

DTN TABS[®] Load Assistance Training Manual

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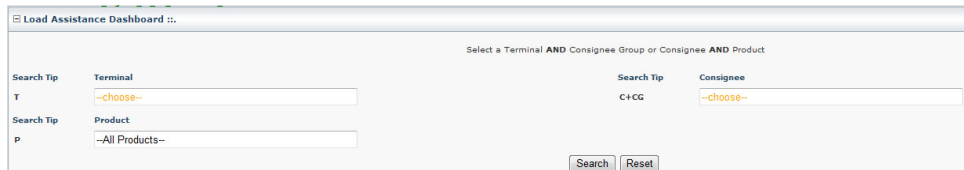
About Load Assistance

The **Load Assistance** page provides information on product and credit allocations, details on BOLs, and recent transactions from the rack.

The **Load Assistance** page simplifies and reduces the time needed to troubleshoot a loading issue at the rack by combining data that was previously only available by running multiple reports. The page provides the ability to:

- View Supply Events
 - Note: Only if you have subscribed to this optional service.
- Check allocations.
- View authorization denials.
- View previous BOL history.
- Provides ability to create a global product override based on the parameters set through the Dashboard Filter pane.

From Allocations menu, select *Load Assistance*. The Load Assistance page appears.



Load Assistance is only available to subscribers and to authorized users through the **User Manager** page by the assignment of a role that has the **Load Assistance** page approved.

Note: See the DTN TABS Initial Setup Training Manual for more information on User Manager and Role Setup.

Note: Contact your DTN sales representative for subscription information.

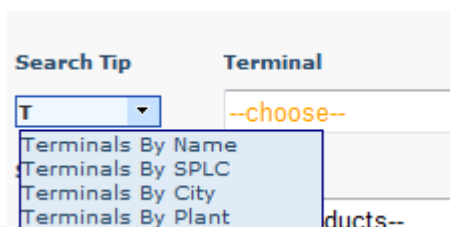
When you select a terminal, DTN TABS filters consignees and consignee groups to display only consignees/consignee groups that have been assigned to the selected terminal.

Running Load Assistance

You can search for information by terminal, consignee or consignee group, all products or a specific product, or a DTN TABS-defined product group or product family by viewing the **Load Assistance** page. In order to search, you **MUST** select both a terminal and a consignee or a consignee group. A best practice is to search on specific terminals and consignees rather than on groups.

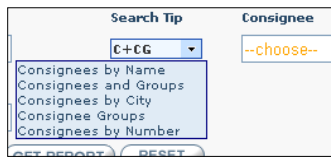
Here's how to run the **Load Assistance** page:

1. Move the mouse over the **Search Tip** field (by the **Terminal** field), to display a list.



Note: This field is set to Terminals By Name as the default. Skip this step and begin typing the name of the terminal in the Terminal field and then continue to Step 3.

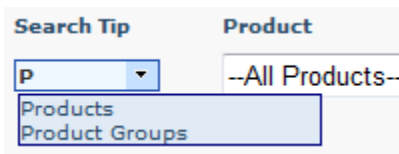
2. Select one of the options for displaying terminal information in the **Terminal** field.
3. Select a **Terminal** based on your **Search Tip** selection.
4. Move the mouse over the **Search Tip** field (by the **Consignee** field), to display a list.



The screenshot shows a web form with two main sections: 'Search Tip' and 'Consignee'. The 'Search Tip' section has a dropdown menu currently displaying 'C+CG'. A list of options is visible below the dropdown: 'Consignees by Name', 'Consignees and Groups', 'Consignees by City', 'Consignee Groups', and 'Consignees by Number'. The 'Consignee' section has a text input field with the placeholder '--choose--'. At the bottom of the form, there are two buttons: 'GET REPORT' and 'RESET'.

Note: This field is set to *Consignee and Groups* as the default. You may skip this step and begin typing the name of the consignee or consignee group in the Consignee field and then continue to Step 6.

