameters (Print Inventory/Delivery)

If **Print Report** is selected from the Type dropdown menu while adding an ATG Scheduler Configuration, a **Report Selection** list will appear. To select which report will print, check the box next to the chosen report; the background of that report will turn orange.

Only one report can be selected at a time.

Use the scroll bar on the right of the Report Selection area to view any Reports that can extend below the bottom of the page.

Depending on which Report is chosen, a series of fields to be filled in will appear to the right of the Report Selection area. Currently, Inventory and Delivery reports are only to be used with the ATG Scheduler.

The Add ATG Scheduler Configuration parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears; click **OK** to close the message box.

**Reminder:** The date field in the Frequency section must also be populated for the parameters to be saved. Clicking the **Cancel** button terminates the operation and returns the user to the main ATG Scheduler page.

### 6.2.4 Add ATG Scheduler Configuration – Frequency

The **Frequency** section of Add ATG Scheduler Configuration is used to establish the dates/times and frequencies that a scheduled event will occur. It is required to enter a value in the Date field, whether choosing a Frequency of **Execute Once** or **Execute at Regular Intervals**, in order for the new Add ATG Scheduler Configuration to be saved.

Choices in Frequency are:

- **Execute Once:** This option schedules an event to execute only once at a set date and time. If the date or time entered is earlier than the current date/time, the Phoenix SQL application will store the event but never execute it.
- **Execute at Regular Intervals:** This option allows an event to be scheduled to execute based on user-defined options that are entered in the Every field, chosen from the dropdown menu and entered in the Starting Date, Time and, if preferred, Until fields (with the Until box also checked). **Example:** An event is scheduled to

execute Every 12 Days Starting on January 19, 2011 at 5 p.m. and continuing Until December 31, 2011.

The **Link to Another** area only becomes active if Print Report is selected as the Type in the Parameters section of Add ATG Scheduler Configuration. Link to Another ties a Print Report event to the execution of another event that has been created, which is chosen from the Link to Event dropdown menu. The box next to “Execute only after successful completion” should be checked if it is critical for the linked-to event to execute before this event.

Events with multiple steps fail if even one step fails to execute within the set number of Retries. If it is an absolute must that all steps in an event pass successfully, check the “Execute only after successful completion” box. If the linked event can run without the other event’s execution, leave the box unchecked.

The Frequency parameters un Add ATG Scheduler Configuration are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears; click **OK** to close the dialogue box.

**Reminder:** The three required fields in the parameters section (Name, Type and Entries, if applicable) must also be populated for the parameters to be saved.

Clicking the **Cancel** button terminates the operation and returns the user to the main ATG Scheduler page.

### 6.2.5 Edit ATG Scheduler Configuration

The **Edit ATG Scheduler Configuration** page allows the information in an already-existing FSC Scheduler entry to be changed.



Click on the configuration to be edited on the ATG Configuration; its background will turn orange, click the edit button at the bottom of the page, which will lead to the Edit ATG Scheduler Configuration page.

Use the +/- radio button to view/hide the information for each specific section.

The required fields, marked by an asterisk (\*), in the **Name**, **Type**, and **Retries** (if applicable) fields of the Parameters section must all be populated before any changes to any section can be completed, as well as any applicable **Date** information in the Frequency section.

The Edit ATG Scheduler Configuration parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been updated successfully” appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and returns the user to the main FSC Scheduler page.

### 6.2.6 ATG Scheduler Configuration – Delete Entry

The **Delete** function allows an entry to be removed permanently from the **ATG Scheduler** home page.

This function is accessed by first clicking the Event to be deleted until its background turns orange, then clicking the Delete button at the bottom of the page.

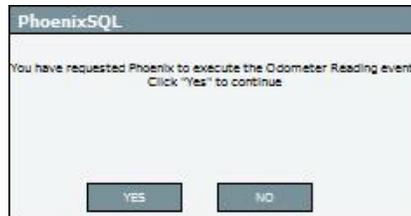
Upon clicking Delete, a message box asking “Delete Current Record?” will appear. Click “Yes” to permanently delete the record, or click “No” to cancel the action and maintain the current information.



### 6.2.7 ATG Scheduler – Run Event

The **Run** option allows a previously scheduled ATG Scheduler event to be executed immediately.

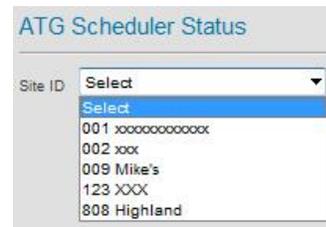
To Run an event, click on the event that will be run immediately in the ATG Scheduler menu until the background of the chosen event turns orange, then click the **Run** button at the bottom of the page. At this time, a message box saying “You have requested Phoenix to execute the (Event Name) event. Click ‘Yes’ to continue.” Click “Yes” to continue the event execution or click “No” to terminate the Run event and return to the main FSC Scheduler page.



### 6.2.8 ATG Scheduler – History

The **History** function within ATG Scheduler displays whether a scheduled event executed properly on the chosen date and time.

This function is activated by first clicking the Event whose History is to be viewed; its background will turn orange, then clicking the History button at the bottom of the page. This leads to an **ATG Scheduler Status** page where the site whose event history is to be viewed must be selected from the **Site ID** dropdown menu.



## 7 FSC Transactions

The **FSC Transactions** Menu allows for the View, Add, Edit, Delete, Export and Reprice of transactions.

The FSC Transactions Menu is comprised of the following links:

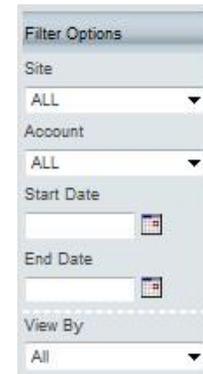
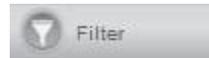
- Transaction Info
- Export Data
- Reprice
- Deleted Transactions



### 7.1 Transaction Info

The **Transaction Info** page allows for the viewing of all of the transactions that have been polled by Phoenix SQL or manually entered by any user of Phoenix SQL.

To simplify viewing the transaction data, **Filter** them by selecting the appropriate conditions from the Filter Options section. **Site**, **Account** and **View by** parameters are selected by either leaving the respective dropdowns at their default values of "All" or by selecting a specific value from each or any one of the dropdowns. Start Date and End Date are selected by using the Calendar icon to set the Start and End Date range for transactions.



When the desired Filter Options are selected, click the **Filter** button located on the Ribbon Bar to see the resulting record set of the transactions that meet the selected parameters.

#### 7.1.1 Transaction – Add, Edit, Delete

The **Add Transaction** function within Transaction info allows transactions to be manually added to the Phoenix SQL database.

A total of 11 required fields, marked by an asterisk (\*), must be filled in for the Add Transaction process to be completed:

- **Site ID:** Choose the Site where the Transaction will be assigned using the Site ID dropdown menu. If the transaction to be added did not occur at one of the Phoenix-defined sites, choose Site "999" as an offset fueling. Using this site will ensure site product totals and reconciliation reports reflect correct inventory data.
- **Date:** The day that the fueling occurred.
- **Time:** The time that the fueling occurred at the selected site. Time information must be entered in HH:MM AM/PM format.

FSC-controlled transactions always represent the time at which the fueling completed.

- **Transaction #:** The chronologically numbered transaction for the fueling site.

The Transaction # is automatically generated when a Transaction is manually entered.

