MDE-5415A

ForeHB
SiteOmat360 User Manual

P/N: MDE-5415

Revison A

This document is based on Orpak's ForeHB SiteOmat360 User Manual, P/N 817423749.

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1 – Introduction

1.1 General

This manual describes SiteOmat360 software application of Gasboy®, and provides instructions on how to use the various features offered by the application.

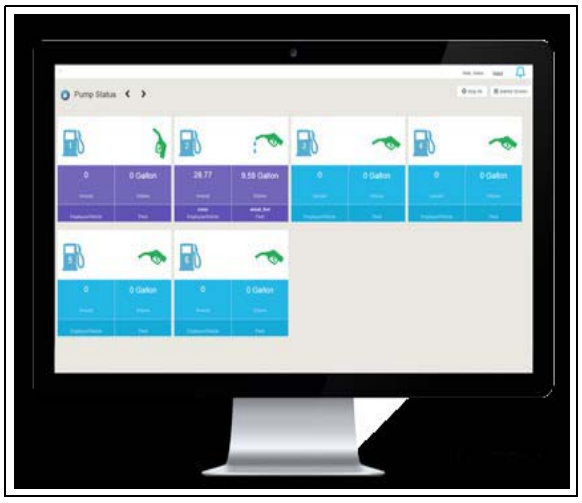
This manual is targeted toward authorized users of the SiteOmat360 Station Controller's web-based application (e.g. gas station managers, gas company managers, fleet owners). For technical information regarding the SiteOmat360 Station Controller setup and maintenance, refer to *MDE-5414 SiteOmat360 Setup and Maintenance*.

1.2 Solution Description

Gasboy SiteOmat360 software provides complete and secure site automation, including managing dispensers, forecourt terminals, and fuel tanks through an enhanced and user-friendly web interface compatible with any browser via PC, tablet, or mobile.
The following details the main features of the SiteOmat360 application:

- Controls and records all transactions
- Supports any configuration and business logic
- Enables various authorization options
- Offers real-time monitoring of refueling, tank levels, delivery, and inventory reconciliation
- Delivers an innovative reporting mechanism

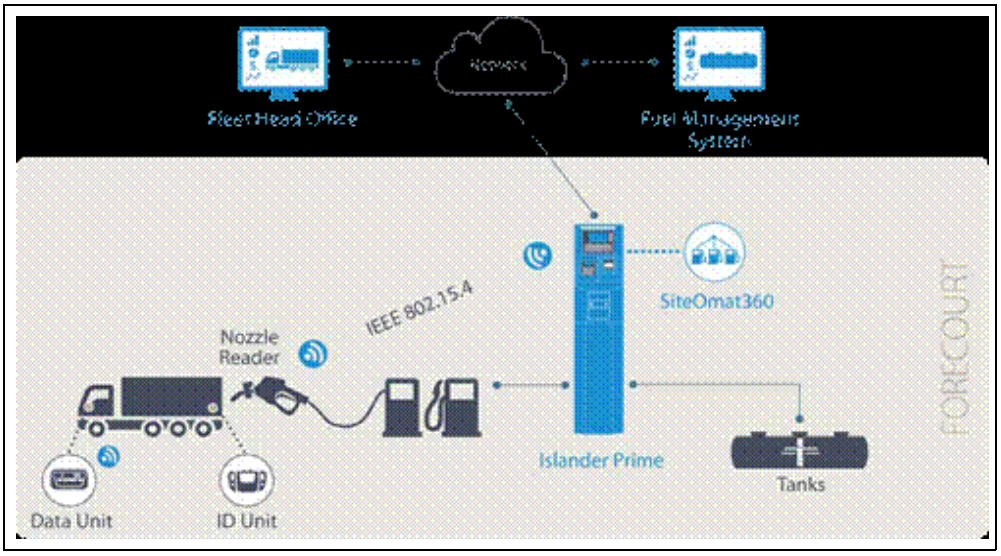
Figure 1: SiteOmat360



1.3 System Architecture

Figure 2 shows a basic diagram of Gasboy's ForeHB architecture:

Figure 2: ForeHB System Architecture



1.4 Manual Structure

Section 1: Introduction
This section provides a general description of the system.

Section 2: Getting Started
This section provides initial instructions needed to start using SiteOmat360, references to subsequent sections, and discusses the different parts of the system.

Section 3: Status
This section provides instructions for monitoring the gas station in real-time using the SiteOmat360 application.

Section 4: Reports
This section provides instructions for generating reports in the SiteOmat360 application.

Section 5: Wet Stock Management
This section describes the Wet Stock Management features, including deliveries data entry, inventory management and reconciliation, scheduled price changes, and more.

Section 6: Local Fleet Management
This section provides instructions for managing fleets, vehicles, devices, and defining rules.

Section 7: Events and Alarms
This section describes the Event Viewer feature, which enables viewing system warnings, logins, and the alarms screen.

1.5 Documentation Conventions

This manual uses the following conventions:

WARNING

Warning notes contain information that, unless strictly observed, could result in injury or loss of life.

CAUTION

Caution notes contain information that, unless strictly observed, could result in damage or destruction of the equipment or long-term health hazards to personnel.

Notes contain helpful comments or references to material not covered in the manual.

Best practice notes contain helpful suggestions.

Example notes contain additional information to illustrate a concept/ procedure.

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2 – Getting Started

2.1 General

This section provides initial instructions needed to start using SiteOmat360, references to subsequent sections, and discusses the different parts of the system.

Note: The SiteOmat360 application has been designed and tested to run properly on Microsoft® Internet Explorer® 7 and higher. On any other browser (or version), the application may not function properly.

The SiteOmat360 application can be logged into using a standard browser on any PC. The application is launched from the SiteOmat360 computer and may be accessed from any networked computer (directly connected to the SiteOmat360 via the LAN) or from a remote computer with an Internet browser over the Internet. For security measures, it is highly recommended for external work to use Virtual Private Network (VPN), so it will not be exposed to the Internet.

To access the application, launch the Internet browser and enter the address (IP address or domain name) of the SiteOmat360 as provided by Gasboy as follows:

https://IPaddress

Each customer's IP address may differ based on their network.

Once a link is established, the SiteOmat360 login page is displayed.

2.2 Logging In

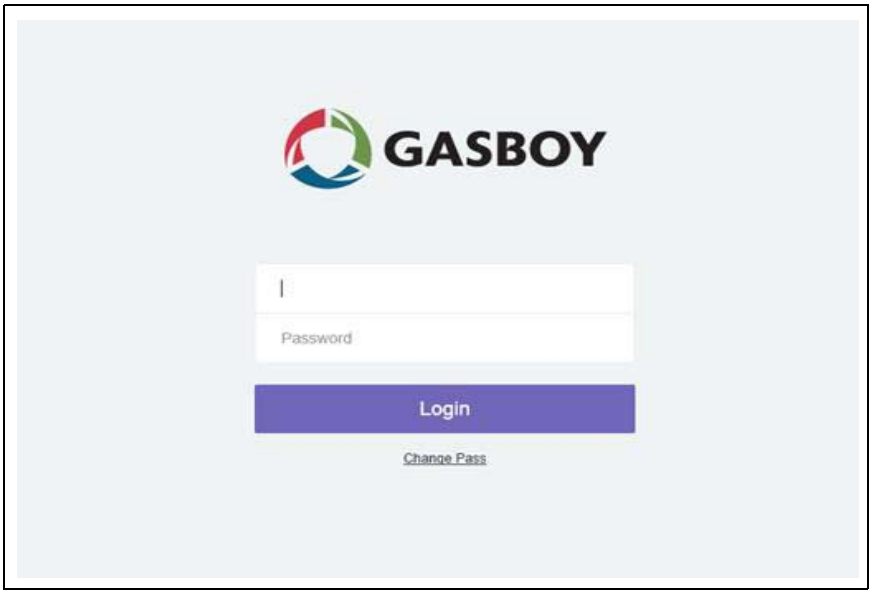
The SiteOmat360 Forecourt Controller incorporates powerful Secure Socket Layer (SSL) mechanisms to allow only authorized users to view and alter its contents. The SiteOmat360 application opens with a login page for entering the username and password (see Figure 3).

The accessible contents and privileges of the user depends on the access level, as set in the User Management definitions of the SiteOmat360 application. The application is designed to grant relevant privileges for each user and block other capabilities. For example, a gas station manager is not allowed to manage vehicle fleets.

Enter the username and password and click **Login**. The SiteOmat360 Forecourt Controller checks the entered information against the users listed in the system. If the user and the password are authenticated, the user logs into the SiteOmat360 Forecourt Controller with his applicable access level.

Note: The initial password will be provided by Gasboy's Customer Support. After installation, you must change the password. It is highly advised to create a secure password which includes a combination of upper and lower-case alphabetic letters and digits, and to keep your password protected. We will not be able to recover your password, so it is crucial that you perform database backup on a regular basis.

Figure 3: Login Page



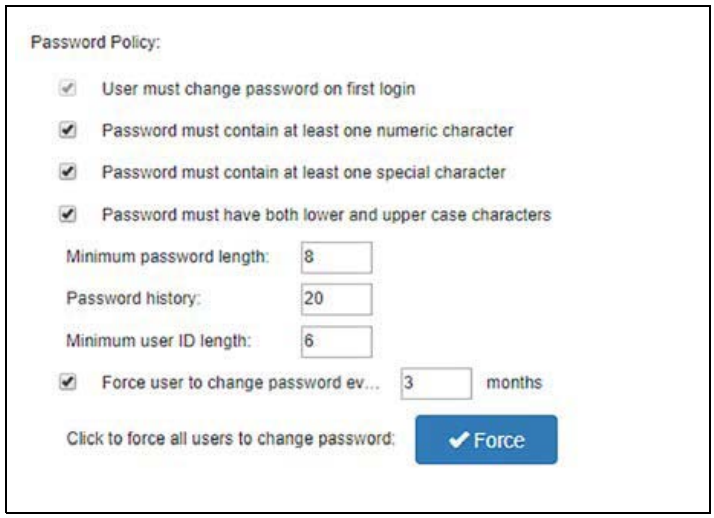
Note: Disable any sort of pop-up blockers as they may interfere with the operation of the application.

2.2.1 Password Policy

The Admin user is obligated to replace the default password. This also applies to upgrades. Additionally, each new user is obligated to replace his initial password upon first login. *Note: This cannot be reconfigured in the Password Policy configuration screen* (see Figure 4).

The following displays the default password policy for all users.

Figure 4: Default Password Policy



The following may be used as special characters: **% - ~ _ + ` : ; ' " [ ] \ | , . / ! @ $ ^ * ( )** < > **{ } ? =**

2.3 Navigating the Application

After successful login, the opening page opens (see Figure 5).

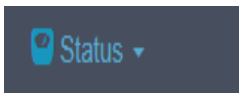
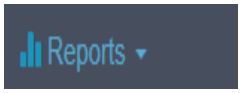
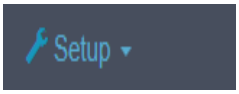
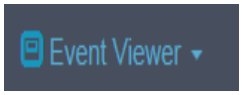
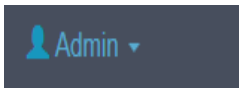
Figure 5: Opening Page

The SiteOmat360 interface includes three sections:

- Navigation Bar - Accessing the various capabilities of the SiteOmat360 application is done using the Navigation Bar on the left-hand side of the page. The Navigation Bar opens throughout the SiteOmat360 application and contains links which leads to various pages of the application within the boundaries of the user's access level.
- Information Bar - The Information Bar is always displayed on top of the page with the login name of the current user, a logging out option, and an alarm icon indicating the most critical alarms in the system.
- Work Area - The main user interface located at the center of the page.

Clicking any button in the Navigation Bar opens the subsequent contents in the work area; while the Navigation Bar is fixed, the work area is dynamic and changes according to the requested action. The objective of each button in the Navigation Bar is depicted as follows (see Table 1 on page 9).

Table 1: Navigation Menu

Button	Description
	Provides real-time monitoring of the gas station fuel pumps. Refer to Status on page 11.
	A report generator tool, which enables you to produce a wide variety of reports. Refer to Reports on page 23.
	Provides control of the Wet Stock in all aspects, including deliveries data recording, inventory management and reconciliation, and more. Refer to Wet Stock Management on page 39.
	Manages local accounts fleets, vehicles, and devices. Refer to Local Fleet Management on page 57.
	Leads to SiteOmat360 setup definitions, which map the gas station for the SiteOmat360 Station Controller. These definitions are beyond the scope of the user, and are described in the *MDE-5414 SiteOmat360 Setup and Maintenance Manual*.
	Displays system warnings and logins. Refer to Events and Alarms on page 103. .
	Manages users, sets password policy, and provides system commands. Refer to *MDE-5414 SiteOmat360 Setup and Maintenance Manual*.
	Exits SiteOmat360 application. Closes the current window and redirects to the login page.

Note: Not all of the navigation buttons are available to all users (e.g. Setup and Admin navigation buttons are available to users with Admin access level).

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3 – Status

3.1 General

This section provides instructions for monitoring the gas station in real time using the SiteOmat360 application. The SiteOmat360 Forecourt Controller is connected to all the modules in the gas station, and receives online fueling information and status from each of the pumps deployed in the gas station. The Status feature also enables monitoring the status of the fuel tanks in the station.

To access the Status page, click **Status** link in the navigation bar. The Status section includes the following pages: Pumps, Tanks, OPT, and Devices (see Figure 6).

Figure 6: Status Page

3.2 Pump Status

The application presents the data of each fuel pump in the station. It enables you to remotely initiate a fuel dispensing transaction by clicking the relevant pump head indicator, and enables monitoring a group of eight pump heads simultaneously. Switching between the groups of pump heads is done by clicking the gauges in the upper part of the page.

To access the Pump Status page, click **Status** in the navigation bar and then select **Pumps** (see Figure 7).

Figure 7: Pump Status Page

Note: A Dispenser Unit pump may consist of one or two pump heads, each pump head including the number (one or more) of nozzles. Only a single nozzle in a pump head can be used in a given time.

The Pump Status page comprises of the following two sections:

- Pump Status Pane
- Fueling Transactions Log

3.2.1 Pump Status Pane

Each fuel pump is displayed with the number of pump, and its current status as follows:

- **Amount**: The amount of money, which should be collected for the fuel dispensed so far.
- **Volume**: The volume of fuel dispensed so far (in liters or gallons).
- **Employee/Vehicle**: The employee name, or plate number of the vehicle being fueled.
- **Fleet**: The number of the fleet, of which the fueled vehicle belongs.

The following color indicators display the state of the pump:

- Blue: The pump head is not defined.
- Green: The pump head is monitored.
- Purple: The pump is in use.
- Yellow: The pump is idle, or there is no communication with the pump.

The Pump Status indicators display the state of the nozzle of each pump head. The nozzle icon and color of the pump status change according to its state as follows:

a Idle - Awaiting fueling request.

b Call status - Fuel nozzle was lifted.

c In-Use - Fuel is being dispensed.

d Pay status - Transaction is completed and money is collected.

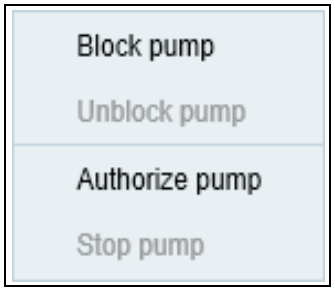
e Ready - Fueling was authorized but the nozzle was not lifted yet.

f Stop - Fueling is stopped (e.g. nozzle is pulled out before fueling was completed).

g Attention - A problem of some sort occurred (e.g. pump in error, communication error, indicates that mechanical pump is in Bypass mode).

Right-clicking the pump head indicator displays a context menu, which enables you to perform the following actions (see Figure 8).

Figure 8: Pump Context Menu



- **Block/Unblock Pump**: Blocks/Unblocks the pump.
- **Authorize Pump/Stop Pump**: Initiates/stops a refueling transaction.

To toggle between the options, click the enabled selection.

3.2.2 Fueling Transactions Log

The Fueling Transactions Log is a grid listing of all the fueling transactions that took place in the gas station. The grid is sorted by the date and time of the transaction with the most recent transaction appearing first (see Figure 9).

Figure 9: Fueling Transactions Log

Date	Time	Transaction	Receipt	Employee/Vehicle	Odometer	Sale (Dollars)	Quantity (Gallon)	PPU	Fuel Type	Pump	Nozzle	Density (Kg/M³)
06/21/18	14:47:00	300000011	11	Admin		184.83	61.610	3.001	1	2	1	0.000
06/20/18	17:28:15	300000010	10	5		3.92	1.960	2.001	1	1	1	0.000
06/20/18	17:27:02	300000009	9	5		0.48	0.480	1.001	1	1	1	0.000
06/20/18	17:26:39	300000008	8	5		0.68	0.680	1.001	1	1	1	0.000
06/20/18	17:21:05	300000007	7	5		1.96	1.960	1.001	1	1	1	0.000
06/20/18	14:32:11	300000006	6	Admin		8.90	1.780	5.001	1	1	1	0.000
06/20/18	12:50:42	300000005	5	3985		19.50	3.900	5.001	1	4	1	0.000

The fields that appear in the Fueling Transactions Log are described in the following table (see Table 2).

Table 2: Fueling Transactions Log Fields

Field Name	Description
Date	Date of the transaction.
Time	Time of the transaction.
Transaction	A unique transaction ID number given by SiteOmat360 to each transaction.
Employee/Vehicle	An ordinal unique number assigned by SiteOmat360 to each receipt as included in each printed receipt.
Odometer	Odometer reading of the vehicle in the transaction.
Sale	The sum of money collected in the transaction.
Quantity (Gallon)	The volume of fuel dispensed in the transaction.
PPU	Product Price Per Unit (PPU).
Fuel Type	Type of fuel supplied in the transaction.
Pump	Number of the pump head of which the transaction was performed.
Nozzle	Number of the nozzle in the pump head used to supply the fuel in the transaction.
Density (Kg/m3)	Fuel density

3.2.2.1 Remotely Authorizing Transactions

The SiteOmat360 enables you to remotely initiate and stop refueling transactions by clicking on the relevant pump head icon.

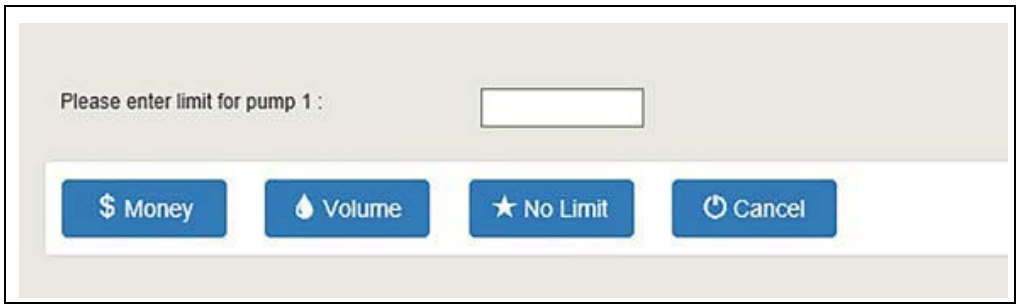
Note: The remote refueling option is available only if enabled in the setup of SiteOmat360. For more information about the setup of this feature, refer to the MDE-5414 SiteOmat360 Setup and Maintenance Manual.

3.2.2.1.1 Starting a Transaction

To start a fueling transaction for a certain pump head, proceed as follows:

1 Click the applicable pump head icon in the Status window. The Authorize Pump dialog box opens (see Figure 10).

Figure 10: Authorize Pump Dialog Box



*Note: The limit types can be set to display Money, Volume, or both from **Setup** >**Global** > **Advanced**. For more information, refer to MDE-5414 SiteOmat360 Setup and Maintenance Manual.*

2 Enter the money/volume limit and click **Money** or **Volume** accordingly. Click **No Limit** to authorize unlimited refueling. A confirmation message is displayed (see Figure 11).

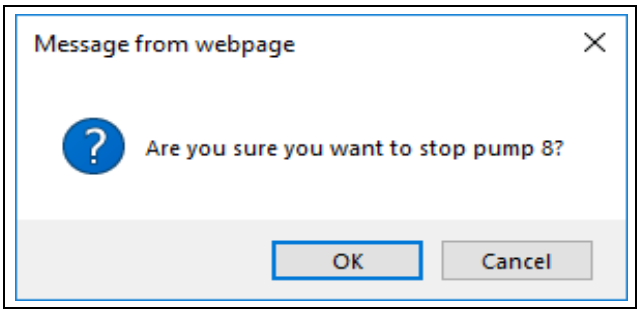
Figure 11: Limit Confirmation Message

3 Click **Yes** to start the refueling transaction for the given pump.

3.2.2.2 Stopping a Transaction

To stop a refueling transaction from a certain pump head, click the pump head indicator. A confirmation message is displayed (see Figure 12).

Figure 12: Stop Pump Confirmation Message

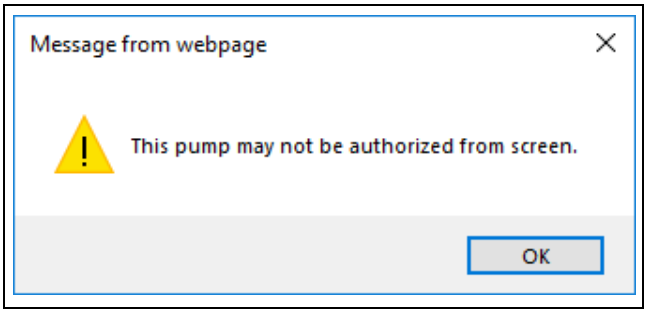


Click **OK** to stop the transaction.

3.2.2.3 Remote Refueling Notifications

In cases where you initiate a refueling transaction, but the pump is in Auto-Authorize mode, the following message is displayed (see Figure 13).

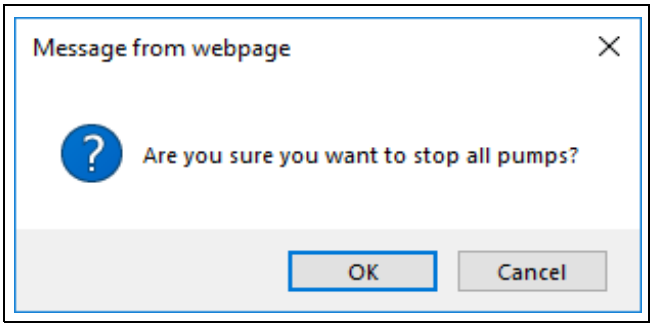
Figure 13: Pump Authorization Error Message



3.2.2.4 Stopping all Transactions

All pump heads currently engaged in a refueling transaction can be remotely stopped by clicking **Stop All**. Prior to stopping all transactions, a confirmation message is displayed (see Figure 14).

Figure 14: Stop all Pumps Confirmation Message



3.2.2.5 Market Screen

The Market Screen displays the Pump Status information in a full screen display.

To access the full screen display, click **Market Screen**.

3.3 Tank Status

The Tank Status page provides a visual inspection of the current fuel level in each tank. The visual and textual data displayed for each tank is obtained from the last inventory measurement, without the fuel consumption according to the registered transactions (refer to Wet Stock Management on page 39). This data can also be provided from the TLG readout.

To access the Tank Status page, click **Status** in the navigation bar and then select **Tanks** (see Figure 15).

Figure 15: Tank Status Page

The Tanks Status window enables monitoring a group of four tanks simultaneously. Switching between groups of tanks is done by clicking the gauges in the upper part of the page.

The Tanks page is comprised of the following two sections:

- Tank Status Pane
- Fuel Tank Transactions Log

3.3.1 Tank Status Pane

The Tank Status data is displayed in real-time with four text boxes and a fuel tank level indicator (see Figure 16).

The textual information displayed is as follows:

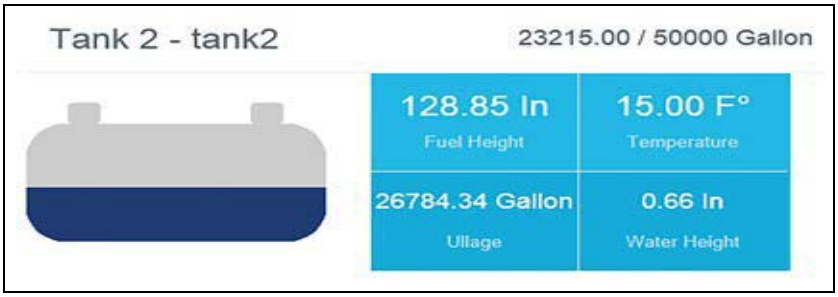
a Fuel Height: Displays the height of fuel in the tank.

b Temperature: Displays the temperature inside the fuel tank.

c Ullage: Displays the amount of unfilled space in the fuel tank.

d Water Height: Displays the height of the water in the fuel tank.

Figure 16: Tank Status Data



Note: Some of the data may not be available depending on the TLG type and probes (such as density). If the TLG reports on delivery status, a relevant indication is displayed.

The following states are shown by the fuel tank indicator:

a Dark Blue: Displays the fuel level in the tank.

b Light Blue: Displays the water level in the tank. If the water level is above zero, at least one light blue line is displayed.

3.3.2 Fuel Tank Transactions Log

The Fuel Tank Transactions Log is a grid listing the capacity and current inventory of the products in the gas station (see Figure 17). The grid is sorted by product but may be sorted by any other field.

Figure 17: Tank Status Transactions Log

Product	Capacity	Volume
Diesel	19988.000	12326.430
Regular	9994.000	4012.000
Super	9994.000	8288.885

1 - 6 [6]

The fields that appear in the Fuel Tank Transactions Log are described in the following table (see Table 3).

