Fuel Delivery Manager User Guide

Updated Monday, 12th October 2009

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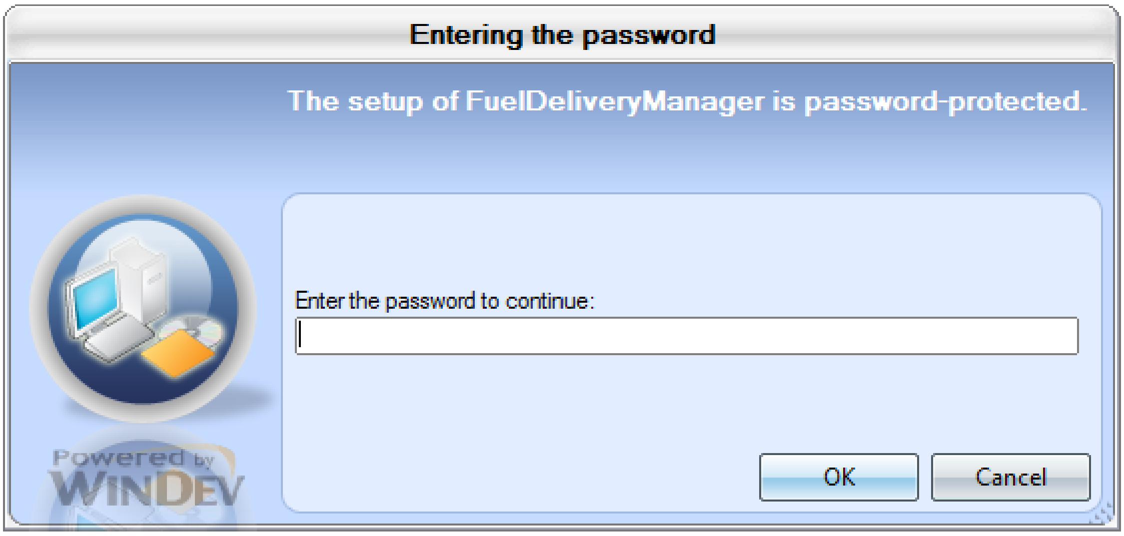
Chapter 1 - Installation

When installing the program, the first screen to appear is the program password screen, if you have purchased this software then you will have been issued the password.



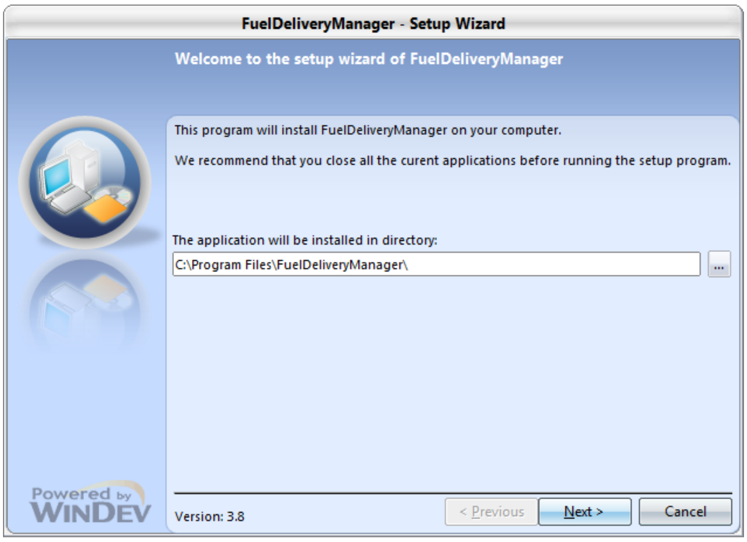
Chapter 1 - Installation

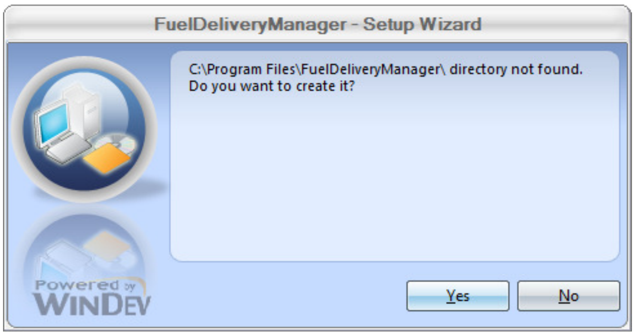
- **Installation and Updates**

Double-click on the FuelDeliveryManager.EXE

First Time Installers – follow these screens:

On the first screen keep the application directory as standard, click next.





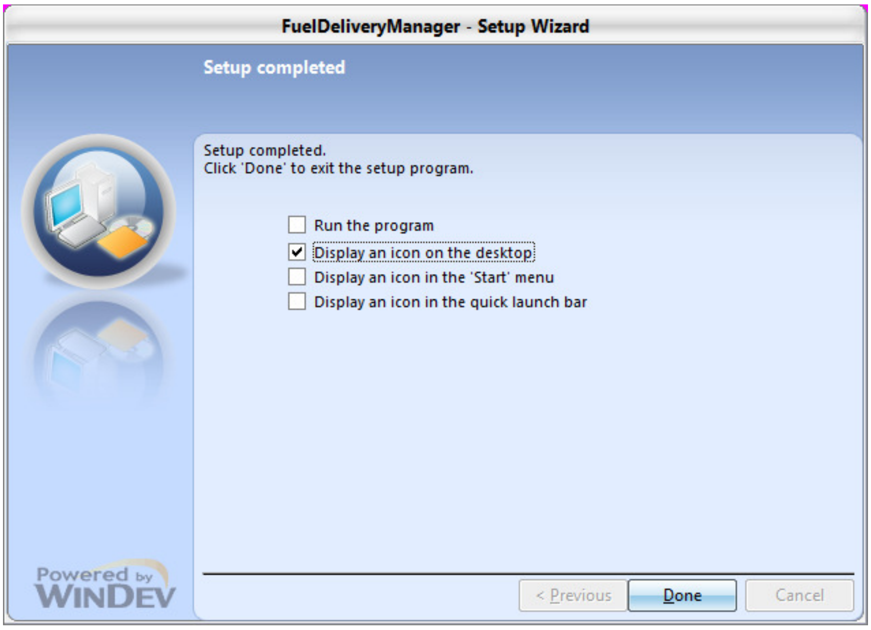
If asked to create the directory, click "Yes".

Setup summary will then be displayed, click next.

This will then install the Fuel Delivery Manager server and inform you that setup is complete

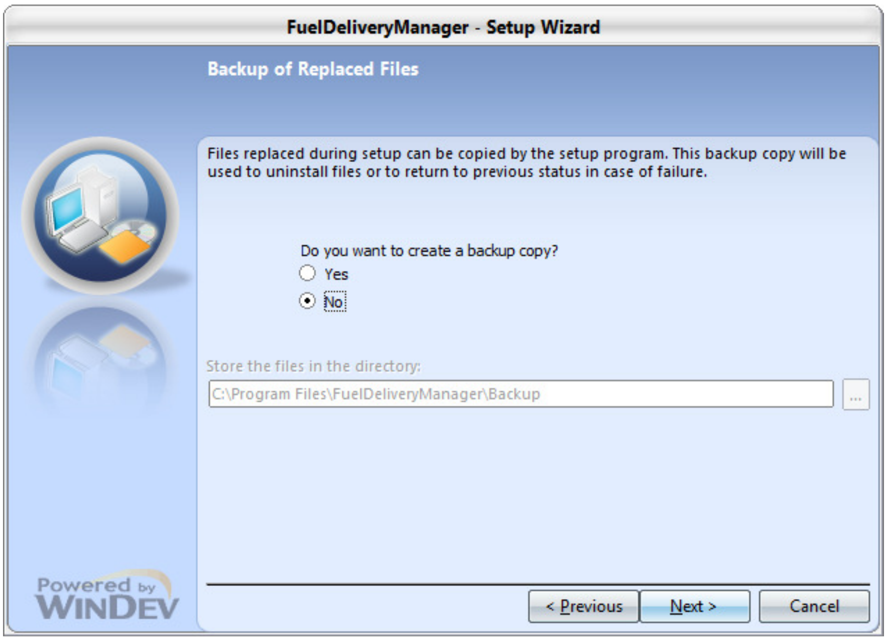
Chapter 1 - Installation

Fuel Delivery Manager will then be installed and on the final screen tick only “desktop shortcut” and complete the setup by clicking done.



If Fuel Delivery Manager has been installed before:

Follow the same screens as above. Except where you get create directory you might get the following screen:



If asked to create a backup directory, select “No”

- **Networking the Program**

If you wish to run the program across a Local Area Network you should install the program on all PC’s that are to access the program. You should then look at loading the program on the next page.

Chapter 1 - Installation

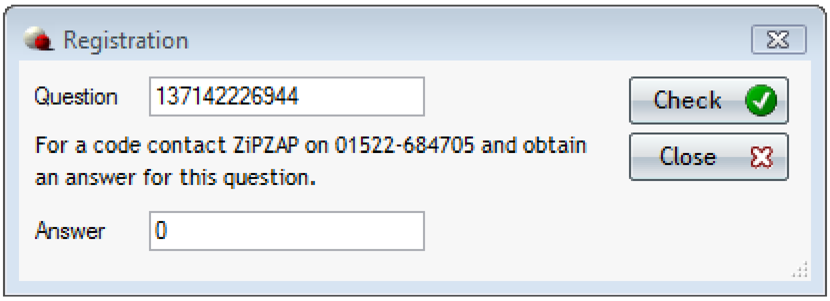
- **Loading the Program**

Running Fuel Delivery Manager for the First Time

Double-click the FuelDeliveryManager icon on the desktop.

To run the program across a network, install the program on all workstations and then select a shared folder on a mapped driver for the data. All workstations must point to the same place although it is possible that they are mapped differently. Go to page 8 for instructions on how to set the data path.

Initially when you open the program you will be asked to register your program. Contact ZiPZAP to obtain an answer for this question.