- **Account ID:** When manually entering transactions, the Account ID and Name fields are locked. This information is automatically back-filled once the single/driver or vehicle card is selected.
- **Card1 Title:** Select the appropriate card number from the Single/Driver Card dropdown menu.

When the Single/Driver card number is selected, the corresponding Single/Driver Name field is automatically populated by the selected card's Short Name. If the selected card is configured as a Driver card, then a vehicle card must also be selected.

- **Pump:** The pump used during the fueling transaction.

Pump numbers range from 1-99.

- **Hose:** The pump hose that is used during the fueling transactions.

Hose numbers are single-digit entries from 1-9.

- **Product ID:** The product number of the product that was dispensed during the fueling transaction. This is a user-defined number that typically ranges from 1-32.
- **Price Per Gallon:** The price charged per gallon of product dispensed during the transaction.

This can be changed to another form, i.e. Liter.

- **Quantity:** The Quantity of fuel dispensed during the transaction.

There are also a number of other non-required fields that can be populated. They are:

- **Sequence #:** This is the day sequence number that is assigned to each transaction. This number resets daily to track the order in which transactions occurred (were completed) on a specific day.
- **Misc KB Title:** Miscellaneous Keyboard is a generic prompt that can be presented during fueling to collect any numeric entry required. These field labels can be programmed to help identify the value entered.
- **Total:** This is the total sales value for a recorded transaction. **Example:** 100 Gallons at \$2.75 per gallon equals \$275.00 in total sales value.
- **Odometer:** This field reflects a vehicle's odometer reading entered during the transaction. Odometer entries are used to calculate the distance traveled between fueling stops.
- **Termination Code:** A letter that indicates how a transaction ended, normally or abnormally.

If abnormally, in what way, i.e. Bad Odometer, Bad Card, User Entry Timeout, etc.

- **Don't use in reconcile:** This box should be checked if it is not desired that the transaction be included in any tank reconciliation. Normally, fuel that was taken would be returned to the tank of the transaction at an off-site fueling location. Off-site transactions can be manually entered to help track fuel usage and MPG data.
- **Receipt Printed:** This box indicates the driver took a receipt after the transaction was completed.
- **Bad Odometer:** This box is "disabled" unless transactions flagged as having an Odometer entry are being edited. Phoenix SQL can be configured to flag transactions as having a Bad Odometer entry for values such as Single Digit, Same Digit, Incremental or Decremental Strings Less Than Previous Entry, etc.

The Add Transaction parameters are saved only when the **Apply** button is clicked and a message box indicating “Your Record has been saved successfully” appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and returns the user to the main Transaction Info page.



The **Edit Transaction** page is used to change the information in an already existing Transaction. To access the Edit Transaction page, click on the record to be edited on the Transaction Info page so that the background of that entry turns orange, and then click the **Edit** button on the Ribbon Bar.

The 10 required fields, marked by an asterisk (\*), must be populated before the Add or Edit function can be completed.

The edited entry is updated only when the **Apply** button is clicked and a message box indicating “Your Record has been updated successfully” appears; click **OK** to close the message box. Clicking the **Cancel** button terminates the operation and leads back to the Transaction Info Page.

The **Delete** function allows an entry to be removed from the Transaction Info section. This function is accessed by first selecting the Transaction record to be deleted; its background will turn orange, then clicking the Delete button on the Ribbon Bar. Once a transaction has been deleted, the transaction data will not be used in any reports generated by Phoenix SQL.

Deleted transactions can be restored if mistakenly deleted.

Upon clicking Delete, a message box asking “Delete Current Record?” will appear. Click “Yes” to permanently deleted the record, or click “No” to cancel the action and maintain the current information.

## 7.2 Export Data

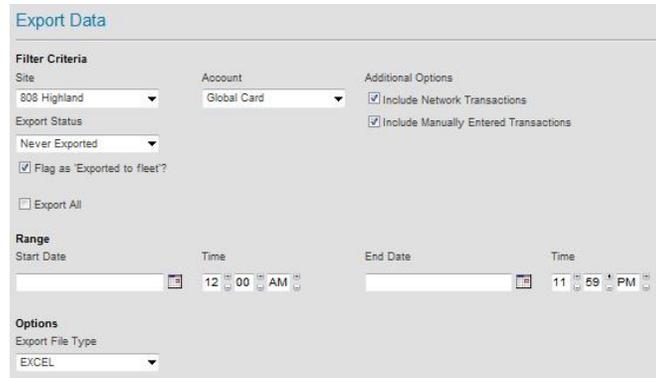
The **Export Data** page under FSC Transactions allows for the export of Transaction data to a choice of CSV, Excel or SML file doormats via the **Export File Type** dropdown (other file formats could become available based on customer needs).

The other fields refine the search criteria for a specific Export Data operation. These fields are:

- **Site:** This dropdown menu is used to choose the Site from which the data will be exported. All sites can also be chosen.
- **Account:** This dropdown menu contains all of the accounts that are configured within the Phoenix SQL.

Only those accounts for which the user has access to, if a Group Level user, will be displayed.

- **Export Status:** From this dropdown menu Never Exported, Previously Exported or Both/All can be chosen.



If the Never Exported option is chosen, information can be retrieved for only those transactions that have not been exported previously. If the Previously Exported option is chosen, only those transactions that have been previously exported can be exported. When the Both/All option is selected, all of the transactions regardless of the exported status can be exported.

- **Flag as “Exported to Fleet”?:** Checking this box prevents transactions from being exported twice, when the “Never Exported” status is used. This is an important option when data is being exported that will be imported into a Fleet Maintenance package that can’t filter out duplicate transaction data.
- **Include Network Transactions:** This additional option should be checked when it is desired that the exported data include Network-authorized transactions. Under normal export conditions, only PCF-based transactions (those cards managed by Phoenix SQL) are exported.
- **Include Manually Entered Transactions:** This additional option should be checked when it is desired that the exported data include any transactions that have been entered manually into Phoenix SQL.
- **Export All:** Check this option if it is desired that all transactions in the Phoenix SQL database are to be exported. Checking the Export All box disables the Start Date, End Date and Time fields.

**Caution:** Depending on the number of records in the database, selecting this option can generate a very large file.

- **Start Date:** Use the Calendar icon to enter the starting date from which transactions should be exported.
- **End Date:** Use the Calendar icon to enter the ending date to which transactions should be exported.
- **Time:** The starting/ending times for the selected dates from which transactions will be exported.
- **Export File Type:** Use this dropdown menu to choose which file type the exported data will be compiled in. The **CSV**, **Excel** and **XML** file formats all contain the same data fields. Other formats can contain different formats and data elements than these three formats.

To Export Data for the selected parameters, click the Export button on the Ribbon Bar. Phoenix SQL will generate a file for selected options and then prompt for the download of the resulting file to the machine.