Table 3: Fuel Tank Transactions Log Fields

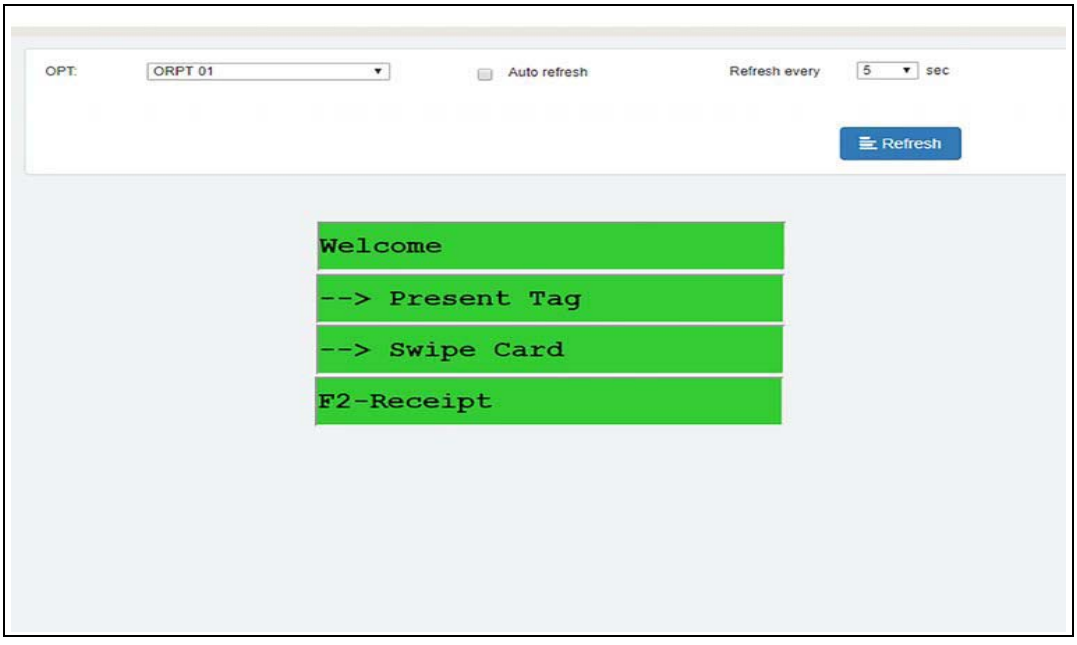
Field Name	Description
Product	Fuel type name.
Capacity	Product capacity.
Volume	Volume of all the tanks containing the specific product in the gas station.

3.4 Outdoor Payment Terminal (OPT)

The OPT page enables viewing the current message displayed on any of the outdoor payment terminals defined in the system.

To access the OPT page, click **Status** in the navigation bar and then select **OPT** (see Figure 18).

Figure 18: OPT Page



Note: The current message displayed on the selected OPT is displayed. Data entered by drivers/attendants, such as odometer, is not displayed.

In order to view the outdoor payment terminal to be displayed, select the requested terminal in the **OPT** drop-down list.

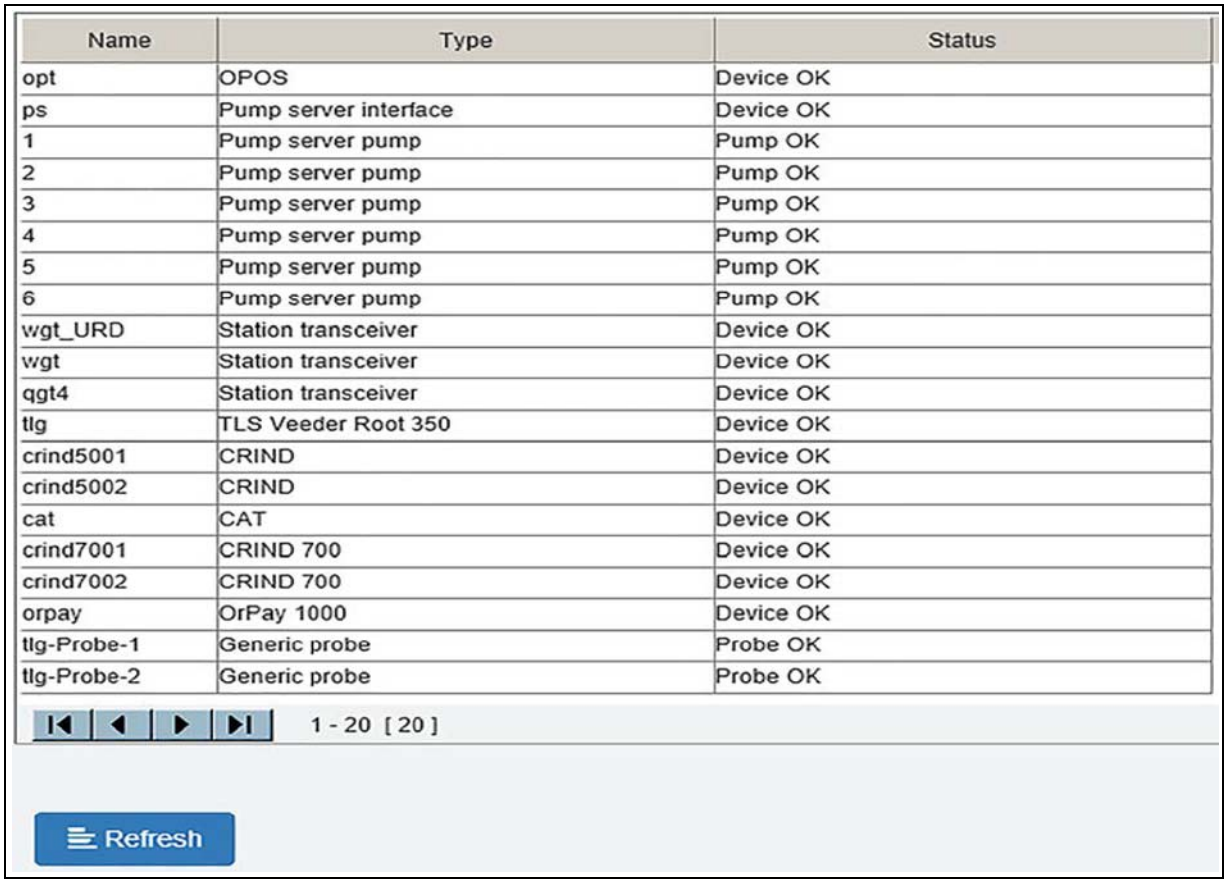
The page can be manually refreshed by clicking **Refresh**, or automatically by selecting the **Auto refresh** check box and defining intervals from the R**efresh every x sec** drop-down list.

3.5 Devices

The application presents a summary of all the devices in the system and their current status.

To access the Devices page, click **Status** in the navigation bar and then select **Devices** (see Figure 19).

Figure 19: Devices Page



The field that is displayed on the Devices status page are described below (see Table 4).

Table 4: Devices Status Fields

Field Name	Description
Name	Name of the device.
Type	Type of the device.
Status	Status of the device, as shown in the alarms.

This page is intentionally left blank.

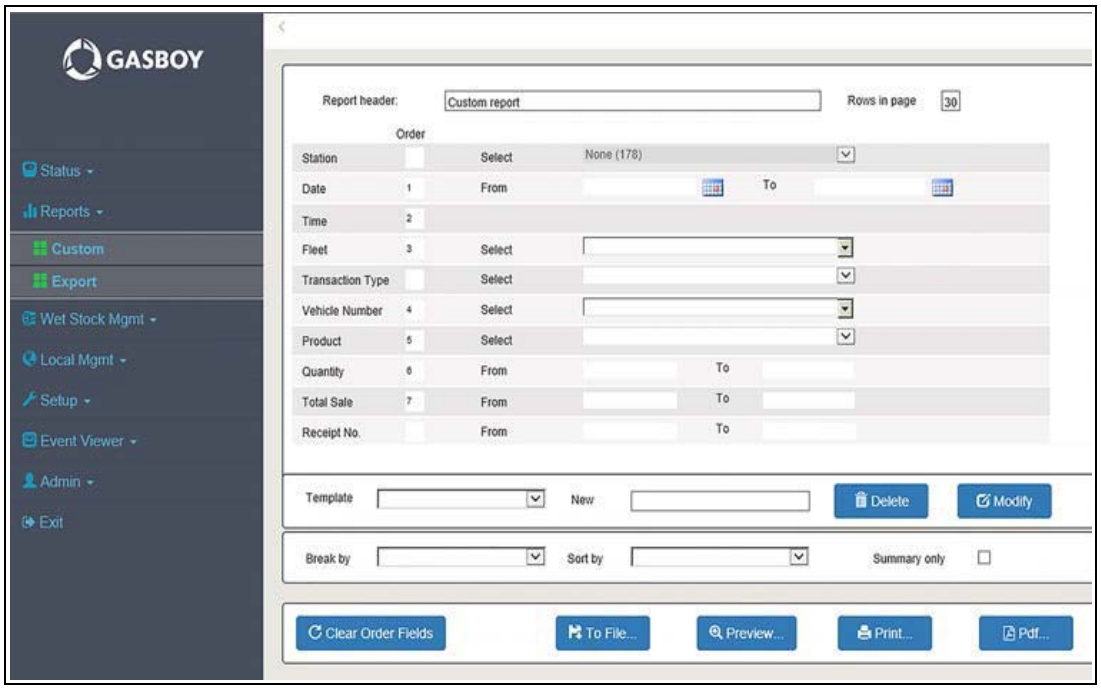
4 – Reports

4.1 General

This section provides instructions for generating reports in the SiteOmat360 application. The application provides a highly flexible report utility for producing data reports, enabling fleet, and head office managers to cross fueling transactions from different aspects such as sales, fleet expenses, vehicle performance, and more.

To access the Reports page, click **Reports** in the navigation bar. The Reports section includes the following pages: Custom and Export (see Figure 20).

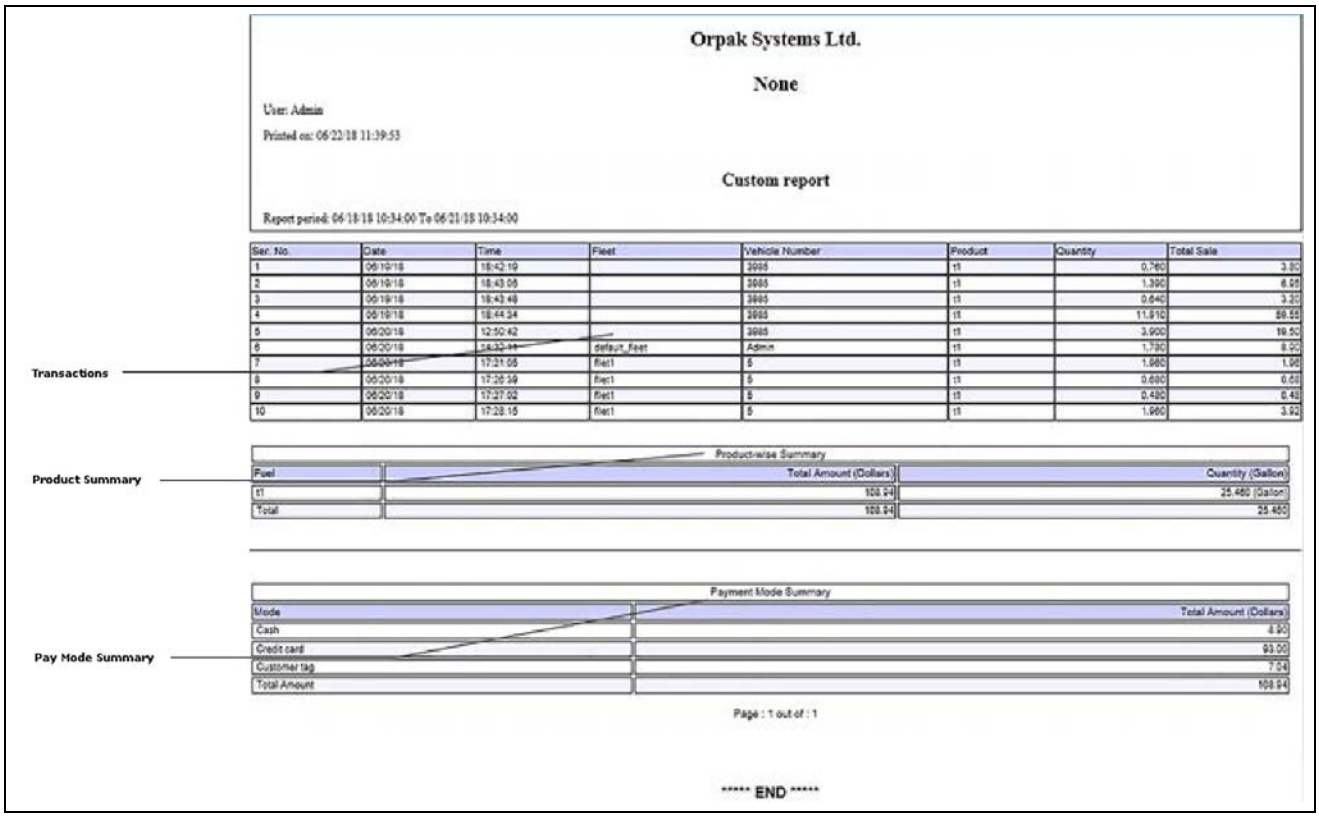
Figure 20: Reports Page



Note: A maximum of eleven (11) fields may be selected when producing reports.

The output of reports has a header, which includes the station name, report title, and username. The report period (date range) is also displayed on the header (see Figure 21 on page 24).

Figure 21: Custom Report - Example



Most of the report's data are divided into the following three sections:

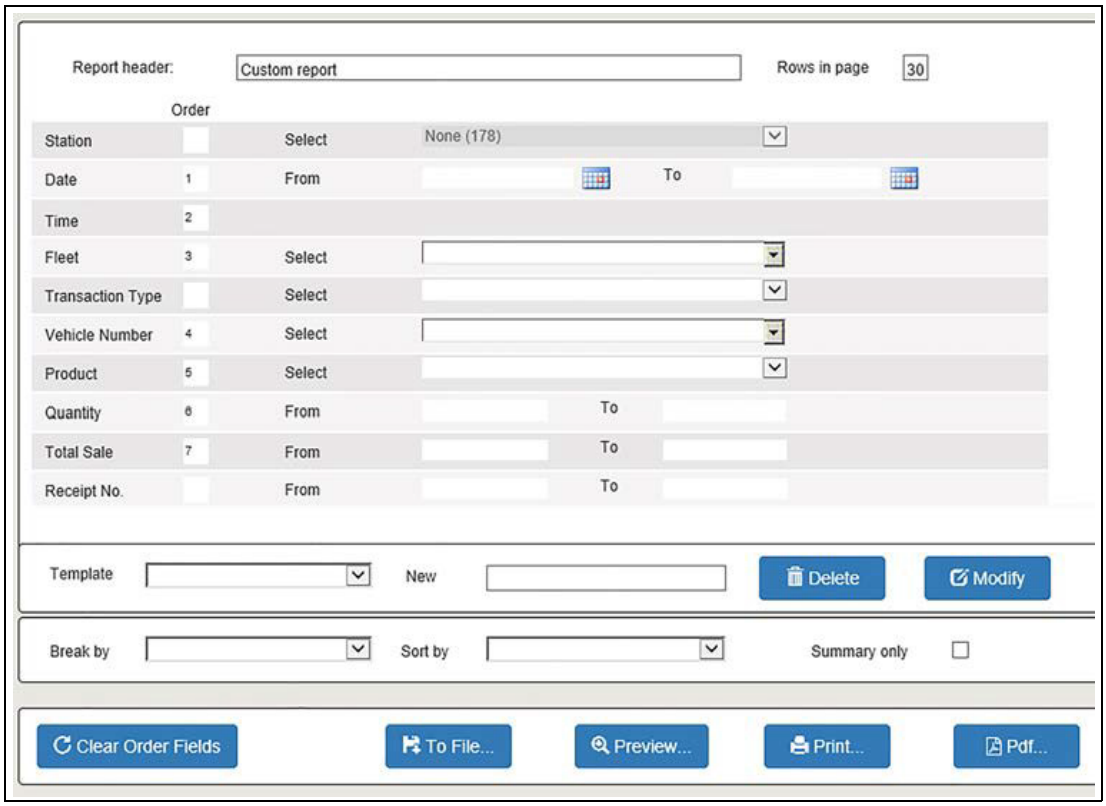
- **Transactions:** Contains the transactions details in order and broken by the selected field. If data contains more than one page, then the header is repeated on each page. The page number is displayed at the bottom of each page. In cases where a break is selected, a summary line is added.
- **Product-wise Summary section:** Sums up all data in the report by product, containing total transactions Amount and Quantity sold.
- **Payment Mode Summary section:** Sums up all data in the report by pay mode.

4.2 Custom Reports

The Custom reports page enables you to generate reports of the transactions performed in the gas station in various profiles.

To access the Custom Reports page, click **Reports** in the navigation bar and then select **Custom** (see Figure 22).

Figure 22: Custom Report Page



4.2.1 Report Elements

The Custom reports page comprises the following elements:

- **Report header:** Sets the title of the report. Use the report header to distinguish between produced reports.
- **Rows in page:** Sets the number of rows (records) in each report page.
- **Report Criteria:** The report criteria section is the main part of the report, as it establishes the data to be included in the report. The produced report displays only the transactions that meet the specified criteria.

- **Template:** The Template options enable saving specific report parameters (header, criteria, structure) for selecting these parameters automatically in the future. The field list, the columns order as well as the Report Header, Sort by, and Break by can be saved for later use as a template for similar reports. A new template can be saved by simply selecting the fields, writing a template name in the New field in the template section, and then clicking **Modify**. A template can be deleted by selecting it from the Template list and clicking **Delete**.

Best practice : Save parameters of commonly used reports into templates, to avoid manually specifying them each time the report is required.

- **Report Structure Options:** The lower frame in the Custom Report page includes several options, which affect the way the report is structured. The options are:
  - **Break by:** Specifies a field, by which the report breaks and sums-up (each time the field value is changed).
  - **Sort by**: Indicates the field (column) by which the report is sorted (ascending order).
  - **Summary Only**: Displays summary only (without detailed transaction records).

- **Functional Buttons:** The Custom Report page includes the following four buttons in the bottom of the page:
  - **Clear Order Fields:** Clears all Order text boxes in the Custom report.
  - **To File:** Saves the Report into a text file.
  - **Preview:** Displays the Custom report in a new page from which report printing and saving is possible.
  - **Print:** Opens the Printers dialog box for sending Custom report to a printer.
  - **PDF:** Opens a dialog box and downloads the Custom report as a PDF file.

4.2.2 Report Criteria

To include a field in the report, click **Order** text box adjacent to the field name. The field is automatically assigned a consecutive number which specifies the field's order of appearance in the report and can be manually edited. To remove a previously selected field, click the **Order** text box again.

To completely reorder the fields in the report, click **Clear Order Fields** and specify the order again.

The following are the Custom Report fields (see Table 5 on page 27).

The criteria types are:
- Range (minimum and maximum values)
- Specific values selected from combo box or drop-down list, or
- N/A (no criteria is available)

Table 5: Custom Report Fields

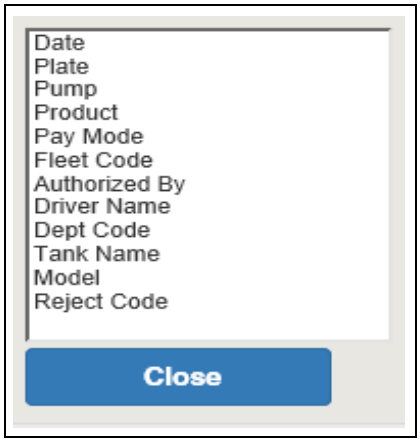
Field Name	Description	Criterion Type
Station	Gas station name.	Selected from drop-down list.
Date	Date of the transaction.	Selected from date and time box.
Time	Time of the transaction.	N/A (previously selected in the time dialog box).
Fleet	Fleet of which the fueling vehicles belong.	Selected from combo box.
Transaction Type	Type of transaction carried out.	Selected from drop-down list.
Vehicle Number	License plate number or vehicle ID of the fueling vehicle. The vehicle number appears in the transaction only if provided by the VIU, or entered on the keypad.	Selected from combo box.
Quantity	Volume of fuel supplied in the transaction.	Range
Total Sale	Sum of money collected in the transaction. This field does not include any discount given to the client.	Range
Receipt No.	Ordinal unique number assigned by SiteOmat360 to each receipt and as included in each printed receipt.	Range
Fleet Code	Code of the fleet of which the fueling vehicle belongs.	Selected from combo box.
Pay Mode	Means of payment used in the transaction.	Selected from drop-down list.
Transaction ID	Unique ordinal ID number given by the SiteOmat360 to each transaction.	Range
Authorized By	User who authorized the transaction.	Selected from drop-down list.
Department	Department of which the vehicle belongs.	Selected from combo box.
PPU	Price Per Unit.	N/A
Odometer	Odometer reading from the vehicle.	N/A
Engine	Number of engine hours of the vehicle, as reported by the Vehicle Data Unit or manually entered at the keypad.	N/A
Pump	Number of the pump head, from which the transaction was performed.	Selected from drop-down list.
Tank	Tank associated with the pump used in the transaction.	Selected from drop-down list.
Nozzle	Nozzle number in the pump head, used to supply the fuel in the transaction.	N/A
Density	Fuel density at the current temperature.	N/A
Temperature	Temperature inside the fuel tank.	N/A
Vehicle Type	Type of vehicle fueling.	Selected from drop-down list.
Ref. / Slip No.	Slip number (or reference number).	N/A
Driver Name	Driver name entered for identification.	Selected from combo box.
Dept code	Code of the department of which the vehicle belongs.	Selected from combo box.
Card Number	Unique ordinal ID number given by the system to each device.	Selected from combo box.
Total billing sale	Displays the transaction amount in cases where the PPL was changed after the transaction has already been made.	Range
Sent to FHO	Enables selection according to whether a transaction was sent to the FHO application or not.	Selected from drop-down list.

Field Name	Description	Criterion Type
Proxy Device	Proxy device used to authorize the transaction.	Selected from drop-down list.
Credit card Comp	Credit Card Company details.	N/A
Credit card num	Credit Card number.	N/A
Base Price	Product base price.	Range
Price List	Price List associated to the device.	Selected from combo box.
Sale after discount	The sum of money collected in the transaction after discount.	N/A
Model	Vehicle model.	Selected from combo box.
Reject Text	Text message sent by payment processor for rejected credit card transactions.	N/A
Reject Code	Rejection message code.	N/A
Authorization Mode	Filters the report by authorization mode: Swiped Card or Manual Entry.	N/A
Authorized User	CNG/LPG authorized user.	N/A
Totalizer	Offset-compensated pump totalizer as recorded at the end of the transaction.	N/A
Original Totalizer	Pump totalizer as recorded at the end of the transaction.	N/A
Truckstop Invoice	Pump totalizer Invoice reference code sent by payment processor.	N/A
AUX 1	Utility Engine #1 EH current reading.	N/A
AUX 2	Utility Engine #2 EH current reading.	N/A
Tail ID	Aircraft registration ID - read from the card and validated.	N/A
Pressure level	Required pressure level for vehicle (gas pumps).	N/A
Attendant ID	The ID of the attendant who authorized the fueling/ fueled the vehicle.	N/A
Attendant Name	The name of the attendant who authorized the fueling/fueled the vehicle.	N/A
Start Flow Time	The time stamp when the fuel starting flowing during fueling.	N/A
End Flow Time	The time stamp when the fuel stopped flowing during fueling.	N/A
Invoice number	Invoice number sent by payment processor.	N/A
Account number	Account number sent by payment processor.	N/A
Job Code	The job code that the driver keyed on the OPT during authorization.	N/A

Multi-Selection

For a selection list, one of the options is Multi select. Selecting this line opens a dialog box containing a list of all of the items. To select additional items, click the item while holding the CTRL key (see Figure 23).

Figure 23: Multi-Selection Dialog Box

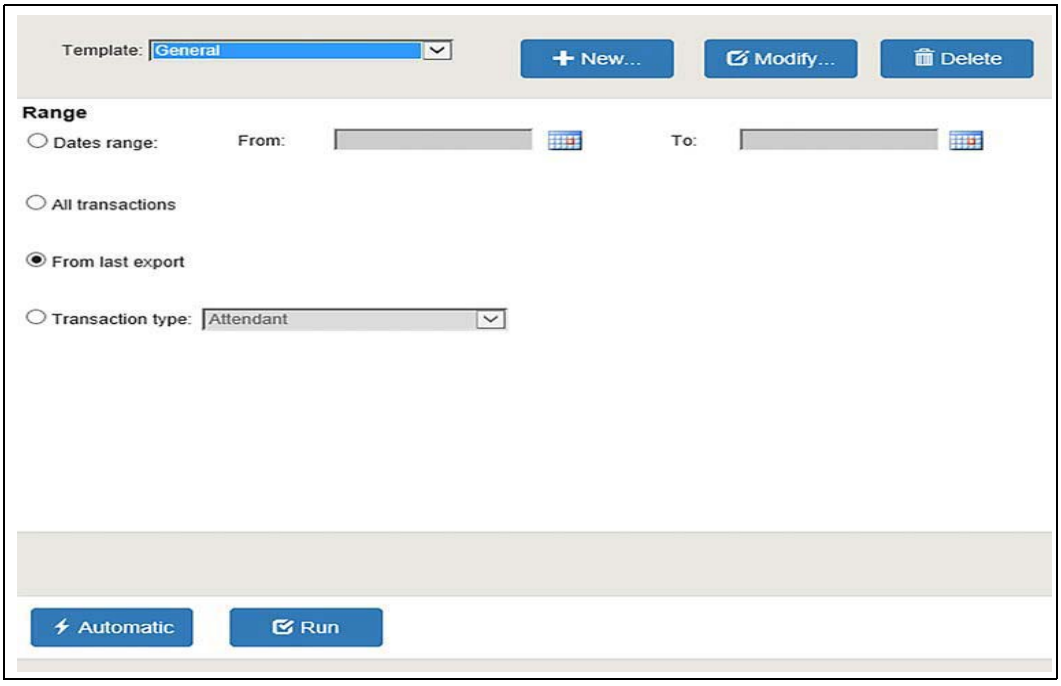


4.3 Export Transactions

The Export feature enables you to export records of the transactions performed in the gas station in various profiles into CSV, XML, or plain text formats to an FTP or a local directory.

To access the Export page, click **Reports** in the navigation bar and then select **Export** (see Figure 24).