5. Select one of the options for displaying consignee information in the **Consignee** field.
6. Select a **Consignee** based on your **Search Tip** selection.
7. Move the mouse over the **Search Tip** field (by the **Product** field) to display a list.



The screenshot shows a web form with two main sections: 'Search Tip' and 'Product'. The 'Search Tip' section has a dropdown menu currently displaying 'P'. A list of options is visible below the dropdown: 'Products' and 'Product Groups'. The 'Product' section has a text input field with the placeholder '--All Products--'.

Note: This field is set to Products as the default. Skip this step and begin typing the name of the product in the Product field and then continue to Step 9.

8. Select one of the following methods for displaying terminal information in the **Product** field.
9. Select a **Product/Product Group** based on your **Search Tip** selection.

10. Click 

Note: Click  to clear all parameters for this report and make new selections.

Viewing the Load Assistance Page

About Supply Events

After running the **Load Assistance** page, you can view any supply events based on the search criteria used.

Supply Events ::													
Records 1 - 1 of 1													
Terminal	Terminal Status	Product	Channel	Description	Event Start Date	Event End Date	Type	Enable Load	Media Code	Alert Time	Days In Advance 1	Days In Advance 2	Created Date
AMARILLO TX COP		PO: GASOLINE	Text		11/27/2017 1:26:00 PM CST	3/31/2018 1:26:00 PM CDT	No Outages	Y	All	Schedule	0	0	11/28/2017 1:28:04 PM CST
													Modified Date
													Backup Terminal

About Customer Setup


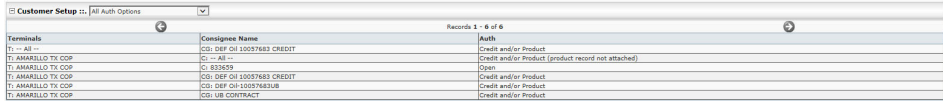
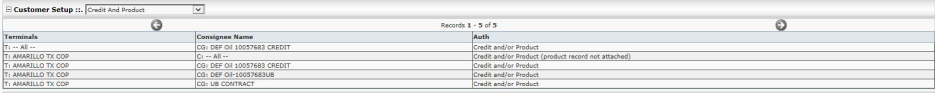
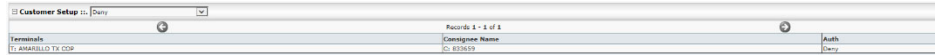
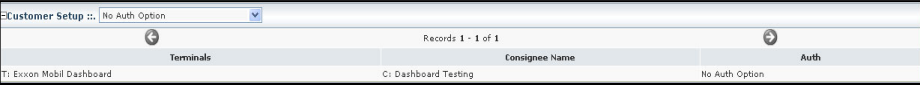

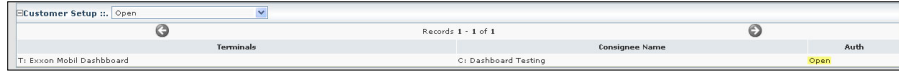
Customer authorization points, as set through the **Allocations** page for the selected filters, can be viewed in the **Customer Setup** panel.

The **Customer Setup** panel provides information on how the allocations are configured and assists with troubleshooting deny codes at the rack. Use the **Auth Type** field in the **Customer Setup** panel to filter the results.

Note: If there are no records for the selected criteria, the “No customer information matches your search criteria” message appears in the Customer Setup panel.