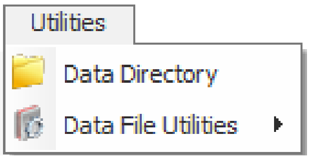


Chapter 1 - Installation

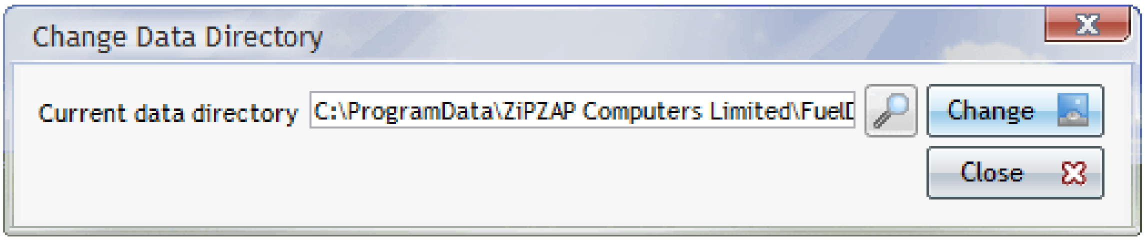
- **Data Path**

To set the data path you should have a mapped folder on the network that everyone has read/write access to.

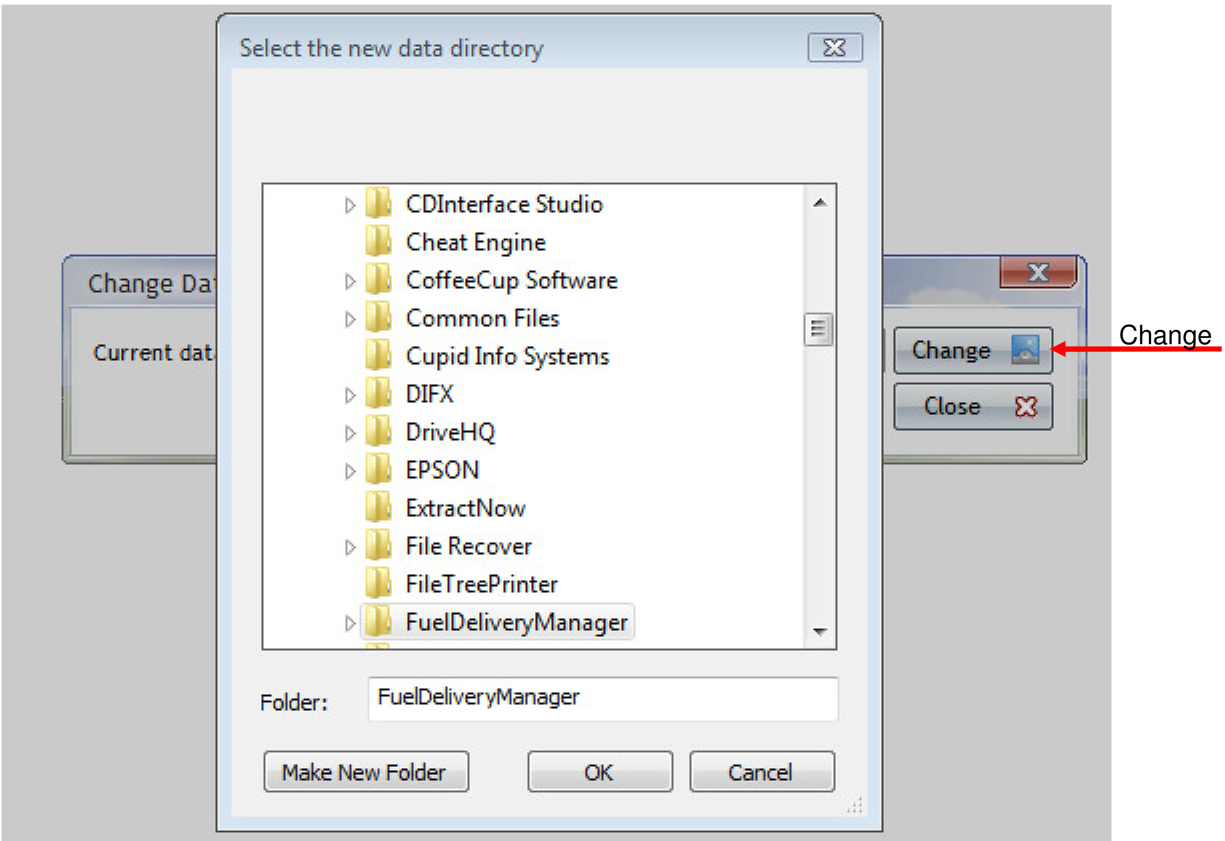
On the Utilities Menu you should select **Data Directory**



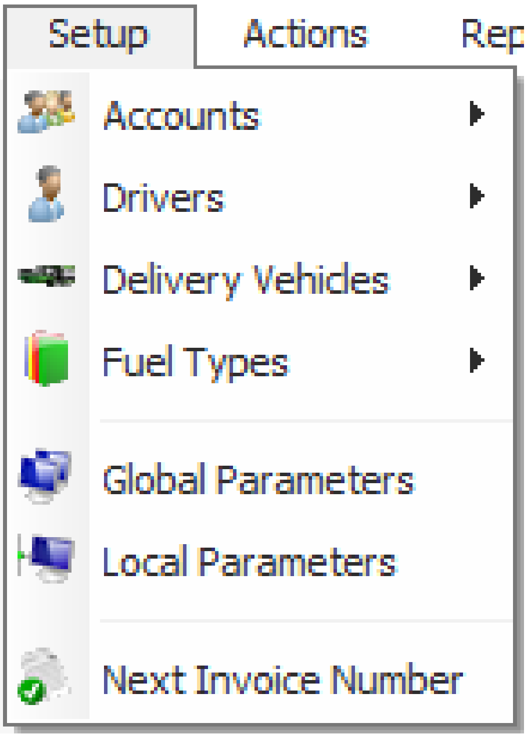
The window below will appear for changing the location of the data by click on the magnifying glass. The program will then remember this for future user.



Click on the change button after selecting the drive.



Chapter 2 – Initial Setup

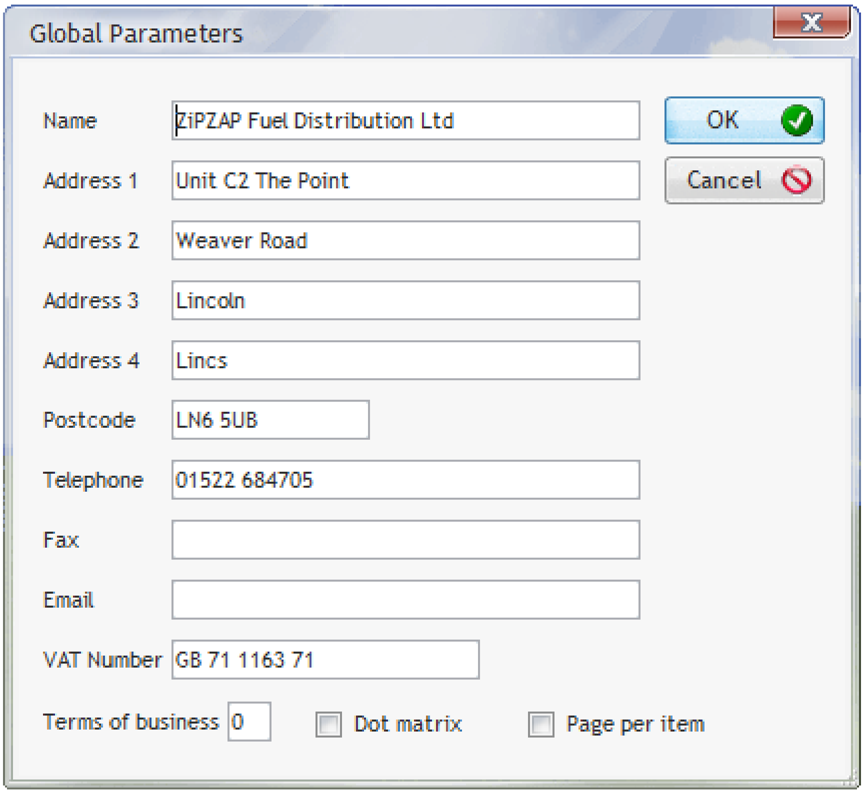


The setup menu - It is important to work through it in the order indicated in this manual.

Chapter 2 – Initial Setup

- **Setup, Global Parameters**

Enter <u>your</u> company details on the screen as below:



Type in the terms of business, which is the number of days you must make payment within.

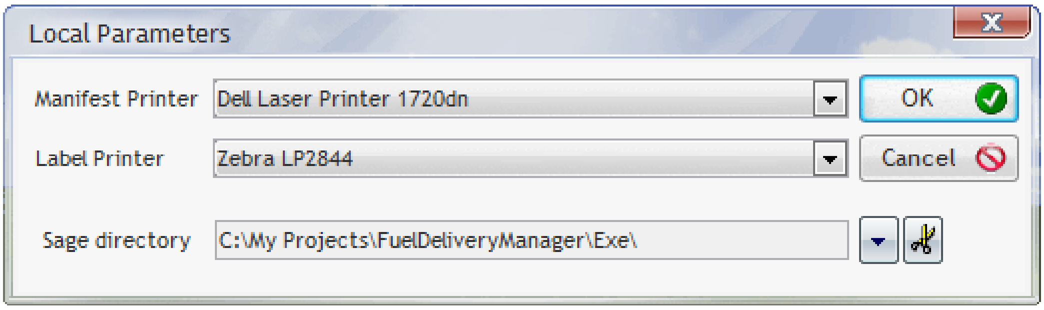
If you are going to use a Dot matrix printer, tick the tick box.

The page per item tick box is ticked if you want to print a separate ticket for each individual item.

Click **OK** to finish.