Figure 24: Export Page



4.3.1 Defining Templates

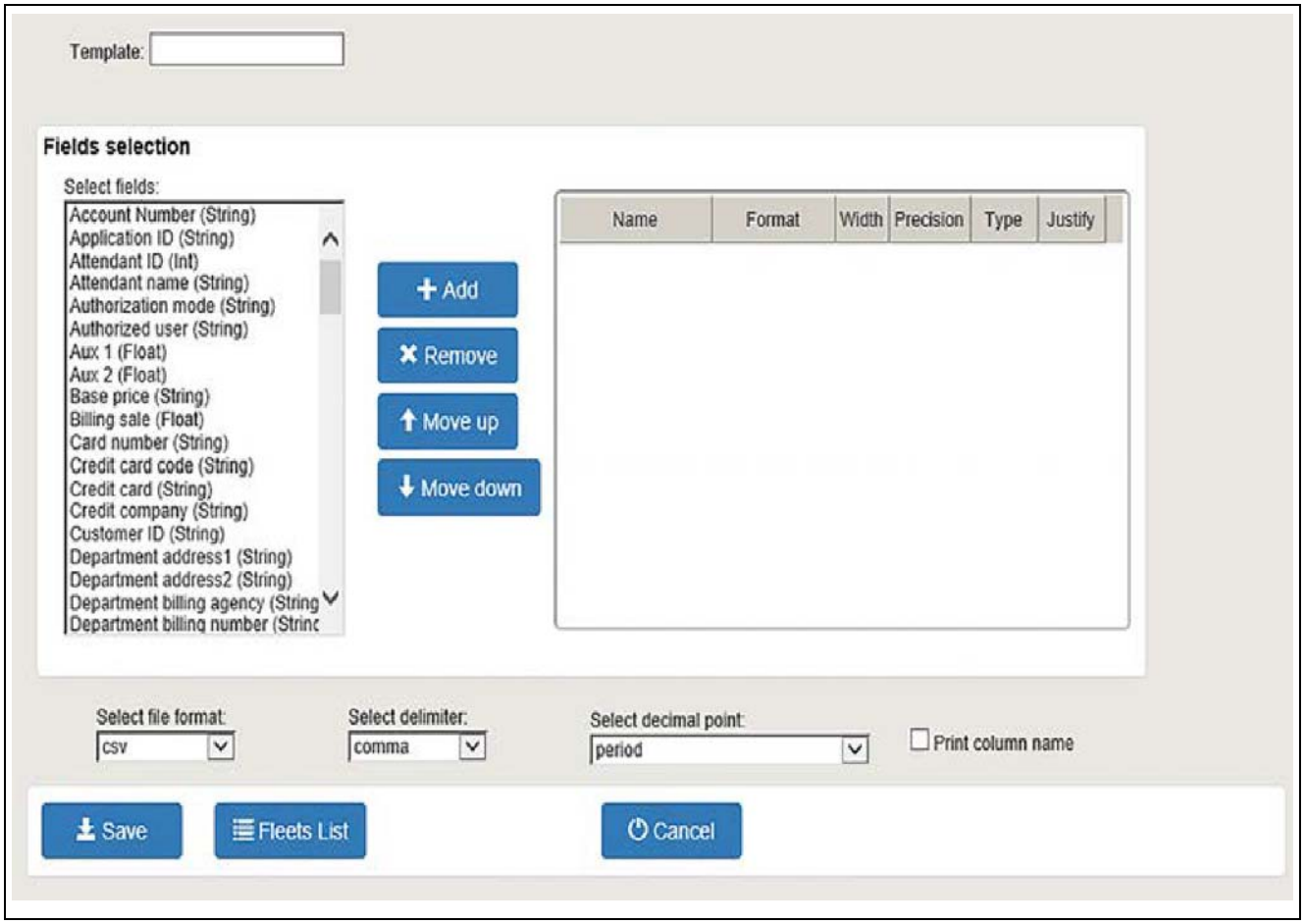
A Template enables you to define the fields to be included in the export, their order of appearance, as well as the output options. Several templates may be defined.

The following options are available:

- Selecting a previously defined template from the **Template** drop-down menu.
- Clicking **New** to create a new template.
- Selecting a **Template** from the drop-down menu and then clicking **Modify** to change its properties.

The last two options open the Reports - Export Transactions dialog box (see Figure 25).

Figure 25: Reports - Export Transactions Dialog Box



To define templates, proceed as follows:

1. Select the required fields by clicking the field row and then clicking **Add**. The field is added to the grid on the right hand side.

2. (Optional) Click any row and proceed as follows:

   a Click **Move up** or **Move down** to change the field's order of appearance in the report.

   b Double click the **Name** field to rename the field.

   c Double click the **Format** field to select a different format from a list of available formats (.csv or .txt output only, see Table 6 on page 32).

   d Double click the **Width** field and enter a new value to change the width of the field (for .csv or .txt output only).

   e Double click the **Precision** field to select a different number of decimal digits of precision from a list (for .csv or .txt output only).

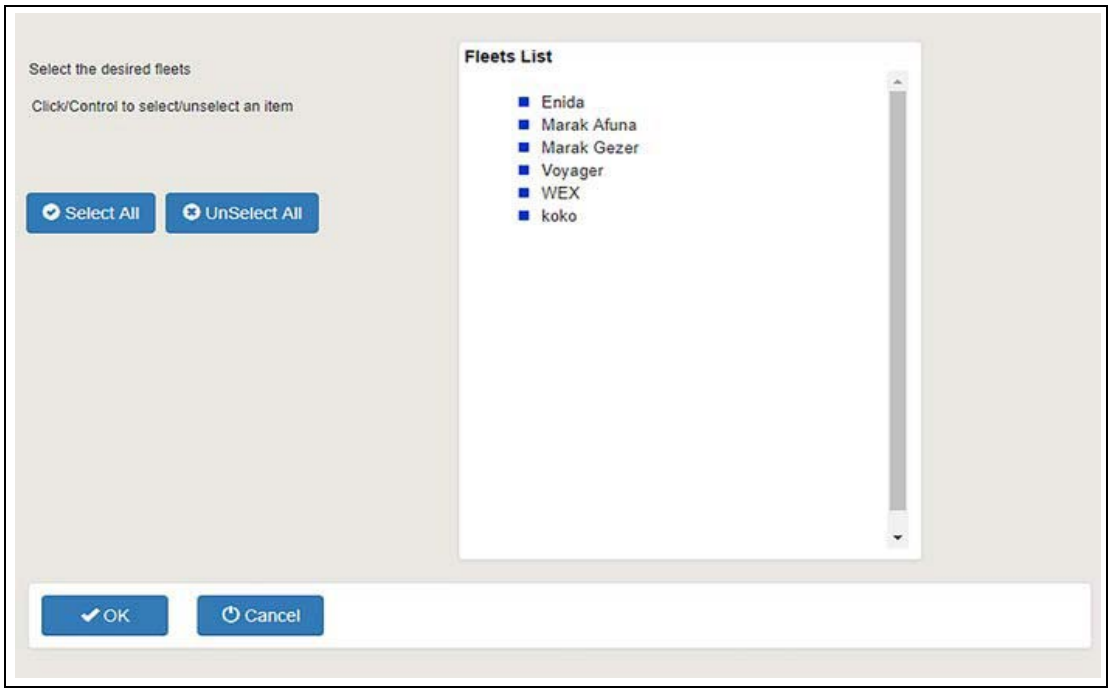
3. Select the output type from the **Select file format** drop-down menu: csv, txt, or xml.

4. (Optional) Select the field delimiter character from the **Select Delimiter** drop-down menu (for .csv output only).

5. (Optional) Select the decimal point notation from the **Select decimal point** drop-down menu.
   *Note: Do not select a comma as a decimal point notation if commas were selected as field delimiters. (Optional) Select the **Print column name** checkbox to include the field name in the export file.*

6. (Optional) Filter the export by fleet by clicking **Fleets List**, which opens the Fleet List dialog box (see Figure 26 on page 32). Select the check box next to the required fleets. To select all the fleets, click **Select All**, to reset the selection click **UnSelect All**. Click **OK** to save changes and close the dialog box, or **Cancel** to close the dialog box without saving the changes.

Figure 26: Fleet List Dialog Box



7 Click **Save** to save the settings.

To remove a field from the report, click the row in the right of the grid and then click **Remove**.

Table 6: Export Fields

Field Name	Description
Account Number	Account number sent by payment processor.
Application ID	ID number of the manual transaction reported from the mobile application.
Attendant ID	The ID of the attendant who authorized the fueling/fueled the vehicle.
Attendant name	The name of the attendant who authorized the fueling/fueled the vehicle.
Authorization mode	Auto Authorize/Need Authorize operation modes. In Auto-Authorize mode, the pump is authorized as soon as the nozzle is lifted. The Need Authorize mode blocks the pump until authorization is given by attendants or by means of authorization devices.
Authorized user	CNG/LPG authorized user.
Aux 1	Utility Engine #1 EH current reading.
Aux 2	Utility Engine #2 EH current reading.
Base price	Product base price.
Billing sale	Transaction amount in cases where the PPV was changed after the transaction has already been made.
Card number	A unique ordinal ID number given by the system to each device.
Credit card code	Currently not in use.
Credit card	Credit card Primary Account Number protected and masked complying with PCI standards.
Credit company	Credit card company details.
Customer ID	ID number of the customer.
Department address 1	First line of department address.

Field Name	Description
Department address 2	Second line of department address.
Department billing agency	Department billing agency name.
Department billing number	Department billing agency number.
Department city	City of the department's location.
Department code	Unique code identifying the department in the fleet.
Department contact	Name of personnel responsible for the running of the FHO.
Department Email	E-mail address of Contact personnel.
Department Name	Name identifying the department in the fleet.
Department Phone	Telephone number of Contact personnel.
Department State	State/Province of the department's location.
Department Zip	Zip code
Device Name	Unique device name.
Double Zero Filler	00 filler characters.
Driver Card Number	String from the drive's card (Track 2).
Driver Customer ID	Customer ID number of the driver.
Driver Name	Driver name entered for identification.
Driver User Data 1-5	Additional driver card data.
Driver Vehicle no.	Unique ID number of the vehicle.
Empty Filler	Empty filler character.
End Flow Time	The time stamp when the fuel stopped flowing during fueling.
Engine Hours	Number of engine hours of the vehicle.
Fleet Code	Numeric code identifying the fleet.
Fleet Name	Name identifying the fleet.
Four Zero Filler	0000 filler characters.
Hose	Number of the hose used to supply the fuel in the transaction.
Invoice Number	Invoice number sent by payment processor.
Job Code from OPT	The job code that the driver keyed on the OPT during authorization.
Job Code from mobile	The job code that was received from the mobile application that the driver used.
Lock State	Not applicable
Model Class	Additional vehicles classification.
Model Description	Vehicle model name.
Nozzle	Number of the nozzle used to supply the fuel in the transaction.
Odometer	Odometer reading from the vehicle.
One Filler	1 filler character.

Field Name	Description
Payment Type - Code	Code of the pay mode used in the transaction: • CASH • CASHCU • COUPON • CREDIT • CSTMR • FPOS • NONE • OTHERS • OWN • REDEMP • SAMPLE • SCREEN • TEST • VIT
Payment Type	Description of pay mode code: • **CASH**: Cash • **CASHCU**: Cash Customer • **COUPON**: Coupon • **CREDIT**: Credit • **CSTMR**: Customer tag • **FPOS**: Axalto • **NONE** • **OTHERS** • **OWN**: Own use • **REDEMP**: Redemption • **SAMPLE**: Sample • **SCREEN**: Screen • **TEST**: Testing • **VIT**: VIT
PPV	Price Per Volume
Pressure Level	Required pressure level for vehicle (gas pumps).
Price List	Price List associated to the device.
Product Alternate Name/ Code	Product short name.
Product Code	Code identifying the product in the system.
Product Name	Name identifying the product in the system.
Proxy Device	Proxy device used to authorize the transaction.
Pump	Number of the pump head, from which the transaction was performed.
Receipt Date	Date of issue of the receipt.
Receipt ID	Ordinal unique number assigned by the system to each receipt as included in each printed receipt.
Receipt Plate	License plate of the fueling vehicle.
Receipt Time	Time of issue of the receipt.
Reference Number	Pre-authorization code sent by payment processor.
Refund	Refund transaction flag.
Reject Code	Rejection message code.
Reject Text	Text message sent by payment processor for rejected credit card transactions.
Route Number	Not applicable
Sale after Discount	The sum of money collected in the transaction after discount.
Star Filler	* filler character.
Start Flow Time	The time stamp when the fuel starting flowing during fueling.
Station ID	Identification code of the station.

Field Name	Description
Station Name	Identification name of the station.
Tail ID	Aircraft registration ID - read from the card and validated.
Tank ID	The ID of the tank used in the transaction.
Tank Name	Identification of the tank connected to the pump.
Tank Number	Identification code of the tank connected to the pump.
Total Price	The sum of money collected in the transaction.
Totalizer Money	The pump totalizer (counter) in monetary value.
Totalizer Original	Pump totalizer as recorded at the end of the transaction.
Totalizer	Offset-compensated pump totalizer as recorded at the end of the transaction.
Transaction Date	Date of the transaction.
Transaction Driver ID	Driver ID entered for identification.
Transaction ID	Unique ordinal ID number given by the system to each transaction.
Transaction Time	Time of the transaction.
Transaction Timer 2-3	Currently not in use.
Transaction Type - Code	Identification code of the type of transaction carried out: • ATDNT • AUTO • CSTMR • FPOS
Transaction Type	Description of transaction type code: • **ATDNT**: Attendant • **AUTO**: Auto-Authorize • **CSTMR**: Customer • **FPOS**: Axalto FPOS
Truckstop Invoice Number	Invoice reference code sent by payment processor.
Vehicle Company Name	Vehicles manufacturer.
Vehicle Model	Vehicles model.
Vehicle No.	The license plate number or unique number of the vehicle.
Vehicle User Data 1-5	Currently not in use.
Vehicle Year	Manufacturing year of the vehicle.
Volume/Quantity	Fuel volume supplied in the transaction.
YYYY+ Transaction ID	Year and unique ordinal ID number given by the system to each transaction.
Zero Filler	0 filler character.
Empty/Default	Default field format.
Float (%f)	Decimal floating point numbers.
Float 0-pad (%0*.*f)	Decimal floating point numbers with zero padding to the required width.
Integer (%d)	Decimal numbers.
Hex (%x)	Hexadecimal numbers.
Int/ 0-pad	Decimal numbers with zero padding out to the required width.
Hex/ 0-pad	Hexadecimal numbers with zero padding out to the required width.
Int/exact/0-pad	Decimal numbers with zero padding out to the required width.
Hex/exact/0-pad	Hexadecimal numbers with zero padding out to the required width.
Int/ 0-pad/LJ	Decimal numbers with zero padding out to the required width, left justified.
Hex/ 0-pad/LJ	Hexadecimal numbers with zero padding out to the required width, left justified.

Field Name	Description
String (%s)	Alphanumeric characters.
Right Part of String	Right characters in the string, according out to the required width.
Date Formats	Available formats: YYYY-MM-DD YYYYMMDD DD-MM-YYYY MM-DD-YYYY DD/MM/YYYY MM/DD/YYYY DD/MM/YY MM/DD/YY DDMMYYYY MMDDYYY
Time Formats	Available formats: hh:mm:ss hhmmss hh:mm hhmm

4.3.2 Setting the Export Range

The following are the range options:

- **Dates range**: Sets a specific time range. Use the From and To date menus.
- **All transactions**: Exports a record that includes all the transactions, without filtering.
- **From last export**: This report refers to the transactions that took place since the last All Transactions export.
- **Transaction type**: The export record includes all the transactions performed filtered by the selected transaction type and selected template settings.

Note: A transaction is exported only once. Already exported records will not be included in later exports.

Range settings do not enable selection of multiple parameters. Only one of the above options may be selected.

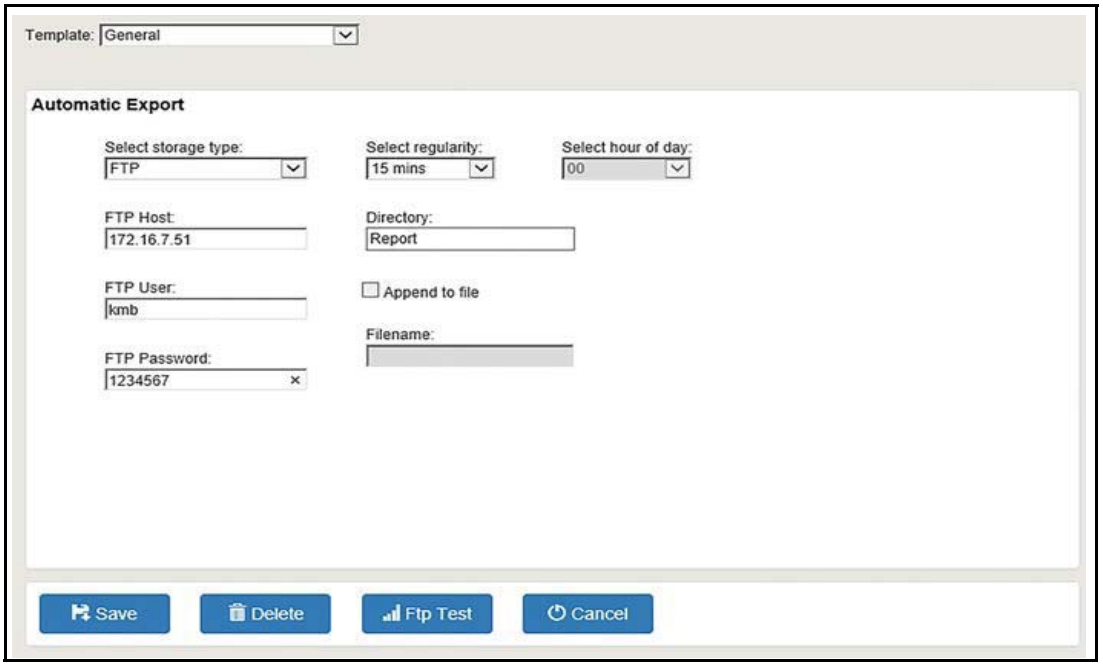
4.3.3 Scheduling Automatic Exports

Transactions export can be scheduled to run automatically at predefined time intervals. Exports with different templates or the same template filtered by different fleets can be programmed.

To schedule an automatic export, proceed as follows:

1 Click **Automatic**. The Automatic Export dialog box opens (see Figure 27).

Figure 27: Automatic Export Transaction Dialog Box



2 Select **Template** from the drop-down menu.

3 Select the Select storage type from the drop-down menu: FTP Site/Local Directory.

4 If exporting to an FTP proceed as follows:

a Enter the FTP Host (Address).

b Enter the FTP User and Password for access.

c (Optional) After setting the above parameters, click **FTP Test** to check the connection to the FTP server. A success message is displayed.

If exporting to a local directory, proceed as follows:

a Enter the path to the Directory field.

b (Optional) Select the **Append to file** check box to add the exported records as a supplement to the existing export file, and then enter the export Filename.

5 Select the time interval from the **Select regularity** (15 to 24 hrs.) and then **Select hour of day** drop-down lists.

6 Click **Save** to save the automatic export.

4.3.4 Running Manual Exports

To manually run the Transactions Export, proceed as follows:

1 Select a **Template** from the drop-down list.

2 Select a Range.

3 Click **Run**. You can now either open or save the file.

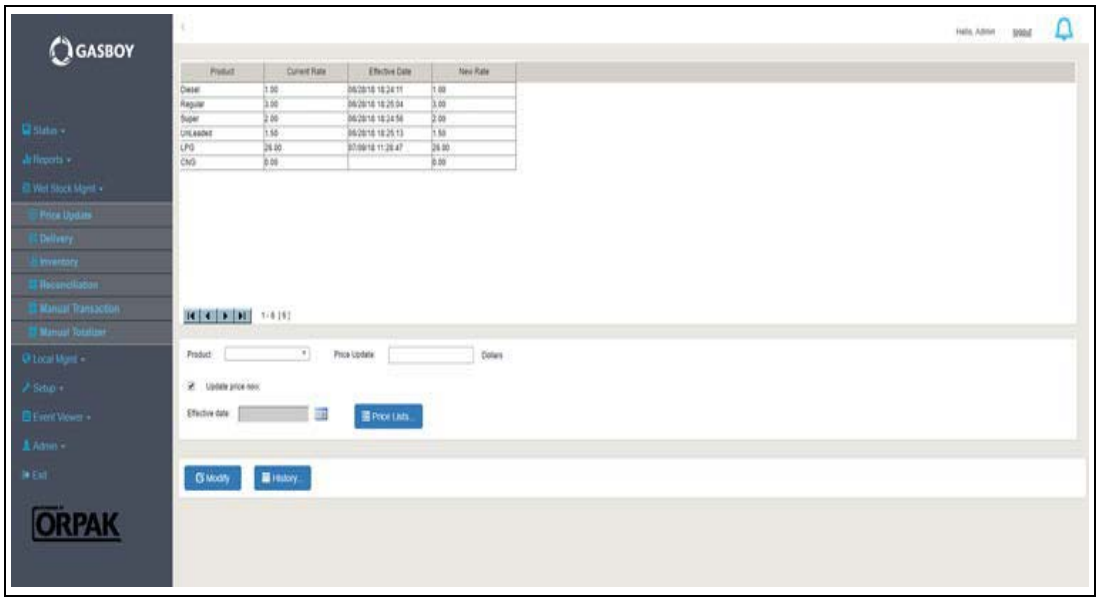
5 – Wet Stock Management

5.1 General

This section describes SiteOmat360's Wet Stock Management features, which enable controlling the Wet Stock in all aspects, including deliveries data entry, inventory management and reconciliation, scheduled price changes, manual entry of transactions, and more.

To access the Wet Stock Management page, click **Wet Stock Mgmt** in the navigation bar. The Wet Stock Management section includes the following pages: Price Update, Delivery, Inventory, Reconciliation, Manual Transaction, and Manual Totalizer (see Figure 28).

Figure 28: Wet Stock Management Page



5.2 Price Update

The Price Update page displays the prices for all products at the station, and enables updating all of the prices for the products at the station.

To access the Price Update page, click **Wet Stock Mgmt** in the navigation bar and then select **Price Update** (see Figure 29).

Figure 29: Price Update Page

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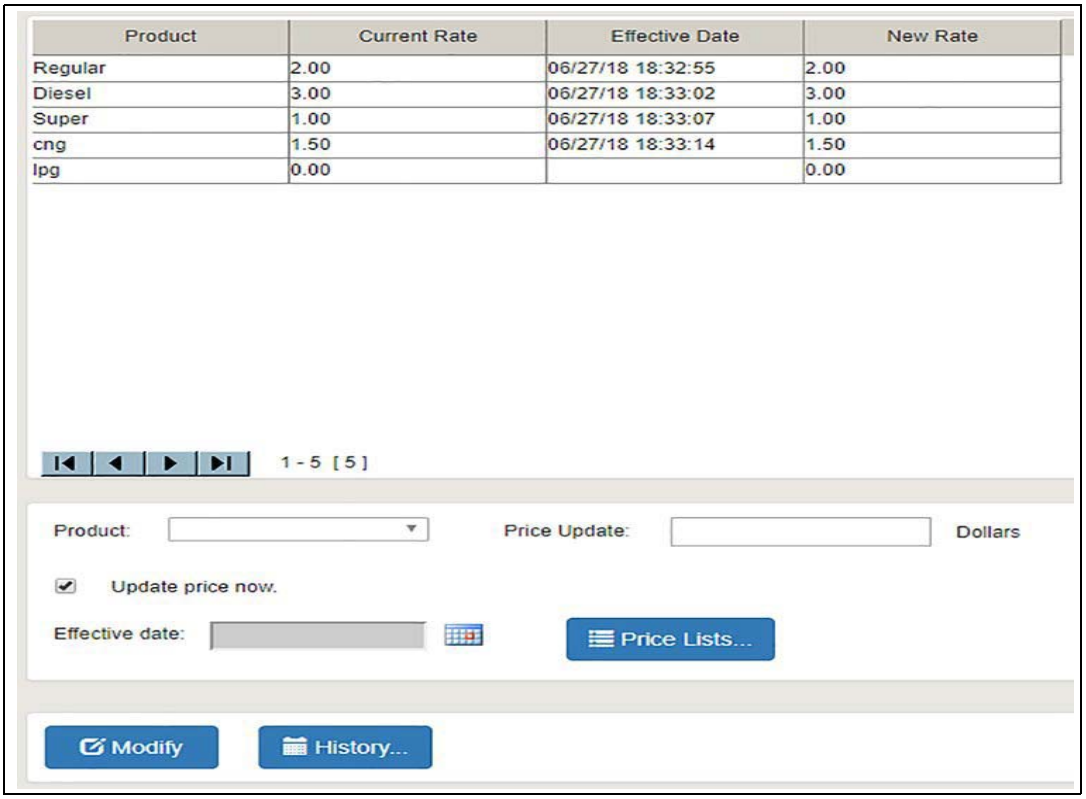


5.2.1 Updating Prices

To update a price, proceed as follows:

1. Select a product from the list.
2. Enter the new price in the Price Update field.
3. To update a price immediately, check the **Update price now** check box before approving. To schedule a future update, select the **Effective date** by using the date and time dialog box.
4. Click **Modify**. The following confirmation message is displayed: “Are you sure you want to change price for product X?”.
5. Click **OK.**

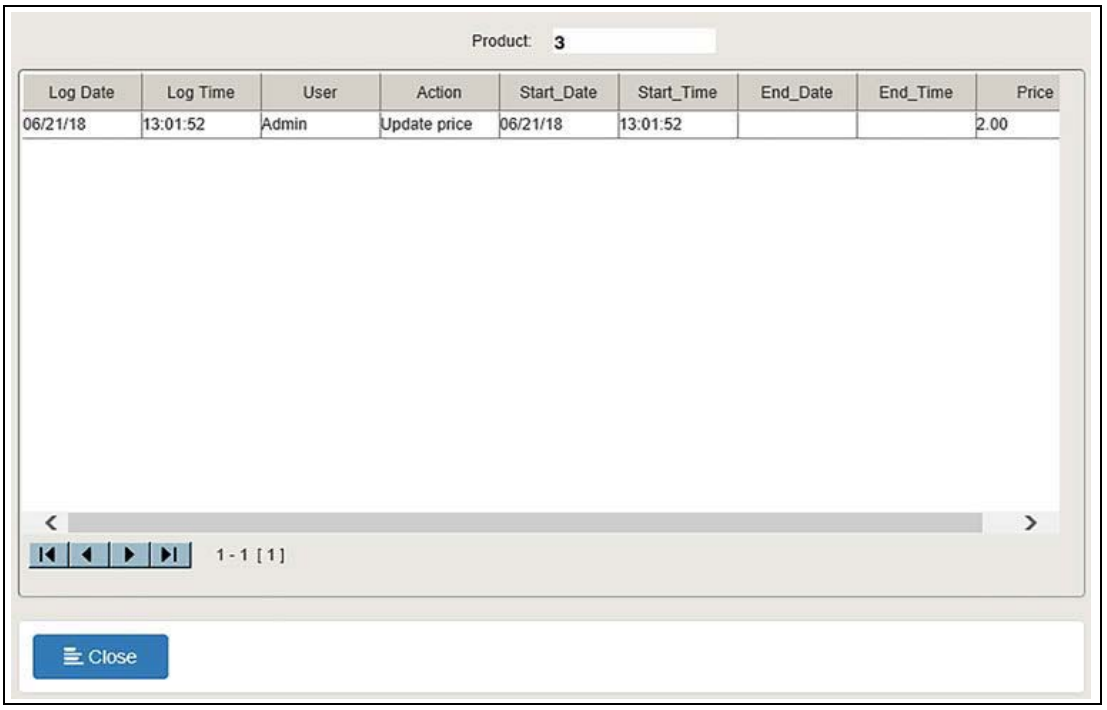
You will be notified via an alarm in cases where the update process has failed for any of the stations.