Customer Setup :: All Auth Options		
Records 1 - 8 of 8		
Terminals	Consignee Name	Auth
T: -- All --	CG: LITHGOW BR - 652000	Credit and/or Product
T: -- All --	CG: TUCKER BR - 752000	Credit and/or Product
T: BARROW TERMINAL	C: 400000	Open
T: BARROW TERMINAL	CG: ATKA BR - 952000	Credit and/or Product
T: BARROW TERMINAL	CG: LITHGOW BR - 652000	Credit and/or Product
T: BARROW TERMINAL	CG: LITHGOW CR - 652000	Credit and/or Product
T: BARROW TERMINAL	CG: SPOT CHANNEL	Credit and/or Product
TG: (SAP)BARROW	CG: LITHGOW BR - 652000	Credit and/or Product

	DESCRIPTION
All Auth Options Resulting in Deny	<p>Displays all authorization options (direct and indirect) in the allocation header that would cause the driver to be denied at the loading rack. For example, if a consignee is selected at a specific terminal, this panel not only displays any allocation for that consignee at that terminal, but also displays any allocations that are done at the Terminal/Consignee Group level, Terminal/Sold To level, or Terminal/Channel level. The All Auth Options Resulting in Deny option is the default setting.</p> <p>Below is an example of one level of allocation (Terminal/Consignee level.) For the first terminal, the Auth column displays Credit and/or Product, but neither of the records are attached, which denies the driver at the rack.</p> <p>For the second terminal, the Auth column displays Deny (for example, the seller made a decision to deny a customer until past credit issues are resolved.)</p>

	
All Auth Options	<p>Provides all authorization options (direct and indirect) for a selected terminal and consignee/consignee group that are set through the Allocations Product Manage page or through the ADMLOD process.</p> 
Credit and Product	<p>Contains all authorization options (direct and indirect) for the selected terminal and consignee combination that are set to Credit and/or Product through the Allocations Product Manage page or through the ADMLOD process.</p> 
Deny	<p>Identifies all authorization options (direct and indirect) for the selected terminal and consignee combination that are set to Deny through the Allocations Product Manage page or through the ADMLOD process.</p> 
No Auth Option	<p>Indicates whether No Auth Option was selected for the selected terminal and consignee combination (direct and indirect).</p> 
One time	<p>Specifies all authorization options (direct and indirect) for the selected terminal and consignee combination that are set to One Time through the Allocations Product Manage page or through the ADMLOD process.</p> 
Open	<p>Determines all authorization options (direct and indirect) for the selected terminal and consignee combination that are set to Open through the Allocations Product Manage page or through the ADMLOD process.</p> 

About Credit Allocations

The **Credit Allocations** panel displays all credit allocations for the selected filters. If the selected consignee/consignee group combination had a credit allocation, it would reflect all the associated credit information in the **Credit Allocation** panel.

Credit Allocations														
Records 1 - 1 of 1														
Customer	Credit Name	Units	Credit Limit	Receivables	Orders	Special Liabilities	Credit Adjustment	Unprocessed BOLs	In Process	Credit Hold Balance	Valued BOLs	Pre-Paid Amount	Remaining	Active
CG-DEF OIL 10057683	DEF OIL CREDIT	USD	220,000	0	0	0	50,000	0	0	0	0	0	270,000	Y
Auth Option														
Deny Reason Code														
Deny Reason Code Description														

The columns in this panel contain the following information:

Note: Fields marked with an (E) after the names are shown if using the Enhanced Credit Module. Fields marked with an (L) after the names are shown if using the Legacy Credit process. Fields without such designation are shown no matter which version of our credit system is being used.

	DESCRIPTION
Credit Name (Customer ID)	Identifies the credit record.
Period (L)	Displays the refresh period in days.
Units	Contains the units of measurement.
Credit Limit (E)	Provides the credit limit for a customer in dollars.
Start (L)	Specifies the starting credit limit.
Used (L)	Determines the number of units that have been lifted.
Receivables (E)	Indicates the dollar balance due based on lifting activity for each customer, minus any payments received.
Orders (E)	Describes the dollar balance for non-Fuel Marketing scheduled transactions that impact credit but have not yet reached the receivables. This value calculates the customer's remaining credit.
Special Liabilities (E)	Specifies the dollar balance for special liabilities for the customer in SAP. Used to calculate remaining credit.
Unprocessed BOL Balance (E)	Provides the total estimated load cost of all Unprocessed BOLs.
In-Process BOL Balance (E)	Indicates the total estimated load cost of all In-Process BOLs.
Credit Hold (E)	Defines the amount of dollars reserved against the customer's Credit Remaining when a load is authorized prior to the receipt of the BOL. The amount is calculated: (Configured Decrement Size of a Load * Average Fuel Price currently in effect) + Federal Tax Amount + State Tax Amount = Amount of dollars reserved
Remaining (E)	Displays the remaining amount. The amount is calculated:

	Credit Limit - (Receivables + Orders + Special Liabilities + In Process BOL Balance + Unprocessed BOL Balance + Credit Hold Balance) = Remaining amount
Remaining (L)	Describes the remaining amount. The amount is calculated: Start - Used = Remaining amount
Active (E)	Indicates if the credit record is active or inactive.
Auth Option (E)	Indicates if the record is enforced or unenforced.
Deny Reason Code (E)	Enter frequently used reason codes as to why a customer would be denied. They can then be used when setting a credit record to deny.
Deny Reason Code Description (E)	Details for the reason codes.
Refresh Date (L)	Determines the next time the record refreshes.

About Product Allocations

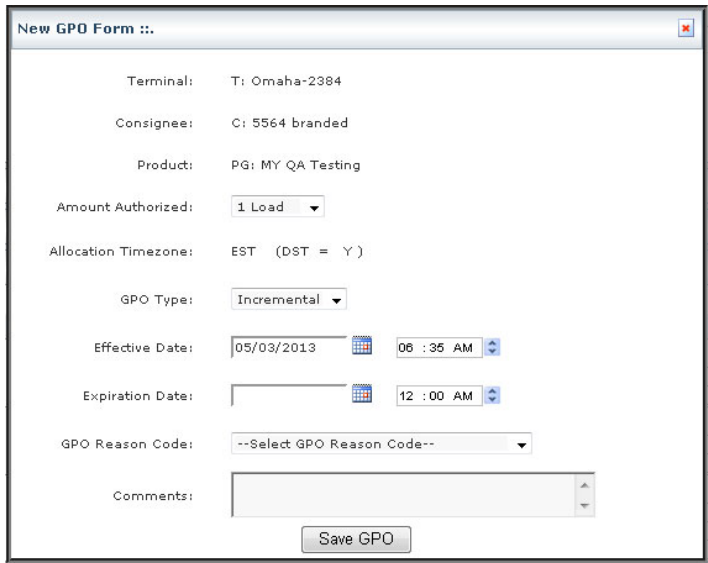
The **Product Allocations** panel displays all active direct and indirect product allocations for the selected filters. For instance, if a consignee is selected at a specific terminal, this report displays any allocations for that consignee at that terminal. It also displays any allocations for the consignee groups to which the consignee has been assigned. Flat and hierarchal allocations set to unenforced track lifted volume and refresh the same as active allocations but are not used to authorize loads.

Unenforced allocations that are set through the **Allocations Product Manage** page or ADMLD to track volume without authorizing loads. Flat and hierarchal allocations set to unenforced track lifted volume and refresh the same as active allocations but aren't used to authorize loads. Unenforced allocations are not displayed on the Load Assistance Dashboard.