Chapter 2 – Initial Setup

- **Setup, Local Parameters**

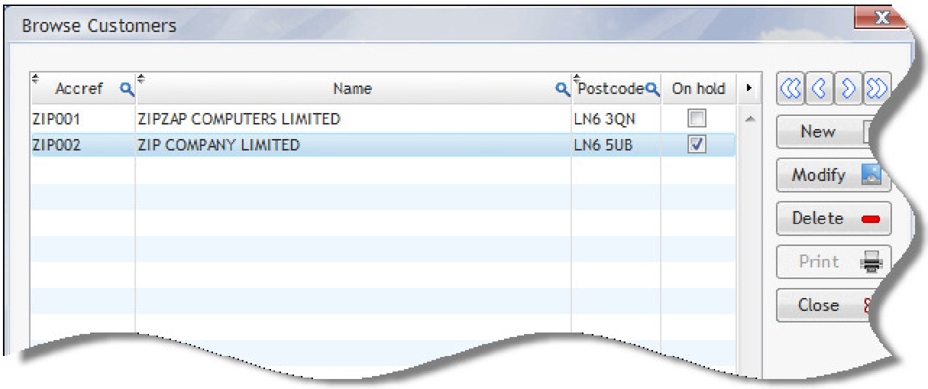


These settings are specific to your own local computer. Enter the default settings for your printers and sage directory.

Click **OK** to finish.

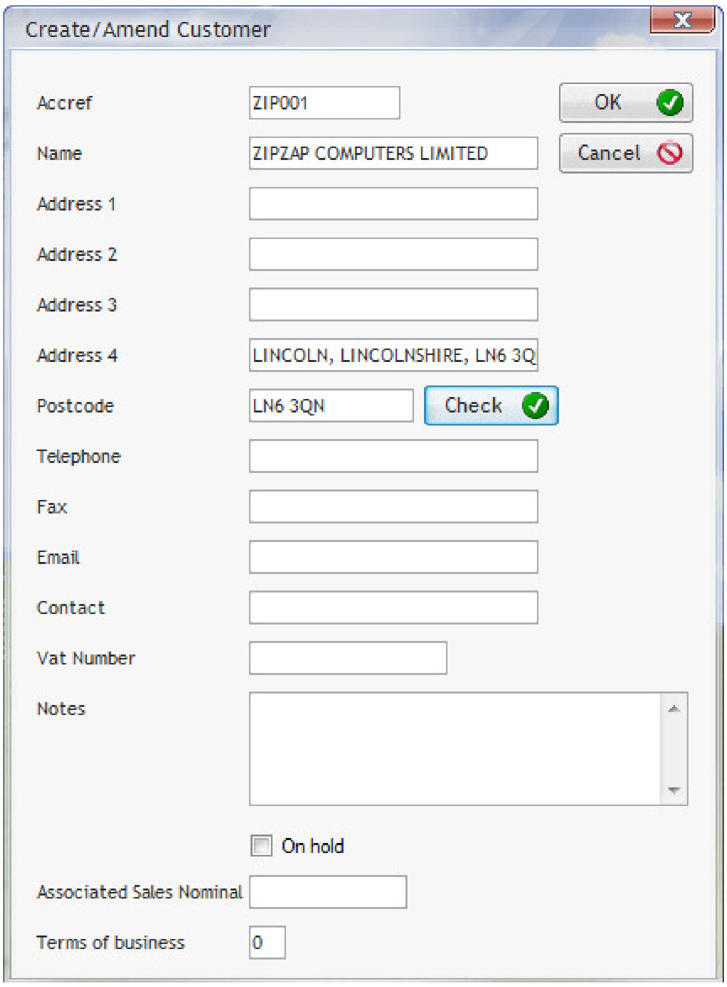
Chapter 2 – Initial Setup

- **Setup, Accounts**



Click on New to add a new record or Modify to alter the highlighted record.

On the screen above you will notice that one of the records has a tick in the on hold column, this means the account is on hold (Not Trading). This option can be selected on the following screen.



Enter the Customer details.

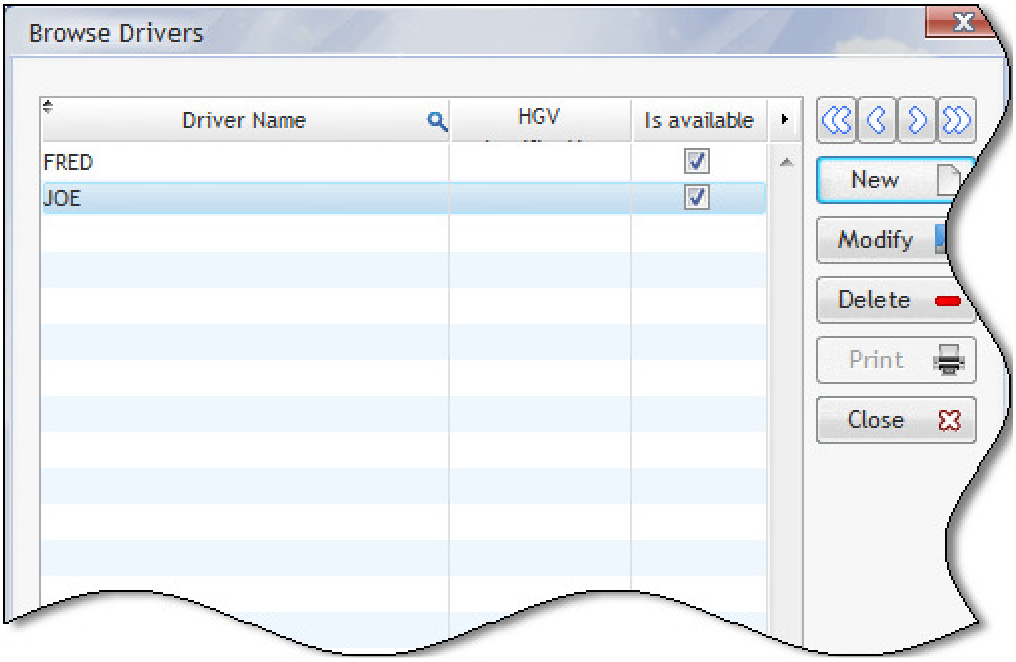
You can use the check button to fill in some of the address by typing in the postcode.

Then click on the check button and the details will appear in address 4.

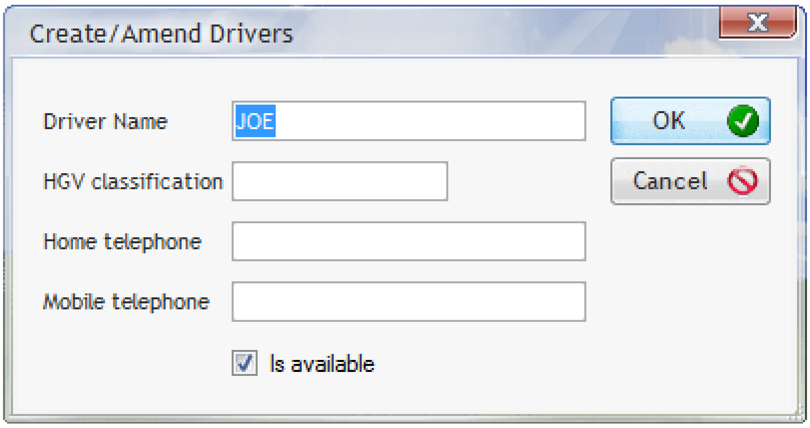
Enter the terms of business, which is the number of days the customer must make payment within and click **OK** to finish.

Chapter 2 – Initial Setup

- **Setup, Drivers, Browse Drivers**



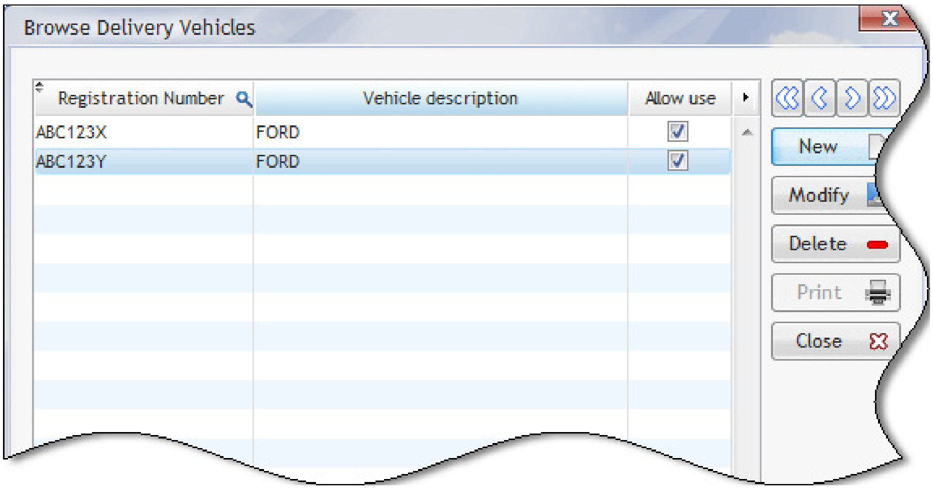
Click on New to add a new record or Modify to alter the highlighted record.