5.2.2 Price History

The history dialog box displays the history of price updates and changes for the different products.

To view all price updates per product, select the product from the grid and click **History**, the Wet Price History dialog box opens (see Figure 30).

Figure 30: Price History Dialog Box



Click **Close** to return to the Price Update page.

5.2.3 Price Lists

Fleets, departments, and devices can be associated to a particular price list. Price lists are derived from the base price defined for each product.

While refueling and after identification, the driver sees the specific price linked to the device on the dispenser (on dispensers supporting price display). The price changes back to base price after the transaction is completed and the nozzle is placed back on the dispenser.

Departments and devices automatically inherit the fleet's price list; the association may still be overridden by assigning departments or devices different price lists or none.

Note: Price lists can only be associated to hand-held devices. If a driver lifts the nozzle first and then presents the card/tag/key, he's notified and the process is stopped.

The transaction is not authorized in the following cases:

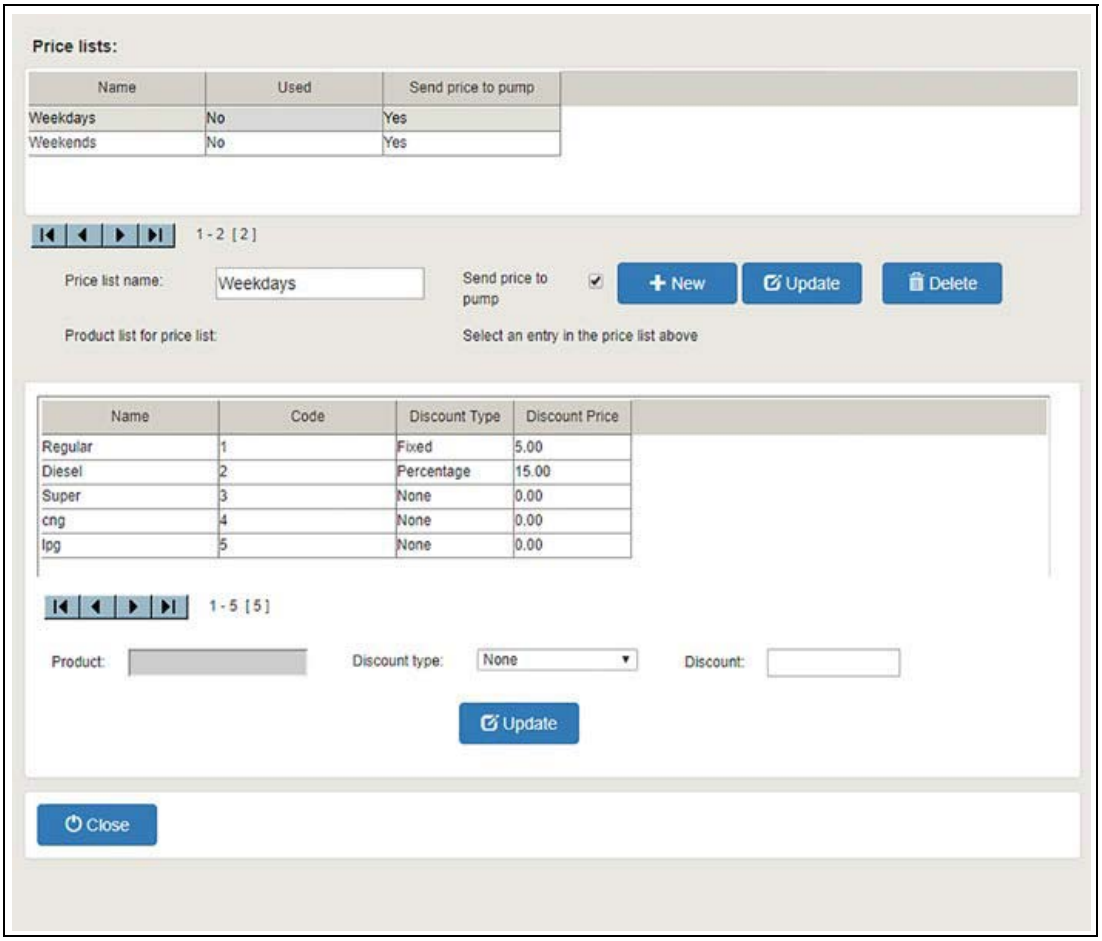
a A device linked to a price list is recognized, but the pump price update has failed.

b A driver using a device linked to a price doesn't return the nozzle back to dispenser, and consequently the system doesn't update the pump back to the base price.

To create a new price list, proceed as follows:

1 Click **Price Lists.** The Wet Price Lists dialog box opens (see Figure 31).

Figure 31: Wet Price Lists Dialog Box



The dialog box contains two grids:

a The upper grid contains all price list defined.

b The lower grid displays all products previously set in the system.

2 Enter a name in the **Price list name** field.

3 Select the **Send price to pump** check box in cases where the special price is sent to the pump. Otherwise, the base price remains in the transaction, and the controller calculates the price after discount.

4 Click **New**. The new list opens in the Price lists grid.

5 Select the desired product in the products grid by clicking the row.

6 Select the **Discount type** to be applied, utilizing the drop-down list:
- **None:** To leave the price as is.
- **Absolute:** To reduce a specific amount.
- **Percentage:** To reduce a percentage of the base price.
- **Fixed:** To set a fixed price.

7 Enter the amount or percentage in the **Discount** field.

8 Click **Update** to apply the changes.

To update an existing price list, select the required list from the Price list grid by clicking it and proceed as described from step 3 onwards.

To delete a price list, select the required list from the Price list grid by clicking it and then **Delete**.

9 Click **Close** to close the dialog box and return to the Products page.

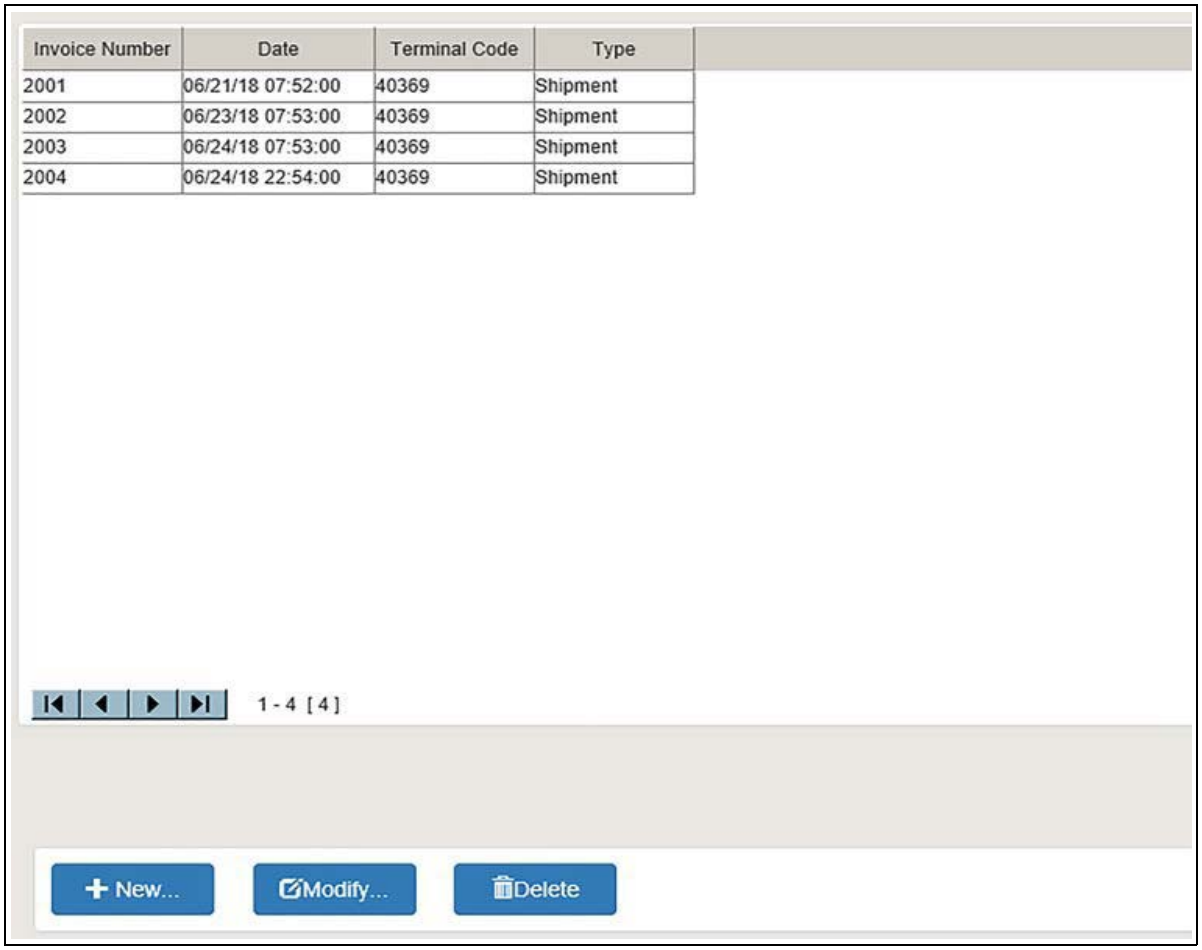
After a price list is defined, devices can be associated to it from the Information tab on the Fleet/Department Properties dialog box (refer to Fleet's 6.3.1.2 Information Tab on page 61 and Department's 6.3.3.1.2 Information Tab on page 70 respectively).

5.3 Delivery

The Delivery page enables you to collect specific data regarding fuel delivery such as invoice number, date, terminal code, and type.

To access the Delivery page, click **Wet Stock Mgmt** in the navigation bar and then select **Delivery** (see Figure 32).

Figure 32: Delivery Page



Note: The delivery process can be done either in Station level or in HO level. It is not allowed for companies to perform the process in two levels simultaneously. Companies are required to determine at which level the delivery process is handled.

5.3.1 Adding a New Delivery

To add a delivery, proceed as follows:

1 Click **New**. The Wet Delivery Details dialog box opens. Fill in the following fields (see Figure 33, Table 7):

Figure 33: Wet Delivery Details Dialog Box

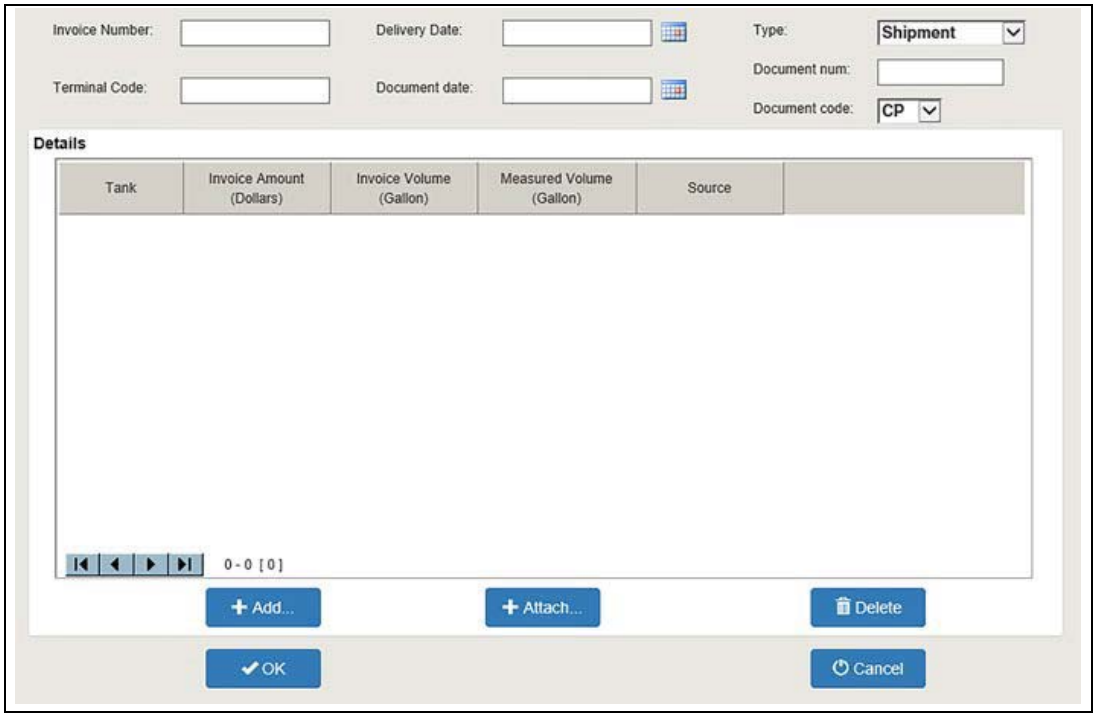


Table 7: Wet Delivery Details Fields

Field Name	Description
Invoice Number	Number of supplier invoice form
Delivery Date	Actual date of delivery
Type	Type of delivery
Terminal Code	Fuel depot code
Document date	Delivery document date
Document number	Identification number of the delivery document
Document code	Currently not in use

After adding a new delivery, its details are listed in a grid containing the following:

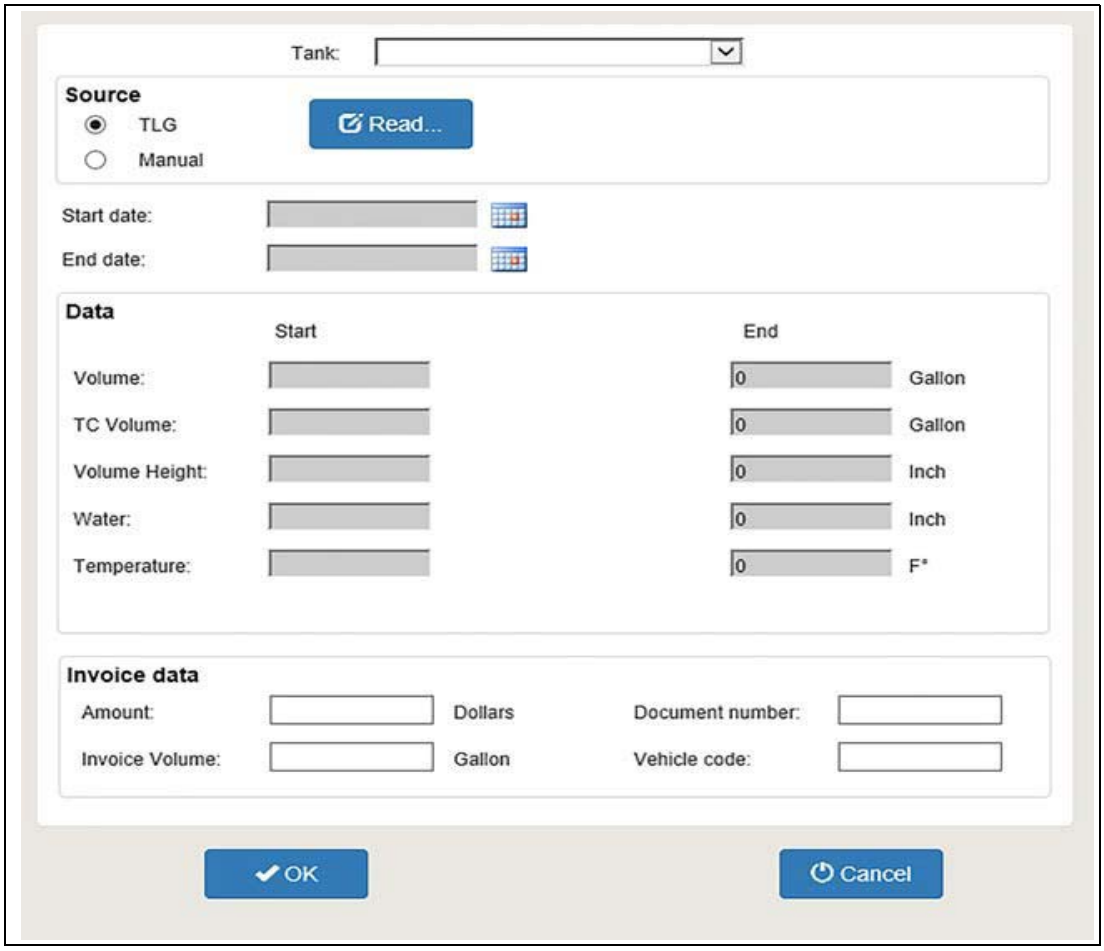
- **Tank**: Filled fuel tank.
- **Invoice Amount**: Amount from the invoice (BOL).
- **Invoice Volume**: Volume from the invoice (BOL).
- **Measured Volume**: Delivered fuel volume measurement.
- **Source**: Measurement source (TLG or manual).

2 Click **Add**. The Wet Delivery Detailed Data dialog box opens (see Figure 34, Figure 36 on page 48).

3 Select the **Tank** from the drop-down list.

4 Select the measurement data source, utilizing the following radio buttons:
- **Manual**: For manual readings (using dip stick). In cases where this option is selected, the Start date fields are not available and you have to manually enter the End date, namely the fuel levels after the delivery (see Figure 34, Table 8 on page 49).

Figure 34: Wet Delivery Detailed Data Entry Using Manual Source

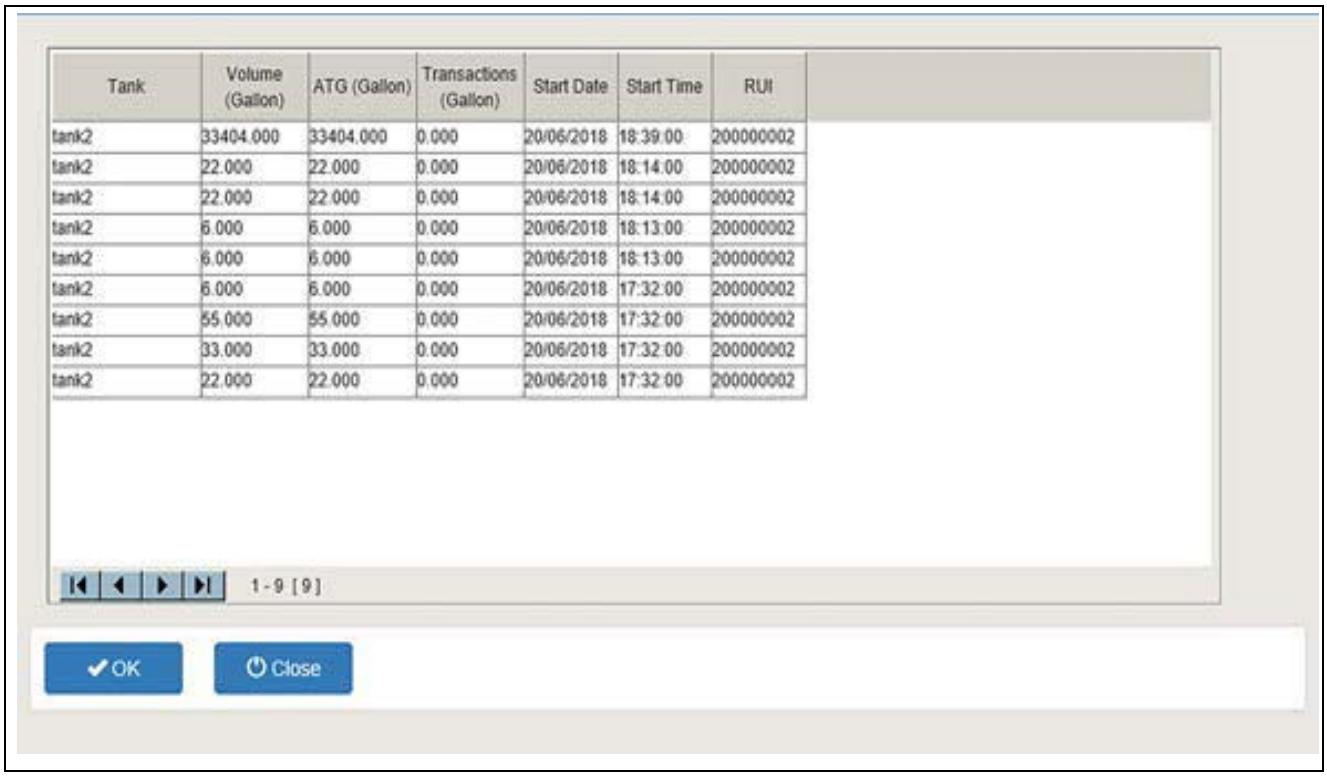


- **TLG**: For data obtained from TLG readings. In cases where this option is selected, proceed as follows:

a Click **Read**. The Wet Delivery TLG Reading dialog box opens displaying a list of TLG readings from the relevant tank (see Figure 35 on page 47).

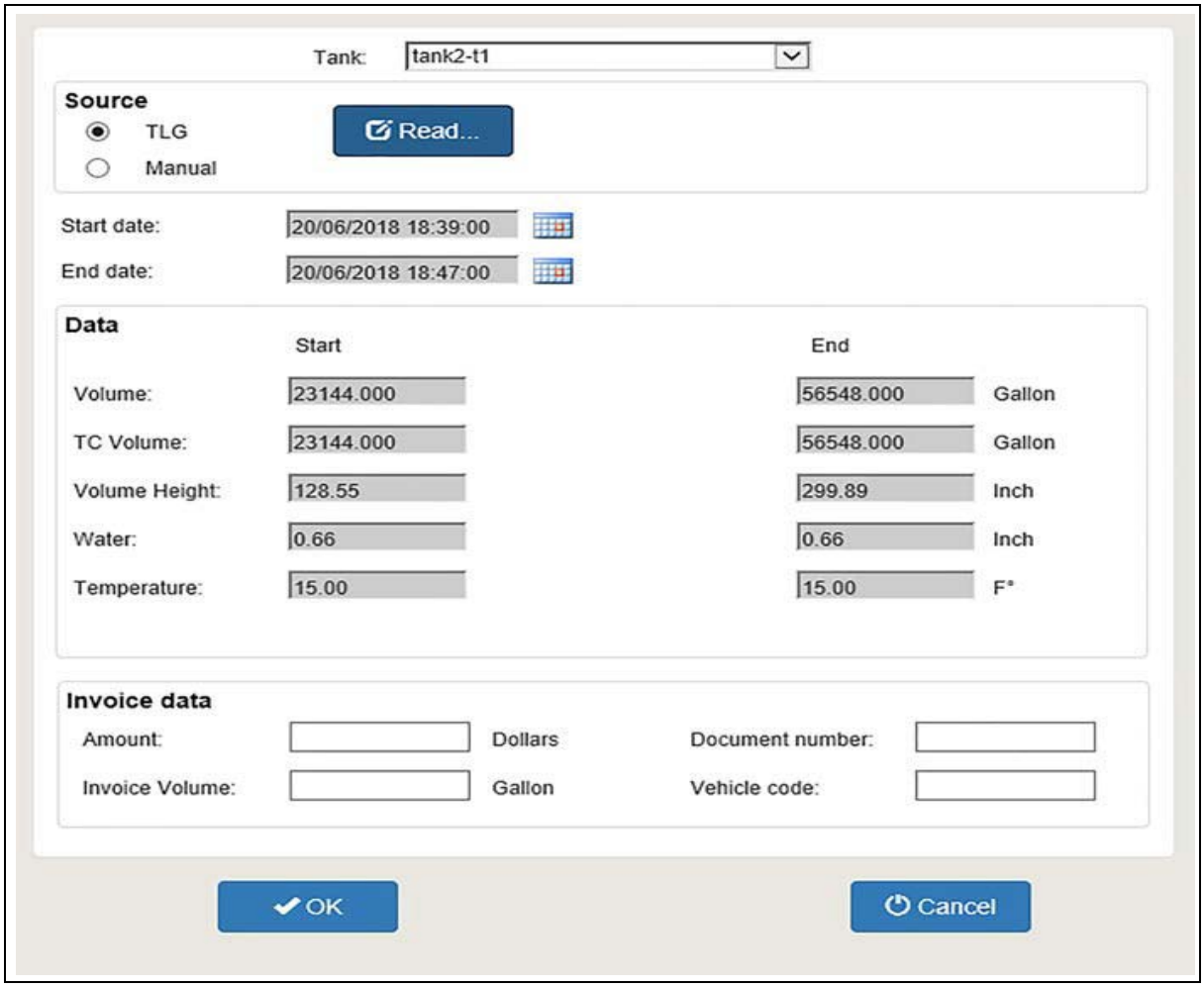
b Select a TLG reading by clicking the relevant row and click **OK**.

Figure 35: Wet Delivery TLG Reading Dialog Box



The delivery data is filled automatically, including Start and End readings (see Figure 36).

Figure 36: Wet Delivery Detailed Data Page Based on TLG Reading



5 Verify that all relevant fields are filled and click **OK** to save the data and return to the Wet Delivery Details dialog box (see Table 8 on page 49).

6 Click **OK** to save the changes and return to the Delivery page.

To delete the delivery data, click the relevant delivery data row and click **Delete**.

