DTN TABS® Authorization Options and Product Allocations Training Manual

Table of Contents

Setting up Allocations

Allocations control your customers based on factors such as supply needs (product) which make it possible to perform controls at a specific product family or class of products. There are differing strategies on how to utilize product allocations.

DTN recommends performing product allocations through a specific terminal or terminal group by SoldTo. Customers' credit can be controlled through the Enhanced Credit module (ECM). The ECM tracks customers' liftings regardless of what terminal and product the driver lifts. DTN recommends setting the credit control at ***All Terminals*** and by a specific SoldTo.

DTN TABS provides a wealth of reports that can help you zero in on the information you need, when you need it. The types of reports you can create include:

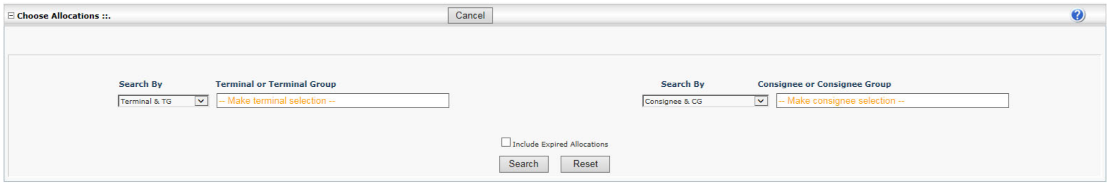
Note: See the DTN TABS Best Practices Quick Guide for more information on best practices for allocation controls.

About the Product Allocation Manage Page

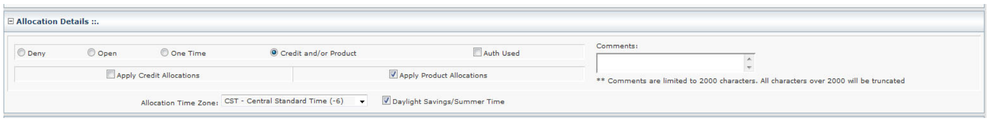
The **Product Allocation Manage** (**Allocations** > **Product** > **Manage**) page allows the setup of both product and credit allocations. The following panels display on this page.

Choose Allocations panel: Provides a search tool for finding an existing allocation or for selecting a Terminal or Terminal Group and Consignee or Consignee Group for setting up a new allocation.

Note: When opening the Product Allocation Manage page, only the Choose Allocations panel appears. Additional panels are visible depending on search results such as Supply Events and Product Details.



Allocation Header Details panel**:** Defines information about the purpose of the allocation.



Supply Events panel**:** Contains a summary of any supply events that affect the selected product allocation record.

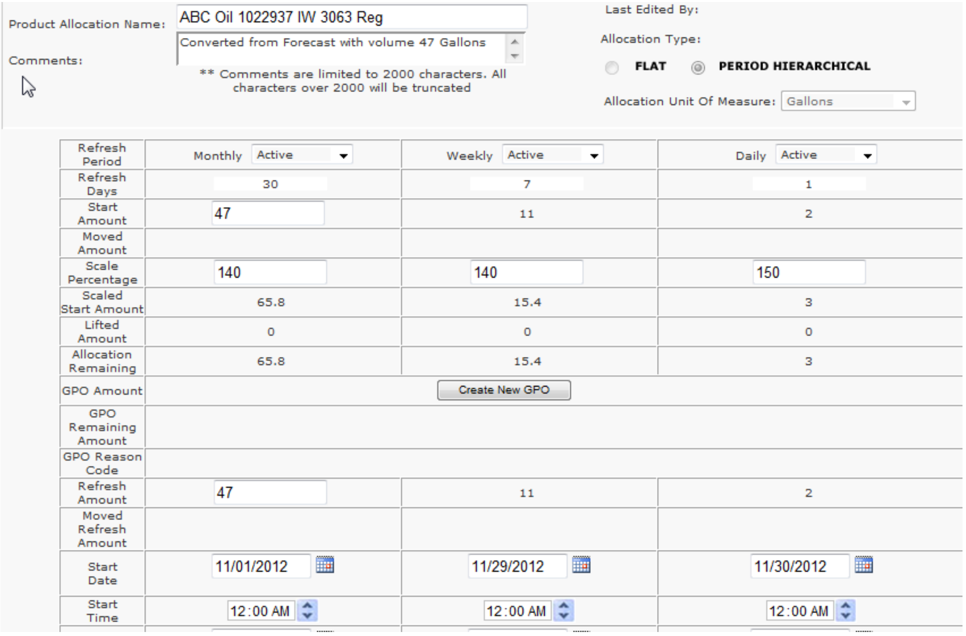
Note: See the DTN TABS Supply Event Training Manual for information on Supply Events.

Supply Events ::.

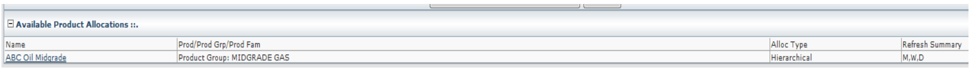
Records 1 - 1 of 1

Terminal	Terminal Status	Product	Channel	Description	Event Start Date	Event End Date	Type	Enable Loads	Media Code	Alert Time	Days In Advance 1	Days In Advance 2	Created Date	Modified Date	Backup Terminals
AMARILLO TX COP		PG: GASOLINE		Weather is bad	10/13/2017 11:04:56 AM CDT	12/31/2017 11:04:56 AM CST	No Outages	Y	All	Schedule	0	0	10/13/2017 11:07:14 AM CDT	10/13/2017 11:08:00 AM CDT	None

Product Allocation Details panel**:** Provides a summary of any product allocations for the selected allocation record.



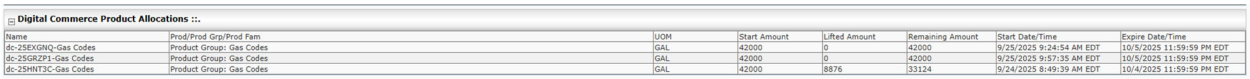
Available Product Allocations panel**:** Displays a list of current product allocations for the terminal or terminal group.



Available Product Allocations ::.

Name	Prod/Prod Grp/Prod Fam	Alloc Type	Refresh Summary
ABC Oil Midgrade	Product Group: MIDGRADE GAS	Hierarchical	M,W,D

Digital Commerce Product Allocations panel: Displays a list of current Digital Commerce allocations. Note: Digital Commerce functionality must be enabled for this to display.



Digital Commerce Product Allocations ::.

Name	Prod/Prod Grp/Prod Fam	UOM	Start Amount	Lifted Amount	Remaining Amount	Start Date/Time	Expire Date/Time
dc-25EXGNQ-Gas Codes	Product Group: Gas Codes	GAL	42000	0	42000	9/25/2025 9:24:54 AM EDT	10/5/2025 11:59:59 PM EDT
dc-25GRZP1-Gas Codes	Product Group: Gas Codes	GAL	42000	0	42000	9/25/2025 9:57:35 AM EDT	10/5/2025 11:59:59 PM EDT
dc-25HNT3C-Gas Codes	Product Group: Gas Codes	GAL	42000	8876	33124	9/24/2025 8:49:39 AM EDT	10/4/2025 11:59:59 PM EDT

Retrieving an Allocation

Here's how to pull up an existing allocation or to create an allocation:

1. From the **Search By** arrow next to the **Terminal or Terminal Group** field, select one of the options:
   - ***Terminal & TG***
   - ***Terminal by Name***
   - ***Terminal Group***
   - ***Terminal by SPLC***
   - ***Terminal by City***
   - ***Terminal by Plant***
2. From the **Search By** arrow next to the **Consignee or Consignee** Group field, select one of the options
   - ***Consignee & CG***

- ***Consignee Name***
- ***Consignee Group***
- ***Consignee #***
- ***Consignee by City***
- ***Channel as Consignee/CG***
- ***SoldTo as Consignee/CG***

3. Click inside the **Terminal or Terminal Group** field to select a terminal or terminal group. Once the terminal or terminal group has been selected, DTN TABS populates the **Consignee or Consignee Group** field with consignees/consignee groups that have been assigned to the selected terminal or terminal group.

4. Click inside the **Consignee or Consignee Group** field to select a consignee or consignee group to filter results.

   Note: If you select a consignee or consignee group first (instead of a terminal or terminal group), the Terminal or Terminal Group field populates with the terminals that are assigned to the selected consignee or consignee group.

5. Click **Include Expired Allocations** if you wish to see any allocations that are expired.

   Note: Selecting this option is recommended as it provides you with all potential records, if they exist.

6. Click Search The **Allocations Setup** page expands to display the selected record, or if no allocation record exists, the **New Allocations** panel opens.

Viewing an Allocation

Here's how to view a product allocation:

1. In the **Available Product Allocations** panel, click the desired allocation name listed under the **Name** column. This panel displays product allocations for the selected terminal/terminal group and selected consignee/consignee group combination.

⊟ **Available Product Allocations ::.**

Name	Prod/Prod Grp/Prod Fam	Alloc Type	Refresh Summary
Distillates Monthly	Product Group: DISTILLATES	Hierarchical	M,W,D

The following information appears for each allocation:

	DESCRIPTION
Name	Displays the user-defined name of the product allocation.
Prod/Prod Grp/Prod Fam	Identifies the product, product group, or product family to which the product allocation applies.
Alloc Type	Specifies the type of product allocation. Options are: • ***Flat*** • ***Hierarchical***

Refresh Summary	Summarizes refresh periods for the product allocation record.

Adding a Product Allocation

You can control supply at specific product family or class of products by adding product allocations.

DTN recommends working with your terminal product allocation personnel to make sure that you are allocating at a level most consistent with the terminal product allocation needs in use by and available at the terminal.

> **Product Availability:** Once you have set up an allocation for a product, DTN TABS automatically checks to be sure the product is available at the terminal for the consignee. If the allocation is set up for a product at a terminal group level, the system automatically checks to be sure the product is available to that consignee through at least one of the terminals in the group. If the product is not available, the system generates a message.
>
> **Flat Product Allocations:** Flat product allocations can be set up to refresh on a daily, weekly, monthly, and/or tri-monthly basis. If needed, you can set up a custom refresh period. For each period, you can designate an allocation amount that is set independently of the others. For authorization purposes, the system applies the strictest allocation setting.
>
> **Hierarchical Product Allocations:** Hierarchical product allocations can beset up automatically to be applied in a stair step or hierarchical fashion. Once you enter your base or starting refresh period and starting amount, the system calculates and auto-fill amounts and dates for the lower periods. For example, when you designate monthly as your base, and select weekly as your next stair step down, the system calculates a start amount and refresh date for the weekly refresh period.

DTN recommends only doing product allocations on specific supply points/customer levels and not creating allocations that are generic. While the system supports such configurations, generic allocations are not recommended.

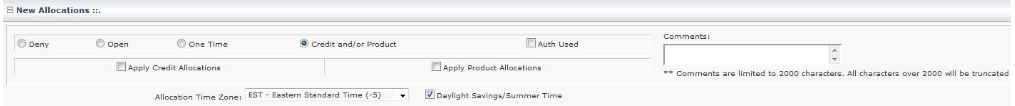
When you start to create a product allocation on one product for a client, allocations must be in place for all other products for that client. If this is not done, the system only returns product authorizations for products that belong to an allocation that is active and has a remaining amount.

To avoid this, allocations should be set up as a flat daily allocation for each product class that needs to be cleared without control. These allocations can be for 9,999,999 gallons with a refresh of the same volume. Then, clear the additional products at a volume that, in normal circumstances, would never be met. These types of records should be placed at the same level the controlling allocations are placed and not at a terminal/all consignees level. This keeps the system consistent and prevents issues with multi-level conflict.

Here's how to add a product allocation:

1. From the **Allocations** menu, select ***Manage*** under the **Product** list.
2. Enter or select the Terminal or Terminal Group for the allocation.
3. Enter or select the Consignee or Consignee Group for the allocation.

4. Click **Search** The page expands to include additional panels for allocation information. If there is an existing allocation it will display the allocation.