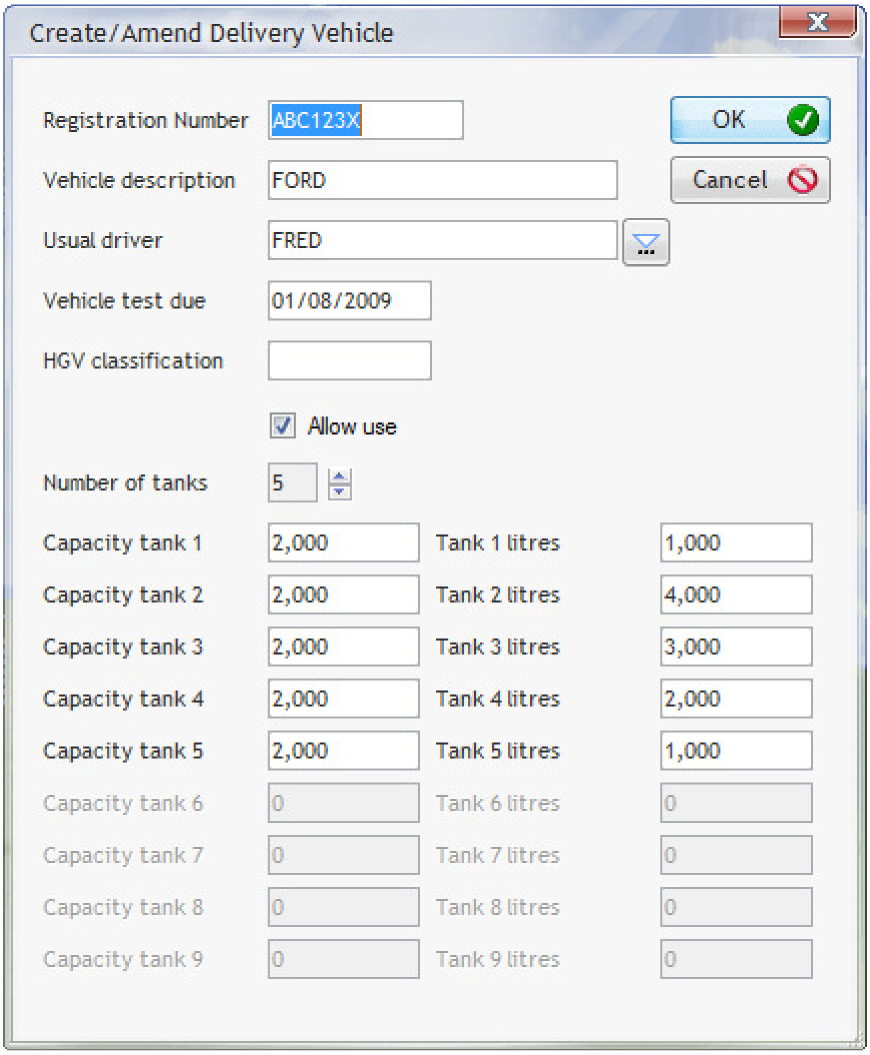
Enter the details of the driver and click **OK** to finish.

Chapter 2 – Initial Setup

- **Setup, Drivers, Delivery Vehicles, Browse Delivery Vehicles**



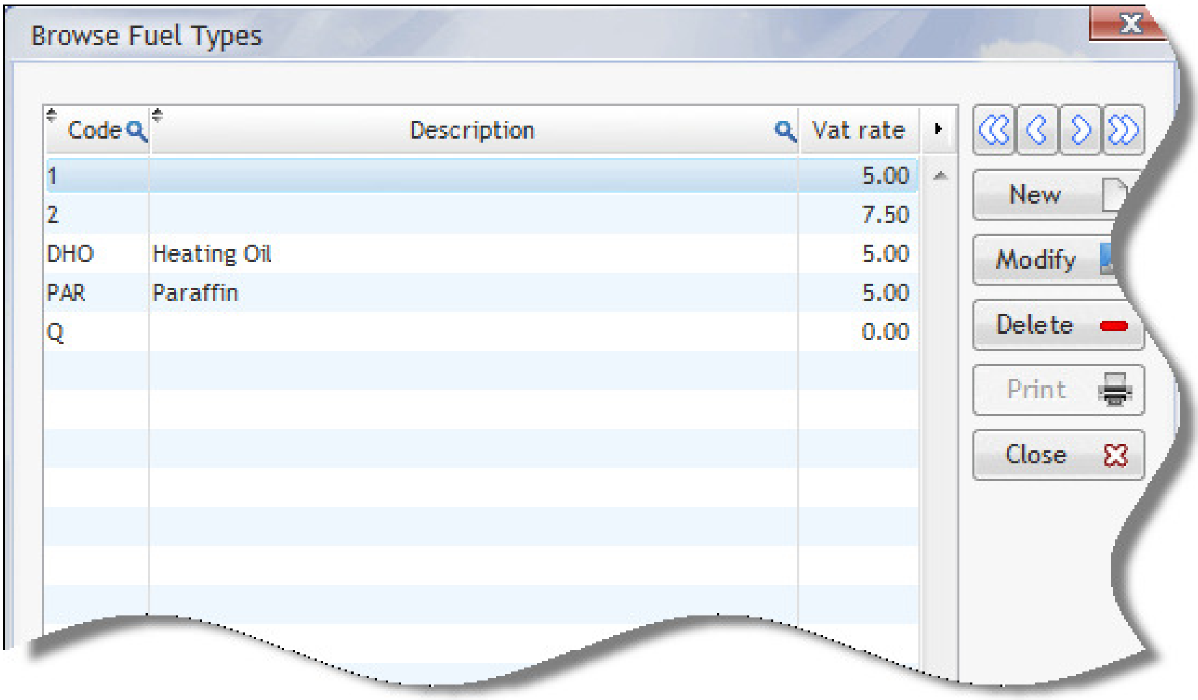
Click on New to add a new record or Modify to alter the highlighted record.



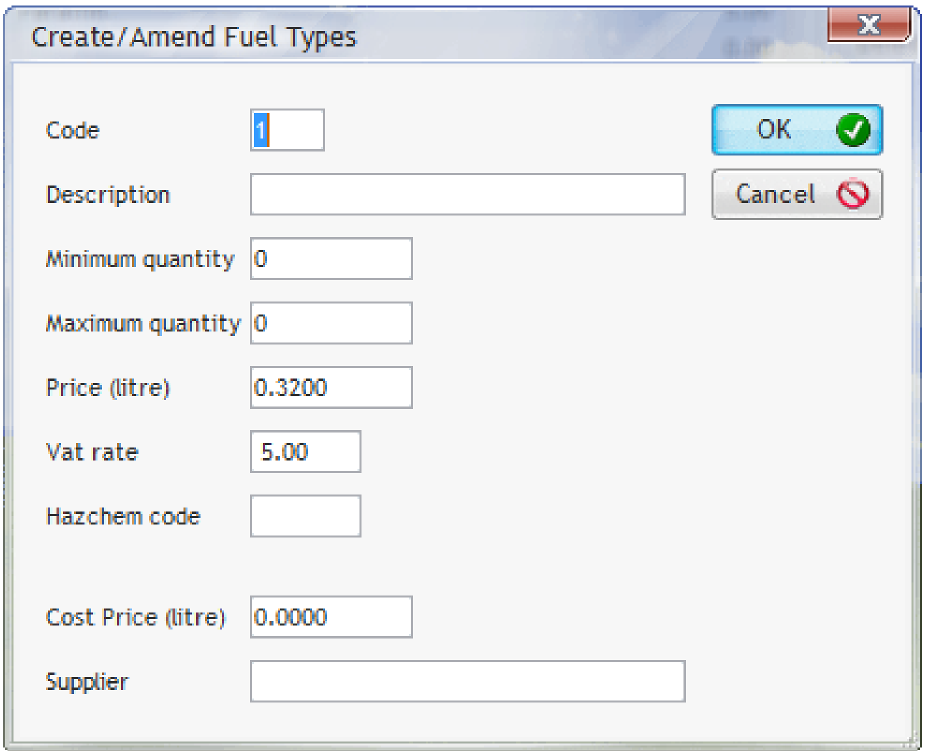
Enter the details of the vehicle and click **OK** to finish.

Chapter 2 – Initial Setup

- **Setup, Drivers, Fuel Types, Browse Fuel Types**



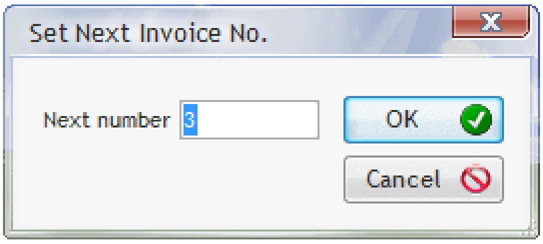
Click on New to add a new record or Modify to alter the highlighted record.



Enter the details of the fuel and click **OK** to finish.

Chapter 2 – Initial Setup

- **Setup, Next Invoice Number**

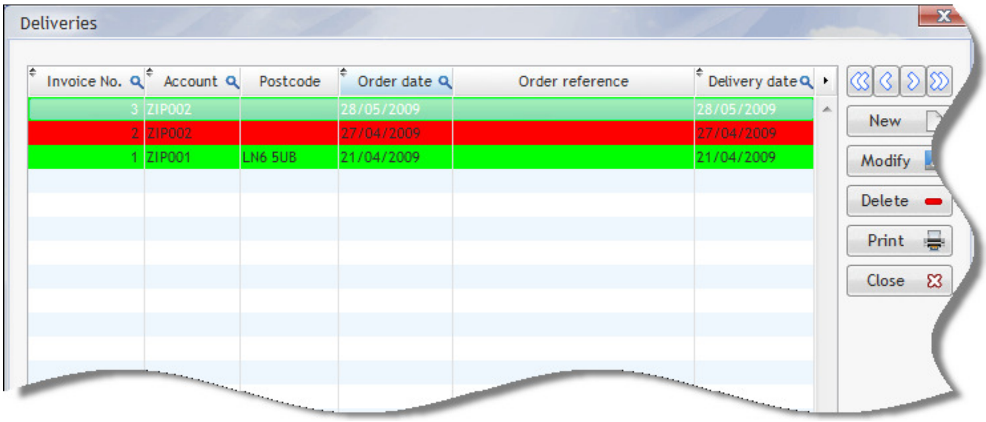


Here you can set the number of the next invoice.

Click **OK** to Finish.