Table 8: Wet Delivery Detailed Data Fields

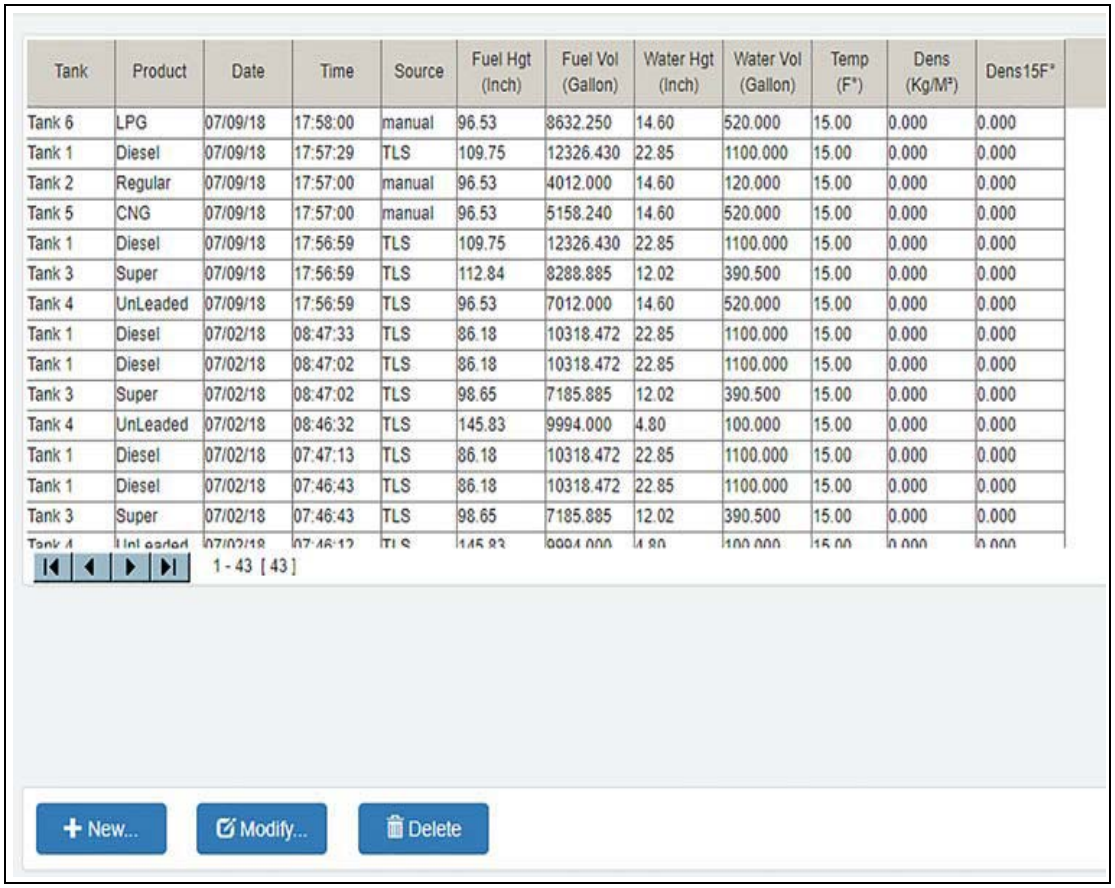
Field Name	Description	Attribute
Tank	Selects the relevant tank from a list.	Required
Source	Measurement source (TLG or Manual).	Required
Start Date	Delivery start date and time.	Required
End Date	Delivery end date and time.	Required
Delivery Data	For TLG deliveries, all fields are filled automatically and the Manual Data fields are optional. For manual deliveries, you need to enter all fields manually. When entering the data manually, you only enter the dip stick recorded levels. When you click either **Save** or **Save & Close**, the system calculates the manual volumes based on strapping tables for each tank.	Based on Manual entry
Volume	Volume measurement.	Optional, but strongly recommended
TC Volume	Temperature Compensation Volume.	Optional
Volume Height	Fuel height level in the tank.	Optional
Water	Water level in the tank.	Optional
Temperature	Temperature inside the fuel tank.	Optional
Amount	Amount from the invoice (BOL).	Required
Invoice Volume	Volume from the invoice (BOL).	Required
Document number	Identification number of the delivery document.	Informative
Vehicle code	Fuel truck code.	Informative

5.4 Inventory

The Inventory page enables you to add and modify inventory points in the system, based on which reconciliation can be done.

To access the Inventory page, click **Wet Stock Mgmt** in the navigation bar and then select **Inventory** (see Figure 37).

Figure 37: Inventory Page



There is a grid displaying tank readings status in the station. Readings are based on TLG readings during end of shifts, or on occasional requests for readings.

5.4.1 Adding Readings

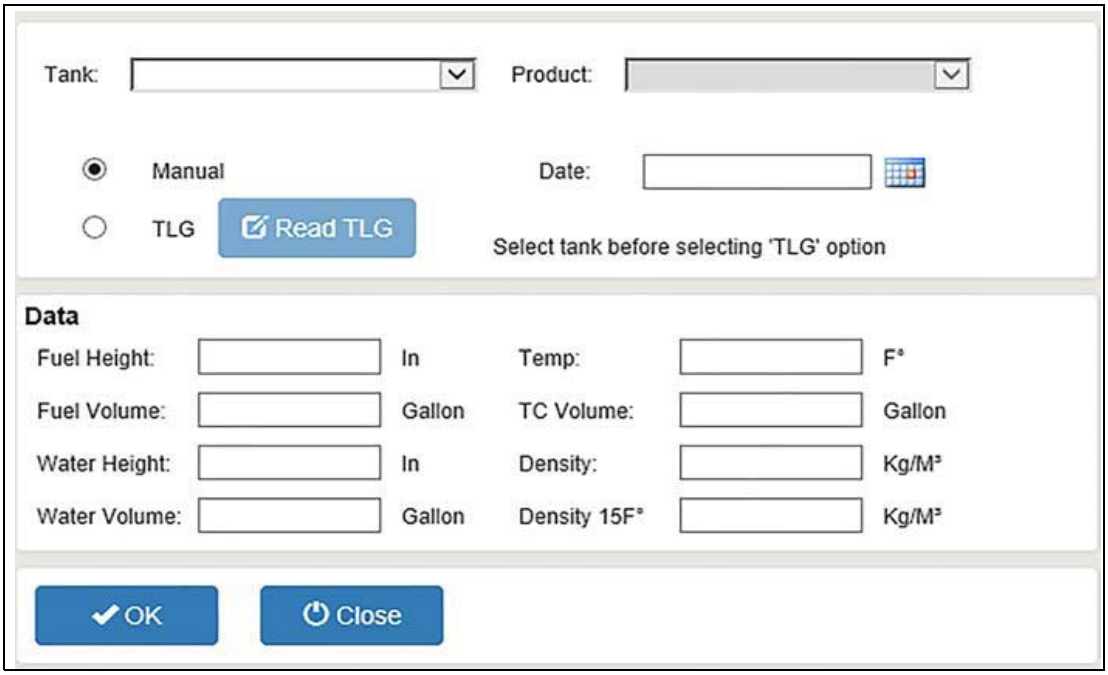
You can create readings manually. These readings can be based on two sources:

- Complete manual readings in cases where there is no TLG or if it is defective. Readings for manual entry are based on stick readings from the station.
- You can be connected to a TLG and receive data per call in order to see the current status.

To add a new reading, proceed as follows:

1 Click **New**. The Wet Inventory page opens (see Figure 38). There is an optional connection to the TLG. Using a similar page, you can modify the existing readings.

Figure 38: Wet Inventory Dialog Box



2 Select **Tank** from the adjacent drop-down list.

3 Select the reading source, utilizing the radio buttons: **Manual** or **TLG**.

4 If the TLG option is selected, click **Read TLG**. The Wet Inventory fields are auto- populated, otherwise enter the data manually.

5 Click **OK** to save changes.

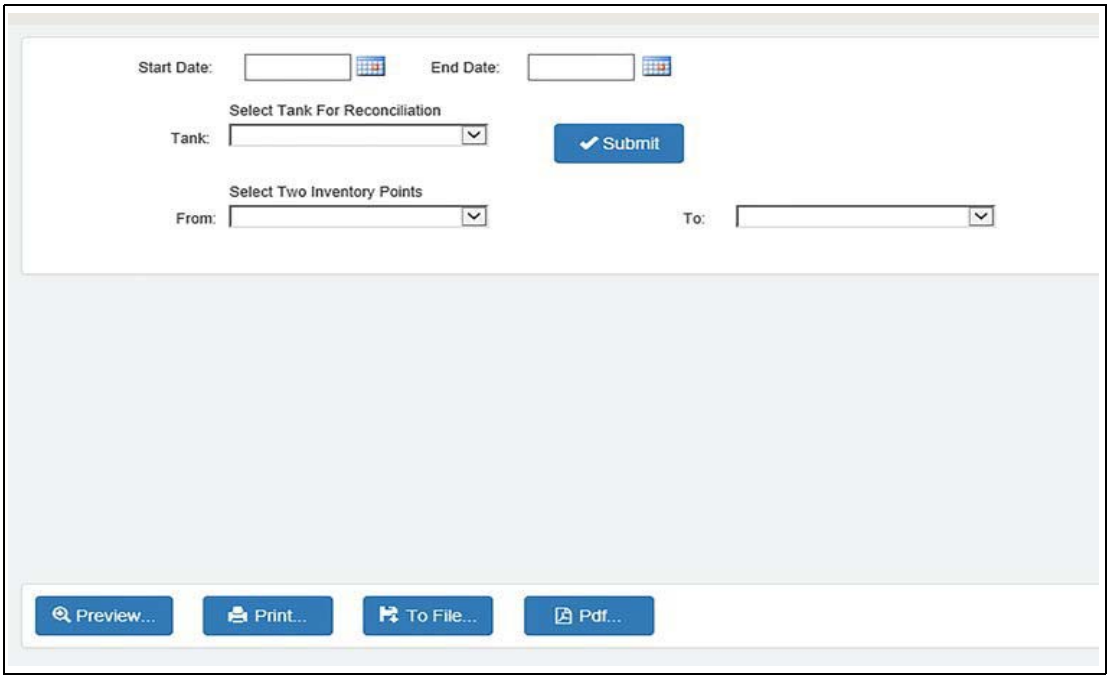
6 Click **Close** to return to the main page.

5.5 Reconciliation

The Stock Reconciliation Report displays wet stock balance data for a specific tank within the selected time range.

To access the Reconciliation page, click **Wet Stock Mgmt** in the navigation bar and then select **Reconciliation** (see Figure 39).

Figure 39: Reconciliation Page



5.5.1 Stock Reconciliation Fields

The report includes several fields described below (see Table 9):

Table 9: Stock Reconciliation Fields

Field Name	Description
Opening Stock	Tank stock at the opening inventory point (A).
Product Delivery Report	Detailed data on deliveries loaded to the tank within the time range, including: • Date • Invoice No. • Invoice Quantity • Actual Quantity
Total Computed Delivery (Invoice)	Total deliveries invoice quantity.
Total Actual Delivery	Total deliveries actual quantity (B).
Total Transactions	Total quantity dispensed during the period (C).
Calculated Stock	Estimated stock based on the following calculation: A+B-C.

Field Name	Description
Closing Stock	Actual tank stock at the closing inventory point.
Gain	Difference between Closing Stock and Calculated Stock. For an accurate balance, this parameter should be equal or close to zero.

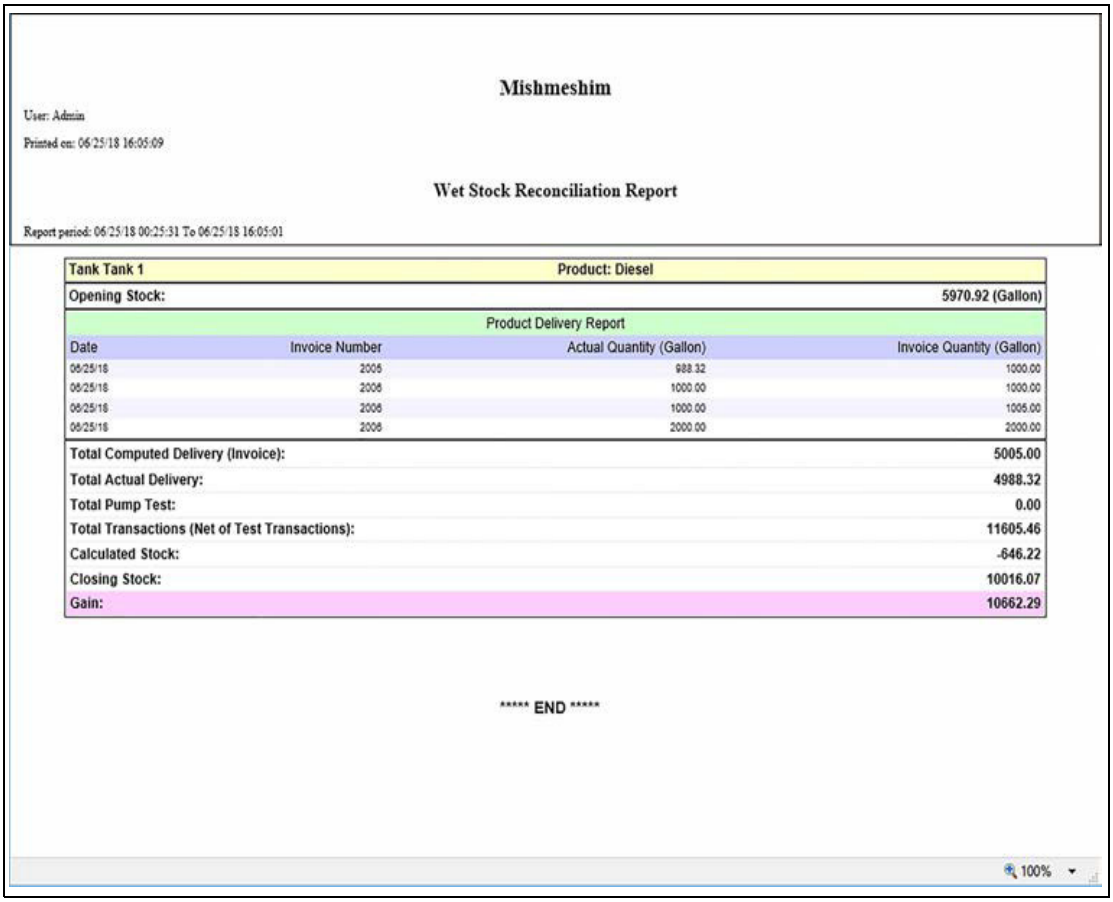
5.5.2 Producing a Report

To produce the report, proceed as follows:

1. Select **Tank** from the drop-down list.
2. Select the time range by clicking **Start Date** and **End Date** text boxes to open the date boxes.
3. Click **Submit**. The Inventory Points for the selected dates are auto-populated.
4. (Optional) Select **Inventory Points** from the **From** and **To** drop-down list.
5. Print, preview, or save the report.

The following is an example of the generated report (see Figure 40):

Figure 40: Wet Stock Reconciliation Report - Example



Mishmeshim

User: Admin

Printed on: 06/25/18 16:05:09

Wet Stock Reconciliation Report

Report period: 06/25/18 00:25:31 To 06/25/18 16:05:01

Tank Tank 1		Product: Diesel	
Opening Stock:			5970.92 (Gallon)
Product Delivery Report			
Date	Invoice Number	Actual Quantity (Gallon)	Invoice Quantity (Gallon)
06/25/18	2005	988.32	1000.00
06/25/18	2006	1000.00	1000.00
06/25/18	2006	1000.00	1005.00
06/25/18	2006	2000.00	2000.00
Total Computed Delivery (Invoice):			5005.00
Total Actual Delivery:			4988.32
Total Pump Test:			0.00
Total Transactions (Net of Test Transactions):			11605.46
Calculated Stock:			-646.22
Closing Stock:			10016.07
Gain:			10662.29

***** END *****

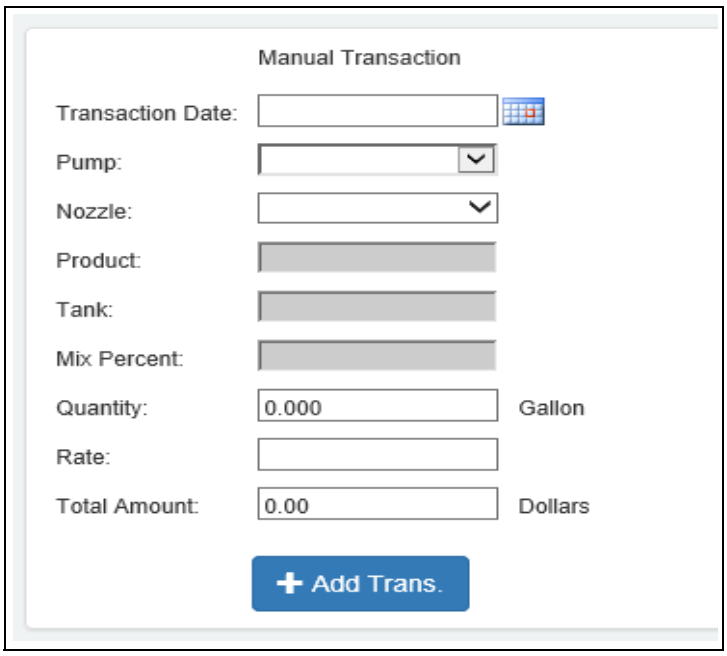
100%

5.6 Manual Transaction

The Manual Transaction page enables you to manually add transactions to the system, to enable complete reconciliation in cases where the system would have missed out a transaction.

To access the Transaction Reconciliation page, click **Wet Stock Mgmt** in the navigation bar and then select **Manual Transaction** (see Figure 41).

Figure 41: Manual Transaction Page



5.6.1 Adding a Transaction

To manually add a transaction, proceed as follows:

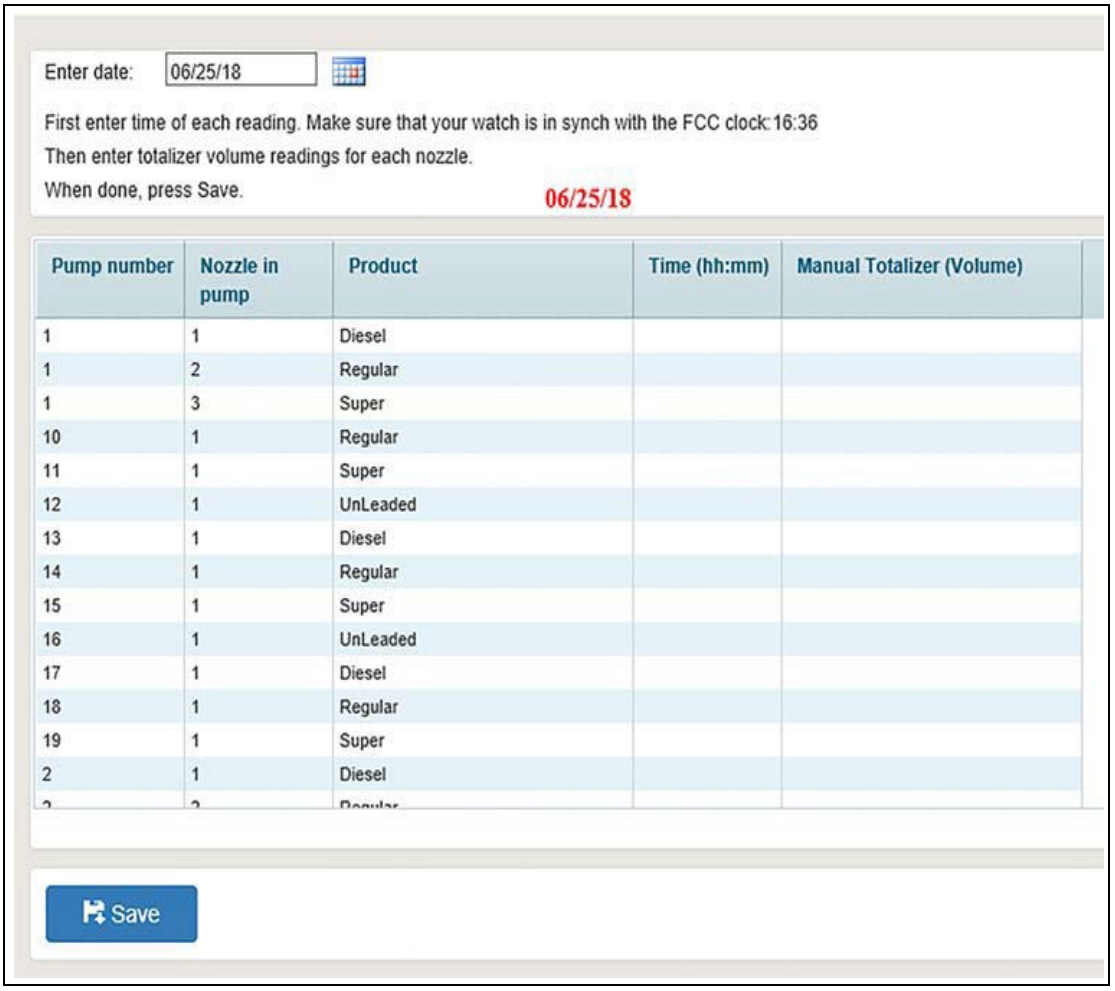
1. Enter the Transaction Date, using the date and time box.
2. Select the Pump and Nozzle from the drop-down lists. The Product, Tank, and Mix Percent (percentage of fuel in the mixture) fields are auto-populated according to the selection and cannot be changed.
3. The Rate (Price) field is auto-populated according to the selected product, but you may also edit it.
4. Enter the Quantity dispensed. The Total Amount field is auto-calculated.
5. Click **Add Trans**. to add the transaction to the system.

5.7 Manual Totalizer Entry

The Manual Totalizer Entry page enables you to manually enter mechanical pumps totalizer readings to the system. This data is required for performing reconciliation between pump mechanical totalizers and the volume dispensed registered in the transactions.

To access the Manual Totalizer Entry page, click **Wet Stock Mgmt** in the navigation bar and then select the **Manual Totalizer** (see Figure 42).

Figure 42: Manual Totalizer Entry Page



Note: Read the pump totalizers only when the pump is idle and not fueling.

The page consists of a grid which includes the following fields: Pump number, Nozzle in pump, Product, Time (hh:mm), and Manual Totalizer (Volume). A row per nozzle is displayed with previously entered data of the current date (if any).

To edit readings from previous dates, as it may be required for adding missing readings for a pump or correcting typing errors, select the required date using the Enter date text box or the Date and Time box.

5.7.1 Entering a Totalizer Reading

To manually enter a totalizer reading, proceed as follows:

1. Click the row to be edited.
2. Double-click the **Time** field and enter the time of reading (HH:MM).
3. Double-click the **Manual Totalizer (Volume)** field and enter the totalizer reading.
4. Click **Save** to enter the data to the system.

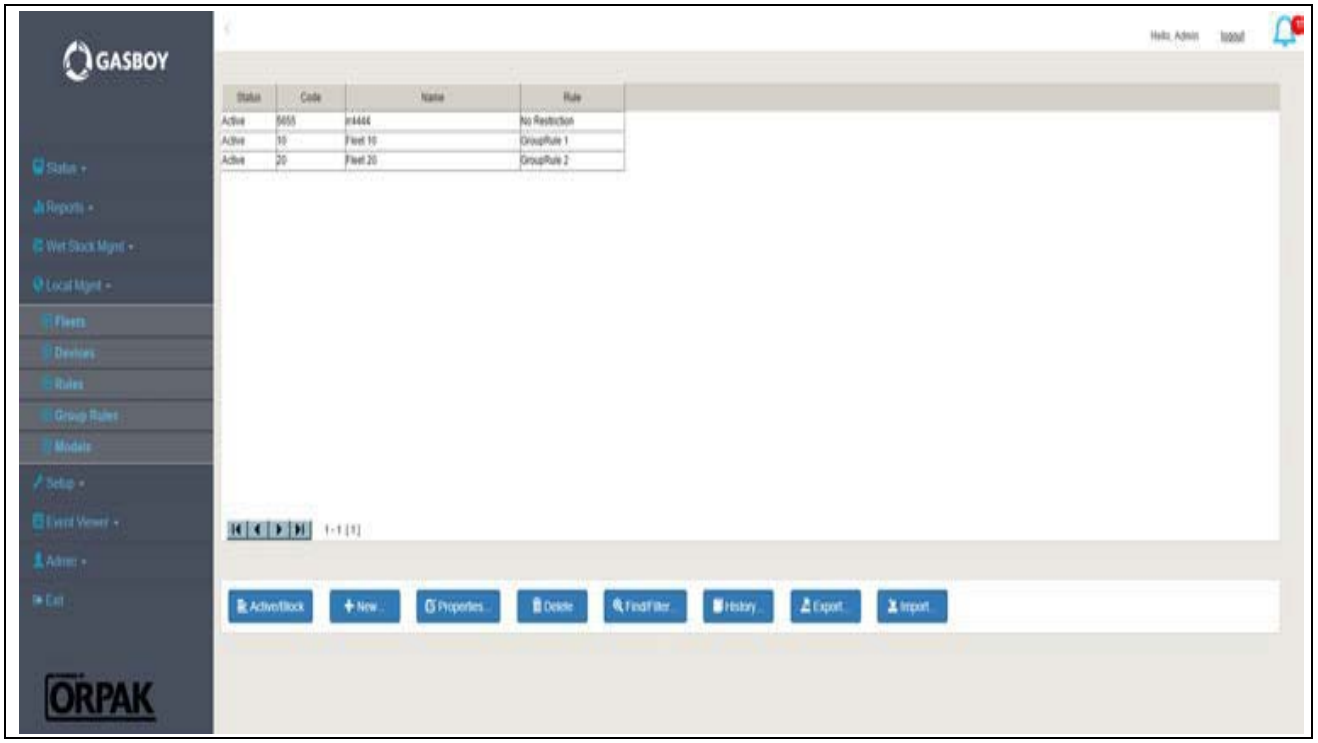
6 – Local Fleet Management

6.1 General

This section provides instructions for managing fleets, vehicles, devices, and defining rules for them in the SiteOmat360 Forecourt Controller database. SiteOmat360 checks the vehicles information against a negative or positive list on-line from the Head Office server or from the local lists. Only after the vehicle information is authenticated, the system allows fueling.

To access the Local Management page, click **Local Mgmt** in the navigation bar (see Figure 43). The Local Management section includes the following pages: Fleets, Devices, Rules, Group Rules, and Models.

Figure 43: Local Management Page



Note: Local fleets and devices are allowed to refuel only at the stations where they are defined. In a system with several stations, use the Head Office to globally define the same rules and information.

6.2 Fleet Definitions Overview

A device in SiteOmat360 is a physical authorization device, such as a Fuel Point PLUS Vehicle ID Unit, tag, key, or magnetic card.

A device pertains to a department which is part of a fleet. SiteOmat360 includes lists of fleets and their departments, and each department has a list of vehicles with its authentication devices.In order to refuel, the authentication device should be recognized by the SiteOmat360. Once the reading and parsing of the device string are done, a search for a match is executed in the system's database.

A set of rules are set for each device, allowing the vehicle to fuel only under the defined conditions. Fleet lists (vehicles) can work in the following two modes:

- Positive list (preferred method): Only vehicles found in the list can refuel, and in addition each vehicle must meet a set of rules.
- Negative list: All vehicles in this fleet can refuel except the ones that are in the negative list.

Positive/Negative lists apply only to the department level of a fleet, and not to the fleet itself. There can be only one department classified as a negative list in a fleet.

Each fleet has a set of rules that are defined as default rules for all of the fleets vehicles.

A rule created for a fleet applies to its departments and devices. However, the rule can be overridden at lower levels so that a Device/Department can have different rules than the fleets rule.