5. In the **New Allocation** panel, select one of the following authorization options:

	DESCRIPTION
Open	Indicates that the customer has no controls at this level and can lift any product available to them at the terminal/terminal group in question.
Deny	Determines that the customer is locked out at this level and cannot load any products at the specified terminal/terminal group. If this option is checked, the user must enter a reason for the deny in the **Comments** field if that option has been selected as a system-wide default through the **Defaults** page.
One-Time	Specifies that the customer can lift any product available to them at the terminal/terminal group but is limited to one load. Once the load has been completed, a flag is set to identify the load has been lifted and the customer is locked out until the flag is reset. Note: When the one-time allocation has been used, the system automatically selects the Auth Used check box. This prohibits the consignee/consignee group from loading any additional product until the record has been updated.
Credit and/or Product (L) or Product (E):	Determines that the customer is being allocated by the ***Apply Credit Allocation*** or ***Apply Product Allocation*** option based on the selection of the ***Apply Credit*** or ***Apply Product*** option. See the *Product Allocations* section in this training manual. See the *DTN TABS Enhanced Credit Training Manual* for information on credit allocations. If an allocation is created, it is not applied unless the ***Apply Credit Allocation*** or ***Apply Product Allocation*** option has been selected. Note: Only an option if legacy credit is in use. If Enhanced Credit is in use, Product will be the only option.
Auth Used	Indicates that the one-time authorization has been used. This prohibits the consignee/consignee group from loading any additional product until the check box has been cleared.
Enforce Full Truck For Product Allocation(s)	Determines if Full Truck functionality should apply to the allocation. Truck Sizes are configured under Data Management.
Apply Credit Allocations	Activates any attached credit allocations. Note: Only an option if legacy credit is in use.

Apply Product Allocations	Activates any attached product allocations. Note: If the Apply Credit Allocation or Apply Product Allocation option is selected, but there is no credit or product allocation record attached, the system issues a Deny to the customer. Only an option if legacy credit is in use.
Comments	Contains comments regarding the allocation, including why a customer has been set to ***Deny***. This field can also be used to note times of changes done to records such an ADMLOD file. Comments are limited to ***2000*** characters**.**
Allocation Time Zone	Indicates the time zone to be applied to the allocation. This defaults to the Time Zone Settings defined through the **Terminal Setup** page for the terminal or to Eastern Standard if a Terminal Group is selected, but can be changed, as needed.
DayLight Savings Time	Identifies that Daylight Savings Time (DST) is observed for the selected **Allocation Time Zone** if selected. The system automatically adjusts the time zone for the allocation to DST as needed.

6. In the Product Allocation Detail panel, click Add New Product Allocation

   The Product Allocation Detail panel provides a summary of any product allocations for the selected allocation record. You can set up an allocation by product, product group, or product family. You can also define whether the allocation is flat or period hierarchical, and then set a refresh period, refresh amount, etc.

7. Select or enter the following information for a product allocation:

	DESCRIPTION
Restrict to Assigned Products	Enables the Products, Product Groups, and Product Families menus to display only those items that have been assigned to the selected terminal or terminal group. This reduces the chance of setup errors.
Products/Product Groups/Product Families	Contains the lists of products, product groups and product families. DTN recommends allocating on product groups as a best practice. The allocation is enforced based on the selection.
Product Allocation Name	Identifies the allocation name. DTN recommends a standard and consistent use of naming conventions.
Comments	Displays comments about the product allocation. Although comments are not required, they are useful for determining who created the record and why it was created.
Allocation Unit of Measure	Specifies the unit of measure for the allocation. Options are

<table>
<tr><td></td><td>Cubic Meters
Gallon
Imperial Gallons
Imperial Ton
Kilo Barrels
Kilograms
Liters
Metric Ton
Pounds
Ton</td></tr>
<tr><td>Allocation Type</td><td>Defines one of the following options:

Flat - Flat product allocations can be set up to refresh on a Daily, Weekly, Monthly, and/or Tri-monthly basis. If needed, you can set up a Custom refresh period. For flat allocations, each period can assign an allocation amount that is set independently of the others; therefore, providing more flexibility in the way the allocations with different time periods can be implemented. For authorization purposes, DTN TABS applies the strictest allocation setting.

Hierarchical - Hierarchical product allocations make it possible to implement an automated stair step or hierarchical approach to allocations. Once you enter your base or starting refresh period and starting amount in, DTN TABS calculates and auto-fill amounts and dates for the next selected stair step(s) down.

For example, when you designate Monthly as your base, and select Weekly as your next stair step down, the system calculates a start amount and refresh date for the weekly refresh period. Then, whichever time period runs out of allocation first denies the customer from lifting.

For either Flat or Hierarchical, enter the following:
<table>
<tr><td>Active</td><td>Indicates that the product allocation is in effect.</td></tr>
<tr><td>Unenforced</td><td>Specifies that the particular period is set as unenforced. This is used for reporting purposes; keeping track of gallons lifted but not shutting off the customer if the amount exceeds the allocation. At least one time period must be active for allocation controls.</td></tr>
<tr><td>Inactive</td><td>Sets up an allocation to be turned on at a later date. The system considers these allocations as dormant. If all time periods are set to Inactive, the system denies the customer. This field is only available to flat allocations.</td></tr>
<tr><td>Refresh Period</td><td>Specifies one of the following refresh periods:
Monthly (available for hierarchical and flat allocations)</td></tr>
</table></td></tr>
</table>

		• ***Tri-Monthly*** *(only available for flat allocations)* • ***Weekly*** *(available for hierarchical and flat allocations)* • ***Daily*** *(available for hierarchical and flat allocations)* • ***Custom*** *(only available for flat allocations)*
	Refresh Days	Adds the number in the **Refresh Days** field to the start date to calculate the next refresh date.
	Start Amount	Provides the initial amount authorized for product for the customer. The numeric value corresponds to gallons. This amount is refreshed by the specified refreshed amount at the **Next Refresh Date** field. Note: If the Credit and/or Product check box is selected, you must enter a start amount greater than zero. If not, the system issues a Deny to the customer.
	Scale Percentage	Indicates the percentage the allocation start amount is increased /decreased. To enter a decrease, use a minus sign (-) before the percentage. By using the scale percent function, you can increase or decrease the start amount without having to actually make any modifications to the number in the start amount field.
	Scaled Start Amount	Specifies the scaled start amount. This amount is calculated as follows: `Start Amount x Scale Percent`
	Lifted Amount	Provides the amount lifted from the terminal or terminal group.
	GPO Allowance	Describes the amount that exceeds the allowed allocation and that incrementally lifted amount of the GPO. This displays only once GPO is entered.
	Allocation Remaining	Identifies the remaining amount upon completion. The formula includes, the system subtracting the gross gallons lifted which generates the remaining amount.
	GPO Amount	Displays the amount allowed if a GPO is in place. Click **Create New GPO** to create a GPO record that allows the customer to lift an additional load if their product allocation has reached ***0*** (zero).

	GPO Remaining Amount	Displays the amount remaining on a GPO
	Refresh Amount	Describes the number of gallons to which the start amount is automatically refreshed on the **Next Refresh Date** field.
	Moved Refresh Amount	Provides the moved allocation refresh volume, if using Move Allocations functionality.
	Carry Forward	Indicates any leftover allocation is added to the start amount on the **Next Refresh Date** field, if checked. Note: Only available on Flat product allocations.
	Start Date	Contains the date on which the product allocation goes into effect.
	Start Time	Describes the time which the product allocation goes into effect ***Note:*** *The Start Date/Time entered here does not go into effect until you select the* ***Schedule Product Refresh*** *option on the Defaults screen. If the* ***Schedule Product Refresh*** *option is not selected, the system applies the refresh amount when the first authorization request is received on or before date in the* ***Next Refresh Date*** *field*
	Expire Date	Specifies the date the product allocation expires or no longer be in effect. If a date and time is not entered in the **Expire Date/Time** field, the allocation continues to refresh indefinitely. DTN recommends keeping this field blank unless the allocation is no longer needed.
	Expire Time	Defines the time the product allocation expires or no longer is in effect. DTN recommends keeping this field blank unless the allocation is no longer needed.
	Refresh Date	Displays a date based on the **Start Date** and **Refresh Period** fields. The system automatically fills in this field.
	Refresh Time	Identifies the time the record is refreshed. Note: The Refresh Date/Time entered here does not go into effect until you select the Schedule Credit Refresh option on the Defaults page. If the Schedule Credit Refresh option is not selected, the system applies the refresh amount when the first

		authorization request is received on or before the date in the Next Refresh Date field.

8. Scroll back to the top of the **Product Allocation Details** panel and click Save

Deleting an Allocation

Allocations may be deleted from TABS but note that any reference to the allocation will no longer be visible within your account.

Here’s how to delete an allocation:

1. From the **Allocations** menu, select ***Manage*** for either Product or Credit.
2. Enter or select the terminal or terminal group for the allocation.
3. Enter or select the consignee or consignee group for the allocation.
4. Click Search The page expands to include additional panels for allocation information.
5. To delete:
    - **The entire record:** If multiple allocations exist, ***Delete All*** displays at the top of the page. Click Delete All at the top of the page. A message apears confirming the deletion.
    - **An attached product record:** Select the product record to be removed from the product details panel of the page and click Delete Allocation within the details panel to remove the product allocation record.
    - **An attached credit record:** In the **Credit Allocation Details** panel, click Delete next to the credit record to remove, then click Save to save the change made to the allocation record.

Note: Any deletion that results in either no allocation record being retained for a consignee/consignee group at a terminal/terminal group, or no valid credit/product record on an allocation that is set to Credit and/or Product, results in a denial at the terminal.

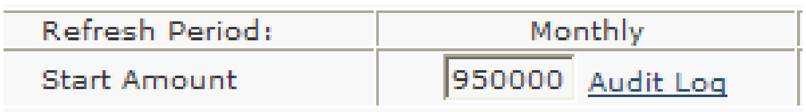
Changing a Start Amount

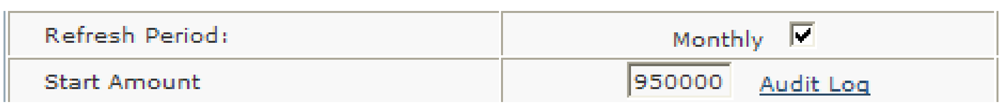
As supply (product) needs change and adjustments need to be made, you can modify the **Start Amount** field for any level of a flat product allocation and for the highest refresh period level of a hierarchical allocation. The new start amount becomes effective as soon as you click **Save**. When you change the start amount, the system performs the following re-calculations:

DATA FIELD	PRODUCT ALLOCATION TYPE	RE-CALCULATION DESCRIPTION

Remaining Amount	Flat	Recalculates to include new start amount
Remaining Amount	Hierarchical	Specifies the highest refresh period and sub-refresh periods recalculated to include the new start amount for highest refresh period.
Start Amount	Hierarchical	Provides the start amounts for the sub refresh periods that are recalculated using the new start amount of the highest refresh period.
Refresh Amount	Flat	Displays the same amount and doesn’t recalculate.
Refresh Amount	Hierarchical	Contains the refresh amounts for the sub refresh periods that are recalculated using the new start amount of the highest refresh period. The Refresh Amount for the highest refresh period is not recalculated.

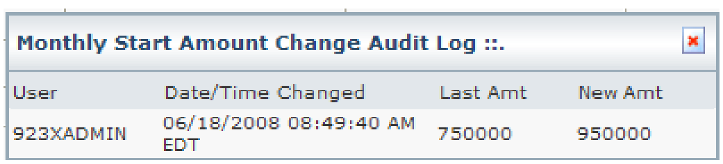
When you change the start amount for a Product Allocation, the system generates an audit log to track changes to the allocation. You can access the audit log for each modified start amount by clicking **Audit Log**.

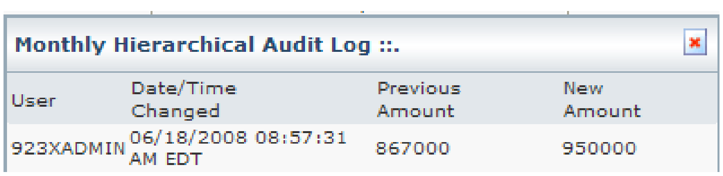




A pop-up window displays the log of changes for the Start Amount that occurred during the current refresh cycle. The log displays the name of the user who made the change, the date and time the change occurred, the previous Start Amount and the new Start Amount.