Chapter 3 – Actions Menu

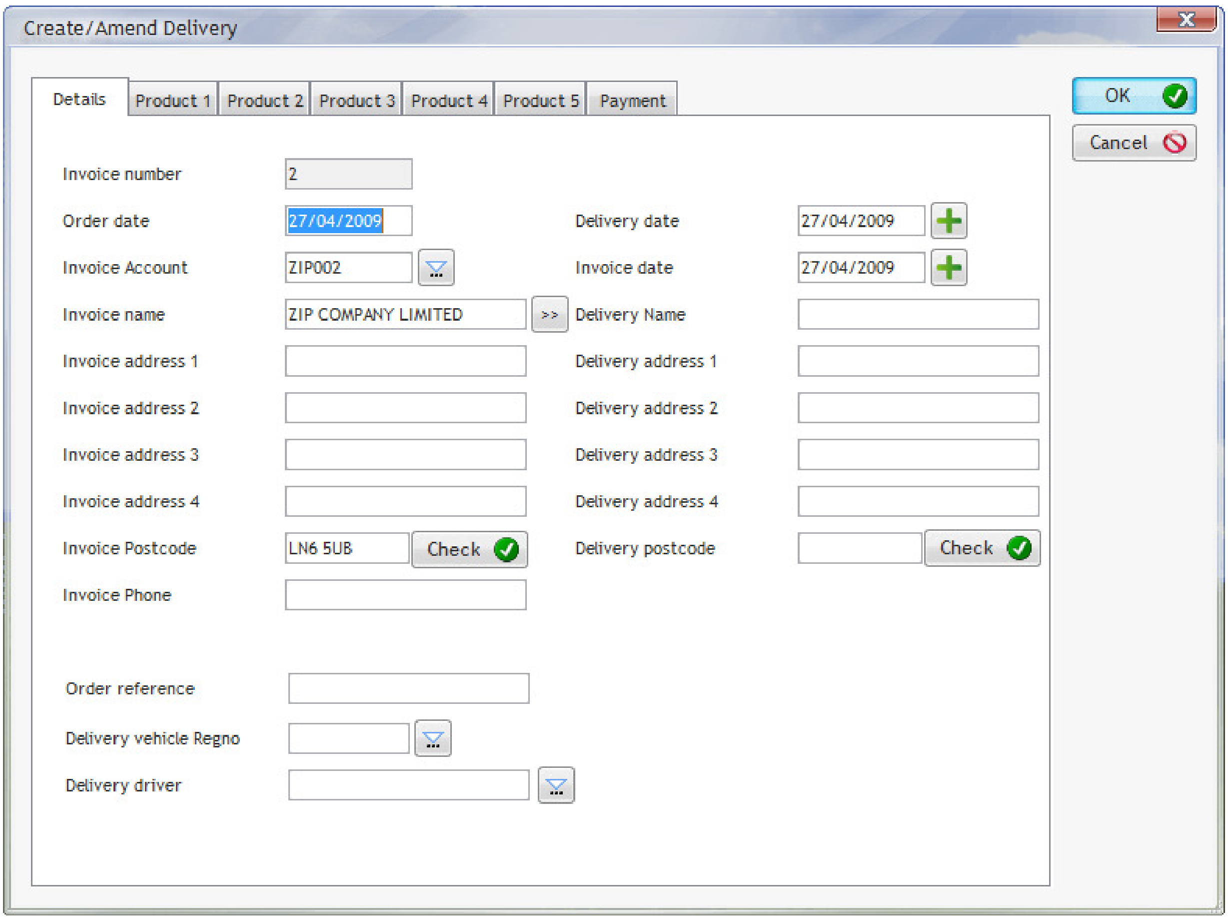
- **Actions, Deliveries**



This Table is Colour Coded:

Green	**=**	**Paid**
Yellow	**=**	**Not Paid**
Red	**=**	**Not Paid & Overdue**

Click on New to add a new record or Modify to alter the highlighted record.



Enter the Order Date

Select the account by clicking on this button  next to invoice account.

If the delivery address is the same as the invoice address click on this button  to replicate the address.

If the delivery address is different, enter the address.

Enter the order reference if applicable

Select the delivery vehicle reg number and driver by using this button

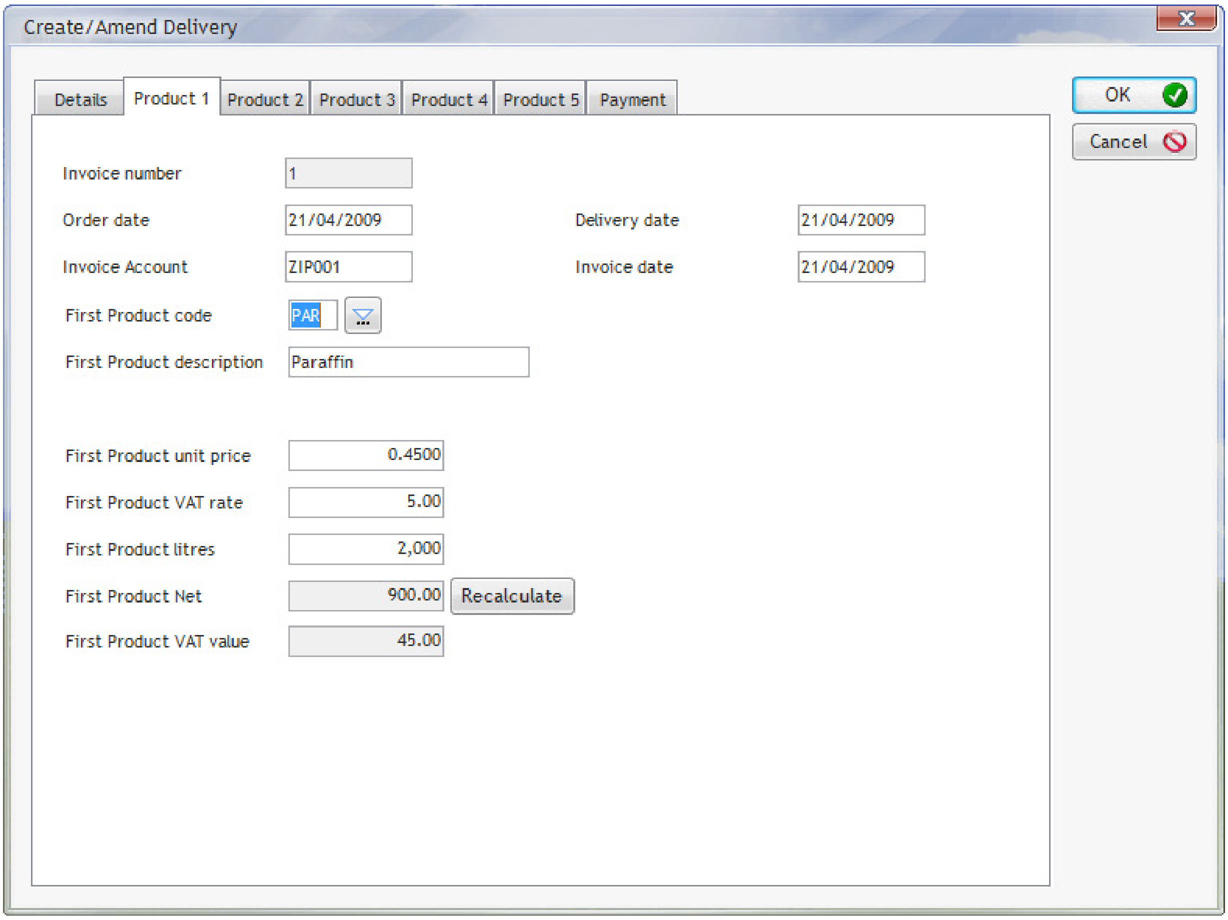
Enter the delivery and invoice date or use the cross buttons to plus a day to the current date.

Go to the next tab – Product 1. There are 5 product tabs; these are for entering what's been ordered.

Product Tabs

Select the product code by clicking on this button . The details for that product will automatically fill in the boxes product description, unit price and VAT rate.

Next you need to enter how many litres have been ordered. Once this has been entered the product Net total and VAT value will automatically calculate.



If you have more than one product that has been ordered, enter them in the next product tabs.

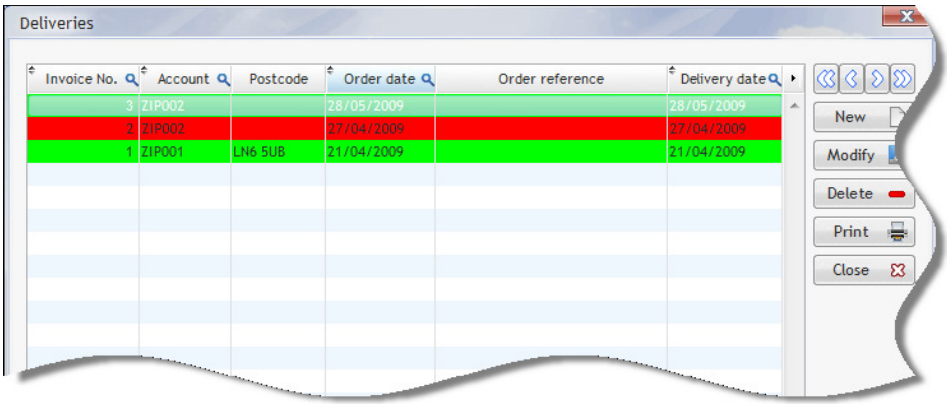
When you have finished entering all the product details, click on the **OK** button.

There is one more tab to be filled in later, which is the payment tab, where the payment details will be entered.