**Export Format File Information.** The standard formatting of data fields for **CSV**, **Excel** and **XML** file formats are as follows:

Field	Value	Field	Value
Card 1 Number	19	Misc. Keyboard Entry	10
Card 2 Number	19	Account ID	20
Transaction Date	8	Account Short Name	9
Transaction Time	5	Driver Short Name	9
Transaction Number	4	Vehicle Short Name	9
Sequence Number	3	ConvType	9
Site ID	3	DtConv	8
Pump # (and Hose)	2	Receipt Printed	1
Product ID	2	Manually Entered	2
Quantity Fueled	10	Unit of Measure	2
Price Per Unit	12	Term Code	1
Odometer Entry	8		

**Example Output:**

```
"220400000002057", "3857", 19991120, "00:04", "1484", "001", "011", "021", "06", 62.200, 1.199, 21892, "", "1000", "FUEL", "BROCG", "3857", " ", "0", " ", " ", "I"
```

Exported data from **Old Castle** can be stored/entered into Phoenix SQL in the following manner:

Comp #	100
Month	10/2/2011
Date of Trans.	10/4/2011
Unit #	23.1605
Comp #	100
Fuel Site	F40043
Product	Dieselon
Product Description	Diesel on Highway
Quantity	8.30
Units	GAL

- Company # and Fuel Site.** These values are to be entered in the "Notes" field on the "Site Configuration" page as follows, where "Comp. #" is used for the Title row. This can be entered as desired, however it must end with a colon (:). The "xxx" value represents the Company number exported for all records. The "Comp. #" value will be duplicated in the first column and the fifth column, while the "Fuel Site" value will only appear in the sixth column. Additional information can be added to the "Notes field", but must start on a third line.

```
Comp #:      xxx
Fuel Site:  xxxxxxx
```

- Month/Date of Trans.** The "Month" value will always be entered as the first day of the month of the actual transaction date. The transaction date is the actual date fueling took place.
- Unit #.** This information is to be taken from the transaction's "Vehicle Short Name" field and will be labeled "Unit #" in column 4. This field has a maximum of 9 characters.

- Products, Units and Description.** Columns 7, 10 and 8 will be provided, and the name will always be shown as "Product", "Units" and "Product Description" respectively. To ensure this information is made available as needed, you are required to ensure all sites are configured correctly, so the product code (2 digits) returned from the FSC is used across all sites. To configure the desired information, the "Description" field of the Product Table found on the "System Setup" page under the "Administration" tab of Phoenix SQL should be modified to read: "DIESELON, GALS, Diesel On Highway". Following this format, the export process will separate the data at the commas (,) and place the information in the appropriate columns.
- Quantity.** This data is to be taken directly from the transaction table as provided by the FSC and placed in column 9, with a name of "Quantity". The field itself will always be rounded to 2 decimal places (the FSC always returns 3).

**Example Output:**

"001","12/12/2011","12/12/2011","FP24234",93232,"ka234","UNLD","Unleaded",23.000,"GALLONS"

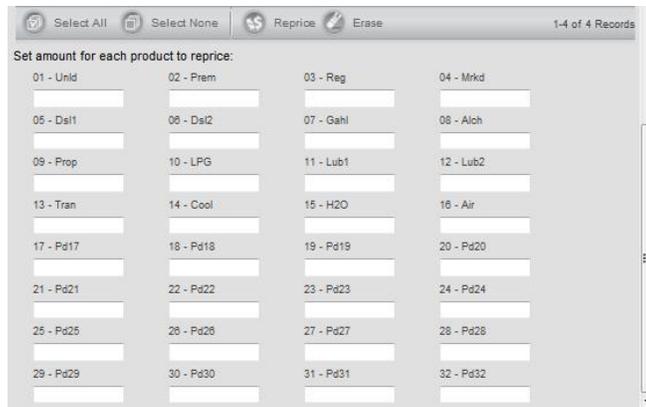
### 7.3 Reprice

The **Reprice** feature under FSC Transactions allows transactions for the selected accounts and date range to be Repriced.

Use the calendar icons to first select the From and To Date Range for which the new prices will be applied. Then select the Account(s) to be repriced by checking the box next to the Account Number(s) it is desired to Reprice.



If every Account is to be repriced, click the **Select All** button on the Ribbon Bar. To clear the selected Accounts to be repriced, click the **Select None** button. Use the inner scroll bar on the right side of the screen to see all available accounts for selection. Use the outer scroll bar on the right side of the page to access the area where the new price for each product that is to be repriced is entered. Set the new price for any product transactions to be changed.



If an error is made while entering the new prices, all values can be cleared and entering can be started again by clicking on the **Erase** button.

To complete the Reprice action, click the **Reprice** button on the Ribbon Bar. At that time, a message box saying, "Warning! The repricing of transactions cannot be reversed once changed and the original price is lost. Continue with repricing?" appears. Click "Yes" to complete the reprice process, or click "No" to cancel the action and maintain the current information.

## 7.4 Deleted Transactions

The **Deleted Transactions** page under FSC Transactions displays all of the transactions that have been deleted. If so choosing, any transactions that have been deleted can be restored.

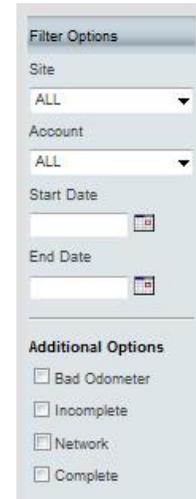
To view a list of Deleted Transactions, select the Site and Account from the respective dropdown menus, enter a Start Date and End Date using the Calendar icons and check one, some or all of the Additional Options that could help narrow the search.

The Additional Options are:

- **Bad Odometer:** If this option is chosen, all Bad Odometer transactions are listed.
- **Incomplete:** If this option is chosen, all Incomplete transactions are listed.
- **Network:** If this option is chosen, all Network transactions are listed.
- **Complete:** If this option is chosen, all Complete transactions are listed.

After all chosen fields have been populated, click the **Filter** button to see a complete list of deleted transactions that fit the chosen parameters.

To restore any Deleted Transaction, when the list of transactions for the defined parameters appears, select the record to be restored and click the **Restore** button.



More than one Deleted Transaction can be restored at a time by checking multiple boxes in the list of Deleted Transactions.



## 8 ATG Transactions

The **ATG Transactions** menu allows for the Add, Edit and Delete of Inventory and Delivery Information for any site configured within Phoenix SQL.



Sites with a Tank Gauge installed can be polled by Phoenix SQL to collect the data.

Data polled from a tank gauge cannot be Edited or Deleted, except a BOL delivery value, which can be entered against polled deliveries.

Sites configured without a Tank Gauge installed can be edited to manually add and delete inventory and delivery information. Manually added deliveries do not allow BOL data to be entered.

### 8.1 ATG Data

The **ATG Data** option in the ATG Transactions menu allows for the display of **Inventory** or **Delivery** information for the selected site.



First, select the site to view from the “Current Site” dropdown menu.

Phoenix SQL will then display the Inventory information for selected site. **Inventory** or **Delivery** information can be displayed by selecting the appropriate radio button.

#### 8.1.1 ATG Data – Inventory

The **Inventory** section of ATG Data displays specific inventory periods for each configured storage tank at a fueling site. An inventory period is the time that has lapsed between two consecutive polls.

UseInRec	Site ID	Tank ID	Date	Time	Gross	Net
Yes	808	1	04-16-2011	17:13:00:000	2000.000	0.000
Yes	808	1	04-19-2011	11:44:00:000	5000.000	0.000

Because Phoenix SQL allows for the polling of current inventory of a tank gauge at any time via the Scheduler, many extra records can exist. Therefore, inventory records can be flagged to be ignored when running Reconciliation reports.

#### 8.1.2 ATG Data – Delivery

The **Delivery** section of ATG Data allows for all deliveries that have been made for each configured storage tank at a fueling site listed by Site ID to be displayed.