To close the box, click .



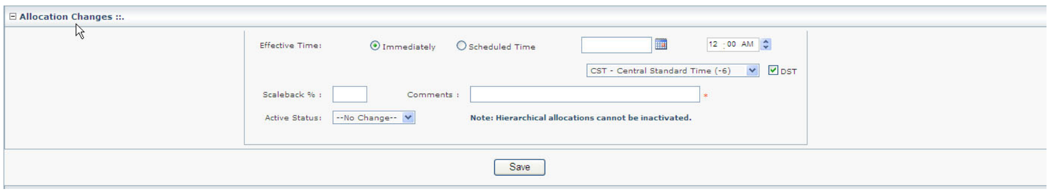


See the ***Allocation Historical Time-Span Report*** section in this manual for more information on changes to an allocation.

Mass Edit Allocations

The **Mass Edit Allocations** page adjusts several product allocations at once, when supply fluctuations occur at a terminal or terminal group instead of increasing every allocation at specific terminal by 10% or temporarily shutting everyone off by setting the scale percent to 0%.

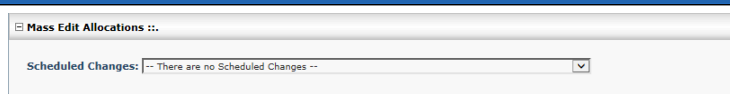
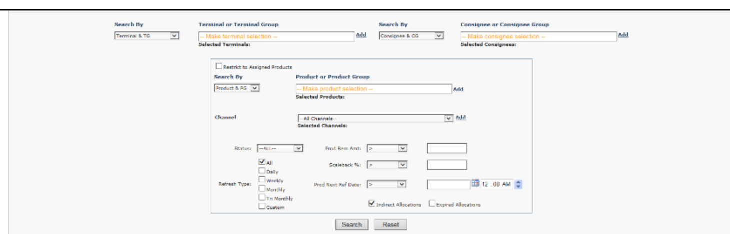
The **Mass Edit Allocations** page is the most effective tool within the DTN TABS UI to make such changes at once. The mass changes can be made effective immediately or at a scheduled date and time.



Searching for Allocations to edit

1. From the **Allocations** menu, select ***Mass Edit*** under the **Product** list.

2. Select the criteria for the allocations you want to change by using the following fields:

	DESCRIPTION
	
Scheduled Changes	
Search by Field for Terminals & Terminal Groups	Select one of the following options: • ***Terminal & TG*** • ***Terminal by Name,*** • ***Terminal by Group*** • ***Terminal by SPLC*** • ***Terminal by City*** • ***Terminal by Plant*** • Then select your terminal or terminal group from the Terminal or Terminal Group drop-down list box.
Search by Field for Consignee & Consignee Groups	Select one of the following options: • ***Consignee & CG***

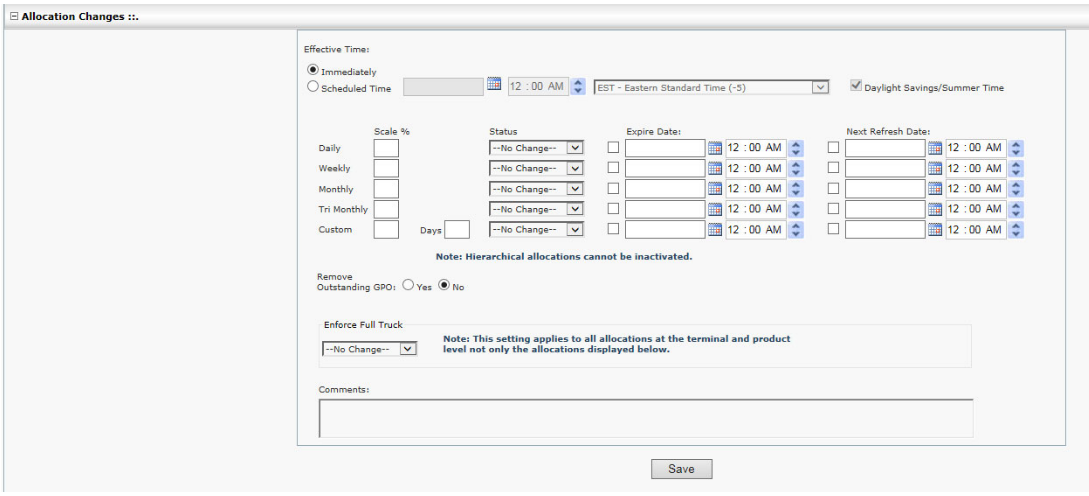
	• ***Consignee by Name,*** • ***Consignee by Group*** • ***Consignee by SPLC*** • ***Consignee by City*** • ***Channel as Consignee/CG*** • ***SoldTo as Consignee/CG*** Then select your consignee or consignee group from the Consignee or Consignee Group drop-down list box.
Restrict to Assigned Products	Displays only products available at the selected terminal or terminal group and consignee or consignee group combination as well as for product groups and product families. ***Products****:* Provides the specific products from the Products arrow. ***Product Groups:*** Contains the specific product groups from the Product Groups arrow. ***Product Families:*** Lists the specific product groups from the Product Families arrow ***Refresh Type*****:** Indicates the refresh type for the allocation. Select one of the following options: • All • Daily • Weekly • Monthly • Tri Monthly • Custom ***Prod rem amt:*** Identifies the amount of product left of the original allocation. Enter an amount in this field and a corresponding option and the system searches for any product allocations with a remaining amount that matches your criteria. Options are: • **=** • **<** • **<=** • **>** • **>=** • ***Between*** ***Status:*** Describes the status of the allocation. Options are: • All • Active • Inactive • Unenforced ***Scaleback %:*** Determines the percentage of temporary increase/decrease for the selected product allocation. Enter an amount in this field and a

	corresponding option The system searches for any product allocations with a scaleback percentage that matches your criteria. Options are: • **=** • **<** • **<=** • **>** • **>=** • ***Between*** ***Prod next ref date:*** Provides the date and time a product is refreshed. Select a date and time and the system searches for any allocation records whose next refresh date and time matches your criteria. Options are: • **=** • **<** • **<=** • **>** • **>=** • ***Between*** ***Indirect Allocations:*** Contains an indirect allocation that may apply indirectly to the selected terminal and consignee combination. For example, an allocation that is applied to all terminals would be an indirect allocation. ***Expired Allocations*:** Specifies allocations that have a designated date and time for when the allocation no longer controls the customer. The system stops reviewing expired allocations for controls.

3. Click Search The matching allocations display in the **Allocation Detail** pane.

Allocation Changes Panel

Once a search has been completed and allocations are available for selection in the **Allocation Details** panel, you will then need to fill in the **Allocation Changes** panel:



	DESCRIPTION
Effective Time	Options are: • ***Immediately****:* Changes will go into effect at the moment the change is saved. • ***Scheduled Time****:* Sets the date and time that the mass edit changes are to go active.
Refresh Type	Indicates the refresh type for the allocation. Select one of the following options: • ***All*** • ***Daily*** • ***Weekly*** • ***Monthly*** • ***Tri Monthly*** • ***Custom***
Scale %	Updates the allocation period scaling percentage to this value.
Status	Options are: • ***No Change*** • ***Active*** • ***Inactive*** • ***Unenforced***
Expire Date	Updates the expired date on the allocation period to the value entered in this field.

Next Refresh Date	Revises the next refresh date on the allocation period to the value entered in this field.
Remove Outstanding GPO	Options are: • ***Yes*** • ***No***
Enforce Full Truck	Options are: • ***No Change*** • ***Yes*** • ***No*** Note: This setting applies to all allocations at the terminal and product level not only the allocations displayed in the Allocation Details panel.
Comments	Allows free text comments about the reason for the Mass Edit. This field is useful for scheduled events to communicate to other users the reasons this event was scheduled.

Allocation Details Panel

The **Allocations Detail** panel shows the records that are available to modify from the **Mass Edit** page. You can select the allocation records to change using the details you provided in the **Allocation Changes** panel.


Allocation Details ::. Export To Excel

Select All

Terminal / Terminal Group	Consignee / Consignee Group	Full Truck
T - AMARILLO TX COP	CG - DEF Oil-10057683UB	No

Select	Product	prod alloc detail name	Status	Type	Ref Type	Ref Days	Start Amount	Ref Amt	Rem Amt	Expire Date	Next Ref Date	Scale Percent	Unit of Measure	SoldTo ID	SoldTo Name	Channel ID	Channel Name	Move Event Details
☐	PG - GASOLINE	test	Unenforced	HRCH	Daily		16,129	16,129	8,064.5		12/5/2017 12:00 AM CST	50	Gallons	10057683	DEF Oil - 10057683			No Move Event
		Comments: Test																
☐	PG - GASOLINE	test	Unenforced	HRCH	Weekly		112,903	112,903	112,903		12/5/2017 12:00 AM CST	100	Gallons	10057683	DEF Oil - 10057683			No Move Event
		Comments:																
☐	PG - GASOLINE	test	Unenforced	HRCH	Monthly		500,000	500,000	550,000		1/1/2018 12:00 AM CST	110	Gallons	10057683	DEF Oil - 10057683			No Move Event
		Comments: mass edit test 2 07/11/17 stm																

Terminal / Terminal Group	Consignee / Consignee Group	Full Truck
T - AMARILLO TX COP	CG - UB CONTRACT	No

Select	Product	prod alloc detail name	Status	Type	Ref Type	Ref Days	Start Amount	Ref Amt	Rem Amt	Expire Date	Next Ref Date	Scale Percent	Unit of Measure	SoldTo ID	SoldTo Name	Channel ID	Channel Name	Move Event Details
☐	PG - GASOLINE	Gasoline	Active	Flat	Daily		50,000	50,000	25,000		12/5/2017 12:00 AM CST	50	Gallons					No Move Event
		Comments: Test																

Mass Delete Allocations

It is recommended that routine maintenance be performed on your DTN TABS database. This routine maintenance includes deleting product allocations that are no longer in use.

The **Mass Delete Allocations** (**Allocations** > **Product** > **Mass Delete**) page is effective tool for deleting a number of allocations at once for a specific terminal or terminal group. The page shows you any allocation records that are orphaned due to removed setups or broken linkages caused by consignee deletions.

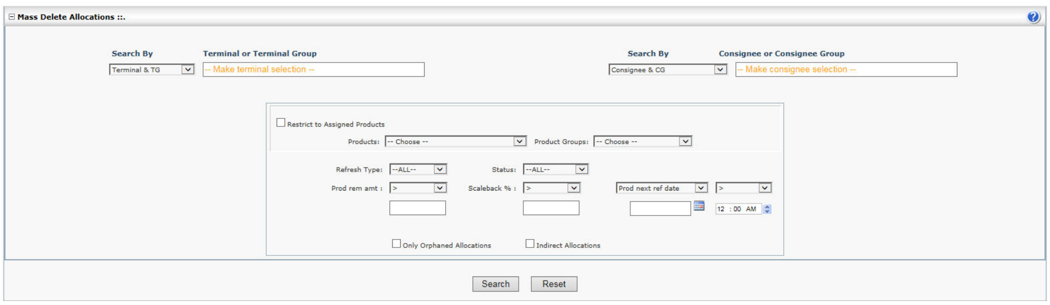
Allocations can be filtered by terminal or terminal group and consignee or consignee group as well as by channel or SoldTo. You can select all or any combination of allocations to be deleted. If an authorization point has no remaining allocations, you can delete it, set it to deny or set it to open.

Note: All allocation history, alerts, GPOs and pre-approved overrides tied to the deleted allocation are permanently deleted from DTN TABS.

Mass Deleting Product Allocations

Here's how to mass delete product allocations:

1. From the **Allocations** menu, select ***Mass Delete*** from under the **Product** list. The **Mass Delete Allocations** page opens.