The following work flow is recommended for defining fleets:

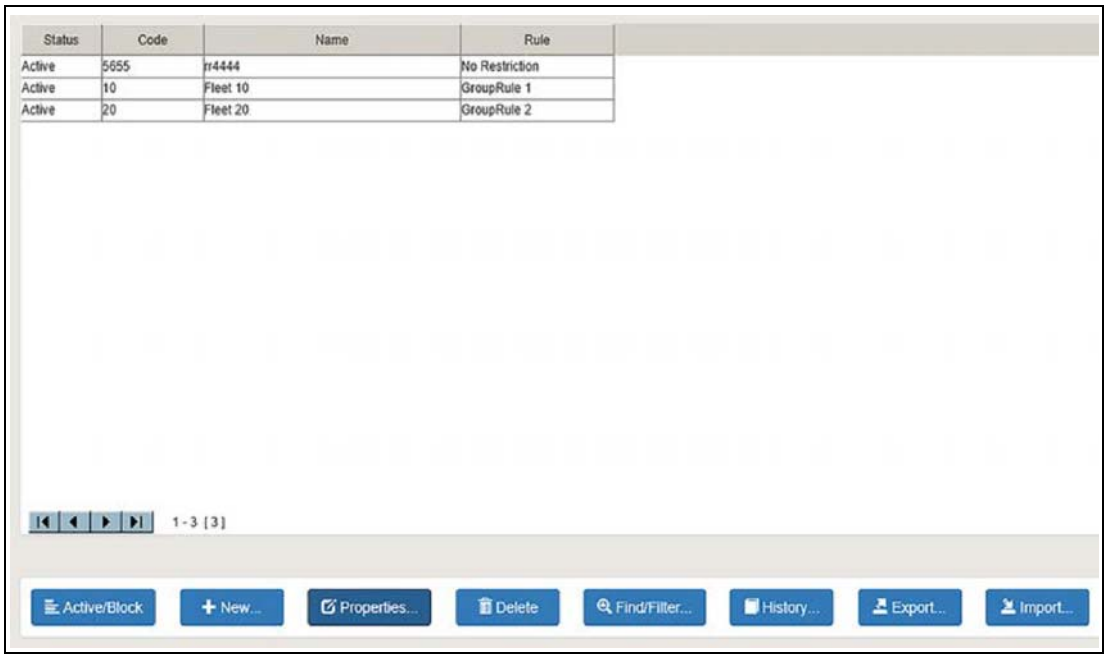
1. Models
2. Rules
3. Group Rules
4. Fleets
5. Managing Departments
6. Devices

6.3 Fleets

The Fleets page enables you to add, remove, update, and activate/block fleets.

To access the Fleets page, click **Local Mgmt** in the navigation bar and then select **Fleets** (see Figure 44).

Figure 44: Local Fleet Management Page



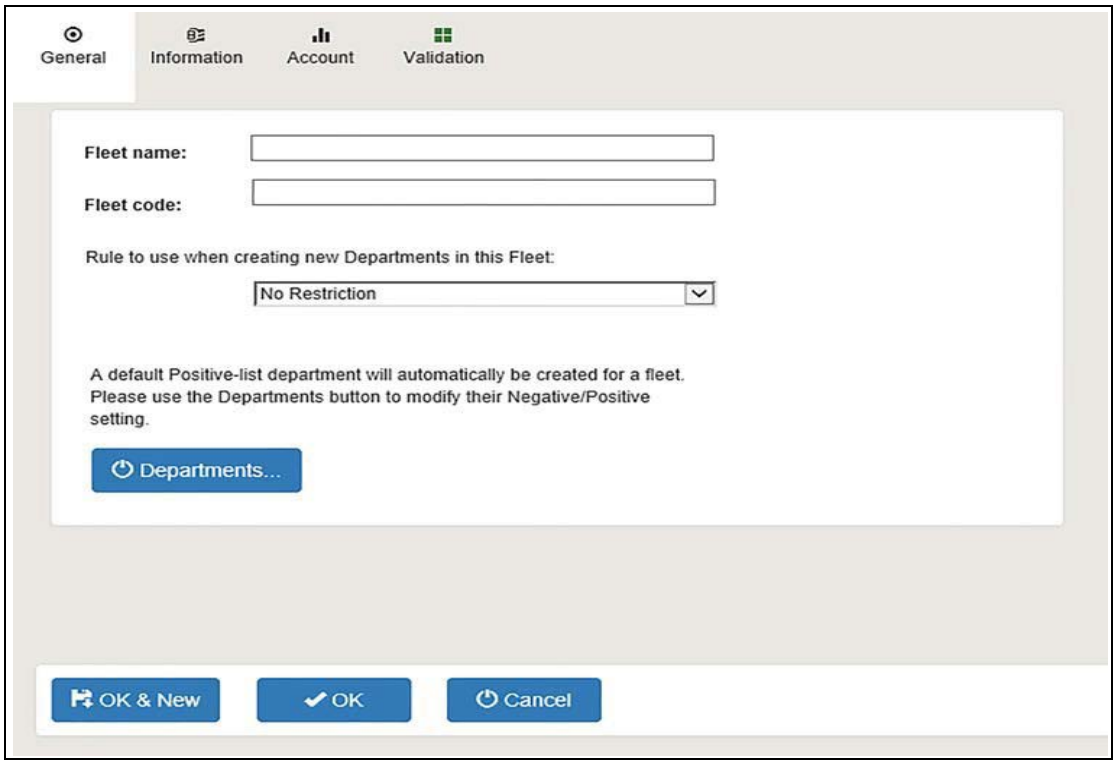
The grid in the Fleets main page lists the fleets, including: the fleets status (active/blocked), code, name, and the group rule applied to the fleet (if any).

6.3.1 Adding a New Fleet

To define a new fleet, proceed as follows:

Click **New** on the Fleets page. The Fleet Properties dialog box opens (see Figure 45).

Figure 45: Fleet Properties Dialog Box



It consists of four tabs: General, Information, Account, and Validation, each containing a different set of parameters described below.

6.3.1.1 General Tab

The General tab includes general fleet settings (see Figure 45).

To configure the General tab, proceed as follows:

1 Enter the following information in the applicable fields:

a Fleet name: A name identifying the fleet (string 80).

b Fleet code: A numeric code identifying the fleet (integer 8).

Fleet code and name must be unique in the system. Otherwise, a fail message is displayed.

2 Select **Rule** to use from the drop-down list, this rule will be applied to the fleet and its departments by default. This rule is used when defining a new department as the default rule.

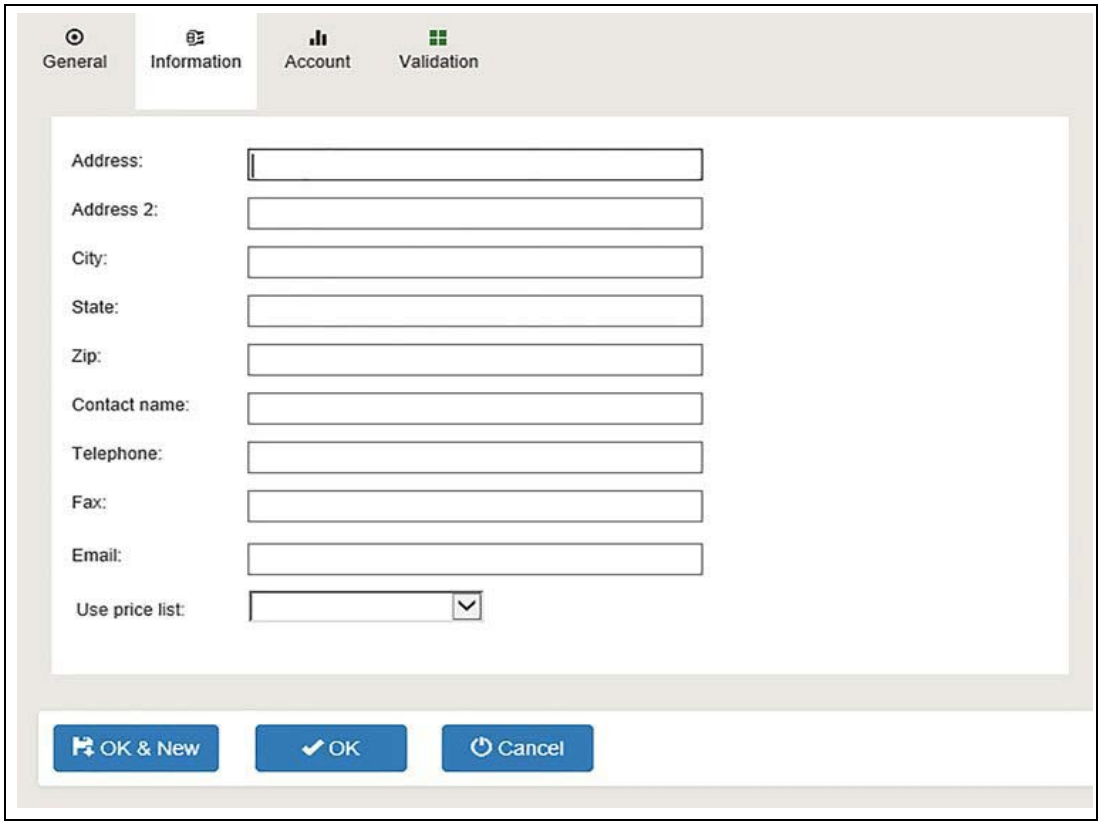
3 Go through the dialog tabs detailed below. After you've finished setting the fleet, perform one of the following:
- Click **OK & New** to save the information on the new fleet without closing the window. Creating departments is not allowed until saving the new fleet.
- Click **OK** in cases where the attributes of an existing fleet have been modified.

4 Click **Departments** to define the fleet departments (see 6.3.3 Managing Departments on page 68).
Note: The default department is automatically created for a fleet once the fleet is created.

6.3.1.2 Information Tab

The Information tab includes general fleet and contact info (see Figure 46).

Figure 46: Fleet Properties - Information Tab



To configure the Information tab, proceed as follows:

1 Fill in the following fields:
- Address
- City
- State
- Zip
- Contact Name
- Telephone
- Fax
- Email

2 (Optional) In the **Use price list** drop-down list, select a previously defined discount list and link it to the fleet (see 5.2.3 Price Lists on page 41).

6.3.1.3 Account Tab

The Account tab includes fleet financial balance information and enables you to set the fleets balance (see Figure 47, Table 10 on page 63).

Figure 47: Fleet Properties - Account Tab

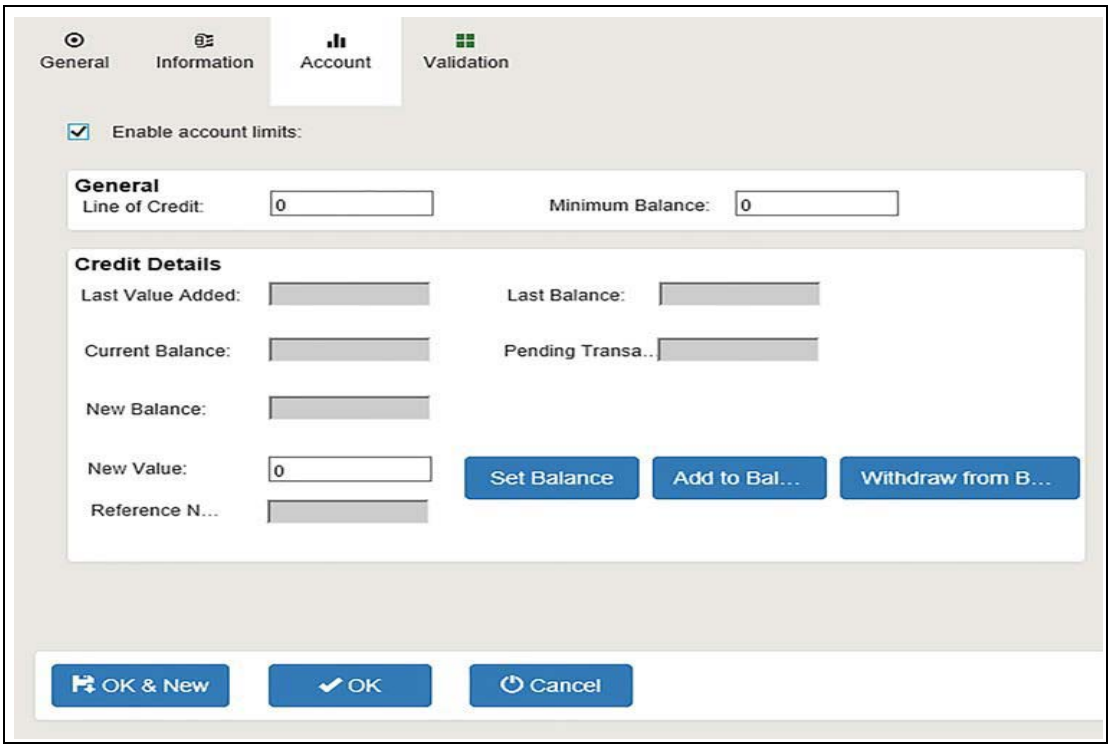


Table 10: Fleet Properties - Account Tab Elements

Element	Description
Enable Account Limits	Enables account limits for the fleet.
General	• **Line of Credit**: The amount of credit extended to the fleet. • **Minimum Balance**: The minimum balance that your organization requires fleets to have in their accounts. These fields essentially show and record high and low limits, without setting the actual limits.
Last Value Added	Value entered in the previous credit update.
Last Balance	Credit balance from the previous update.
Current Balance	Actual fleet account balance before the current update.
Pending Transactions	Total sum of the transactions not yet calculated in the balance.
New Balance	Balance calculated combining the current balance and the new value, according to the action selected.
New Value	New value added to the balance. Enter a value and click one of the following buttons: • **Set Balance**: Replaces the Current Balance with the New Value. • **Add to Balance**: Adds the New Value to the Current Balance. • **Withdraw from Balance**: Subtracts the New Value from the Current Balance. Click **OK** to update the balance and save changes.
Reference Number	Auto-generated reference ID for the current operation.

6.3.1.4 Validation Tab

The Validation tab enables you to set the driver input parameters for driver authorization (see Figure 48, Table 11 on page 64).

Figure 48: Fleet Properties - Validation Tab

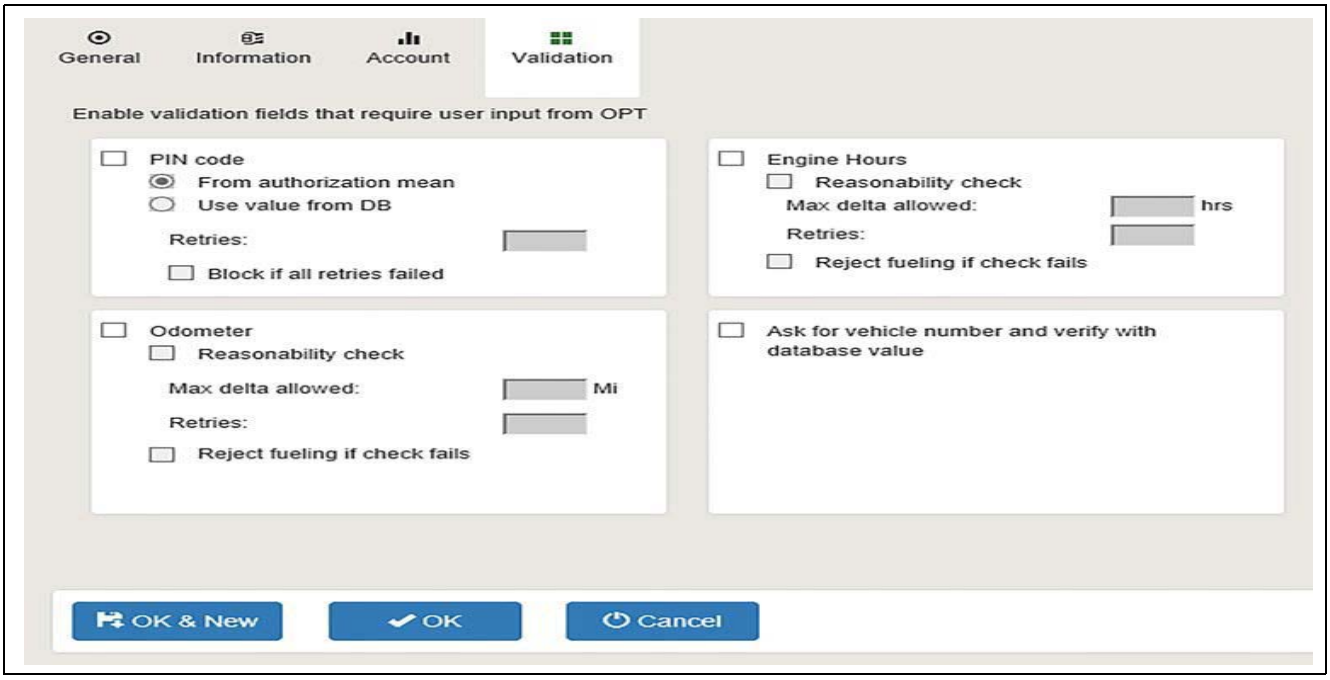


Table 11: Fleet Properties - Validation Tab Parameters

Parameter	Description
PIN Code	• **PIN Code:** If selected, the driver will be required to enter a PIN code in the outdoor payment terminal after presenting or swiping a fueling tag/card. • **From authorization mean/Use value from DB:** Defines the storage location of the PIN for validation control. In the first option, the code is stored on the card, and in the second it is stored in the system's DB. • **Retries:** Sets the number of retries allowed. • **Block if all retries failed:** If selected, the device is blocked and cannot be used until it is unblocked by an administrator.
Odometer	• **Odometer:** If selected, the driver will be required to enter the vehicles current odometer reading in the outdoor payment terminal. This option is not required for vehicles equipped with Fuel Point PLUS Vehicle Data units. • **Reasonability check:** Compares between last odometer entered and the current driver input. • **Max delta allowed:** Sets the acceptable difference between last and current input. • **Retries**: Sets the number of retries allowed. • **Reject fueling if check fails:** If selected, the device is not authorized to refuel after the driver exceeds the number of retries. The system generates an event on the Events & Alarms screen: Wrong odometer entered that also informs about the OPT from which the transaction was started.
Engine Hours	• **Engine Hours:** If selected, the driver will be required to enter the vehicles current engine hours in the outdoor payment terminal. This option is not required for vehicles equipped with Fuel Point PLUS Vehicle Data units. • **Reasonability check:** Compares between last engine hours entered and the current driver input. • **Max delta allowed:** Sets the acceptable difference between last and current input. • **Retries:** Sets the number of retries allowed. • **Reject fueling if check fails:** If selected, the device is not authorized to refuel after the driver exceeds the number of retries.
Ask for vehicle number and verify with database value	If selected, the driver is required to enter the vehicle number in the OPT. The entered value must match the vehicle number defined for the specific authorization device in the database. This number is not saved in the transaction record.

6.3.2 Fleet Features

The Fleets page includes an array of additional features, accessed by clicking different buttons located at the bottom of the page.

6.3.2.1 Activating/Blocking a Fleet

A fleet can be either in:

- Active status: The fleets vehicles/departments are allowed to refuel (within the defined limits).
- Blocked status: All of the fleets vehicles/departments are denied automatic refueling.

To toggle between Active status and Block status of a fleet, proceed as follows:

1. Click any row in the Fleets grid to select the fleet to be changed.
2. Click **Active/Block**. A confirmation message opens.
3. Click **OK.**

   The status of the selected fleet is changed.

6.3.2.2 Modifying a Fleet

To modify the attributes of an already defined fleet, proceed as follows:

1. Click any row in the Fleet grid to select the item to be modified.
2. Click **Properties** to open the Fleet Properties dialog box described above.
3. Edit the required fields.
4. Click **OK** to save changes and close the dialog box, or **Cancel** to close the dialog box without saving the changes.

6.3.2.3 Deleting a Fleet

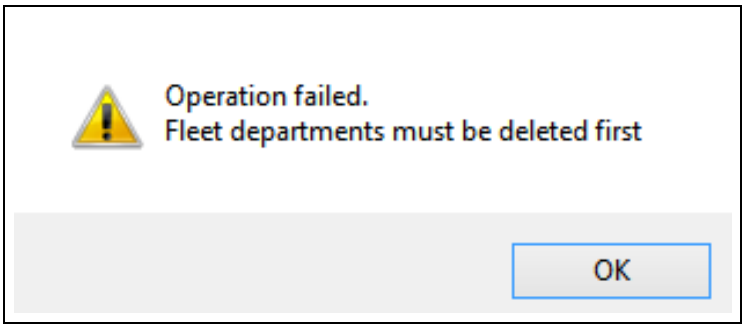
To delete an existing fleet, proceed as follows:

1 Click any row in the Fleet grid to select the item to be deleted.

2 Click **Delete**. A confirmation message opens.

3 Click **OK.**
Note: You can a delete a fleet only after you've deleted all of its departments. In this case, the following warning message will be displayed (see Figure 49).

Figure 49: Deleting a Fleet - Departments Delete Warning Message

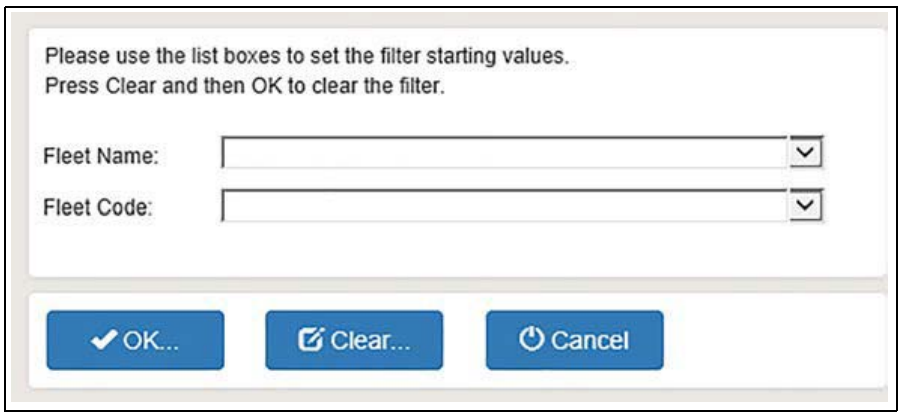


6.3.2.4 Finding a Fleet / Filtering the Fleets Grid

To find a fleet or filter the list, proceed as follows:

1 Click **Find/Filter** on the Fleets page. The Find Fleet dialog box opens (see Figure 50).

Figure 50: Find Fleet Dialog Box



2 Proceed with one of the following:
- Select a name from the **Fleet Name** drop-down list.
- Select a code from the **Fleet Code** drop-down list.

3 Click **OK** to apply the filter, or click **Clear** to delete the filtered criteria and start the search new.

The Fleets grid is narrowed accordingly.

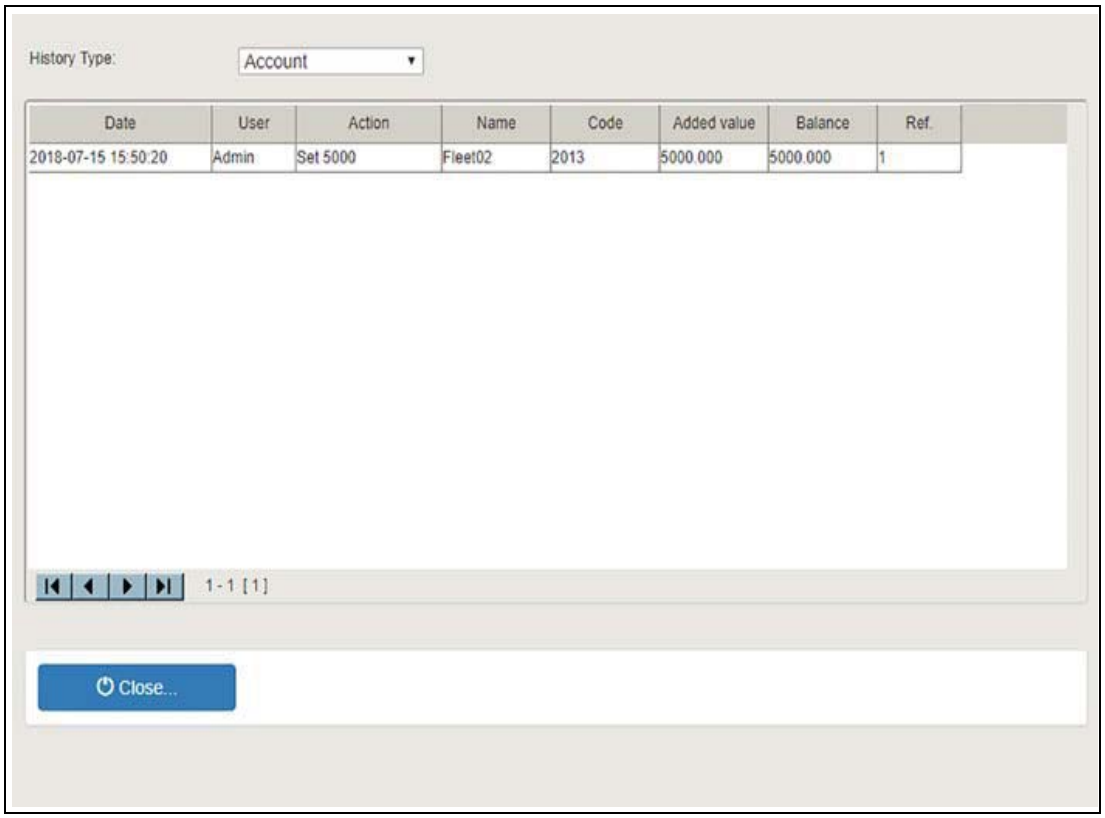
6.3.2.5 Viewing Fleet's History

To view the fleets account operations, proceed as follows:

1 Click any row in the Fleet grid to select the fleet.

2 Click **History**. The Fleet History dialog box opens (see Figure 51).

Figure 51: Fleet History Dialog Box



This dialog box displays a list of account operations actions along with the following data: Date, User, Action, Name, Code, Added Value, Balance, and Reference Number.

6.3.2.6 Exporting Fleets Data

To export your fleets data from the SiteOmat360 database, click **Export**. The data is written into a .CSV (Comma Separated Value) file.

6.3.2.7 Importing Fleets Data

To import your fleets data into the SiteOmat360 database without needing manual data entry, click **Import** and use the browsing dialog box to search for a .CSV file.

6.3.3 Managing Departments

A department is a sub-division of the fleet. This hierarchy enables defining limits more easily. For example, vehicles pertaining to the management are likely to have different limits than vehicles of the other departments in the organization.