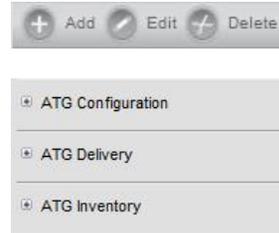
Site ID	Tank ID	Date	Time	Delivered	Delivered Net	Delivered Water
808	1	04-17-2011	12:12:00:000	10000.000	0.000	0.000
808	1	04-25-2011	13:35:00:000	20000.000	0.000	0.000

Because delivery information is vital to the reconciliation process, these records cannot be deleted once they are collected from the tank gauge.

### 8.1.3 ATG Data- Add, Edit and Delete

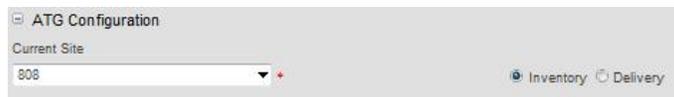
With Permissions, **Add**, **Edit** or **Delete** can be performed on ATG Data for a specific fueling site by clicking the appropriate button at the bottom of the ATG data page when a specific Site ID's Inventory or Delivery information is displayed.

When attempting to Add or Delete ATG Data for a site that is configured with an ATG, a message box will be displayed with the message, "You cannot add/delete Delivery or Inventory information to a site with an ATG configured!" Click OK to close the box.



When working with sites that don't have Tank Gauges configured, it is possible to **Add** ATG data. First, select a site without a configured tank gauge and then click the **Add** button. A section listing ATG Configuration, ATG Delivery and ATG Inventory will appear.

Use the +/- radio buttons to view/hide the information contained in the specific sections.



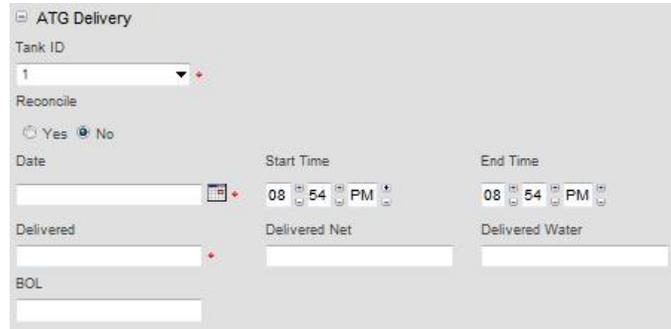
**ATG Configuration:** Within this section, choose the Current Site ID for which data will be entered, then select the radio button for either Inventory or Delivery.

**ATG Delivery:** This section should be selected if **Delivery** has been selected in ATG Configuration. Information in the three required fields, marked by an asterisk (\*), must be entered: Select the Tank ID, Date (chosen from the Calendar icon) and Delivered (the amount delivered).

Other fields that should be completed are:

- **Start Time and End Time:** The beginning and ending times for the specific date on which the delivery occurred.

If the delivery occurred while fueling took place at the site, the start and end times values are important to ensure Reconciliation reports for that site are accurate.



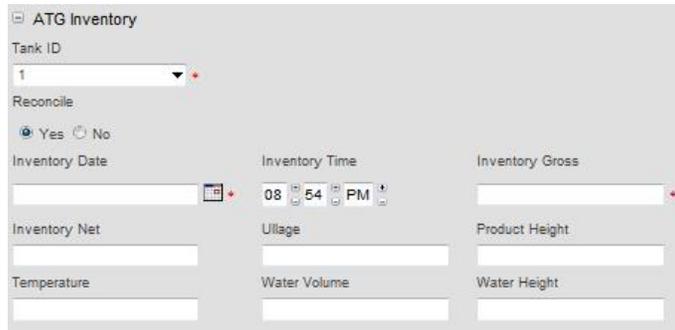
- **Delivered Net and Delivered Water:** The net amount of fuel delivered, as well as its water content. These fields are normally not entered for manual entries and can be left empty.
- **BOL:** The bill-of-lading number for the delivery. When entering a manual delivery this value should be entered in the Delivered field to ensure reconciliation reports can be generated. When editing a delivery, for those polled from a configured tank gauge, this value is entered from the ticket provided by the delivery driver. This value, when entered, will be used on the site's reconciliation report to give an additional reference to the tank's inventory variance.

For deliveries, the "No" button is the default in the Reconcile area and cannot be changed. This setting has no effect on the reconciliation report.

**ATG Inventory:** This section should be selected if **Inventory** has been selected in ATG Configuration. Input information for the three required fields, marked by an asterisk (\*): Select the Tank ID, Inventory Date (chosen from the Calendar icon) and Inventory Gross (total amount of fuel in the tank).

Other fields that can be entered are:

- **Inventory Time:** The time that the Inventory was polled or taken.
- **Inventory Net:** The net amount of fuel at the time Inventory was polled. This value is normally not entered when the Inventory is manually entered.
- **Ullage:** The amount of unfilled space in the storage tank when Inventory was polled. This can be manually calculated for manual entries, but is not required.
- **Product Height:** The height of the product level when the Inventory was polled. This value represents the unit of measure used.
- **Temperature:** The temperature of the product when the Inventory was polled. Typically, this value is not available when the inventory is manually entered.
- **Water Volume:** The amount of water that was in the tank when the Inventory was polled.
- **Water Height:** The height of the water level when the Inventory was polled.



If it is desired to **Edit ATG Data**, then select the Site, Inventory or Delivery, and then select the record to edit. Click the **Edit** button at the bottom of the ATG Data page. When an attempt is made to edit an inventory record, the only field available for edit is the Reconcile Yes/No field. Setting this field to “No” tells Phoenix to skip this record when generating the reconciliation reports.

**Delete ATG Data** cannot be performed unless the inventory or delivery information was entered for a site configured without having a tank gauge. To delete a record, select a site without a configured gauge, select the Inventory or Delivery radio button and then the record to be deleted. Click the **Delete** button at the bottom of the ATG Data page.

Any **Add or Edit** function within ATG Data is only completed once the **Apply** button is clicked. Clicking the **Cancel** button discards any changes that could have been made and returns the user to the main ATG Data page.

## 9 Reports Menu

The **Reports Menu** allows for the calculation of MPG's under **Report Utilities**, as well as reports for pre-defined topics, including:

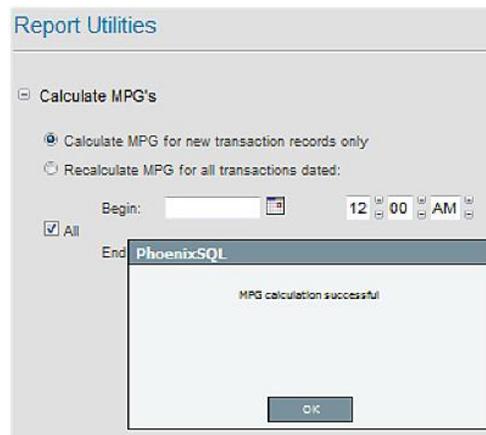
- Report Utilities
- Administrator Reports
- Site Reports
- Account Reports
- Card Reports
- Transaction Reports
- Product Reports
- Support Table Reports



### 9.1 Report Utilities

The **Report Utilities** menu of Phoenix SQL is used to **Calculate MPG's** for specific dated fueling transactions, which will be displayed on Activity detail type reports. This operation should **always** be performed before generating any of these reports, if odometers are being stored in the system.

Once the Calculate MPG's operation is performed for a given date range, it is possible to run Activity reports for that date range of transactions, and it will display calculated MPG data for all of them. If the Calculate MPG's operation is not performed, then the MPG's calculations shown on the reports will either not appear or be incorrect, especially if any odometer entries were corrected before the report was run.