Product Allocations											
Records 1 - 4 of 4											
Customer	Terminal	Product	Auth	Period	Start	Moved Amt	Lifted	Remaining	Moved Ref Amt	Unit of Measure	Refresh Date
CG: ABC Oil 1022937 IW	T: DES PLAINES IL TERMINAL-3045	PG: Mid RFG	Credit and/or Product	Daily	8,333	0	0	8,333	0	Gallons	11/21/2012 12:00:00 AM CST
				Weekly	58,333	0	0	58,333	0	Gallons	11/22/2012 12:00:00 AM CST
				Monthly	250,000	0	0	250,000	0	Gallons	12/1/2012 12:00:00 AM CST
CG: ABC Oil 1022937 IW	T: DES PLAINES IL TERMINAL-3045	PG: Prem RFG	Credit and/or Product	Daily	0	0	0	4.5	0	Gallons	11/21/2012 12:00:00 AM CST
				Weekly	23	0	0	23	0	Gallons	11/22/2012 12:00:00 AM CST
				Monthly	100	0	0	140	0	Gallons	12/1/2012 12:00:00 AM CST
CG: ABC Oil 1022937 IW	T: DES PLAINES IL TERMINAL-3045	PG: Reg RFG	Credit and/or Product	Daily	4	0	0	4	0	Gallons	11/21/2012 12:00:00 AM CST
				Weekly	26	0	0	36.4	0	Gallons	11/22/2012 12:00:00 AM CST
				Monthly	110	0	0	154	0	Gallons	12/1/2012 12:00:00 AM CST
CG: ABC Oil 1022937 IW	T: DES PLAINES IL TERMINAL-3045	PG: ULSD	Credit and/or Product	Daily	4,567	0	0	4,567	0	Gallons	11/21/2012 12:00:00 AM CST
				Weekly	31,970	0	0	31,970	0	Gallons	11/22/2012 12:00:00 AM CST
				Monthly	137,016	0	0	137,016	0	Gallons	12/1/2012 12:00:00 AM CST

The columns in this panel contain the following information:

	DESCRIPTION
Customer	Displays consignee/consignee group name the Product allocation is assigned to.
Terminal	Contains the terminal name the Product allocation is assigned to.
Product	Identifies the product name, product group, or product family of the Product allocation.

Auth	Indicates the Auth option that was selected in allocation set up page.
Period	Provides the effective time period for the allocation.
Start	Describes the number of units allocated initially.
Moved Amt	Specifies the number of units added to record as a part of a move event.
Lifted	Determines the number of units lifted against this allocation.
Remaining	Displays the number of units remaining on this allocation.
Moved Ref Amt	Contains the number of units added to refresh as a part of a move event.
Unit of Measure	Identifies the volume designation used for the record (i.e. Gallons, Liters).
Refresh Date	Indicates the date and time when the allocation is refreshed. For a specific terminal, the time zone is the same one defined for the terminal through Terminal Setup.
Moved Reset Date	Describes the expiration date for a move event.
GPO	<p>Defines the Global Product Override (GPO).</p> <p>A GPO is a quick way to load after having exhausted or nearly exhausted allocations. When a product allocation is running low and a customer needs to load more product than is available before the next Refresh Date, issue a GPO to provide additional product right away.</p> <p>All levels (direct and indirect) of product allocations include a GPO button. The GPO button appears on the right side of the page. To create a global product override to enable a customer to load, click GPO, enter the required information, and click Save.</p> 

	Amount Authorized	Determines the number of loads of the selected product/product group that can be lifted. Number of gallons per load and maximum number of loads is set through the Product Override Settings page.
	Allocation Time Zone	Describes the time zone in which the GPO is controlled by.
	GPO Type	DDisplays the GPO type to use. Options are: <ul style="list-style-type: none"> Incremental Borrowed The default is configured in Product Override Settings page.
	Effective Date	Specifies the date and time the GPO becomes active.
	Expiration Date	Provides the date and time after which the GPO will no longer be in effect.
	GPO Reason Code	Defines the quick code for why a GPO was issued.
	Comments	Displays any user-entered notes and comments.

About GPO Allocations

The **GPO Allocations** panel displays all active GPO for the selected filters.