2. Enter or select the terminal or terminal group for the allocation you want to delete.

3. Enter or select the consignee or consignee group for the allocation you want to delete.

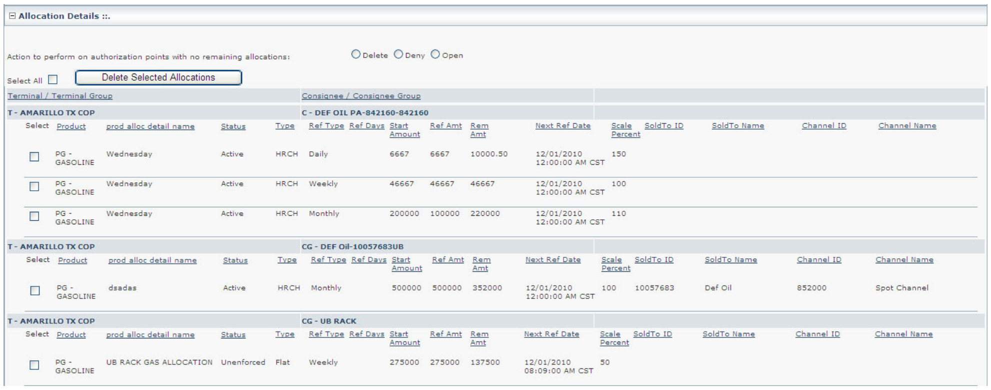
4. Select **Restrict to Assigned Products** to display only products available at the selected terminal or terminal group and consignee or consignee group combination as well as for product groups and product families.

	DESCRIPTION
Products	Provides the specific products from the **Products** arrow.
Product Groups	Contains the specific product groups from the **Product Groups** arrow.
Product Families	Displays the specific product family from the **Product Family** arrow.
Refresh Type	Indicates the refresh type for the allocation. Select one of the following options: • ***All***

	• ***Daily*** • ***Weekly*** • ***Monthly*** • ***Tri Monthly*** • ***Custom***
Prod rem amt	Identifies the amount of product left of the original allocation. Enter an amount in this field and a corresponding option and the system searches for any product allocations with a remaining amount that matches your criteria. Options are: • **=** • **<** • **<=** • **>** • **>=** • ***Between***
Status	Describes the status of the allocation. Options are: • ***All*** • ***Active*** • ***Inactive*** • ***Unenforced***
Scaleback %	Determines the percentage of temporary increase/decrease for the selected product allocation. Enter an amount in this field and a corresponding option. The system searches for any product allocations with a scaleback percentage that matches your criteria. Options are: • **=** • **<** • **<=** • **>** • **>=** • ***Between***
Prod next ref date/Expire date	Uses the date and time a product is refreshed or expired. Select a date and time and the system searches for any allocation records whose next refresh or the expired date and time matches your criteria. Options are: • **=** • **<** • **<=** • **>** • **>=** • ***Between***
Only Orphaned Allocations	Shows allocations that are in a state where they are classed as orphaned either due to the deletion of a consignee or the removal of a terminal assignment that causes the Consignee Group used for allocations to no longer have a single consignee associated with a terminal used for the authorization point.

Indirect Allocations	Contains an indirect allocation that may apply indirectly to the selected terminal and consignee combination. For example, an allocation that is applied to all terminals would be an indirect allocation.

5. Click **Search** The **Allocations Detail** pane appears.

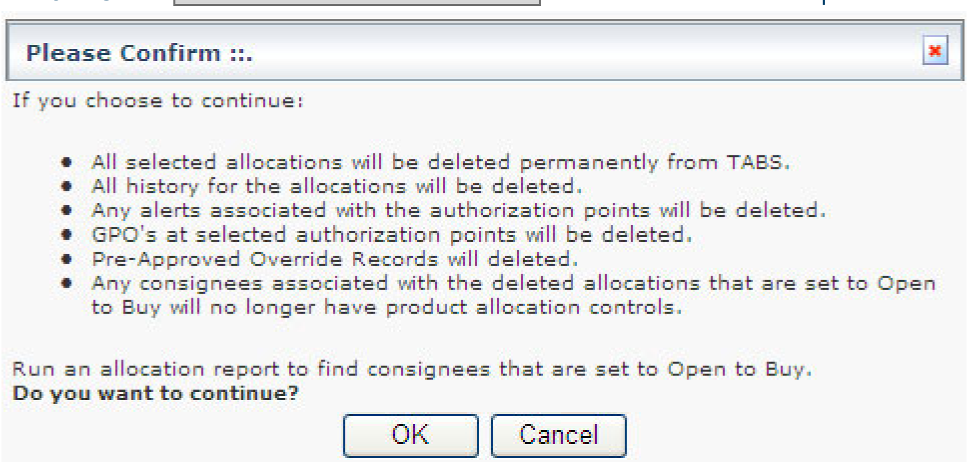


6. Select the allocations to delete. Select the **Select All** box to delete all allocations on the page.

7. Select one of the following options for the **Action to perform on allocation points with no remaining allocations** field:
   a. ***Delete***
   b. ***Deny***
   c. ***Open***

   Note: This doesn't change an authorization point that has credit allocations attached and is active, but only changes the authorization point to the chosen option if there are no more product allocation records attached to the allocation. On hierarchical product allocations, if you delete the parent month (i.e., Monthly/Weekly/Daily and you delete Monthly,) you also delete the sub-refresh periods on the allocation (i.e., Weekly and Daily).

8. Click **Delete Selected Allocations** A confirmation window opens.



9. Click OK to confirm deletion.

Move Allocations

When supply constraints prevent customers from lifting product at their primary terminal, a supplier needs the ability to move (add) the volumes of selected allocations from the primary terminal to a back-up terminal while keeping allocations intact at the source terminal. Once the supply constraint is resolved, the destination allocations need to be set back to normal lifting conditions.

Note: GPOs will not be moved from the source terminal to the destination terminal.

Listed below are some common settings:

- Move all allocations from a given terminal or tied directly to a specified Terminal Group.
- Move all allocations at a terminal for a given Class of Trade (COT),
- Move all allocations at a terminal for the selected Products/Product Groups/Product Families.
- Move selected individual allocations at a terminal.
- Move all allocations at a terminal for the selected refresh period (for example, daily, weekly, etc…).
- Move some allocations to one backup terminal and others to a different terminal. For example, the supplier may have separate gas and distillate backup terminals.

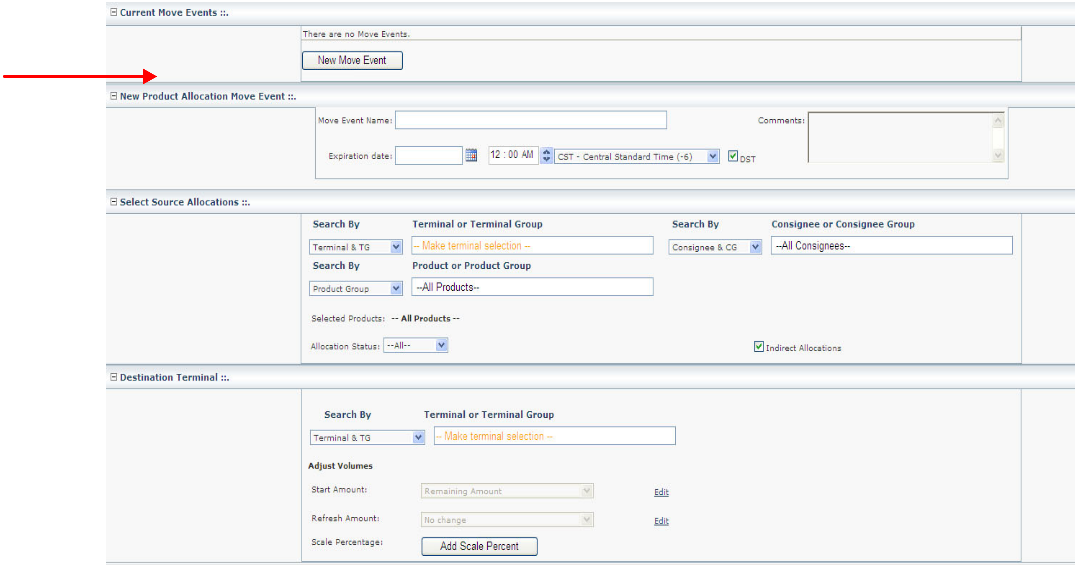
Move Event Setup

Move Events are created by accessing the Move Events page from the **Allocations** menu and selecting ***Move*** under the **Product** list.

If any scheduled events exist, they are available in the **Current Move Events** panel for editing and deletion.

If none exist, the below screen displays. To create a new Move Event, select New Move Event

A source terminal or terminal group may be part of multiple pending or active move events. However, the source and destination product authorization point must not be part of another pending or active move event.



Note: Click **New Move Event** to display the below panels.

This page has 4 panels:

- **New Product Allocation Move Event:** Contains the name of the new move event. Enter the name of the new move event (cannot exceed 100 characters) in the **Move Event Name** field. Expiration date lets you choose the reset date and time, which must be in the future.

  Once the reset day occurs, the move event no longer displays under current move events. The destination terminal keeps the remaining amount of the original source allocation unless this is manually removed. The source terminal's allocation is not impacted by the move event.

- **Select Source Allocations**: Provides the ability to select the source Terminal/Terminal Group and the Consignee/Consignee Group as well as the Product/Product Group for moving the allocation.

- **Destination Terminal:** Allows you to select the destination Terminal/Terminal Group to which the Source allocations are moved to. Under Adjust Volumes, the Start Amount and the Refresh amount can either be left as is or modified by clicking on the edit button.

- **Allocation Details:** Displays allocations viable to moving based on the terminal/terminal and consignee/consignee group source and the terminal/terminal destination.

Creating a New Move Event

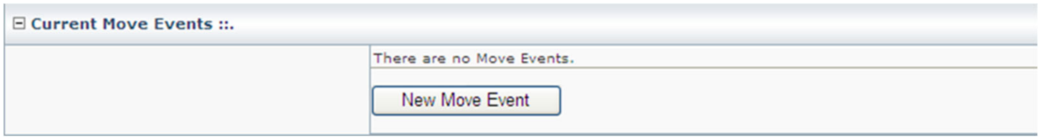
Here's how to create a new move event:

Note: Active move events display in the Current Move Events panel. Before creating a new move event, identify the allocations to be moved and verify the allocations match at the destination terminal.

1. From the **Allocations** menu, select ***Move*** under the **Product** list.

2. Identify the allocations to move and verify an allocation matches at the destination terminal.

3. Click 



4. Enter a move event name in the **Move Event** field.

   Note: The name cannot exceed 100 characters.

5. Enter information in the remaining fields on the **New Product Allocation Move Event** panel.

6. From the **Select Source Allocations** panel, select the terminal or terminal group to attach the source allocation.

7. Enter information in the remaining fields of the **Select Source Allocations** panel.

8. Enter the information in the fields of the **Destination Terminal** panel.

	DESCRIPTION
Search By	Search and select the destination terminal for the move event.
Adjust Volumes	Options Are: Start Amount • ***Remaining Amount*** - Move amount remaining on the allocation. • ***Days of Supply*** - Calculates the amount to move based on the days of supply Refresh Amount • ***No Change*** - Uses the value from the target allocation. • ***Entire Refresh Amount*** - Uses the refresh amount from the source allocation. • ***Days of Supply*** - Calculates the refresh amount from the days of supply. Scale Percentage • Allows to scale the destination allocation.
Product	Options Are: Refresh Period • ***Daily*** • ***Weekly*** • ***Monthly*** • ***TriMonthly*** • ***Custom***

	Scale Percentage Add Scale Percent

9. Click Search and the information displays in the **Allocation Details** panel.

10. In the **Allocation Details** panel, review the match types listed and click one of the following:

    Save As Pending After you have made a direct/near match and selected the allocations you want to move, you have the option to move the event now or wait until later. The pending status makes it possible to activate the move event at a later date. You can change a move event from pending to active by going to the **Allocations** menu and selecting ***Move*** under the **Product** list. Click the **Edit** link next to the pending allocation and click Apply Move Now This will change the pending allocation to an active move event allocation.

    Apply Move Now Activates the Move Event until the expiration date that was set.

    Export to Excel Exports pending or active allocations to an excel spreadsheet.