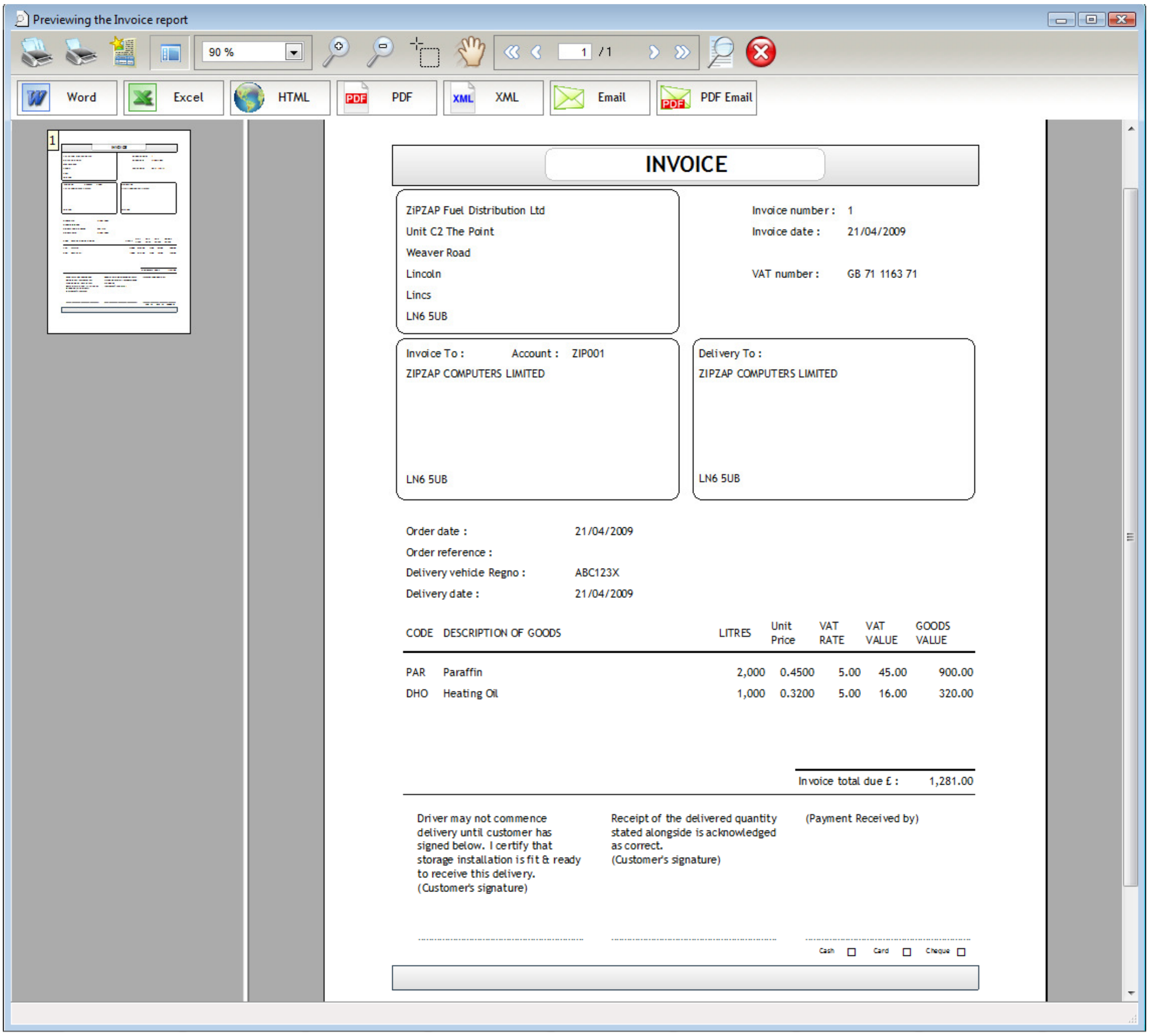
Chapter 3 – Actions Menu

Invoicing

After clicking on the OK button you will return to the table of deliveries.



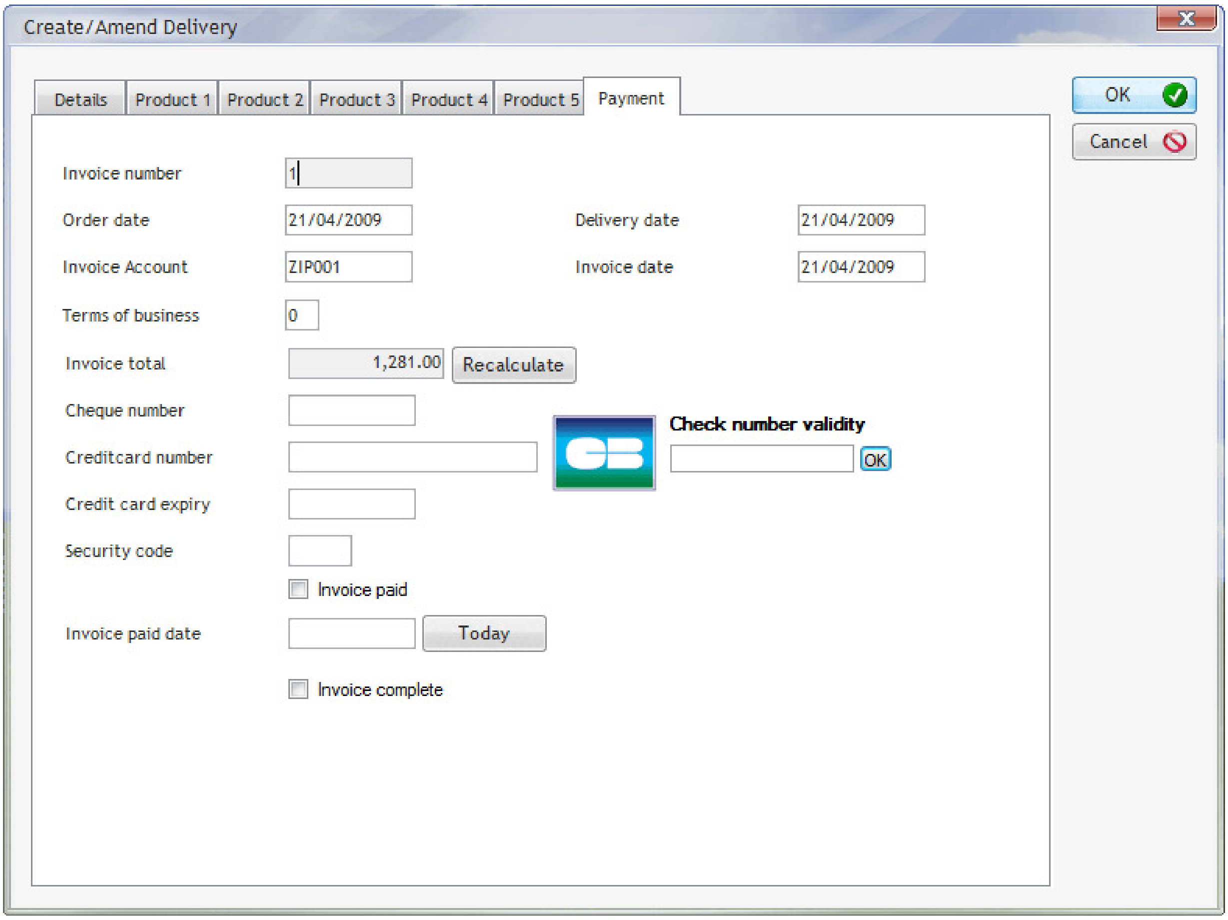
To invoice a customer, select the invoice no and click on the Print button. The print preview screen will appear for you to print the invoice selected.



Chapter 3 – Actions Menu

Payment Tab

When you receive a payment for an invoice, click on the invoice number in the deliveries table, click on the modify button and click on the payment tab.



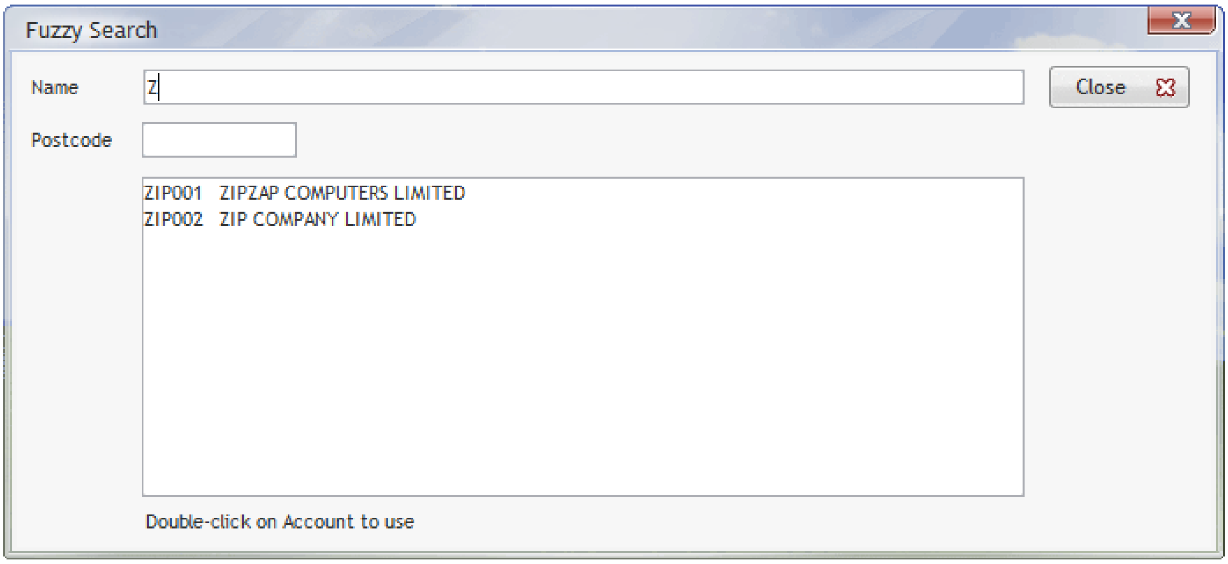
Enter the date of payment and tick the Invoice paid box. Enter the details of payment type, such as cheque number or credit card details. If you entered a credit card number, you can check the validity of the number.

Once everything is complete, tick the Invoice complete box and click on the **OK** button to finish.