The Calculate MPG's operation should also be performed after editing any transactions that were flagged as having a Bad Odometer entry before regenerating a report with the corrected odometer entries.

There are two options when choosing to Calculate MPG's:

- **Calculate MPG for new transaction records only:** When this button is selected, the Phoenix SQL system will calculate the MPG values for all new transactions that have been polled into the system since the last poll process took place.
- **Recalculate MPG for all transactions dated:** When this button is selected, use the respective calendar icon to select a Begin and End Date for the MPG values that are to be recalculated, as well as the Begin and End Time.

If it is desired to recalculate the MPG values for every transaction stored in the Phoenix SQL system, check the **ALL** box. Use the +/- radio button to view/hide the Calculate MPG's fields.

The Calculate MPG's parameters are only saved and applied when the **Apply** button is clicked. When the action has been completed, a message box saying "MPG calculation successful" will appear; click **OK** to close the box. Activity reports are now ready to be run for those transactions.

After the report has been created, one has the capabilities to simply view the report, save the report into an electronic export file or send the report to a printer.

## 9.2 Administrator Reports

Accessing the **Administrator Reports (Phoenix SQL Admin Users only)** section of the Reports Menu allows for the display of specific information for a number of actions.

Reports are accessed by clicking on the report name; its background will turn orange. In most cases, a series of dropdown menus will appear that will help narrow down a specific query.

Report Name
Address Book Data
Audit Trail Data
Error Details
Fuel Zone Data
Group Details

- **Address Book Data:** The Address Book stores all contact information used by the Phoenix SQL system. The report can be queried to run for specific address book entries by their **Name, City, Organization, Title** or **User Name**. Select the criteria for the report to be generated.
- **Audit Trail Data:** The User Audit Trail area in System Setup allows for the tracking of accountability within the system. Either a specific User or all Users can be selected for the Audit Trail report.
- **Error Details:** Error Details allow access to the System Errors Log, which provides diagnostic information on any internal errors that can occur within the Phoenix SQL system. These reports would typically be requested by OPW Tech Support. Select the proper dates to generate a report.
- **Fuel Zone Data:** Fuel Zone displays which Phoenix Sites are assigned to what Fuel Zones within the Phoenix SQL system, such as West Coast/Site ID: 001, 002, East Coast/Site ID: 003,004, Midwest/Site ID: 005, 006, etc. This report should only be generated if Fuel Zones are being used in the Phoenix SQL system. Simply click on Generate Report; there are no report queries to set.
- **Group Details:** This report displays the various defined Groups, including such information as the Group name, the level access rights of the Group, and the accounts/cards and/or sites associated to the group. Simply click on Generate Report; there are no report queries to set.

Any action in the Administrator Reports section is only completed when the **Generate Report** button is clicked at the bottom of the page. At that time, a new browser window will open displaying the requested report.



The options of viewing, printing and exporting the report are now available. If the Export button in the left corner of the displayed window is clicked, a window of Export Options will open. Select the format for the report to be exported. The following options will be given: **Crystal Reports (RPT), Acrobat Format (PDF), MS Excel 97-2000, MS Excel 97-2000 (Data Only)** or **Rich Text Format**.

Once the export format is selected, click **OK**. The options of printing and/or saving the report are now available.

### 9.3 Site Reports

The **Site Reports** section of Reports allows for the printing of monthly fueling totals by product for each fueling site within the Phoenix SQL system. Included is detailed information on accounts, cards and vehicles for the selected site.

Use the scroll bar on the right to view report types at the bottom of the list.

Specific Report Names are accessed by clicking on a report name; its background will turn orange. In most cases, a series of dropdown menus will appear that will help narrow down a specific report search.

These are the report types that can be chosen from the Site Reports menu:

Report Name
Activity Det By Site For Accts
Activity Det By Site For Card1
Activity Det By Site For Card2
Activity Sum By Site For Acct
Activity Sum By Site For Card1
Activity Sum By Site For Card2
Fuel Provider Listing
Network Trans By Site

- Activity Det By Site For Accts:** This report groups transactions first by site ID, then by account number, then in ascending chronological order by account number. The report gives detailed information on date and time of transaction, transaction number, vehicle-card name, driver-card name, driver name, last odometer entry, product name, pump and hose ID, price and quantity of product, and total monetary amount of transactions.
- Activity Det By Site For Card1:** This report groups transactions by site ID, then by card type. For driver cards, the sort is by driver number. Within driver number, all of the transaction numbers are listed in ascending chronological order. This report gives detailed information on date and time of transaction, transaction number, vehicle-card number, account number, account short name, odometer entry, product name, pump and hose ID, miscellaneous keyboard entry, price, total volume driver-card number, driver name, and total monetary amount of those transactions.
- Activity Det By Site For Card2:** This report groups transactions first by site ID, then by card type. For vehicle cards, the sort is by vehicle-card number. Within vehicle number, all of the transaction numbers are listed in ascending chronological order. The report gives a detailed report on date and time of transaction, transaction number, vehicle number, account number, account short name, odometer entry, product name, pump and hose ID, miscellaneous keyboard entry, price, total volume, driver-card number, driver name, and total monetary amount of those transactions.
- Activity Sum By Site For Acct:** This report groups account activity at each site. The activity includes account number, account name, number of transactions, total quantity of each account's transactions and the total monetary amount of those transactions.
- Activity Sum By Site For Card1:** This report groups one card type's activity for each site. Activity shown for each card includes driver-card number, driver name, number of transactions, total volume and the total monetary amount of those transactions.
- Activity Sum by Site for Card 2:** This report groups one card type's activity for each site. Activity shown for each card includes vehicle-card number, vehicle name, number of transactions, total volume and the total monetary amount of those transactions.
- Fuel Provider Listing:** This report lists all of the fuel providers' names, addresses and other contact information. Also included are up to five products supplied by the provider, as well as the sites that treat the provider as their main product source.
- Poll Log:** This report provides information on the polling status. It gives a detailed report on a site's transaction poll status, gauge poll status and card update status.
- Pump Totals By Date:** This report shows transaction totals for each pump at a fueling site. It also gives a detailed report on site details, pump and hose ID, product ID, product description for each pump, number of transactions and the total volume of the product.

- **Pump Totals For Prod By Date:** This report shows transaction totals for each pump at a site. It also gives a detailed report on site details, pump and hose ID, product ID, product description, number of transactions, total quantity for the product and the total volume of the product for the site.
- **Site Constant Data:** This report includes everything about a site in one place. It includes site location, telephone numbers, dial-in and login passwords, communication settings, tank configuration, polling and the update settings.
- **Site Pumps:** This report includes everything about the pumps that are configured for tanks at a fueling site. It includes site ID name and address, the number of pumps and hose/product mapping.
- **Site Totals By Prod For Year:** This report provides a year-at-a-glance format that gives site-by-site product and transaction totals for each month and a grand total for the year. Site data is sorted by site ID.
- **\*Tank Deliveries:** This report shows all of the delivery polls that have been obtained from the tank gauge within a selected date range. **(Only available with the Premier versions of Phoenix SQL)**
- **\*Tank Inventory:** This report shows all of the inventory polls that have been obtained from the tank gauge. Each time the tank gauge is polled, an inventory record is created. The length of time between two inventory polls is considered an inventory period, which is used to generate a tank reconciliation report. **(Only available with the Premier versions of Phoenix SQL)**
- **Tank Reconciliation:** This report allows for the reconciliation of fuel for the tanks. Reconciliation is always based on a time period. These periods are always defined by the time between two inventory readings of a specific tank. Phoenix uses all transactions and deliveries with time-stamps falling within that period to generate the reconciliation report. All inventory and delivery information used to reconcile are based on gross values, not temperature-compensated values. **NEVER** take inventory readings while fuel is being delivered.