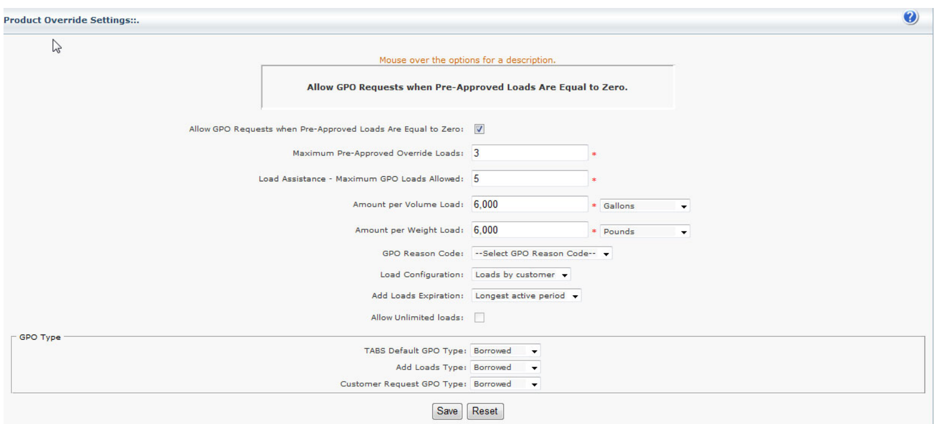
Scale Calculator

Scale Calculator will allow a user to scale back allocation amounts based on channel using a targeted volume amount instead of a scale percentage. It will take inputted criteria, look at the current allocation(s) and determine what the scale percent needs to be to get to your targeted amount in either gallons or barrels.

Pre-Approved Product Overrides (PAPO) and Global Product Overrides (GPO) Setup

The **Product Override Settings** page enables administrators to set parameters governing the approvals and setup of both Pre-Approved Product Overrides (PAPO) and Global Product Overrides (GPO). By establishing these administrative settings, the risk of error is reduced for allowing too many PAPO loads.

1. From the **Admin** menu, select ***GPO*** under the **Configuration** list. The **Product Override Settings** page opens.



2. Set the following for Pre-Approved Product Overrides and Global Product Overrides:

	DESCRIPTION
Allow GPO Requests when Pre-Approved Loads are Equal to Zero	Enables using the Allocation Viewer or Load Assistance Dashboard to approve GPOs even if PAPO loads are not approved.
Maximum Pre-Approved Override Loads	Sets the maximum number of loads that can be assigned via the PAPO screen.
Load Assistance-Maximum GPO Loads Allowed	Displays the number of loads that can be approved via the Load Assistance Dashboard.
Amount per Volume Load	Specifies the Volume based load to be used for the volume available calculations on both GPO and PAPO load approvals.
Amount per Weight Load	Enables the user to set the Weight based load to be used for the weight available calculations on both GPO and PAPO load approvals.

	Note: If a GPO is already in existence for the given combination and the addition of a single load via the Load Assistance Dashboard, this would cause the approved volume to be greater than the Load Assistance – Maximum GPO Loads Allowed x Gallons per load. The Load Assistance Dashboard doesn't allow for the addition of volume. To add volume to a GPO in this situation, the user will need to go to the GPO Setup page. See the Global Product Override (GPO) – Borrowed & Incremental section in this manual for more information on GPO Setup page.
GPO Reason Code	Sets the default GPO reason code.
Load Configuration	Identifies the load configuration. Options are: • ***Loads by customer*** – all applicable loads are added to the GPO for that allocation. Allows all approved customers the entire approved load amount. • ***Max shared loads*** – only one load is applied at a time and shares the approved load amount across all customers.
Add Loads Expiration	Defines the expiration for add loads. Options are: • ***End of the current day*** – expires at the end of the current day. The GPO expires at midnight in the allocation time zone. • ***Longest active period*** – expires by DTN TABS as it currently does. •
Allow Unlimited Loads	Allows unlimited preapproved loads but only one GPO per click of the request button. If Max Shared Loads is selected for add loads type then the Unlimited Loads check box can be selected.
TABS Default GPO Type	Selects the default GPO Type for the **TABS Default GPO**, **Add Loads Type** and **Customer Request GPO Type**. **TABS Default GPO Type:** Identifies the initial GPO type for DTN TABS forms where GPOs can be created. Options are: • ***Borrowed*** • ***Incremental*** **Add Loads Type:** Displays the GPO type of a created GPO when PAPO Add Loads feature is used. Options are: • ***Borrowed*** • ***Incremental*** **Customer Request GPO Type:** Sets the initial GPO type for GPO requests submitted by buyers and customers from portal applications like the allocation viewer. Options are: • ***Borrowed*** • ***Incremental***

Global Product Override (GPO) – Borrowed & Incremental

A Global Product Override (GPO) is a quick way to add product to a product allocation that has been exhausted or nearly exhausted. This helps you keep traffic moving at the rack if you have the product available. For example, when a product allocation is running low and the customer needs to load more product than will be available before the next Refresh Date, you can issue a GPO to provide additional product right now.

When a driver attempts to lift product from the terminal, the Terminal Automation System (TAS) issues an authorization transaction. DTN TABS checks to see if there are any product allocations for the product, terminal, and consignee combination. It then checks to see if there is a remaining amount on the product allocation. If the product allocation period has been exhausted, that is, if the remaining amount on the product allocation equals zero, DTN TABS will check to see if there are any GPOs. If so, the driver may be authorized to load. When loading is complete, the Lifted Amount on the GPO will be incremented by the quantity loaded.

Note: A GPO cannot be used to override a credit allocation. If a customer's credit is exhausted, a GPO doesn't allow the customer to load.

GPOs can only be done at an existing Product Allocation Point and not at generic levels or indirect levels.

There are two types of GPO's that can be utilized:

- Borrowed Global Product Override (GPO)
- Incremental Global Product Override (GPO)

Borrowed Global Product Override (GPO)

Borrowed GPOs operate by "borrowing" volume from a longer period allocation (for both flat and hierarchical allocations) to be lifted during the shorter GPO period. For example, if a customer has daily, weekly, and monthly allocations in place, and a GPO is approved in the first week of the month, the customer is able to load additional fuel above their daily limit. The extra lifts for that day apply against both the GPO and also against the active higher periods (monthly and weekly).

Incremental Global Product Override (GPO)

An Incremental GPO maintains the appropriate amount of product at all active periods of a product allocation. The GPO Allowance Amount is the amount that exceeds the allowed allocation and that incremented lifted amount of the GPO. Incremental Amount is added to the longer active periods when the GPO is used and is set to ***0*** (zero) by the Product Allocation Refresh process.

Customer's current daily allocation is at -6000 gallons, causing them to request a GPO for 7000 gallons to get them through the day.

Refresh Period	Monthly Active	Weekly Unenforced	Daily Active
Refresh Days	31	7	1
Start Amount	250,000	56,452	8,065
Moved Amount			
Scale Percentage	100	100	100
Scaled Start Amount	250,000	56,452	8,065
Lifted Amount	14,065	14,065	14,065
GPO Allowance	0	0	0
Allocation Remaining	235,935	42,387	-6,000
GPO Amount		7,000	
GPO Remaining Amount		7,000	
GPO Reason Code		Supply Manager Approval	
Refresh Amount	250,000	56,452	8,065
Moved Refresh Amount			
Start Date	12/01/2012	12/13/2012	12/18/2012
Start Time	12:00 AM	12:00 AM	12:00 AM
Expire Date	12/31/2012	12/31/2012	12/31/2012
Expire Time	11:59 PM	11:59 PM	11:59 PM
Refresh	01/01/2013	12/20/2012	12/19/2012

Once the customer starts to lift using the GPO volume, (in this case 4500 gallons) the **GPO allowance** field displays on the Weekly and Monthly periods. The 4500 gallons and the Allocation remaining still match what it did pre-BOL for the two periods:

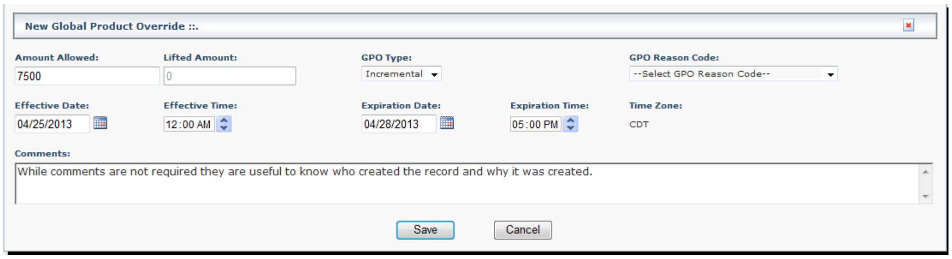
Period	Monthly Active	Weekly Unenforced	Daily Active
Refresh Days	31	7	1
Start Amount	250,000	56,452	8,065
Moved Amount			
Scale Percentage	100	100	100
Scaled Start Amount	250,000	56,452	8,065
Lifted Amount	18,565	18,565	18,565
GPO Allowance	4,500	4,500	0
Allocation Remaining	235,935	42,387	-10,500
GPO Amount		7,000	
GPO Remaining Amount		2,500	
GPO Reason Code		Supply Manager Approval	
Refresh Amount	250,000	56,452	8,065
Moved Refresh Amount			
Start Date	12/01/2012	12/13/2012	12/18/2012
Start Time	12:00 AM	12:00 AM	12:00 AM
Expire Date	12/31/2012	12/31/2012	12/31/2012
Expire Time	11:59 PM	11:59 PM	11:59 PM
Refresh	01/01/2013	12/20/2012	12/19/2012

GPO Setup in Product Allocation Record

Here's how to setup a GPO:

1. From the **Allocations** menu, select ***Manage*** under the **Product** list.
2. Using the search criteria, locate the product allocation that has the authorization point attached.
3. Click Search
4. Click ⊞ to expand the **Product Allocation Details** panel.

5. Click Create New GPO The New Global Product Override page opens.



Enter the following:

	DESCRIPTION
Amount Allowed	Contains the volume for the GPO.
Lifted Amount	Displays the volume that has been lifted against this GPO.
GPO Type	Specifies the type of GPO. Option are:

	• ***Borrowed*** • ***Incremental***
GPO Reason Code	Provides the GPO reason code.
Expiration Date	Identifies the date this GPO is set to become unavailable.
Expiration Time	Indicates the time this GPO is set to become unavailable.
Time Zone	Defines the time zone and Daylight Savings Time (DST) setting for the allocation record that the GPO is being placed against.
Comments	Provides information as to who created the record and why it was created. This is not a required field.

6. Click Save to create the GPO.

Note: To edit a GPO, follow the same steps above and the edit window opens. You can modify or delete the record at that time.

All Allocation Reports

The **Allocations Report** provides a detailed summary of credit and product allocations for a terminal or terminal group and consignee or consignee group.

Allocations Report

The **Allocations Report** tracks all authorization types in DTN TABS (***Deny***, ***Open***, ***One Time***, ***Product/Credit***). Allocations can be tracked for a specific terminal or terminal group and a specific consignee or consignee group.

The **Allocations Report** displays details regarding product and credit allocations, and types of authorization options to be implemented. DTN recommends running the **Allocations Report** for troubleshooting allocation denies and to view the remaining amount of an allocation.

Window Definitions for the Allocations Report

Listed below are the field definitions for the **Allocations Report**.

	DESCRIPTION
Terminals	Displays a terminal. When you select a terminal, the system populates the Consignees or Consignee Groups field with the consignees/consignee groups that have been assigned to the selected terminal.
Terminal Groups	Provides a terminal group. When you select a terminal group, the system populates the Consignees or Consignee Groups field with the consignees or consignee groups that have been assigned to the terminals within the selected terminal group.
Consignees	Identifies a consignee. When you select a terminal or terminal group first, the system populates the Consignee or Consignee Group field with the consignees that have been assigned to the selected terminal or terminal group.
Consignee Groups	Indicates a consignee group. When you select a terminal or terminal group first, the system populates the Consignee or Consignee Group field with the consignees that have been assigned to the selected terminal or terminal group.
Product or Product Group	Identifies product where liftings were done. Options are: • ***Product Name*** • ***Product Group*** • ***Product Family***
Auth Option	Describes the authorization option that you want to include in the report. Options are: • ***All:*** Includes all authorization options • ***Deny***: Includes allocations that are set to deny • ***One Time:*** Includes allocations set up on a one-time basis • ***Open:*** Includes all Open or active allocations • ***Credit and/or Product***: Includes all allocations with a credit or product allocation

Include Expired Allocations	If checked, expired allocations will be included in the report.
Show Seller Allocations	Ensures any allocations set up by a DTN TABS Seller are included in the DTN TABS **Marketer's Allocation Report**, if selected. If the Seller has authorized the Marketer to view the Seller's allocations, the **Show Seller Allocations** field displays.
Product Details	Indicates that you want the report to include details for product allocations, if selected.
Product Remaining	Provides a specific allocation remaining of a product allocation. Options are: • ***<*** • ***<=*** • ***=*** • ***>=*** • ***>*** • ***Between***
Product Next Refresh Date	Defines a specified Next Refresh Date on a product allocation.
Scale Back %	Identifies a specified scale back percentage. Options are: • ***<*** • ***<=*** • ***=*** • ***>=*** • ***>*** • ***Between***
Allocation Status	Identifies the status of the allocation header record used in product and/or credit authorizations. Options are: • ***All*** • ***Active*** • ***Unenforced*** • ***Inactive***

Report Results for Allocations Report

Definitions for the **Allocations Report** results are:

Note: The Allocation Report displays all direct and indirect allocations associated with your selection criteria. For instance, if you selected a consignee at a specific terminal, this report shows any allocations for that consignee at that terminal. It also displays any allocations for the consignee groups to which the consignee has been assigned.