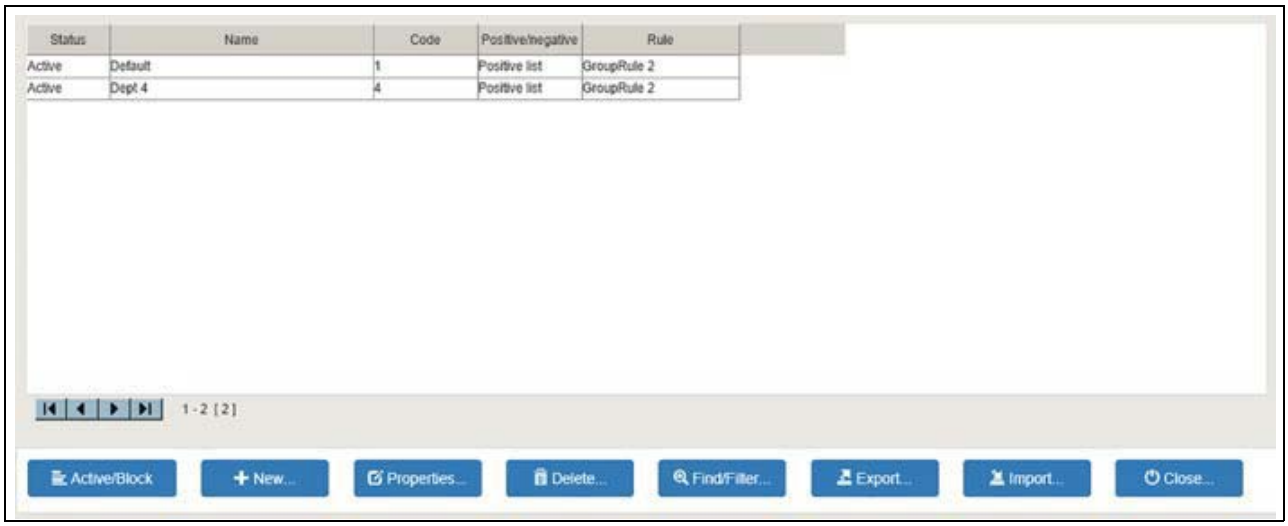
A fleet must include at least one department. SiteOmat360 automatically creates a default department when you create a new fleet. Therefore, before defining or modifying departments, you need to save the fleet. Otherwise, an error message is displayed.

To access the Departments List dialog box, proceed as follows (see Figure 52).

1 Verify that the fleet has been successfully added to the system.

2 Click **Departments** in the Fleet Properties dialog box.

Figure 52: Departments Dialog Box



This dialog box enables you to add, remove, update, and activate/block departments.

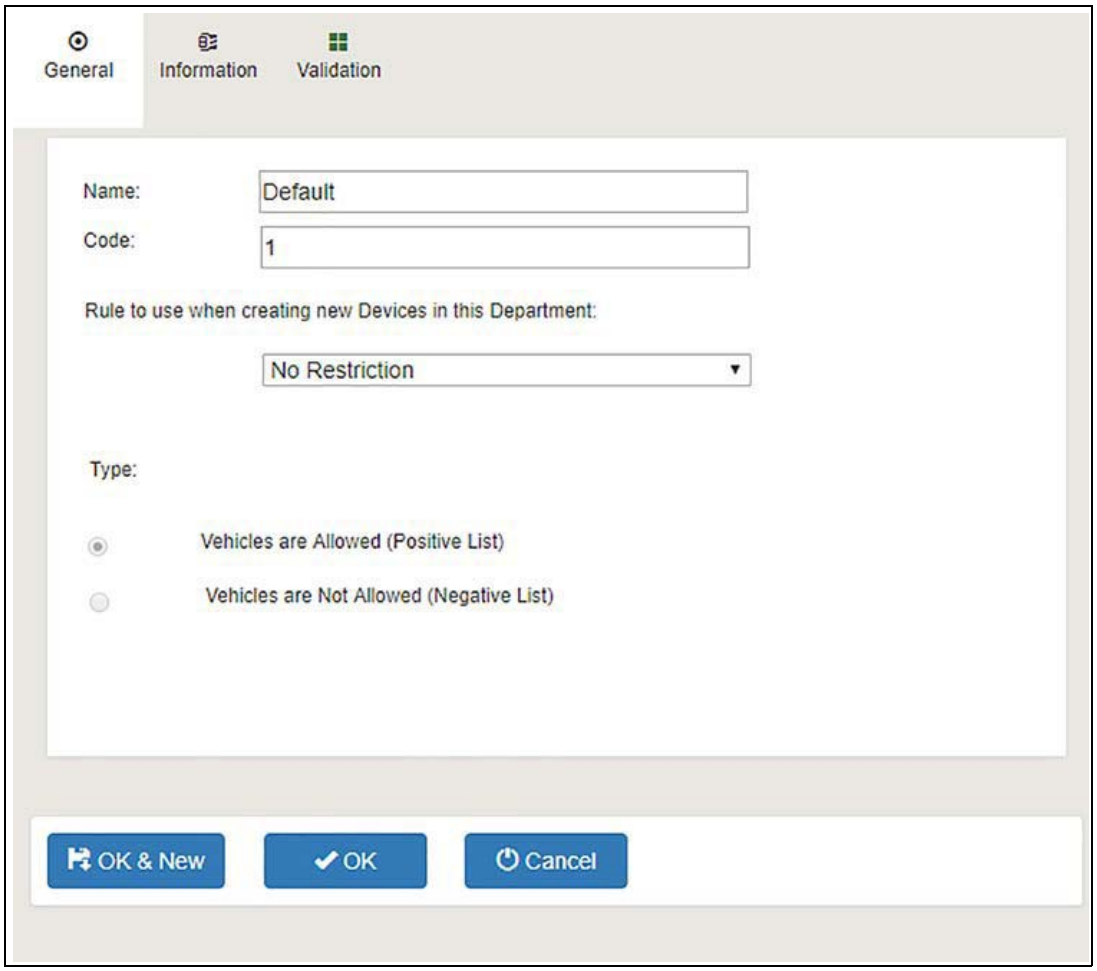
The grid in the dialog box lists the fleets departments, including their status (active/blocked), code, type (positive/negative), and the group rule applied to the fleet (if any).

6.3.3.1 Adding a New Department

To add a new department, proceed as follows:

Click **New** on the Departments dialog box. The Department Properties dialog box opens consisting of three tabs: **General**, **Information**, and **Validation** each containing a different set of parameters (see Figure 53).

Figure 53: Department Properties Dialog Box



6.3.3.1.1 General Tab

The General tab includes general department settings (see Figure 53).

To configure the General tab, proceed as follows:

1 Fill in the following information in the applicable fields:

a Name: A name identifying the department (string 80).

b Code: A numeric code identifying the department (integer 8).

Department code and name must be unique in the system. Otherwise, a fail message is displayed.

2 Select a **Rule to use** from the drop-down list. This rule will apply to the department by default.

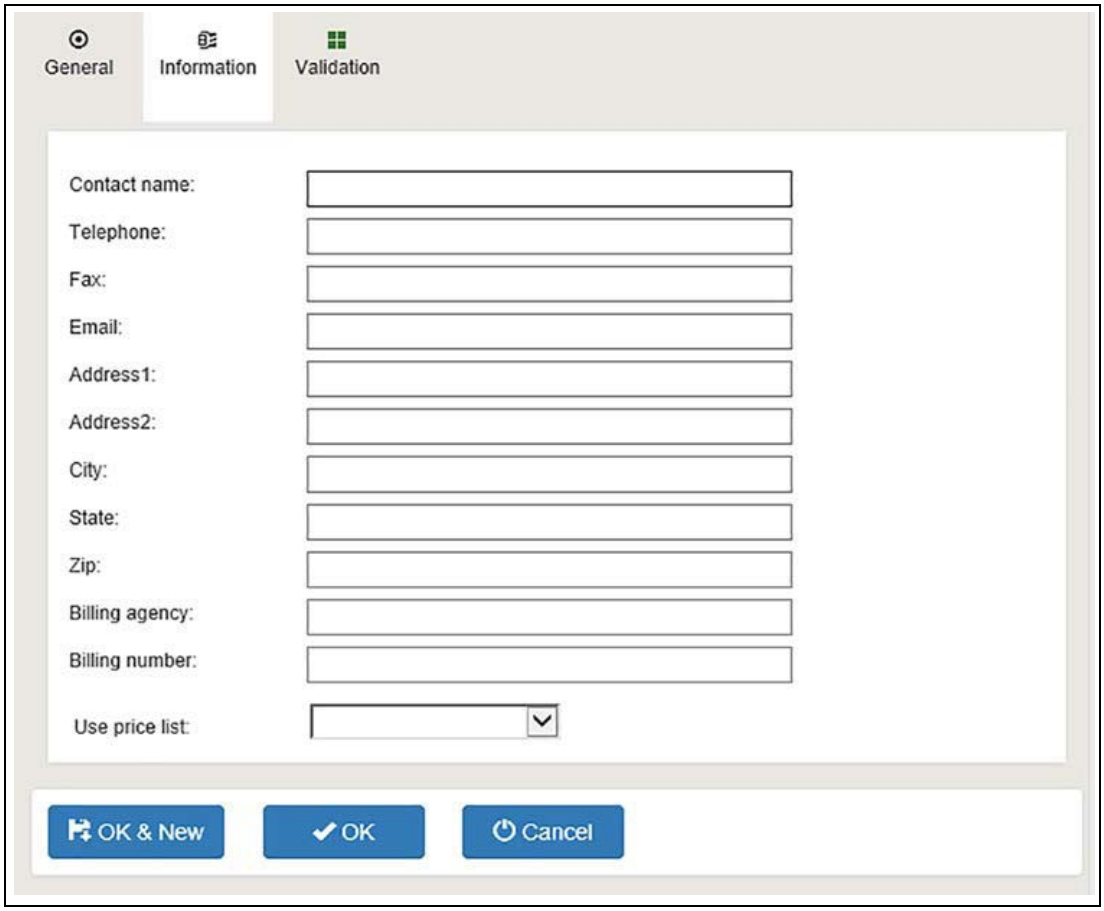
3 Select the department **Type**: set whether the department vehicles are allowed to refuel (pertaining to a positive list), or not allowed to refuel (negative list).
Note: A maximum of one department classified as a negative list in a fleet. Once a department has been blacklisted (negative list), if users want to return that department to a white (positive) list, the department must be deleted and re-entered.

4 Go through the dialog box tabs detailed below. After you've finished setting the department, complete one of the following:
- Click **OK & New** to save the information on the new department without closing the window.
- Click **OK** in cases where the attributes of an existing department have been modified.

6.3.3.1.2 Information Tab

The Information tab includes general fleet and contact info (see Figure 54).

Figure 54: Department Properties - Information Tab



To configure the Information tab, proceed as follows:

1 Fill in the following fields:
- Contact Name
- Telephone
- Fax
- Email
- Address
- City
- State
- Zip
- Billing Agency
- Billing Number

Note: Billing agency and Billing number are used when working with any billing system.

2 (Optional) In the **Use price list** drop-down, select a previously defined discount list (see 5.2.3 Price Lists on page 41) and link it to the fleet.

6.3.3.1.3 Validation Tab

The Validation tab enables you to set the driver input parameters for driver authorization (see Figure 55, Table 12 on page 72).

Figure 55: Department Properties - Validation Tab

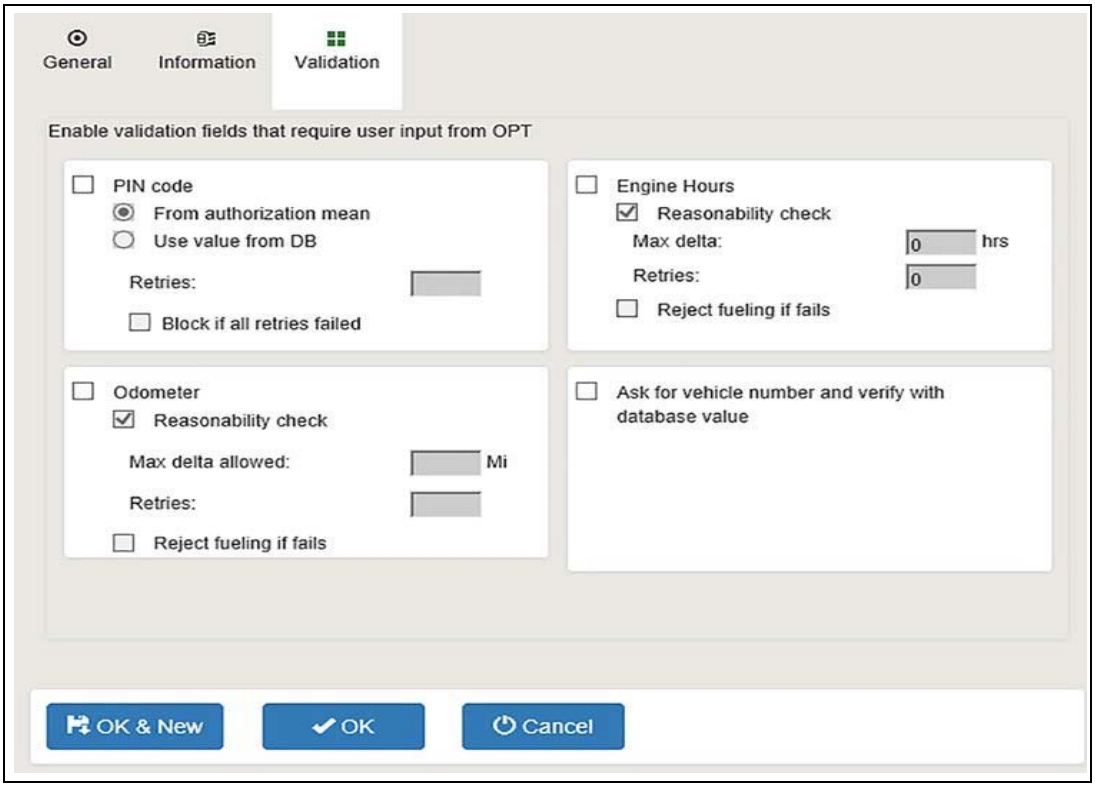


Table 12: Department Properties - Validation Tab Parameters

Parameter	Description
PIN Code	• **PIN Code:** If selected, the driver will be required to enter a PIN code in the outdoor payment terminal after presenting or swiping a fueling tag/card. • **From authorization mean/Use value from DB**: Defines the storage location of the PIN for validation control. In the first option the code is stored on the card, and in the second it is stored in the system's DB. • **Retries:** Sets the number of retries allowed. • **Block if all retries failed:** If selected, the device is blocked and cannot be used anymore, until it is unblocked by an administrator.
Odometer	• **Odometer:** If selected, the driver will be required to enter the vehicles current odometer reading in the outdoor payment terminal. This option is not required for vehicles equipped with Fuel Point PLUS Vehicle Data units. • **Reasonability check:** Compares between last odometer entered and the current driver input. • **Max delta allowed:** Sets the acceptable difference between last and current input. • **Retries:** Sets the number of retries allowed. • **Reject fueling if check fails:** If selected, the device is not authorized to refuel after the driver exceeds the number of retries. The system generates an event on the Events & Alarms screen: Wrong odometer entered, which also informs about the OPT from which the transaction was started.
Engine Hours	• **Engine Hours:** If selected, the driver will be required to enter the vehicles current engine hours in the outdoor payment terminal. This option is not required for vehicles equipped with Fuel Point PLUS Vehicle Data units. • **Reasonability check:** Compares between last engine hours entered and the current driver input. • **Max delta allowed:** Sets the acceptable difference between last and current input. • **Retries:** Sets the number of retries allowed. • **Reject fueling if check fails:** If selected, the device is not authorized to refuel after the driver exceeds the number of retries.
Ask for vehicle number and verify with database value	If selected, the driver is required to enter the vehicle number in the OPT. The entered value must match the vehicle number defined for the specific authorization device in the database. This number is not saved in the transaction record.

6.3.3.2 Department Features

The Department Management dialog box includes an array of additional features, accessed by clicking different buttons located at the bottom of the dialog box.

6.3.3.3 Activating / Blocking a Department

A Department can be either:
- **Active**: The vehicles are allowed to refuel (within the defined limits).
- **Blocked**: All of the vehicles are denied automatic refueling.

To toggle between Active and Blocked status of a Department, proceed as follows:

1. Click any row in the Departments grid to select the item to be changed.
2. Click **Active/Block**. A confirmation message opens.
3. Click **OK.**

The status of the selected Department is changed.

6.3.3.3.1 Modifying a Department

To modify the attributes of an already defined department, proceed as follows:

1 Click any row in the Departments grid to select the item to be modified.

2 Click **Properties** to open the Department Properties dialog box described above.

3 Edit the required fields.

4 Click **OK** to save changes and close the dialog box, or **Cancel** to close the dialog box without saving the changes.

6.3.3.3.2 Deleting a Department

To delete an existing department, proceed as follows:

1 Click any row in the Departments grid to select the item to be deleted.

2 Click **Delete**. A confirmation message is displayed.

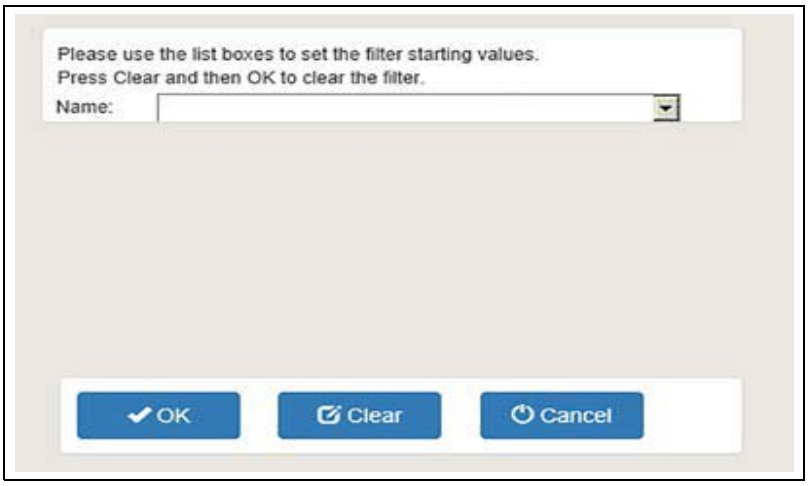
3 Click **OK.**
Notes: 1) Deleting a department linked to a device (vehicle) is not allowed.
2) Deleting all departments of a fleet impedes adding devices (vehicles) to the fleet.

6.3.3.3.3 Finding a Department / Filtering the Departments Grid

To find a department or filter the list, proceed as follows:

1 Click **Find/Filter** on the Fleets page. The Find Department dialog box opens (see Figure 56).

Figure 56: Find Department Dialog Box



2 Select a name from the **Name** drop-down list.

3 Click **OK** to apply the filter, or click **Clear** to delete the filtered criteria and start the search as new.

The Departments grid is narrowed accordingly.

6.3.3.3.4 Exporting Departments Data

To export your departments data from the SiteOmat360 database, click **Export**. The data is written into a .CSV file.

6.3.3.3.5 Importing Departments Data

To import your departments data into the SiteOmat360 database, without needing manual data entry, click **Import** and use the browsing dialog box to search for a .CSV file.

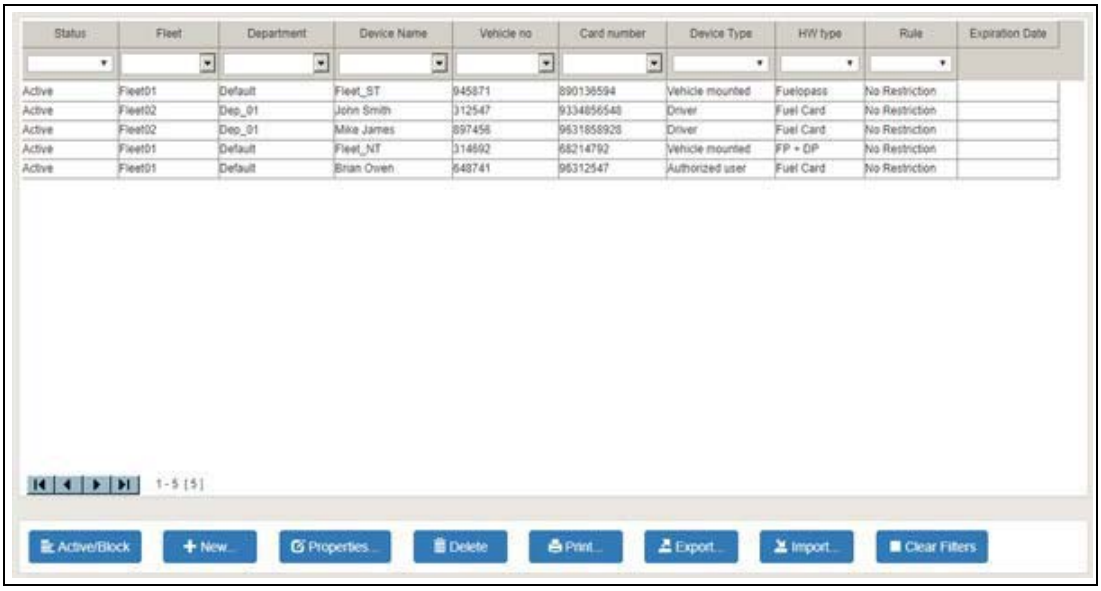
6.4 Devices

The Devices page enables you to add, remove, update, and activate/block devices.

A device in the SiteOmat360 system is a physical authorization device, such as a Fuel Point PLUS Vehicle ID Unit, tag, key, or magnetic card. In addition, an attendant device can be also defined on this page.

To access the Devices page, click **Local Mgmt** in the navigation bar and then select the **Devices** (see Figure 57).

Figure 57: Devices Page



The grid in the devices main page lists the devices, and includes several fields detailed below (see Table 13). You may filter the grid using the drop-down lists in the headers.

Table 13: Devices Grid Fields

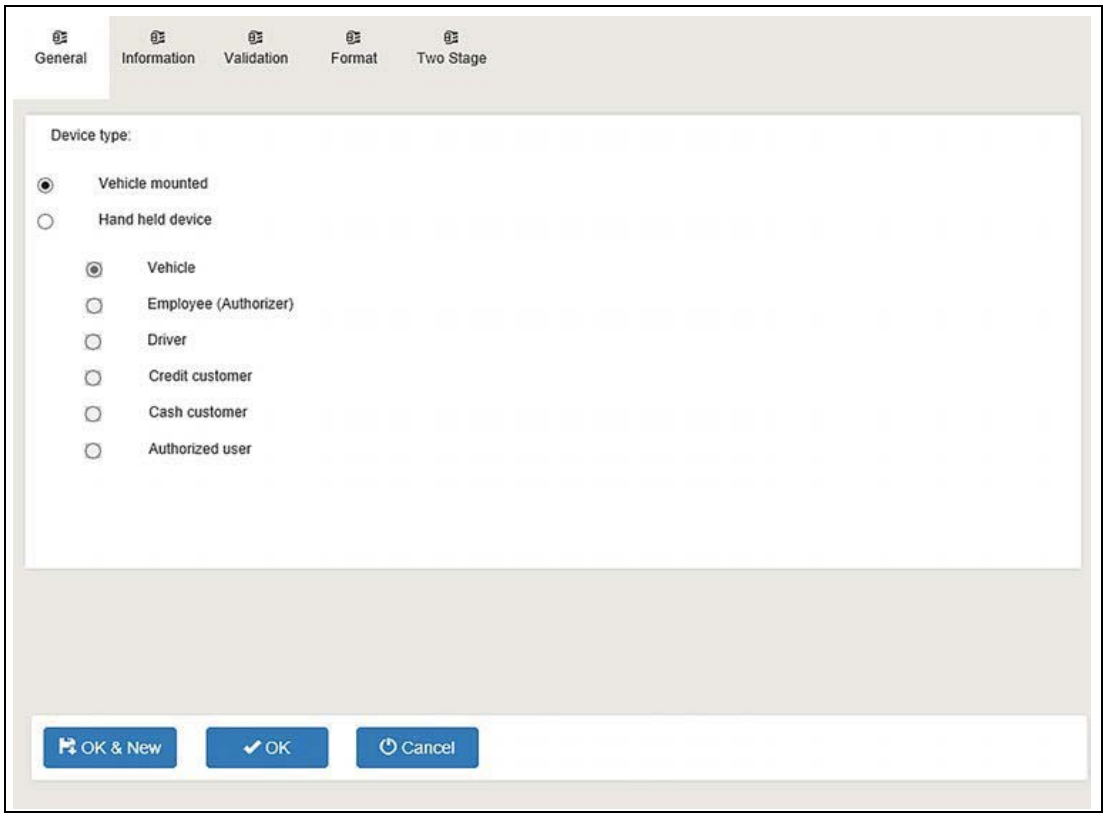
Fields	Description
Status	Device status (Active / Blocked).
Fleet	Fleet of which the device belongs.
Department	Department of which the device belongs.
Device Name	Unique device name.
Vehicle no.	License plate number or unique ID of the vehicle.
Card Number	Unique ID number given by the system to each device.
Device Type	Type of the device.
HW Type	Hardware type of the device.
Rule	Rule that applies to the device.

6.4.1 Adding a New Device

To define a new device, proceed as follows:

Click **New** on the Devices page. The Device Properties dialog box opens (see Figure 58). It consists of five tabs: **General**, **Information**, **Validation**, **Format**, and **Two-Stage** each containing a different set of parameters described below.

Figure 58: Devices Properties Dialog Box



6.4.1.1 General Tab

The General tab enables you to select the type of the device (see Figure 58, Table 14 on page 77).

To configure the General tab, proceed as follows:

1 Select the **Device type** (see Table 14 on page 77).

2 Go through the dialog box tabs, detailed below. After you've finished setting the device, complete one of the following:
- Click **OK** & **New** to save the information of the new fleet without closing the window. Creating departments is not allowed until saving the new fleet.
- Click **OK** in cases where the attributes of an existing fleet have been modified.