#### How Data is Applied:

First, all transactions in the period are summed to determine the amount of fuel dispensed. If the tank being reconciled is a primary or secondary tank type, all transactions associated to the linked blended tank are summed. The percentage of fuel which that tank provides to the blend is calculated and added into the overall total of dispensed fuel. The report displays this value as Total Sales.

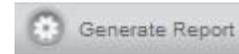
Next, all deliveries completed during the period are summed together to determine a delivered amount. For each delivery, Phoenix queries all transactions that occurred during the delivery period. A delivery period is the time between the point when the gauge senses an influx of fuel to the point where fuel flow ends. Where this end occurs is based on the gauge's parameters.

Then, transactions are again summed and added to the current delivery amount – this appears as Deliveries. When transaction totals are added to polled delivery values, the note “Delivery Calculated” appears on the report. After determining total deliveries, Phoenix uses the value from the inventory period's start – called “Opening Volume” – adds the delivery amount, then subtracts the total sales to determine “Calculated Volume.” Calculated Volume is subtracted from the Ending Volume reading (the end of the period); the result is “Variance.” A negative variance indicates a shortage in fuel.

Because reconciliation is based on fuel usage, deliveries and inventory readings, the time these events occur are some of the most critical variables used in the reconciliation report equation.

It is **EXTREMELY** important that the clock settings in the Fuel Site Controller and Tank Gauge systems are synchronized. If dates are incorrect or the time on one device differs from the other, the reconciliation report will contain bad data. **(Only available with the Premier versions of Phoenix SQL)**

Any action in the Site Reports section is only completed when the **Generate Report** button is clicked at the bottom of the page. At that time, a new browser window will open displaying the requested report.



The options of viewing, printing and exporting the report are now available. If the Export button in the left corner of the displayed window is clicked, a window of Export Options will open. Select the format for the report to be exported. The following options will be given: **Crystal Reports (RPT)**, **Acrobat Format (PDF)**, **MS Excel 97-2000**, **MS Excel 97-2000 (Data Only)** or **Rich Text Format**.

Once an export format is selected, click **OK**. The options of printing and/or saving the report are now available.

## 9.4 Account Reports

The **Account Reports** section of Reports displays names, addresses and phone numbers for all accounts that exist within the Phoenix SQL system. Included in the report are detailed information on accounts, cards and vehicles for the selected site. Also included is detailed information regarding sales summaries for all accounts. Depending on a report's format, the report can be saved, sent as an e-mail or printed for reference.

Report Name
Account Card Listing
Account Constant Data
Account Master Listing
Activity Det By Acct For Card 1
Activity Det By Acct For Card 2
Activity Det By Acct For Prod
Activity Det By Acct For Single Cards
Activity Sum By Acct For Card 1
Activity Sum By Acct For Card 2
Activity Sum By Acct For Prod

Use the scroll bar on the right to view report types at the bottom of the list.

Specific Report Names are accessed by clicking on a report name; its background will turn orange. In most cases, a series of dropdown menus will appear that will help narrow down a specific report search.

These are the report types that are available from the Account Reports menu:

- **Account Card Listing:** This report shows the Account ID and Name, and detailed card information for cards associated within the account. The report will show the total number of cards associated to the Account.
- **Account Constant Data:** This report shows individual account details. The account information consists of the account number, account name, address of the account holder, e-mail address, card status, memo notes, contact details, account open date, account expiration days and up to four user-defined fields.
- **Account Master Listing:** This report summarizes accounts in brief, one-line descriptions, sorted by the account number. Each line contains the account number, account name, contact details of the account holder, last date the account was used and the number of cards in the account.
- **Activity Det By Acct For Card 1:** This report groups transactions first by account number, then by card type. If the card type is driver, the sort is by driver number. The report also displays the total number of transactions for individual cards. Within a driver-card number, transactions are listed in ascending chronological order/transaction number. The report also gives detailed report on transactions based on the account and its associated cards.
- **Account Det By Acct For Card 2:** This report groups transactions first by account number, then by total number of transactions for individual cards. With the vehicle number, the transactions are listed in ascending chronological order/transaction number.
- **Activity Det By Acct For Prod:** This report contains single-line descriptions of transactions. The transactions appear first by account, then grouped by product ID, then in ascending chronological

order. A subtotal at the end of the report is displayed for each Account, totaling the number of **Transactions, Quantity and Monetary Values.**

- **Activity Det By Acct For Single Cards:** This report groups transactions first by account number, then by single card type. The report displays the total number of transactions for individual cards. It also provides a detailed report on the transactions of single cards.
- **Activity Sum By Acct For Card 1:** This report groups transactions by driver card with the summary report displaying driver-card transactions. Each card includes the driver name, number of transactions for the card, total volume, total monetary amount of the transactions, account number, account name, product ID and product name. It also includes transaction date, last odometer entry, and the pump and hose that were used.
- **Activity Sum By Acct For Card 2:** This report groups transactions by vehicle card. The summary report displays the vehicle-card transactions. Each card includes vehicle name, account name, number of transactions per card, total volume and the total monetary amount of the transactions.
- **Activity Sum By Acct For Prod:** This report contains a summary of transactions for each Account. The transactions appear first by account information, then by product ID and then in ascending chronological order.
- **Activity Sum By Acct For Single Cards:** This report groups transactions by the single type card. The summary report displays single-card transactions. Each card includes Single card name, account name, number of transactions per card, total volume and the total monetary amount of the transactions.
- **Detailed Invoice By Acct Card 1:** This report groups transactions by driver card. Each card includes driver name, number of transactions for the card, total volume, total monetary amount of transactions, account number, account name, product ID and product name. It also includes transaction date, last odometer entry, and the pump and hose that were used.
- **Detailed Invoice By Acct Card 2:** This report groups transactions by vehicle card. The sample report shows account number, account name, product ID, product name and a list of vehicle-card transactions. Each card includes vehicle-card name, number of transactions per card, total volume and the total monetary amount of the transactions. Also included are transaction date, last odometer entry, and the pump and hose that were used.
- **Odometer Exceptions By Account:** This report lists the transactions that have been flagged to have bad odometer data. It provides information regarding date and time of the transactions, transaction number, vehicle-card number and name, driver-card number and name, last odometer entry, reason for being flagged for a bad odometer, volume of the product, account number and account name.
- **Simple Invoice By Acct Card 1:** This report groups transactions by driver card. Each card includes driver-card number and name, number of transactions per card, total volume, total monetary amount of the transactions, account number, account name, product ID and product name.
- **Simple Invoice By Acct Card 2:** This report groups transactions by vehicle card. Each card includes vehicle-card number and name, number of transactions per card, total volume, total monetary amount of the transactions, account number, account name, product ID and product name.
- **Trans Summary By Acct For Month:** This report displays the account ID, account name, monetary amount, fuel volume, number of transactions for a selected month, year-to-date and life-to-date for each account.
- **Trans Summary By Acct For Year:** This report shows the account ID, account name, the volume, money transaction totals for each month-by-month within a year for each account.