	DESCRIPTION

Terminal Name	Describes the name for this terminal, as defined through the Terminal Setup page. If a name is not defined, this defaults to the Terminal ID.
Terminal Group	Specifies the unique identifier for the terminal group.
Consignee Name	Defines the name of the consignee through the Consignee Setup page. If you did not define a name, this field defaults to the Consignee Number.
Consignee Status	Identifies whether the consignee has been approved to view Seller's allocations, If the consignee is a Marketer Consignee.
Consignee Group	Contains the unique identifier for the consignee group.
Consignee Group Status	Identifies whether the consignee group has been approved to view Seller's allocations, if the consignee is a Marketer Consignee.
Product/Product Group	Search by Product or Product Group. Options include: • ***Product Name*** • ***Product Group*** • ***Product Family***
Auth Option	Displays the authorization option. Options include: • ***Open*** • ***Deny*** • ***One Time*** • ***Credit and/or Product***
Enforce Full Truck	Indicates if the enforce full truck option is selected.
Auth Used	Determines whether the authorization for a one-time allocation was used.
Credit Checked	Specifies whether there is a credit allocation attached.
Product Checked	Indicates whether there is a product allocation attached.

Product Allocations Report

The **Product Allocation Report** lists any product allocations for terminal/terminal group and consignee/consignee group.

Window Definitions for Product Allocation Report

Listed below are the field definitions for the **Product Allocation Report**.

	DESCRIPTION
Search By	Describes the criteria selected for a product allocation. Options are: • ***Terminal & TG***

	• ***Terminal by Name*** • ***Terminal Group*** • ***Terminal SPLC*** • ***Terminal by City*** • ***Terminal by Plant***
Terminal & Terminal Group	Displays a terminal. When you select a terminal, the system populates the **Consignees or Consignee Groups** field with the consignees/consignee groups that have been assigned to the selected terminal. Provides a terminal group. When you select a terminal group, the system populates the **Consignees or Consignee Groups** field with the consignees or consignee groups that have been assigned to the terminals within the selected terminal group.
Search By	Describes the criteria selected find a product allocation. Options are: • ***Consignee & CG*** • ***Consignee Name*** • ***Consignee Group*** • ***Consignee #*** • ***Consignee by City***
Consignee & Consignee Group	Identifies a consignee. When you select a terminal or terminal group first, the system populates the **Consignee or Consignee Group** field with the consignees that have been assigned to the selected terminal or terminal group. Indicates a consignee group. When you select a terminal or terminal group first, the system populates the **Consignee or Consignee Group** field with the consignees that have been assigned to the selected terminal or terminal group.
Allocation Status	Specifies an allocation. Options are: • ***All*** • ***Active*** • ***Unenforced*** • ***Inactive***
Product Remaining	Provides a specific allocation remaining of a product allocation. Options are: • **<** • **<=** • **=** • **>=** • **>** • ***Between***
Scaleback	Identifies a specific scale back percentage. Select an option and enter a percentage. Options are: • **<** • **<=** • **=**

	• ***>=*** • ***>*** • ***Between***
Include Expired Allocations	Filters Active/Inactive/Unenforced Product Allocation records.

Report Results for Product Allocations Report

Definitions for the **Product Allocation Report** results are:

	DESCRIPTION
Terminal State	Describes the state where the terminal is located.
Terminal Name	Contains the terminal or terminal group name.
Channel ID	Specifies the ID code (assigned by your company) that maps to your ERP or billing system. Corresponds with Channel Name.
Channel Name	Displays the name assigned by your company (ex. Branded Distributors, Wholesale, etc.)
Customer Number	Indicates the consignee number.
Customer Name	Defines the name of the consignee through the Consignee Setup page. If a name is not defined, this field defaults to the consignee number.
Enforce Full Truck	Indicates whether enforce full truck is enabled.
Allocation Name	Displays the name of the allocation.
Product Code	Identifies the product, product group, or product family to which the product allocation applies. This column contains the PIDX product code for a product and product family level allocations.
Product Description	Describes the product.
Refresh Type	Defines the frequency the allocation is refreshed. Options are: • ***Daily*** • ***Weekly*** • ***Monthly*** • ***Tri-Monthly*** • ***Custom***
Active Status	Indicates if the allocation is active. Options are: • ***Active*** • ***Inactive*** • ***Unenforced***

Start Amount	Displays the number of gallons initially allocated.
Scale Percent	Describes the percentage by which the allocation is being temporarily increased or decreased.
Scaled Start Amount	Specifies the scaled start amount. This amount is calculated as follows: START AMOUNT X SCALE PERCENT
Lifted Amount	Provides the number of gallons lifted against this allocation.
GPO Allowance	Describes the amount that exceeds the allowed allocation and that incremented lifted amount of the GPO.
Full Truck Hold Amount	Contains the hold amount, if Enforce Full Truck is enabled.
Remaining Amount	Indicates the number of gallons remaining on this allocation. The formula is: START AMOUNT X SCALE PERCENT - LIFTED AMOUNT + GPO ALLOWED AMOUNT
GPO Allowed Amount	Defines the allowed amount for a global product override.
GPO Lifted Amount	Displays the number of gallons that have been lifted against the GPO
Lifted Percent	Describes the percentage of gallons that have been lifted. The formula is: [LIFTED AMOUNT DIVIDED BY (SCALED START AMOUNT PLUS GPO ALLOWED AMOUNT.)]
Unit of Measure	Indicates what unit of measure is being used for the allocation.
Lifting Qualifier	Display the net or gross gallons.
Next Refresh Date	Contains the date and time the allocation is set to be refreshed with the specified Refresh Amount.
Moved Amount	Identifies the allocated volume moved from the primary terminal to the back-up terminal, if using Move Allocations functionality.
Moved Ref Amount	Provides the moved allocation refresh volume, if using Move Allocations functionality
Move Reset Date	Indicates the date the moved allocation will reset from the back-up terminal to the primary terminal, if using Move Allocations functionality.

Lifted vs Allocated Report

The **Lifted vs Allocated Report** displays allocation and scaled starts, and lifted amounts summed up by the refresh periods. The report also includes a chart for graphical representation of the trend over the specified date range.

Window Definitions for Lifted vs Allocated Report

The following fields are available on the **Lifted vs Allocated Report** page:

	DESCRIPTION
Search By	Describes the criteria selected for a product allocation. Options are: • ***Terminal & TG*** • ***Terminal by Name*** • ***Terminal Group*** • ***Terminal SPLC*** • ***Terminal by City*** • ***Terminal by Plant***
Terminal & Terminal Group	Displays a terminal. When you select a terminal, the system populates the **Consignees or Consignee Groups** field with the consignees/consignee groups that have been assigned to the selected terminal. Provides a terminal group. When you select a terminal group, the system populates the **Consignees or Consignee Groups** field with the consignees or consignee groups that have been assigned to the terminals within the selected terminal group
Search By	Describes the criteria selected find a product allocation. Options are: • ***Consignee & CG*** • ***Consignee Name*** • ***Consignee Group*** • ***Consignee #*** • ***Consignee by City***
Consignee & Consignee Group	Identifies a consignee. When you select a terminal or terminal group first, the system populates the **Consignee or Consignee Group** field with the consignees that have been assigned to the selected terminal or terminal group. Indicates a consignee group. When you select a terminal or terminal group first, the system populates the **Consignee or Consignee Group** field with the consignees that have been assigned to the selected terminal or terminal group.
Search By	Describes the criteria selected find a product allocation. Options are: • ***Product Name*** • ***Product Group*** • ***Product Family***
Product or Product Group	Identifies a Product. When you select a product or product group first, the system populates the **Consignee or Consignee Group** field with the consignees that have been assigned to the selected terminal or terminal group. Indicates a product group. When you select a terminal or terminal group first, the system populates the **Consignee or Consignee Group** field with the consignees that have been assigned to the selected terminal or terminal group.
Start Date Between	Provides the date range for this report.
Report Time Zone	Contains the time zone used for this report.

Daylight Savings/Summer Time	Specifies whether Daylight Saving Time is acknowledged.
Refresh Type	Defines the frequency the allocation is refreshed. Options are: • ***Daily*** • ***Weekly*** • ***Monthly*** • ***Tri-Monthly*** • ***Custom***
Allocation Status	Specifies an allocation. Options are: • ***Active*** • ***Unenforced*** • ***Active and Unenforced***
Report UOM	Indicates what unit of measure (uom) is being used. Only volume based products are considered. Options are: • ***Gallons*** • ***Liters*** • ***Imperial Gallons*** • ***Cubic Meters*** • ***Kilo Barrels*** • ***Metric Ton*** • ***Imperial Ton*** • ***Ton*** • ***Kilogram*** • ***Pounds***
Using digits of precision	Displays the number of decimal places to display.
Include Zero Level Allocations	Includes the allocation that has been set to zero (0), if selected.

Report Results for Lifted vs Allocated Report

Definitions for the Lifted vs. Allocated Report results are:

	DESCRIPTION
Start Date	Specifies the start date of the lifting.
Start Amount	Provides the start amount of the allocation.
Scaled Amount	Contains the calculated total amount of the allocation including the scaled percentage amount.
Lifted Amount	Displays the amount lifted on the start date.

Allocations Error Report

The **Allocations Error Report** provides a detailed summary of any errors that occurred while setting up an allocation for terminal or terminal group and consignee or consignee group. For example, if an allocation record is created but fails to attach a specific product allocation to the record, this report indicates that as an error.

Under the **Product Details** pane, if the report displays the “there are no product details available for this allocation” message, go back to the **Allocations** > **Product** > **Manage** page to create and attach a product allocation.

Window Definitions for the Allocations Error Report

Listed below are the field definitions for the **Allocations Error Report**.

	DESCRIPTION
Search By	Describes the criteria selected find a product allocation. Options are: • ***Terminal & TG*** • ***Terminal by Name*** • ***Terminal Group*** • ***Terminal SPLC*** • ***Terminal by City*** • ***Terminal by Plant***
Terminal & Terminal Group	Displays a terminal. When you select a terminal, the system populates the **Consignees or Consignee Groups** field with the consignees/consignee groups that have been assigned to the selected terminal. Provides a terminal group. When you select a terminal group, the system populates the **Consignees or Consignee Groups** field with the consignees or consignee groups that have been assigned to the terminals within the selected terminal group.
Search By	Describes the criteria selected find a product allocation. Options are: • ***Consignee & CG*** • ***Consignee Name*** • ***Consignee Group*** • ***Consignee #*** • ***Consignee by City*** • ***Channel as Consignee/CG*** • ***SoldTo as Consignee/CG***
Consignee & Consignee Group	Identifies a consignee. When you select a terminal or terminal group first, the system populates the **Consignee or Consignee Group** field with the consignees that have been assigned to the selected terminal or terminal group. Indicates a consignee group. When you select a terminal or terminal group first, the system populates the **Consignee or Consignee Group** field with the consignees that have been assigned to the selected terminal or terminal group.