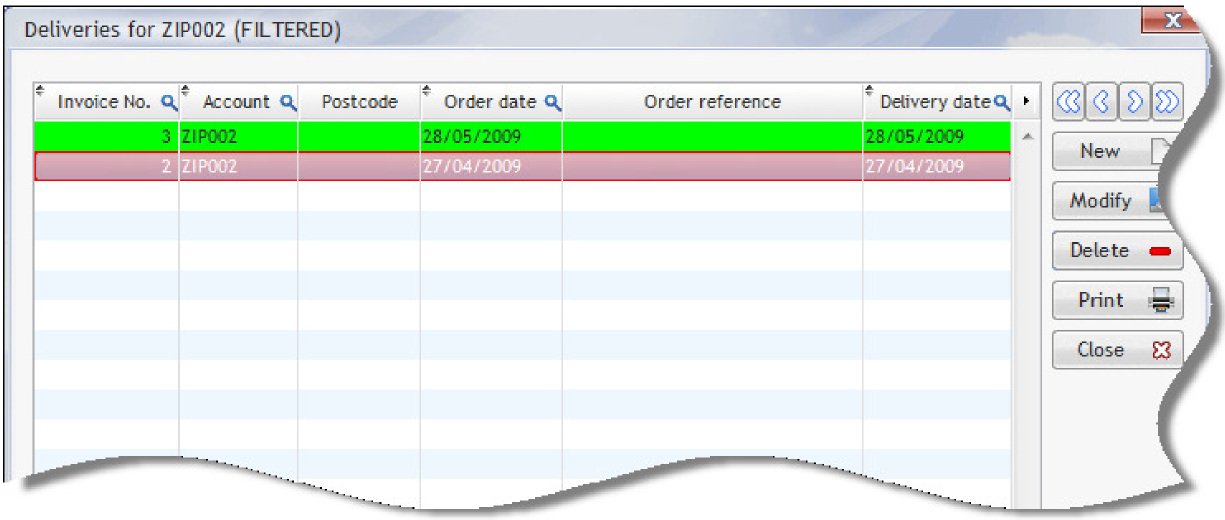
Chapter 3 – Actions Menu

- **Actions, Fuzzy Search**

This is a filter for deliveries which can be filtered by post code or account name

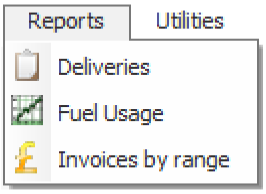


Double click on the account name you wish to view and only the deliveries for that account will come up, example below:

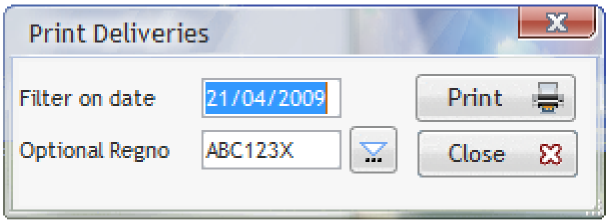


Chapter 4 – Reports Menu

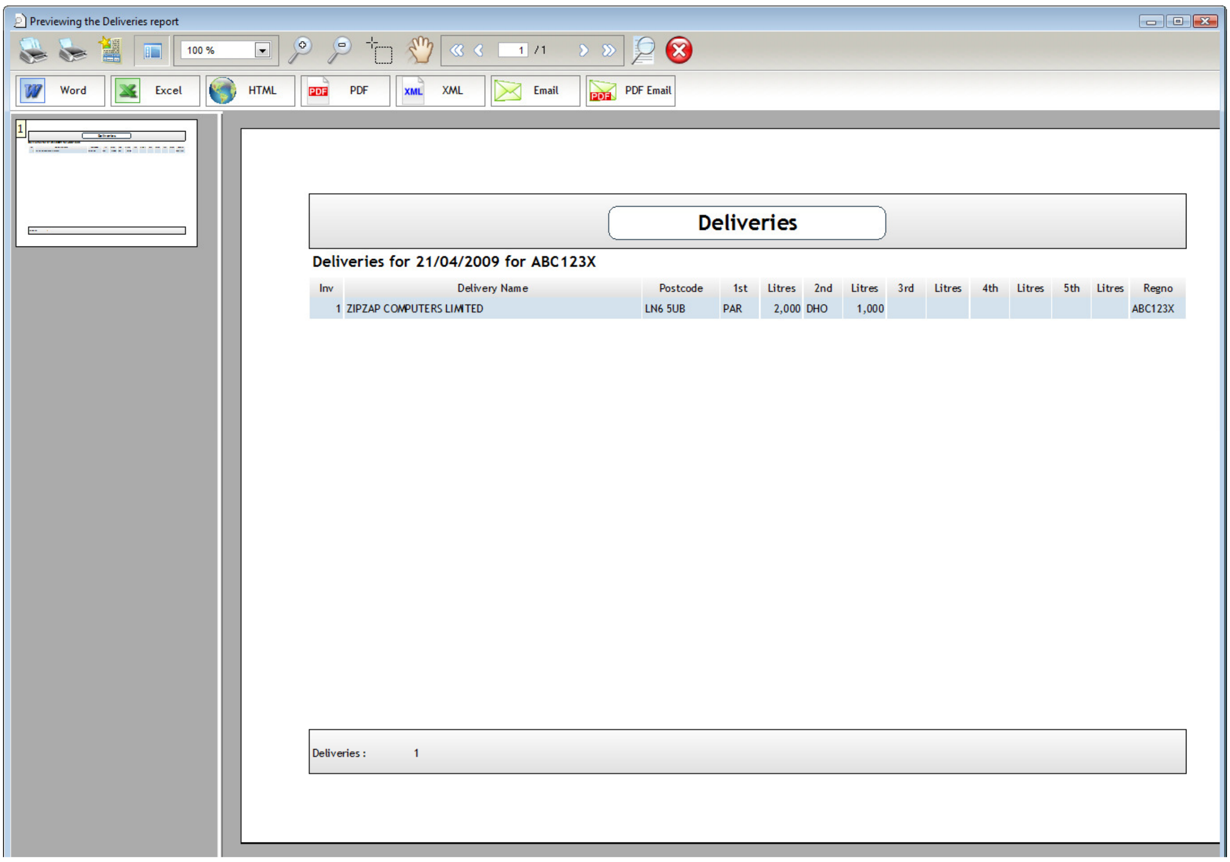
- **Reports, Deliveries**



Enter a date to filter by and if required, select a Reg number as well.



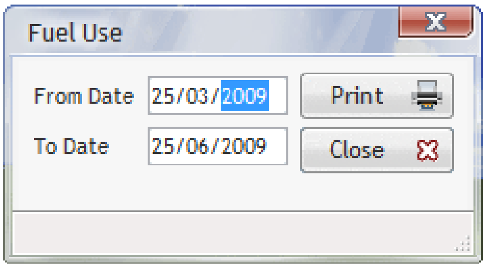
Click on the Print button and the print preview screen of the deliveries will appear, example below:



Chapter 4 – Reports Menu

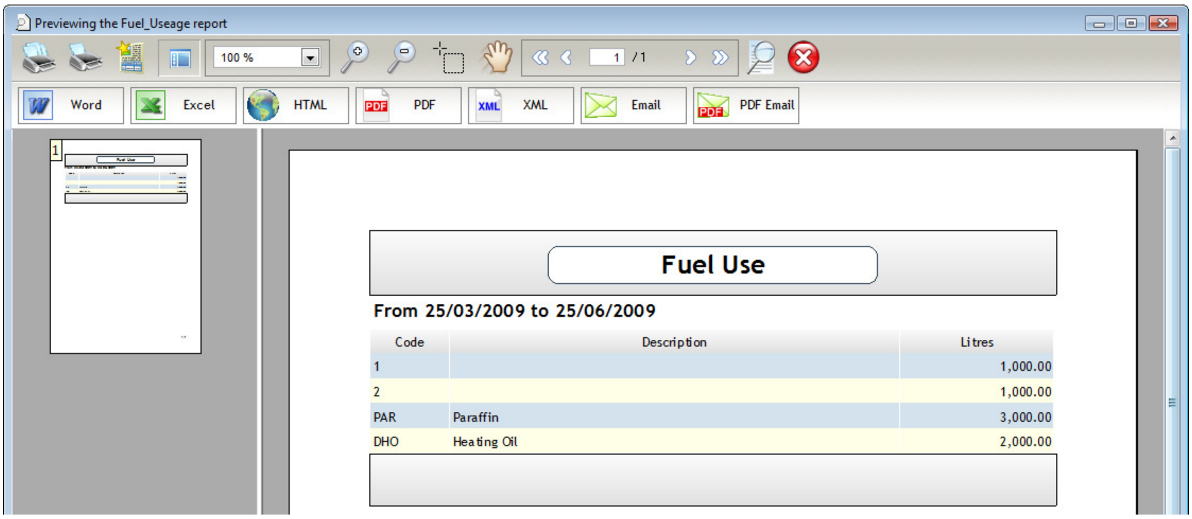
- ## Reports, Fuel Usage

This report shows you how much fuel has been used between the dates you specify.

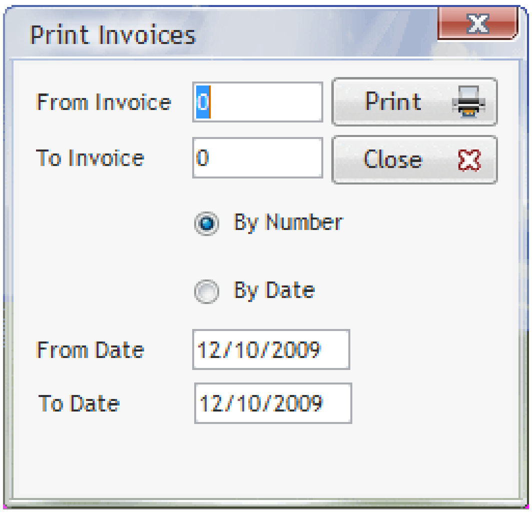


Type in the To and From date you wish to view between and click on the Print button.