Any action in the Account Reports section is only completed when the **Generate Report** button is clicked at the bottom of the page. At that time, a new browser window will open displaying the requested report.



The option of viewing, printing and exporting the report is now available. If the export button in the left corner of the displayed window is clicked, this action will open a window of Export Options. Select the format for the report to be exported. The following options will be given: **Crystal Reports (RPT), Acrobat Format (PDF), MS Excel 97-2000, Ms Excel 97-2000 (Data Only)** or **Rich Text Format**.

Once the export format has been selected, click **OK**. The options of printing and/or saving the report are now available.

## 9.5 Card Reports

The **Card Reports** section of Reports runs reports for transactions solely by card type. Included in the report are detailed information on accounts, cards and vehicles for the selected card.

Use the scroll bar on the right to view report types at the bottom of the list.

Specific Report Names are accessed by clicking on the report name; its background will turn orange. In most cases, a series of dropdowns will appear that will help narrow down a specific report search.

Report Name
Activity Det By Card 1
Activity Det By Card 2
Activity Det By Single Cards
Activity Sum By Card 1
Activity Sum By Card 2
Activity Sum By Single Cards
Card 1 Constant Data
Card 1 Master Listing
Card 2 Constant Data

These are the report types that are available from the Card Reports menu:

- **Activity Det By Card 1:** This report groups transactions solely by the driver card. The report shows a detailed driver-card transaction. The report lists the date and time of the transactions, the transaction number, site ID, vehicle-card number, account number, odometer entry, product name, pump and hose ID, miscellaneous keyboard entry information, quantity and the total monetary amount of the transactions for the vehicle card.
- **Activity Det By Card 2:** This report groups transactions solely by the vehicle card. The report shows a detailed vehicle-card transaction. This report shows the date and time of the transactions, transaction number, site number, driver-card number, account number, miles per gallon, odometer reading, distance traveled, product name, pump and hose ID, miscellaneous keyboard entry information, quantity and the total monetary amount of the transactions for the vehicle card.
- **Activity Det By Single Cards:** This report groups transactions solely by the single card. This report shows the date and time of the transactions, transaction number, site ID, account number, account short name, product name, pump and hose ID, average miles per gallon, last odometer entry, distance travelled, miscellaneous keyboard entry information, quantity and the total monetary amount of the transactions for single cards.
- **Activity Sum By Card 1:** This report groups transactions by the driver card. The report shows a summary of driver-card transactions. Each card includes driver-card number, driver-card name, the number of transactions per card, total volume and the total monetary amount of each transaction.
- **Activity Sum By Card 2:** This report groups transactions by the vehicle card. The report shows a summary of vehicle-card transactions. Each card includes vehicle-card number, vehicle-card name, number of transactions per card, total volume and the total monetary amount for the transactions.
- **Activity Sum By Single Cards:** This report shows a summary of single-card transactions. Each single card report includes card number, card name, number of transactions per card, total volume and the total monetary amount of the transactions.
- **Card 1 Constant Data:** This report summarizes the driver cards within each account. The report shows the card number, card name, card short name, account number, account name, card type, monthly/daily allocation monetary values, reasonability, product and quantity restriction settings along with any Multi-trucking Verified Prompts.

Driver cards are part of a card pair that is used with vehicle cards.

- **Card 1 Master Listing:** This report provides a summation of all of the driver cards in the Phoenix SQL system. The report shows the card number, card name and short name, account number and account name, status of the card, the last day the card was used and the current year number of transactions and monetary totals.

- **Card 2 Constant Data:** This report summarizes the vehicle cards within each account. The report lists card number, card name, card short name, account number, account name, card type, monthly/daily allocation monetary values, reasonability, product and quantity restriction settings, and ChipKey® settings, along with any Multi-trucking Verified Prompts. It also provides a detailed report on Vehicle Card/Card 2.

Vehicle cards are part of a card pair that is used with driver cards.

- **Card 2 Master Listing:** This report provides a summation of all of the vehicle cards that are in the Phoenix SQL system. The report shows the card number, card name and short name, account number and account name, status of the card, last odometer entry, the last day the card was used, the current year number of transactions and monetary totals.
- **Cards By Fuel Zone:** This report provides a summation of cards assigned to specific user-defined fuel zones. The report includes zone name, account ID, card type, card number, card name and short name, along with the status of the card. The total number of cards within the zone is also included.
- **Cards By Site Fueling:** This report provides a summation of all cards in the Phoenix SQL system assigned to specific sites. The report includes account ID, card type, card number, name, short name, status and which Sites the card is assigned to.
- **Global Cards Constant Data:** This report lists driver and vehicle cards assigned to the Global Account. The report shows card number, card name, card short name, account number, account name card type, monthly/daily allocation monetary values, reasonability, product and quantity restriction levels, along with Multi-trucking Verified Prompt information and ChipKey® settings.

Global cards are never linked to a specific account.

- **Global Cards Master Listing:** This report is sorted by card number and lists one-line summations of the transactions tied to all global cards. The cards are grouped within the global account by driver and vehicle type. The report shows card number, card type, card name, card short name, status of the card, last odometer entry, the last day the card was used, the number of times the card was used and the individual charges to the card for the current year.
- **Simple Invoice by Card 1:** This report lists individual transactions for driver cards and single cards. The report shows driver-card number, driver-card name, the date and time of the transactions, transaction number, site ID, product name, vehicle-card number, last odometer entry, pump and hose ID, total volume and the total monetary amount of the transactions.

Single-card transactions will not list any vehicle information on this report.

- **Simple Invoice By Card 2:** This report lists individual transactions for a vehicle card. The report shows the vehicle-card number, vehicle-card name, date and time of transactions, transaction number, site ID, product name, driver-card number, last odometer entry, pump and hose ID, total volume and the total monetary amount of the transactions.
- **Single Cards Constant Data:** This report is sorted by the card number. The report shows card number, card name, card short name, account number, account name, card type, monthly/daily allocation values, reasonability, product and quantity restriction settings, along with Multi-trucking verified prompt, ChipKey® settings and the total number of cards.

Single cards are stand-alone cards and are not used in pairs like driver/vehicle cards.

- **Single Cards Master Listings:** This report is sorted by card number and provides one-line summations of all single cards. The report shows card number, card name and short name, account number and account name, status of the card, the last odometer entry, the last day the

card was used, the number of times the card was used and the individual charges to the card for the current year.

Any action in the Card Reports section is only completed when the **Generate Report** button is clicked at the bottom of the page. At that time, a new browser window will open displaying the requested report.



The option of viewing, printing and exporting the report is now available. If the Export button in the left corner of the displayed window is clicked, a window of Export Options will open. Select the format for the report to be exported as. The following options will be given: **Crystal Reports (RPT)**, **Acrobat Format (PDF)**, **MS Excel 97-2000**, **MS Excel 97 2000 (Data Only)** or **Rich Text Format**.

Once an export format is chosen, click **OK**. The options of printing and/or saving the report are now available.

## 9.6 Transaction Reports

The **Transactions Reports** section of Reports displays lists of transactions that fall within user-defined search parameters. These reports are grouped by the category selected, such as account number, card number, date or miscellaneous entry.

Report Name
Activity Det By Misc Keybd
Activity Sum By Misc Keybd
Incomplete Transactions
Incomplete Transactions Detailed
Multi Proprietary User Entry1

Use the scroll bar on the right to view report types at the bottom of the list.