Report Results for Allocations Error Report

Definitions for the **Allocations Error Report** results are:

	DESCRIPTION
Terminal Name	Describes the name for this terminal, as defined through the Terminal Setup page. If a name is not defined, this defaults to the Terminal ID.
Terminal Group	Specifies the unique identifier for the terminal group.
Consignee Group	Contains the unique identifier for the consignee group.
Auth Option	Displays the authorization option. Options include: • ***Open*** • ***Deny*** • ***One Time*** • ***Credit and/or Product***
Auth Used	Determines whether the authorization for a one-time allocation was used.
Credit Checked	Specifies whether there is a credit allocation attached.
Product Checked	Indicates whether there is a product allocation attached.
Product Details	
Name	Describes the proprietary Product Allocation Name.
Allocation Type	Determines whether the Product Allocation type used is Flat or Hierarchical.
Product Code	Identifies the product, product group, or product family to which the product allocation applies. This column contains the PIDX product code for a product and product family level allocations.
Product Group	Contains the specific product groups from the Product Groups arrow.
Product Family	Displays the specific product family from the Product Family arrow.
Ref Type	Defines the frequency the allocation is refreshed. Options are: • ***Daily*** • ***Weekly*** • ***Monthly*** • ***Tri-Monthly*** • ***Custom***
Ref Days	Identifies the number of days until the allocation will refresh on Custom refresh types.
Start Amt	Defines the number of gallons initially allocated.

Ref Amt	Displays the number of gallons that will refresh on the next refresh date.
Start Date	Contains the date and time that the allocation went into effect.
Next Ref Date	Determines the date and time that the allocation Start Amount is refreshed with the Refresh Amount.
End Date	Specifies the date and time after which the allocation is no longer in effect.
Status	Indicates whether the product allocation is Active or Inactive.
Carry Forward	Determines whether the product allocation record was flagged to carry forward volumes.
Lifted Amount	Provides the number of gallons lifted against this allocation.
Scale Percent	Describes the percentage by which the allocation is being temporarily increased or decreased.
GPO Allowance	Indicates the amount that exceeds the allowed allocation and that incremented lifted amount of the GPO.
Unit of Measure	Defines what unit of measure is being used for the allocation.
Comments	Provides user comments used on the product allocation.
Credit Details	Contains credit allocation details for the selected terminal/terminal group and consignee/consignee group.

Historical Allocations Report

The **Historical Allocations Report** provides a summary of the allocations that were in effect when a loading error or a denial occurred on a given date. The report can be used to trace exactly what happened to an allocation by terminal or terminal group and consignee or consignee group at a given time. The report can provide details by user, action result, and transaction type.

Window Definitions for Historical Allocations Report

Listed below are the field definitions for the **Historical Allocations Report**.

	DESCRIPTION
Search By	Describes the criteria selected find a product allocation. Options are: • ***Terminal & TG*** • ***Terminal by Name*** • ***Terminal Group*** • ***Terminal SPLC*** • ***Terminal by City*** • ***Terminal by Plant***

Terminal & Terminal Group	Displays a terminal. When you select a terminal, the system populates the **Consignees or Consignee Groups** field with the consignees/consignee groups that have been assigned to the selected terminal. Provides a terminal group. When you select a terminal group, the system populates the **Consignees or Consignee Groups** field with the consignees or consignee groups that have been assigned to the terminals within the selected terminal group.
Search By	Describes the criteria selected find a product allocation. Options are: • ***Consignee & CG*** • ***Consignee Name*** • ***Consignee Group*** • ***Consignee #*** • ***Consignee by City*** • ***Channel as Consignee/CG*** • ***SoldTo as Consignee/CG***
Consignee & Consignee Group	Identifies a consignee. When you select a terminal or terminal group first, the system populates the **Consignee or Consignee Group** field with the consignees that have been assigned to the selected terminal or terminal group. Indicates a consignee group. When you select a terminal or terminal group first, the system populates the **Consignee or Consignee Group** field with the consignees that have been assigned to the selected terminal or terminal group.
Date and Time	Specifies the date and time for the historical information.

Report Results for Historical Allocations Report

Definitions for the **Historical Allocations Report** results are:

	DESCRIPTION
Terminal	Describes the proprietary name for the terminal.
Customer	Identifies the Consignee or Consignee Group.
Auth Option	Displays the authorization option. Options are: • ***All:*** Includes all authorization options • ***Deny***: Includes allocations that are set to deny. • ***One Time:*** Includes allocations set up on a one-time basis • ***Open:*** Includes all Open or active allocations • ***Credit and/or Product***: Includes all allocations with a credit or product allocation
Auth Used	Determines whether the authorization for a one-time allocation was used.
Credit Checked	Specifies whether there is a credit allocation attached.

<table>
<tr><th></th><th></th></tr>
<tr><td>Product Checked</td><td>Determines whether there is a product allocation attached.</td></tr>
<tr><td>Modified Date</td><td>Indicates the date and time the allocation was last modified</td></tr>
<tr><td>Mod</td><td>Identifies action type of the modified record. I = Inserted, M = Modified, D = Deleted.</td></tr>
<tr><td>Product Details</td><td>
<table>
<tr><td>Name</td><td>Describes the proprietary Product Allocation Name.</td></tr>
<tr><td>Type</td><td>Determines whether the Product Allocation type used is Flat or Hierarchical.</td></tr>
<tr><td>Prod/Prod Grp/Prod Fam</td><td>Specifies the Product, Product Group or Product Family used in the allocation.</td></tr>
<tr><td>Comments</td><td>Provides user comments used on the product allocation.</td></tr>
<tr><td>Ref Type</td><td>Defines the frequency the allocation is refreshed. Options are:
• Daily
• Weekly
• Monthly
• Tri-Monthly
• Custom</td></tr>
<tr><td>Ref Days</td><td>Identifies the number of days until the allocation will refresh on Custom refresh types.</td></tr>
<tr><td>Start Amt</td><td>Defines the number of gallons initially allocated.</td></tr>
<tr><td>Ref Amt</td><td>Displays the number of gallons that will refresh on the next refresh date</td></tr>
<tr><td>Dec Amt</td><td>Provides the minimum amount that the credit allocation’s Allocation Remaining is decreased when product is lifted. Not dependent on the actual amount lifted.</td></tr>
<tr><td>Rem Amt</td><td>Specifies the credit amount or the number of gallons of product remaining to be lifted on the allocation.</td></tr>
<tr><td>Start Date</td><td>Contains the date and time that the allocation went into effect</td></tr>
<tr><td>Next Ref Date</td><td>Determines the date and time that the allocation Start Amount is refreshed with the Refresh Amount.</td></tr>
<tr><td>End Date</td><td>Specifies the date and time after which the allocation is no longer in effect.</td></tr>
</table>
</td></tr>
</table>

	Status	Indicates whether the product allocation is ***Active*** or ***Inactive.***
	Carry Fwd	Determines whether the product allocation record was flagged to carry forward volumes.
	Lifted Amt	Provides the number of gallons lifted against this allocation.
	GPO Allowance	Indicates the amount that exceeds the allowed allocation and that incremented lifted amount of the GPO.
	Scale %	Describes the percentage by which the allocation is being temporarily increased or decreased.
	Unit of Measure	Defines what unit of measure is being used for the allocation.
	Date Last Modified	Indicates the date and time the allocation was last modified.
	Mod	Identifies action type of the modified record. • ***M*** = Modified • ***I*** = Inserted (or created) • ***D*** = Deleted
	Moved Amt	Provides the allocated volume moved from the primary terminal to the back-up terminal, if using Move Allocations functionality.
	Moved Ref Amt	Contains the moved allocation refresh volume, if using Move Allocations functionality.
	Move Reset Data	Displays the date the moved allocation will reset from the back-up terminal to the primary terminal, if using Move Allocations functionality.

Historical Allocations (Time Span) Report

The **Historical Allocations (Time Span) Report** provides a summary of the allocations that were in effect when a loading error or a denial occurred over a specified period of time. The report determines what happened to an allocation by terminal or terminal group and consignee or consignee group over a span of time. The report can provide details by user, action result, and transaction type.

Note: The report that is generated online summarizes historical information. For a much more detailed report, click Export to Excel

Window Definitions for Historical Allocations (Time Span) Report

Listed below are the field definitions for the **Historical Allocations (Time Span) Report**.

	DESCRIPTION
Terminals	Describes a terminal. When a terminal is selected, the system populates the Consignees or Consignee Groups field with the consignees and consignee groups that have been assigned to the selected terminal.
Terminal Groups	Specifies a terminal group. When a terminal group is selected, the system populates the Consignees or Consignee Groups fields with the consignees and consignee groups that have been assigned to the terminals within the selected terminal group.
Consignees	Provides a consignee. When a terminal or terminal group is selected first, the system populates the Consignees field with the consignees that have been assigned to the selected terminal or terminal group.
Consignee Groups	Indicates a consignee group. When a terminal or terminal group is selected first, the system populates the Consignee Groups field with the consignee groups that have been assigned to the selected terminal or terminal group.
Start Date and Time	Specifies the desired start date and time to view historical information.
End Date and Time	Defines the desired end Date and time to view historical information.

Report Results for Historical Allocations (Time Span) Report

Definitions for the **Historical Allocations (Time Span) Report** results are:

	DESCRIPTION
Active	Indicates whether the allocation is currently in effect. Options are: • ***Y*** • ***N***
Terminal Name or Terminal Group	Specifies the terminal or terminal group to which the allocation applies.
Consignee Name or Consignee Group	Provides the consignee or consignee group to which the allocation applies.
Auth Option	Indicates the authorization option. Options are: • ***Deny*** • ***Open*** • ***One Time Credit and/or Product***
Auth Used	Defines whether the authorization for a one-time allocation was used.
Credit Checked	Specifies whether there is a credit allocation attached.

Product Checked	Indicates whether there is a product allocation attached.
Product Details	Provides product allocation details for the selected terminal or terminal group and consignee or consignee group combination.
Credit Details	Contains credit allocation details for the selected terminal/terminal group and consignee/consignee group.
Name	Specifies the name of the product or credit allocation as defined by the user.
Type	Determines the type of credit or product allocation. Options are: • ***Flat*** • ***Hierarchical***
Prod/Prod Grp/Prod Fam	Identifies the product, product group, or product family to which the product allocation applies.
Comments	Displays the notes or comments that apply to the allocation.
Ref Type	Specifies the Refresh Period. For a legacy Credit Allocation and Flat Allocation. Options are: • ***Monthly*** • ***Tri-Monthly*** • ***Weekly*** • ***Daily*** • ***Custom*** For a Hierarchical Allocation, options are: • ***Monthly*** • ***Weekly*** • ***Daily***
Ref Days	Indicates the day for the refresh, if this Refresh Type or Period is Custom.
Start Amt	Provides the initial credit amount or the number of gallons of product authorized for the allocation.
Ref Amt	Contains the credit amount or the number of gallons of product that the allocation Start Amount is automatically refreshed on the next Refresh Date.
Dec Amt	Identifies the minimum amount that the credit allocation's Allocation Remaining is decreased when product is lifted. Not dependent on the actual amount lifted.
Rem Amt	Specifies the credit amount or the number of gallons of product remaining to be lifted on the allocation.
Start Date	Displays the date and time that the allocation went into effect.

Next Ref Date	Describes the date and time that the allocation Start Amount is refreshed with the Refresh Amount.
End Date	Defines the date and time after which the allocation is no longer in effect.
Carry Fwd	Indicates whether any Allocation Remaining on the next Refresh Date should be added to the Start Amount after it has been refreshed with the Refresh Amount. Options are: • ***Y*** • ***N***
Lifted Amt	Identifies the credit amount or number of gallons of product lifted by the customer during the Refresh Period.
Scale %	Defines the percentage by which the product allocation is being increased or decreased. A scale % of 100 indicates the customer can load 100% of the allocated amount.
Date Last Modified	Displays the date and time the product allocation was last modified.
Mod	Indicates the change status of the allocation as follows: • ***M*** = Modified • ***I*** = Inserted (or created) • ***D*** = Deleted

Global Product Override Report

The **Global Product Override Report** summarizes global product override (GPO) activity for a selected terminal, consignee, and product combination. The report can be filtered by keyword or by terminal or terminal group and consignee or consignee group. A creation or expiration date or range of dates can be specified. The report can also be filtered to view active/future, expired or historical data for overrides.
The Historical Data filter produces a report with details about any modifications to the GPO that occurred during the specified time frame.