GPO Allocations ::											
Records 1 - 1 of 1											
Terminal	Customer	Product	Start Time	End Time	Volume	Lifted	Remaining	Unit of Measure	Reason Code	Approved By	
TI: DES PLAINES IL TERMINAL-3045	CG: ABC OIL 1022937 IW	PG: Prem RFG	11/9/2012 9:28:54 AM CST	12/3/2012 12:00:00 AM CST	15,000	0	15,000	Gallons		969/FIRST	

The columns in this panel contain the following information:

	DESCRIPTION
Terminal	Indicates the terminal that the GPO applies to.
Customer	Identifies the Consignee/Consignee Group that the GPO applies to.
Product	Specifies the Product/Product Groups that the GPO applies to.
Start/End Time	Defines the effective period for the GPO.
Volume	Displays the number of gallons authorized for the GPO.
Lifted	Determines the number of gallons lifted against the GPO.
Remaining	Number of gallons remaining on the GPO.

Unit of Measure	Contains the volume designation used for the record (i.e. Gallons, Liters).
Reason Code	Displays the quick code for issuing a GPO.
Approved By	Identifies the user who issued the GPO. <i>Note: GPOs are done at the same level as allocations (terminal, consignee group level on product/ product group).</i>

About Consignee Load Request History (Last 24 Hours)

The **Consignee Load Request History (Last 24 Hours)** panel displays the last 24 hours of load requests and transaction that have not reconciled to create a BOL. All authorization requests that resulted in a denial and all authorization requests that were granted but did not reconcile with a BOL record are displayed.

Consignee Load Request History (Last 24 Hours) ::									
Records 1 - 3 of 3									
Date	Consignee	Consignee Name	Carrier	BOL Number	Type	Trans No	Result	Prods Authed	Prods Not Authed
10/21/2010 12:20:27 PM EDT	456789	Dashboard Testing	CUTE	0	CA		DENY 9 - Credit Limit Exceeded - 929		
10/21/2010 12:16:05 PM EDT	456789	Dashboard Testing	CUTE	0	CA	79520438	Success	B	
10/20/2010 05:16:16 PM EDT	456789	Dashboard Testing	CUTE	0	CA		DENY 12 - Invalid Transaction - 929		

The columns in this panel contain the following information:

	DESCRIPTION
Date	Indicates the data and time of the load request.
Consignee	Describes the unique, identifying number for the customer.
Consignee Name	Contains the name for the consignee.
Carrier	Identifies the carrier of the product. This is an alphanumeric number field.
BOL Number	Specifies the BOL number for the transaction.
Type	Indicates the Transaction Type.
Trans No	Displays the unique identifier for a successful transaction.
Result	Defines the results of a transaction sent to DTN TABS.
Prods Authed	Lists the authorized products/product groups for loading.
Prods Not Authed	Provides the product / products groups not authorized for this customer at the terminal.

About Consignee Bill of Lading History

The **Consignee Bill of Lading History** panel displays BOLs received over the last 24 hours for the selected filters.

Consignee Bill of Lading History								
Records: 1 - 1 of 1								
Date	Consignee	Consignee Name	BOL Number	Product	Gross Amount	Unit of Measure	Carrier	Authorized
11/21/2012 6:01:04 AM CST	2162716	ABC OIL 1022997 2162716 IL	15896	O24	7,000	GAL	SCAC	Yes

The columns in this panel contain the following information:

	DESCRIPTION
Date	Defines when the transaction was sent to DTN TABS.
Consignee	Identifies the unique number for the customer that was set up through the Consignee Setup screen or through an ADMLD.
Consignee Name	Provides the consignee name that was defined for the consignee through the Consignee Setup screen or through an ADMLD.
BOL Number	Contains the BOL number for the transaction.
Product	Lists the product lifted.
Gross Amount	Describes the number of gross units lifted.
Unit of Measure	Specifies the volume designation used for the record (i.e. Gallons, Liters).
Carrier	Determines the SCAC number for the carrier. This is an alphanumeric number which identifies the carrier of the product.
Authorized	Indicates whether the transaction was authorized by DTN TABS. Options are: <ul style="list-style-type: none"> Yes - authorized through DTN TABS. No – not authorized through DTN TABS.

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