Specific Report Names are accessed by clicking a report name; its background will turn orange. In most cases, a series of dropdown menus will appear that will help to narrow down a specific report search.

These are the report types that are available from the Transaction Reports menu:

- **Activity Det By Misc Keybd:** This report sorts transactions solely by miscellaneous keyboard entry. The report displays the date and time of transactions, transaction number, site number, driver-card number, driver-card name, vehicle-card number, vehicle-card name, account number, product name, pump and hose ID, and the total monetary amount of the transactions. It also includes the number of transactions for each miscellaneous keyboard and the grand total of the transactions.
- **Activity Sum By Misc Keybd:** This report sorts transactions by miscellaneous keyboard entry. The report shows miscellaneous keyboard entry, number of transactions, total volume and the total monetary amount of the transactions. It also includes the grand totals for the miscellaneous keyboard transactions. This report will also include transactions that do not contain a miscellaneous keyboard entry.
- **Incomplete Transactions:** This report is sorted by Record ID. The report lists all transactions that have been imported into the Phoenix SQL system but are flagged as Incomplete due to missing card or account information. The **Reason for Failure**, such as **Unknown Card 1** or **Card 2**, is shown with missing card number on the report along with site ID, transaction number, product ID, pump and hose ID, date and time of transactions, driver- and vehicle-card number, account number and termination code, price per gallon of fuel, total monetary amount of the transactions and the last odometer entry.
- **Incomplete Transactions Detailed:** This report expands the summations that are found in an Incomplete Transactions report. Additional information that is listed is poll date, messages and driver information.
- **Multi-Proprietary User Entry 1-9:** These reports are sorted by the User Entry number selected from the report listing, **Multi Proprietary User entries 1-9**, that are used by host network-based

cards. Also included in the report will be the date, time, Card 1 number and name, account name, Card 2 number and name, pump/hose, product, the User Entry 1-9 data entry, quantity, price and total monetary. Each report will also include a grand total for the quantity and monetary values.

- **Network Sorted By User Entry 1-9:** These reports are sorted by the Network sorted by User Entry number selected from the report listing, **Network Sorted by User entries 1-9**, that are used by host network-based cards. Also included in the report will be the date, time, Card 1 number and name, account name, Card 2 card number and name, pump/hose, product, the User Entry 1-9 data entry, quantity, price and total monetary. Each report will also include a grand total for the quantity and monetary values.
- **Network Trans by Date:** This report provides a line-by-line list of all network authorized card transactions, i.e. any transaction that is not authorized by the Fuel Site Controller's local card file. The list is sorted by transaction date. The report lists transaction date, site number, product dispensed, network card number, account name, transaction time, transaction number, authorization and the trace number that is issued by the network processing the transaction.
- **Network Trans By Product:** This report groups the data found in a Network Trans by the Product ID number and date. The report lists all transactions for the fuel transaction by the first product ID and includes the date, time, pump, site, transaction, card number, account, authorization number, trace number, price, quantity and total monetary values.
- **Odometer Exceptions:** This report lists all transactions that have been flagged as having bad odometer data. The report lists the date and time of all transactions, transaction number, vehicle-card number and name, driver-card number and name, last odometer entry, reason why it was flagged for a bad odometer and the total volume of the product.

Any action in the Transaction Reports section is only completed when the **Generate Report** button is clicked at the bottom of the page. At that time, a new browser window will open displaying the requested report.



The option of viewing, printing and exporting the report will now be available. If the Export button in the left corner of the displayed window is clicked, a window with Export Options will open. Select the format for the report to be exported as. The following options will be given: **Crystal Reports (RPT)**, **Acrobat Format (PDF)**, **MS Excel 97-2000**, **MS Excel 97-2000 (Data Only)** or **Rich Text Format**.

Once an export format has been selected, click **OK**. The options of printing and/or saving the report are now available.

## 9.7 Product Reports

The **Product Reports** section of Reports displays the details of product usage for each fueling site, as well as the volume of each product that has been dispensed at each site.

Report Name
Prod Totals By Site For Year
Prod Totals For Sites By Date

Specific Report Names are accessed by clicking on the report name; its background will turn orange. In most cases, a series of dropdown menus will appear that will help narrow down a specific report search.

These are the report types that are available from the Product Reports menu:

- **Prod Totals By Site For Year:** This report lists product usage in a year-at-a-glance format. The report is sorted by product ID and shows product volume totals on a month-by-month basis for each site. A grand total of product usage for the year is also shown.
- **Prod Totals For Sites By Date:** This report lists total transactions and product volume by pump on a site-by-site basis, sorted by ascending site number.

Any action in the Product Reports section is only completed when the **Generate Report** button is clicked at the bottom of the page. At that time, a new browser window will open displaying the requested report.

The options of viewing, printing and exporting the report are now available. If the Export button in the left corner of the displayed window is clicked, a window of Export Options will open. Select the format for the report to be exported. The following options will be available: **Crystal Reports (RPT)**, **Acrobat Format (PDF)**, **MS Excel 97-2000**, **MS Excel 97-2000 (Data Only)** or **Rich Text Format**. Once an export format is selected, click **OK**. The options of printing and/or saving the report are now available.

## 9.8 Support Table Reports

The **Support Table Reports** section of Reports displays the configuration data for a fueling system's cards and ChipKey@s.

Specific Report Names are accessed by clicking on the report name; its background will turn orange. In most cases, a series of dropdown menus will appear that will help narrow down a specific report search.

Report Name
Card Defaults
ChipKey Codes
Product Restriction Codes
Products
Prompts
Quantity Restriction Codes
Reasonability Codes

These are the report types that can be chosen from the Product Reports menu:

- **Card Defaults:** This report shows a detailed report for account, driver, vehicle and single cards as they are set in the Card Defaults section in the Administrator Menu. The report lists all card types in the default screen template that will be displayed when new cards are created in the Phoenix SQL system.
- **ChipKey Codes:** This report displays all ChipKey® Mileage Reasonability table information for sites that are using ChipKey® Mileage Reasonability software with their Fuel Site Controllers.
- **Product Restriction Codes:** This report lists the two-digit Product Restriction Codes and their actions. The Phoenix SQL system recognizes up to 16 user-defined Product Restriction Codes.
- **Products:** This report lists the two-digit Product codes and their Descriptions. The Phoenix SQL system recognizes up to 32 user-defined Product codes.
- **Quantity Restriction Codes:** This report lists the two-digit Quantity Restriction Codes and their quantity limits used for limiting fuel dispensed per transaction. The Phoenix SQL system recognizes up to 16 different user-defined Quantity Restriction Codes.
- **Reasonability Codes:** This report lists the default odometer reasonability code ranges. The Phoenix SQL system recognizes up to 16 user-defined Reasonability Codes.

Any action in the Support Table Reports section is only completed when the **Generate Report** button is clicked at the bottom of the page. At that time, a new browser window will open displaying the requested report.



The options of viewing, printing and exporting the report are now available. If the Export button in the left corner of the displayed window is clicked, a window of Export Options will open. Select the format for the report to be exported. The following options will be given: **Crystal Reports (RPT)**, **Acrobat Format (PDF)**, **MS Excel 97-2000**, **MS Excel 97-2000 (Data Only)** or **Rich Text Format**. Once an export format is chosen, click **OK**. The options of printing and/or saving the report are now available.

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