Window Definitions for Global Product Override (GPO) Report

Listed below are the field definitions for the **Global Product Override Report**.

<table>
<tr><th></th><th>DESCRIPTION</th></tr>
<tr><td>Search for GPO by Keyword</td><td>This pane filters for GPOs by using a keyword for the terminal name, terminal group name, consignee name, or consignee group name.
<table>
<tr><td>Search By</td><td>Describes the criteria selected to find a Global Product Override (GPO). Options are:
• Terminal Name
• Consignee Name
• Terminal Group Name</td></tr>
</table>
</td></tr>
</table>

		• ***Consignee Group Name***.
	Key Word	Defines a full or partial key word that corresponds with your **Search By** selection.
	Created Between. . . . And	Selects the creation date and time range using the calendar icon and time arrows.
	Expired Between. . . And	Specifies an expiration date and time range using the calendar icon and time arrows.
	Select Overrides to be Shown	Filters the GPO report based on the selected information. Options are: • ***Active Overrides***: Includes all GPO records that are active during the selected time frame. • ***Expired Overrides***: Includes all GPO records that were no longer active during the selected time frame. • ***Historical Data for Overrides***: Includes any modifications to the GPO record that occurred during the specified time frame. If this is unchecked, the report will display the most recent version of the GPO.
	GPO Request Method	Options are: • ***All*** *– Returns both Add loads and GPO setup/approvals* • ***Add loads –*** *Requested Pre-approved Override loads* • ***GPO setup/approval –*** *Global Product Overrides issued and approved*
Search for GPO by Terminal or Terminal Group and Consignee or Consignee Group	Sorts GPOs for a specified terminal or terminal group and consignee or consignee group combination	
	Terminals or Terminal Groups	Specifies the terminal or terminal group associated with the GPO. When a terminal group is selected, the system populates the **Consignees** or **Consignee Groups** fields with the consignees and consignee groups that have been assigned to the terminals within the selected terminal group. At least one terminal or terminal group must be selected.
	Consignees or Consignees Groups	Provides a consignee or consignee group. When a terminal or terminal group is selected first, the system populates the **Consignee** or **Consignee Group** field with the consignees and consignee

	groups that have been assigned to the selected terminal or terminal group. At least one consignee or consignee group must be selected.
Products, Product Groups or Product Families	Displays the product or product group or product family to which the GPO applies. If you want to see a report that includes all products, product groups, and product families to which a GPO is associated, do not select an option from these drop-down menus.
Created Between. . . . And	Selects the creation date and time range using the calendar icon and time arrows.
Expired Between. . . And	Specifies an expiration date and time range using the calendar icon and time arrows.
Select Overrides to be Shown	Filters the GPO report based on the selected information. Options are: • ***Active Overrides***: Includes all GPO records that are active during the selected time frame. • ***Expired Overrides***: Includes all GPO records that were no longer active during the selected time frame. • ***Historical Data for Overrides***: Includes any modifications to the GPO record that occurred during the specified time frame. If this is not selected, the report displays the most recent version of the GPO.
GPO Request Method	Options are: • ***All –*** *Returns both Add loads and GPO setup/approvals* • ***Add loads –*** *Requested Pre-approved Override loads* • ***GPO setup/approval –*** *Global Product Overrides issued and approved*

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Report Results for Global Product Override (GPO) Report

Definitions for the **Global Product Override Report** results are:

	DESCRIPTION

Terminal and Consignee	Describes the terminal or terminal group and consignee or consignee group to which the GPO applies.
Product	Specifies the product, product group, or product family to which the GPO applies.
Allowed Amount	Provides the allowed amount for the GPO.
Lifted Amount	Indicates the amount lifted against the GPO. When the Lifted Amount equals the Allowed Amount, the customer is out of allocation for that GPO.
Created Date	Contains the date and time the GPO was created.
Effective Date	Identifies the date and time the GPO is effective.
Expiration Date	Displays the date and time the GPO expires.
Unit of Measure	Indicates what unit of measure is being used for the GPO.
GPO Type	Determines whether the GPO issued is ***Incremental*** or ***Borrowed***.
Request Method	Identifies whether the GPO method requested is ***Add Loads*** or ***GPO Setup***.
Comments	Displays user defined comments, if applicable.
Audit Information	Tracks changes to the GPO record. Options are: • ***GPO Reason Code –*** Displays user defined reason code, if applicable. • ***User Name*** - The name of the user who created or modified the GPO. • ***Date Modified*** - The date and time that the corresponding Allowed Amount was set. • ***Status – Active*** - Indicates if the corresponding GPO is active. • ***Inactive*** – Indicates if the GPO is inactive.
Modification Type	Indicates if the corresponding GPO has been modified. Options are: • ***New*** - The original GPO without any modifications. This option is seen only when ***Historical Data for Overrides*** is selected. • ***Update*** - A modified GPO. This option is seen only when Historical Data for Overrides is selected. • ***Current*** - The most recent version of the GPO. This option is seen only when Historical Data for Overrides is not selected.

Product Allocations Availability Report

The **Product Allocations Availability** Report displays the percentage of time when the scale percent on the Active Allocation records was greater than or equal to a specified percentage.

Window Definitions for Product Allocations Availability Report

Listed below are the field definitions for the **Product Allocations Availability Report**.

	DESCRIPTION
Country	Provides the country for the report. Click the **Add** link to include more countries.
Product	Specifies the product group or product family. Click the **Add** link to include more product and product groups.
Consignee/CGroup	Selects a consignee or consignee group. When you select a consignee or consignee group, the system only shows audits of the specified consignee or consignee group. Click the **Add** link include more consignees and consignee groups.
Refresh Type	Indicates the type of refresh. Options are: • ***All*** • ***Daily*** • ***Weekly*** • ***Monthly*** • ***Trimonthly*** • ***Custom*** Click the **Add** link to include more refresh types.
Start Date	Contains the date and time that the allocation went into effect.
Scale Percent Target	Describes the percentage by which the allocation is being temporarily increased or decreased.
End Date	Specifies the date and time after which the allocation is no longer in effect.

Report Results for Product Allocations Availability Report

Definitions for the Product Allocations Availability Report results are:

	DESCRIPTION
Country	Describes the country for the report.
Terminal	Contains the unique identifier for the terminal. The Terminal ID consists of the SPLC code for the terminal and the Terminal Owner's ID.
Customer	Provides the allowed amount for the GPO.

Product	Indicates the amount lifted against the GPO. When the Lifted Amount equals the Allowed Amount, the customer is out of allocation for that GPO.
Refresh Type	Defines the frequency the allocation is refreshed. Options are: • ***Daily*** • ***Weekly*** • ***Monthly*** • ***Tri-Monthly*** • ***Custom***
Scale Percent Target	Describes the percentage by which the allocation is being temporarily increased or decreased.
Availability percent Actual	
Start Date	Contains the date and time that the allocation went into effect.
End Date	Specifies the date and time after which the allocation is no longer in effect.

Moved Allocations Report

The **Moved Allocations Report** provides a detailed summary of allocations that were moved from one terminal to another using the Move Allocations functionality.

Window Definitions for Moved Allocations Report

Listed below are the field definitions for the **Moved Allocations Report**.

	DESCRIPTION
Search By	Describes the criteria selected find a product allocation. Options are: • ***Terminal & TG*** • ***Terminal by Name*** • ***Terminal Group*** • ***Terminal SPLC*** • ***Terminal by City*** • ***Terminal by Plant***
Terminal or Terminal Group	Displays list of all available Terminal or Terminal Groups.
Moved Event Modified Date From	Selects the date the moved event was modified from using the calendar icon.
Moved Event Modified Date To	Specifies the date the moved event was modified to using the calendar icon.

Report Results for Moved Allocations Report

Definitions for the **Moved Allocations Report** results are:

<table>
<tr><th></th><th>DESCRIPTION</th></tr>
<tr><td>Event Name</td><td>Contains the name of the event.</td></tr>
<tr><td>Source Terminal Name</td><td>Defines the source terminal or terminal group of the source allocations.</td></tr>
<tr><td>Destination Terminal Name</td><td>Provides the destination terminal or terminal group in which the allocations are moving to.</td></tr>
<tr><td>Move Event Status</td><td>Identifies whether the move event is Active or Inactive.</td></tr>
<tr><td>Modified Date</td><td>Indicates the date the move event was modified.</td></tr>
<tr><td>Modified By</td><td>Describes the user that last modified the move event.</td></tr>
<tr><td>Move Action</td><td>Displays the move event current state. Options are:
Pending – Move event saved but not yet moved. If the event is in pending status when it expires, it will remain on the Current Move Events.
Moved – Move event that is in effect/activated. After the move event has expired it will no longer display under Current Move Events.
Reset – Move event that has reset date less than the current date and therefore no longer in effect.
Invalid – Move event that has no allocations associated with the move event because allocations were deleted or removed from the move event.</td></tr>
<tr><td>Comments</td><td>Specifies user defined comments, if applicable.</td></tr>
<tr><td>Start Amount Adjustment</td><td>Determines the adjusted start amount.</td></tr>
<tr><td>Refresh Amount Adjustment</td><td>Identifies the adjusted refresh amount.</td></tr>
<tr><td>Move Date</td><td>Defines the effective date of the move event.</td></tr>
<tr><td>Reset Date Time</td><td>Describes the date the move event resets from the destination terminal back to the source terminal.</td></tr>
<tr><td>Source Terminal Details</td><td>
<table>
<tr><td>Consignee/CGroup</td><td>Contains the consignee or consignee group.</td></tr>
<tr><td>Product</td><td>Identifies the product, product group, or product family to which the product allocation applies. This column contains the PIDX product code for a product and product family level allocations.</td></tr>
<tr><td>Unit of Measure</td><td>Indicates what unit of measure is being used for the allocation.</td></tr>
<tr><td>Refresh Type</td><td>Defines the frequency the allocation is refreshed. Options are:
Daily
Weekly
Monthly
Tri-Monthly
Custom</td></tr>
</table>
</td></tr>
</table>

	Refresh Days	Indicates the custom day for the refresh, if the Refresh Type or Period is Custom.
	Start Amt	Displays the number of gallons initially allocated.
	Refresh Amt	Describes the credit amount or the number of gallons of product remaining to be lifted on the allocation.
	Scale Percent	Describes the percentage by which the allocation is being increased or decreased.
	Active Status	Indicates if the allocation is active. Options are: • ***Active*** • ***Inactive*** • ***Unenforced***
	Start Date	Contains the date and time that the allocation went into effect.
	Next Refresh Date	Contains the date and time the allocation is set to be refreshed with the specified Refresh Amount.
Destination Terminal Details	Consignee/CGroup	Indicates the consignee or consignee group.
	Product	Identifies the product, product group, or product family to which the product allocation applies. This column contains the PIDX product code for a product and product family level allocations.
	Unit of Measure	Indicates what unit of measure is being used for the allocation.
	Refresh Type	Defines the frequency the allocation is refreshed.
	Refresh Days	Provides the custom day for the refresh, if the Refresh Type or Period is Custom.
	Start Amt	Displays the number of gallons initially allocated.
	Moved Amt	Indicates the number of gallons moved from the source terminal to the destination terminal.
	Refresh Amt	Identifies the credit amount or the number of gallons of product remaining to be lifted on the allocation.
	Moved Refresh Amt	Describes the credit amount or the number of gallons of product allocation remaining to be lifted on the allocation.
	Original Scale Percent	Specifies the source terminal initial scale percentage.

	Adjusted Scale Percent	Defines the destination terminal set scale percentage.
	Active Status	Determines whether the moved allocation is active. • ***Y*** = Active • ***N*** = Not Active •
	Start Date	Contains the date and time that the allocation went into effect.
	Next Refresh Date	Displays the date and time the allocation is set to be refreshed with the specified Refresh Amount.

Contact Us

We hope you enjoy the new look and we welcome your comments and suggestions.

As always, please contact the DTN PetroDex support team at 1-800-982-1583 or by email at petrodexsupport@dtn.com for US support and 1-855-493-0260 or by email to TABSGlobalsupport@dtn.com for international support.