Example report below:

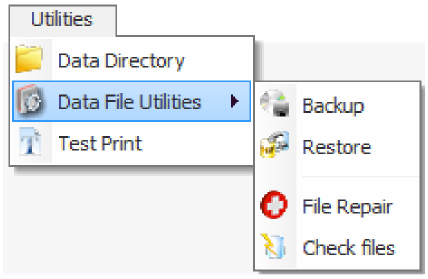


- ## Reports, Invoices by range



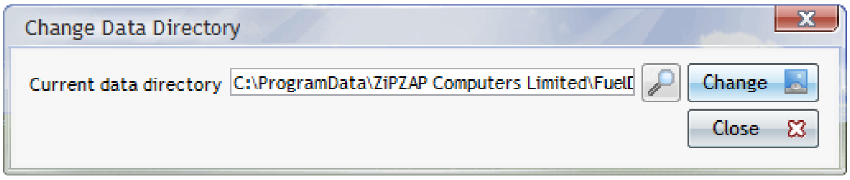
This option is for printing a range of invoices by invoice number or by invoice date. Select the range type, type in the number range or date range and click on the Print button.

Chapter 5 – Utilities Menu



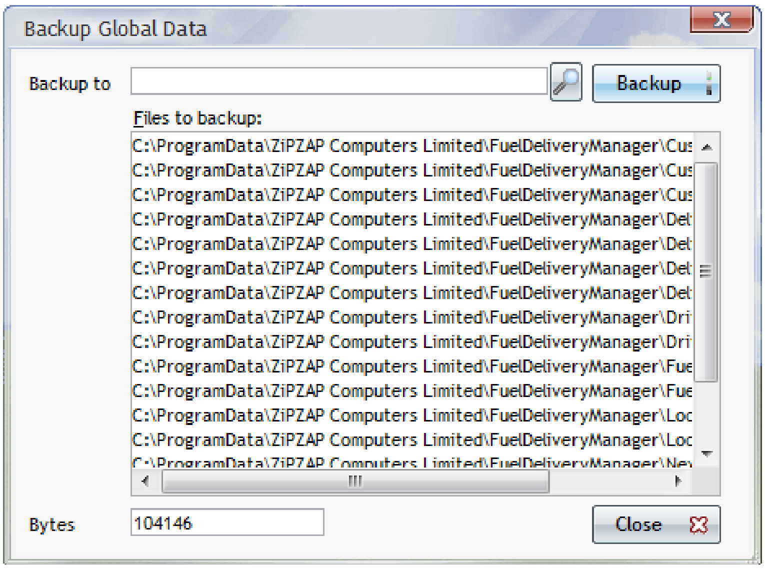
- **Utilities, Data directory**

For a multi user environment you would select your shared data folder here.



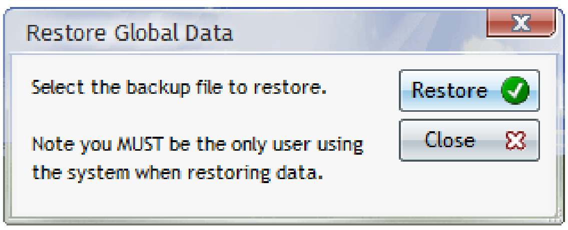
- **Utilities, Data File Utilities, Backup**

The system will automatically select the data files to backup. You just need to select the location to save the backup file to.



- **Utilities, Data File Utilities, Restore**

When doing a restore you will need to locate the backup file.



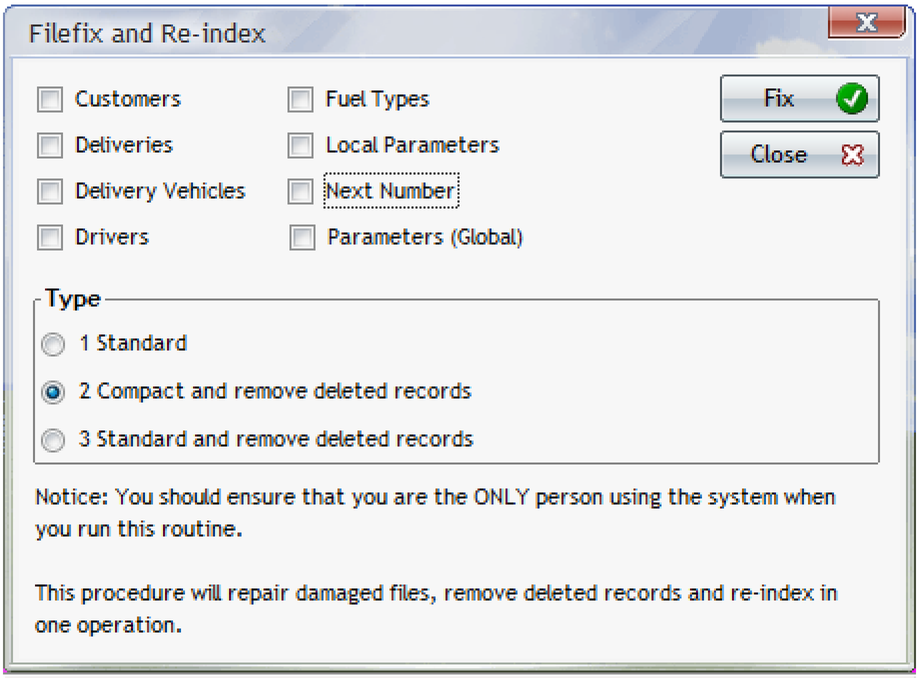
Chapter 5 – Utilities Menu

- **Utilities, Data File Utilities, File Repair**

If you encounter problems with data files it is usually possible to repair them using this utility.

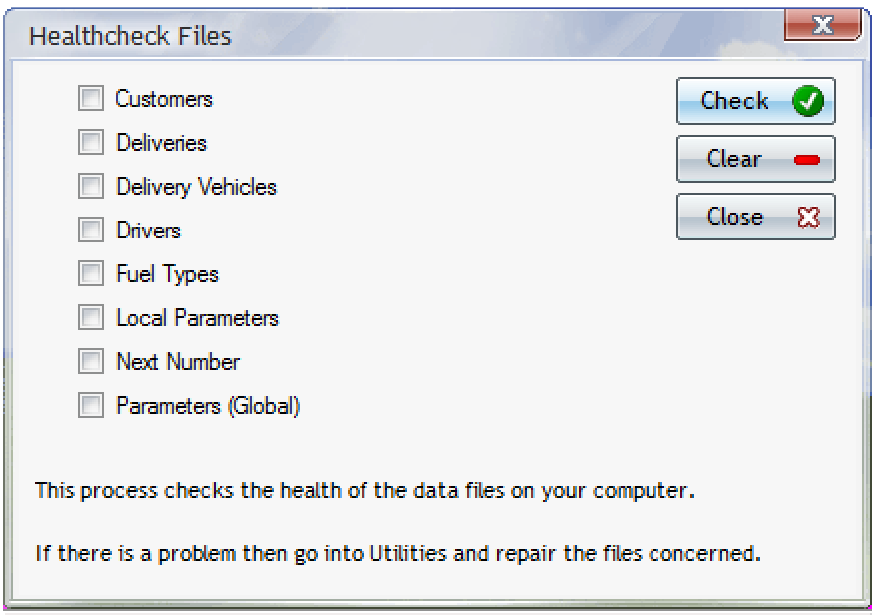
If you find yourself fixing files regularly you should look into the cause of the problem.

When using a multi user system ensure everyone else is logged out of the system.



- **Utilities, Data File Utilities, Check Files**

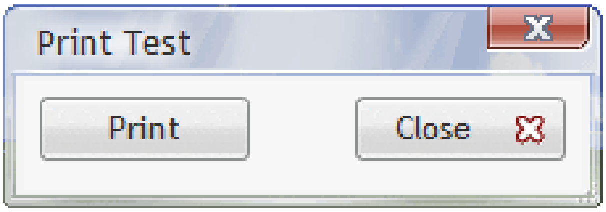
This option checks the health of the files on your computer, if there are any errors, use the utility file fix to repair them.



Chapter 5 – Utilities Menu

- **Utilities, Test Print**

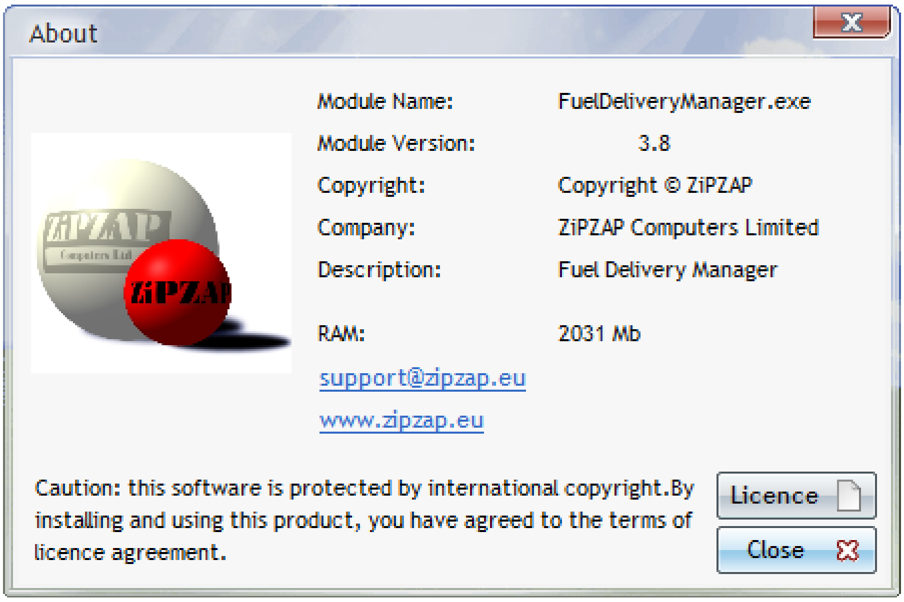
The last option of the utilities menu is a printer test page.



Chapter 5 – Help Menu

- **About**

This option tells you about the program you have installed, e.g. program version.



Click On License Button – This will show you the copyright details