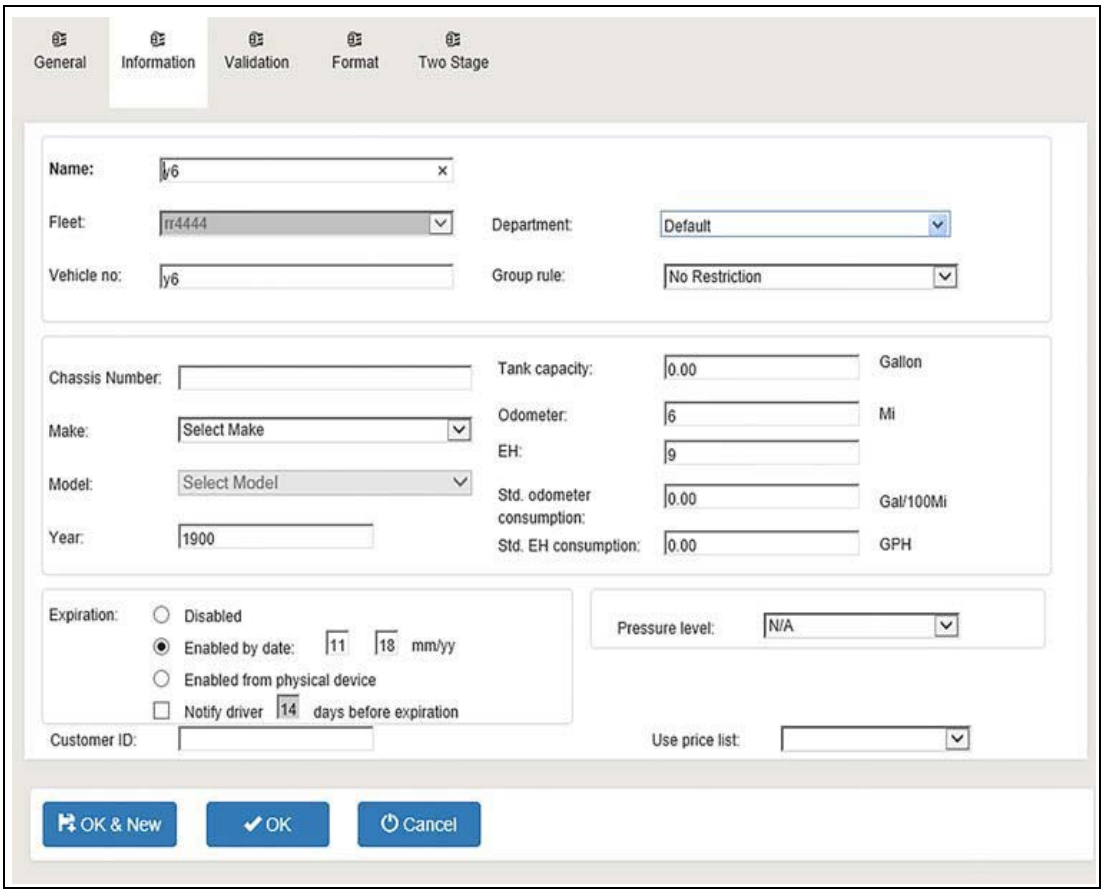
Table 14: Device Types

Fields	Description
Vehicle Mounted	Devices mounted on the vehicle (e.g. Fuel Point PLUS Vehicle ID units).
Hand-held Vehicle	Devices which enable automatic refueling and are not installed in a specific vehicle (e.g. smart tags, magnetic cards).
Hand-held- Employee	Gas station attendant authorization device (applicable only to the station).
Hand-held- Driver	Used for the two-stage authorization process. The driver receives an authorization device and is allowed to refuel only if using both authorization devices (one for the vehicle and one for the driver).
Hand-held- Credit customer	Gas station attendant authorization device for credit card transactions.
Hand-held- Cash customer	Gas station attendant authorization device for cash transactions.
Hand-held Authorized user	User allowed to operate CNG/LPG dispensers. After this authorization device was presented and approved all other existing fueling scenarios can be applied. This device supports validation by PIN only.

6.4.1.2 Information Tab

The Information tab includes several vehicle parameters (see Figure 59, Table 15 on page 78).

Figure 59: Device Properties - Information Tab



This tab includes different fields for an Employee device.

To configure the Information tab, proceed as follows:

1 Fill in the different fields (see Table 15).

2 (Optional) In the Use price list drop-down, select a previously defined discount list and link it to the fleet (see 5.2.3 Price Lists on page 41).

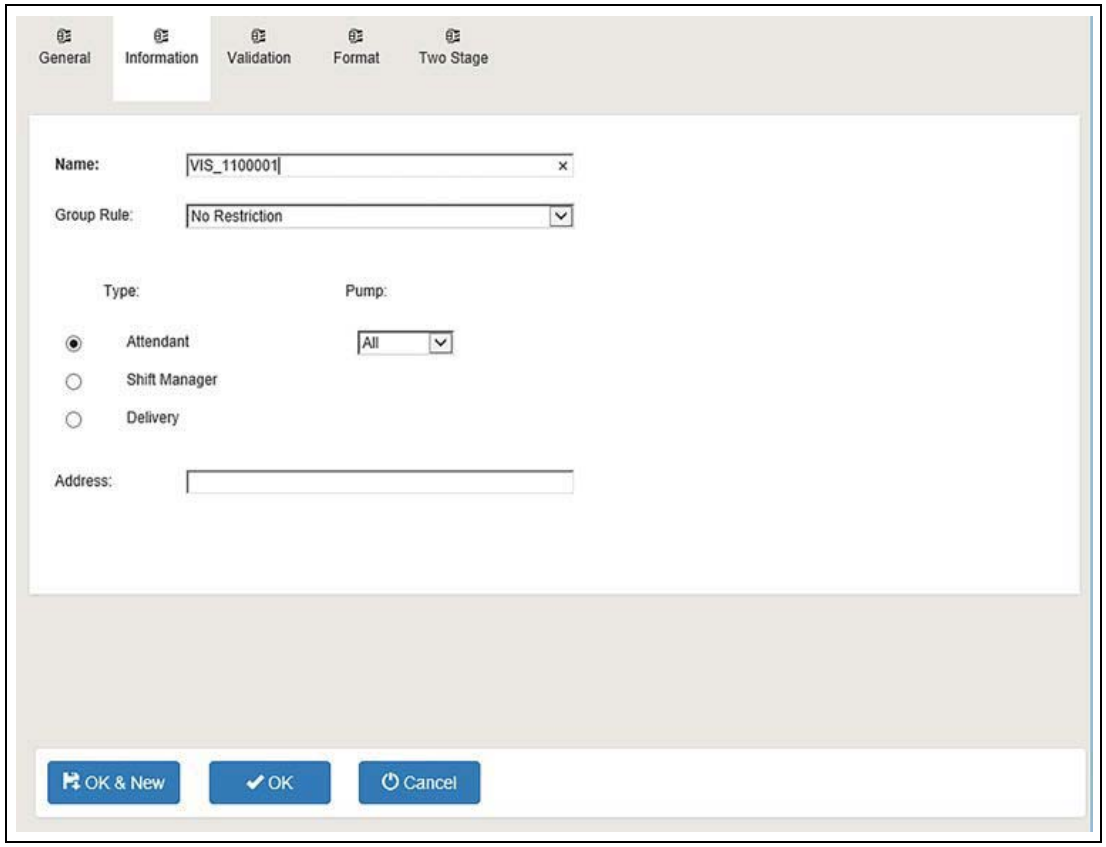
Table 15: Device Information Fields

Fields	Description
Name	Unique device name. If this device is vehicle mounted, enter the license plate number or the vehicle ID number; if it is hand held enter the name/ID of the person of which the device belongs.
Fleet	Selects the fleet of which the device belongs.
Department	Selects the department of which the device belongs.
Vehicle no.	License plate number or unique ID of the vehicle.
Group rule	Selects the group rule applied to the device.
Chassis Number	Vehicles chassis number.
Make	Vehicles manufacturer.
Model	Vehicles model. *Note: Selecting the vehicle model out of the list automatically fills in the Tank capacity and the Standard consumption fields (as set in the Models page).*
Year	Manufacturing year of the vehicle.
Tank capacity	Vehicles tank capacity.
Odometer	Current odometer reading.
EH	Vehicles engine hours.
Std. odometer consumption	Vehicles average fuel consumption.
Std. EH consumption	Vehicles average fuel consumption per engine hour.
Expiration	The following options are available: • **Disabled:** Select this radio button for a device that has no expiration date. • **Enabled by date:** Sets an expiration date for the device. Select this radio button and enter the required date (mm/yy). • **Enabled from physical device:** Select this radio button for devices / formats that include expiration date. The system will read and apply expiration data (relevant for specific formats only).
Customer ID	The ID number of the customer.
Pressure level	The following options are available: • **N/A**: Not applicable • **1:** Standard vehicles (8 bars - 116 PSI) • **2:** Super saturated vehicles (18 bars - 260 PSI) • **3:** Cold vehicles (3 bars - 43.5 PSI)

6.4.1.3 Information Tab - Employee Device

The Information tab includes different employee details (see Figure 60, Table 16).

Figure 60: Device Properties - Information Tab (Employee Device)



Fill in the employee details.

Table 16: Device Information Fields - Employee

Fields	Description
Name	Employee's name/ID.
Group Rule	No restriction (Default)
Type	The following options are available: • **Attendant** • **Shift Manager** • **Delivery**: Tag that enables attendants to receive fuel deliveries and enter relevant delivery data through the OPT. This tag requires defining a PIN code in the Validation screen.
Pump	Authorizes the attendant to open to a specific pump, selected from the drop-down list. All pumps may also be selected.
Address	Employee's address.

6.4.1.4 Validation Tab

The Validation tab enables you to set the driver input parameters for driver authorization (see Figure 61, Table 17).

Figure 61: Device Properties - Validation Tab

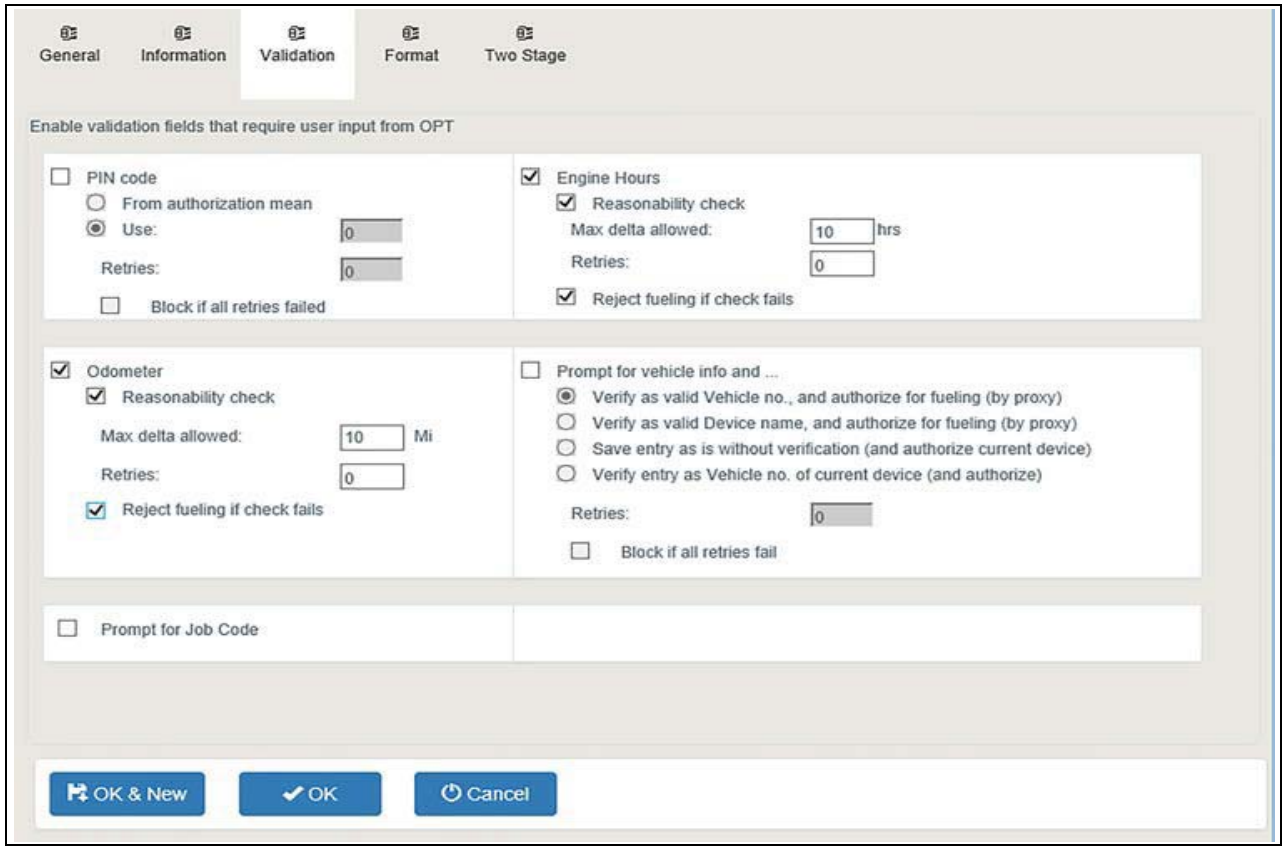


Table 17: Device Properties - Validation Tab Parameters

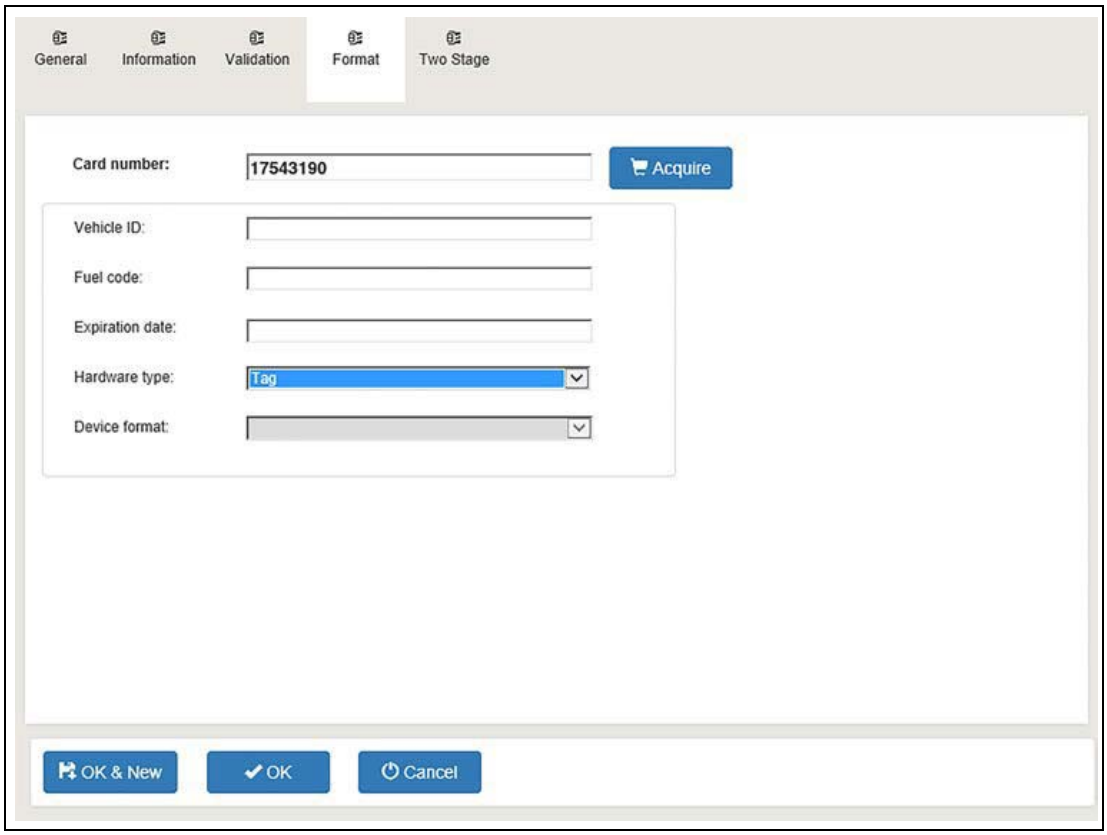
Parameter	Description
PIN Code	• **PIN Code**: If selected, the driver will be required to enter PIN code in the outdoor payment terminal after presenting or swiping a fueling tag/card. • **From authorization mean/Use:** Defines the storage location of the PIN for validation control. In the first option the code is stored on the card, and in the second, define the PIN code of the specific device and type it in the adjacent field. • **Retries:** Sets the number of retries allowed. • **Block if all retries failed:** If selected, the device is blocked and cannot be used anymore, until it is unblocked by an administrator.
Odometer	• **Odometer**: If selected, the driver will be required to enter the vehicles current odometer reading in the outdoor payment terminal. This option is not required for vehicles equipped with Fuel Point PLUS Vehicle Data units. • **Reasonability check:** Compares between last odometer entered and the current driver input. • **Max delta allowed:** Sets the acceptable difference between last and current input. • **Retries:** Sets the number of retries allowed. • **Reject fueling if check fails:** If selected, the device is not authorized to refuel after the driver exceeds the number of retries. The system generates an event on the Events & Alarms screen: Wrong odometer entered, which also informs about the OPT from which the transaction was started.

Parameter	Description
Engine Hours	• **Engine Hours:** If selected, the driver will be required to enter the vehicles current engine hours in the outdoor payment terminal. This option is not required for vehicles equipped with Fuel Point PLUS Vehicle Data units. • **Reasonability check:** Compares between last engine hours entered and the current driver input. • **Max delta allowed:** Sets the acceptable difference between last and current input. • **Retries:** Sets the number of retries allowed. • **Reject fueling if check fails:** If selected, the device is not authorized to refuel after the driver exceeds the number of retries.
Prompt for vehicle info and...	If selected, the system enables authorization using a “Proxy Device”. This option is relevant for fleet vehicles with non-working devices or new fleet vehicles that have not installed a device yet but would like to refuel. For each station or fleet a “Proxy device” needs to be defined in order to assist the drivers in performing such transactions. When creating a new proxy device select the following device type: Hand Held - Vehicle (not Employee). The proxy device will be usually held by station managers. The driver will be prompted to enter vehicle number/device name in the OPT. The transaction is saved with the vehicle details as the main transaction device for billing and rules calculation, the proxy device data is saved also in each transaction for monitoring purposes. The following validation options are available: • **Verify as valid Vehicle no., and authorize for fueling (by proxy):** Verifies that the vehicle number exists in the vehicle list of the system. • **Verify as valid Device name, and authorize for fueling (by proxy):** Verifies that the device name exists in the system. • **Save entry as is without verification (and authorize current device):** Does not verify the data entered with the lists. In this case the proxy device remains as the main transaction device and the entered number is saved in the vehicle number field in the transaction record. • **Verify entry as Vehicle no. of current device (and authorize):** Verifies the vehicle number burned on the proxy device. This option does not record the refueling vehicle number. In addition, you can set the number of retries: • **Retries**: Sets the number of retries allowed. • **Block if all retries fail:** If selected, the device is not authorized to refuel after the driver exceeds the number of retries.
Prompt for Job Code	This returns the Job Code used for authorization (refer to the *MDE-5414 SiteOmat360 Setup and Maintenance Manual*)

6.4.1.5 Format Tab

The Format tab enables you to set the device format properties (see Figure 62).

Figure 62: Device Properties - Format Tab



To configure the Format tab, proceed as follows:

1 Enter the **Card number**. Proceed with the following:

a In the **Card Number** field, enter the number manually.

b Click **Acquire** to read the last card number that was presented to OPT and was not identified, and assign it to the device.

*Note: In cases where the **Card number automatically generated flag** is checked (refer MDE-5414 SiteOmat360 Setup and Maintenance Manual) and the device in use is vehicle mounted, leave this field empty. The number is entered automatically after the first refuel.*

2 Select the **Hardware Type** (see Table 18 on page 83). The contents of the list changes according to the device type selected in the General tab (for example hand-held does not display Fuel Point PLUS Vehicle ID units). Similarly, the Manual entry type can be selected, allowing the drivers to enter the card number manually in the OPT.

3 (Optional) Set the **Number of card numbers:** This field specifies the number of devices mounted on a truck. It is relevant for trucks equipped with multiple tanks: more than a single tank (fuel or others) and more than a single ID unit. Up to five different devices per vehicle can be defined. Numbers are entered automatically by the system after the first refuel. Different numbers are displayed in the card number field separated by semicolons. This option is available only if the update stations with not burned devices and Card number automatically generated options in the Setup screen - General tab are selected (refer to the *MDE-5414 SiteOmat360 Setup and Maintenance Manual*).

*Note: The **Vehicle ID**, **Fuel Code**, **Expiration Date**, and **Device Format** fields are currently not available.*

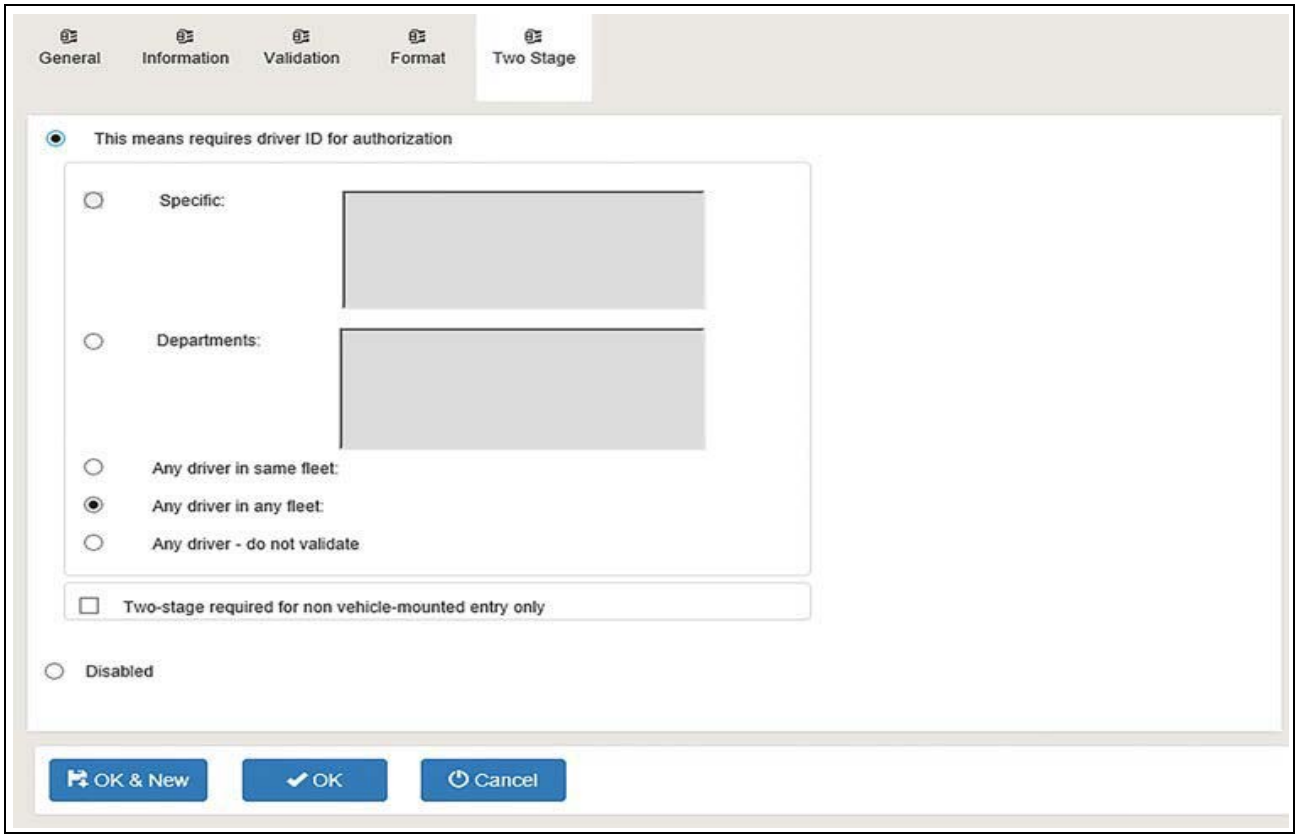
Table 18: Available Hardware Types

Device Type	Hardware Type	Description
Vehicle-mounted	Fuel Ring/FP HS	Fuel Point PLUS Vehicle ID unit.
	TRU/VIU3/VIU35/ 35E/ 35NT/VIU4/ VIU45	Legacy vehicle ID & Data units.
	FP+DP/FPHS +DP	Fuel Point PLUS Vehicle ID + Vehicle Data units.
	DP only	Fuel Point PLUS Vehicle Data unit.
Hand-held: Vehicle/Credit Customer/Cash Customer	Fuel Ring	Fuel Point PLUS Hand-held ID unit.
	Fuel Card	Fuel card that includes vehicle or driver details.
	Gasboy Key	Also known as a fleet key or data key, and is used for vehicle or driver identification.
	Manual Entry	Uses the driver's manual card number input in the OPT as authorization device.
	Electronic Key	Legacy Driver/Vehicle ID unit.
	Tag	Contactless tag used for driver/vehicle identification.
Hand-held: Driver/Authorized User	Fuel Card	Fuel card that includes vehicle or driver details.
	Gasboy Key	Also known as a fleet key or data key, and is used for vehicle or driver identification.
	Electronic Key	Legacy Driver/Vehicle ID unit.
	Tag	Contactless tag used for driver/vehicle identification.
Hand-held: Employee	Tag	Contactless tag used for attendants.
	Authorizer	Attendant or station manager authorization device, that can authorize any vehicle. In full service stations, this tag opens the attendant menu in the OPT.
	Master Authorizer	Legacy Authorization unit.
	Fuel Ring	Fuel Point PLUS Hand-held ID unit.

6.4.1.6 Two Stage Tab

The Format tab enables you to link the vehicle device to a specific driver or a group of drivers (see Figure 63). If selected, in addition to Vehicle ID, the driver will be prompted to present his Driver ID tag or manually enter Driver ID through the OPT.

Figure 63: Device Properties - Two-Stage Tab



Notes: 1) This tab is only active when defining a vehicle device.
2) A device must be saved before setting the two-stage authorization feature.
3) It is possible to keep the authorization settings but disable the functionality by using the disabled radio button.

To configure the Two Stage tab, proceed as follows:

1 Select the **This means requires driver ID for authorization** check box.

2 Select the driver(s) linked to this vehicle device. Proceed with the following:
- Select **Specific** and select a driver from the list next to it.
- Select **Departments** and select a department from the list next to it.
- Select **Any driver in the same fleet** to allow all the drivers in the fleet to refuel this vehicle.
- Select **Any driver in any fleet** to allow all the drivers defined in the system to refuel this vehicle.
- Select **Any driver - do not validate** to allow all drivers to refuel the vehicle.

3 (Optional) Select **Two-stage required for non-vehicle mounted entry only** to prompt for driver ID only if the vehicle-mounted device was not identified and the transaction was initiated from the OPT (using the station proxy device, manual entry, or Driver ID tag).

6.4.2 Device Features

The Device Management page includes an array of additional features, accessed by clicking on the different buttons located at the bottom of the page.

6.4.2.1 Activating/Blocking a Device

A device can be either:
- **Active**: Allowed to refuel (within the defined limits)
- **Blocked**: Denied automatic refueling

To toggle between Active and Blocked status of a device, proceed as follows:

1 Click any row in the devices grid to select the device to be changed.

2 Click **Active/Block**. A confirmation message is displayed.

3 Click **OK.**

The status of the selected device is changed.

6.4.2.2 Modifying a Device

To modify the attributes of an already defined device, proceed as follows:

1 Click any row in the Devices grid to select the item to be modified.

2 Click **Properties** to open the Device Properties dialog box as described above.

3 Edit the required fields.

4 Click **OK** to save changes and close the dialog box, or **Cancel** to close the dialog box without saving the changes.
Note: Modifying the device's fleet is not allowed.

6.4.2.3 Deleting a Device

To delete an existing device, proceed as follows:

1 Click any row in the Devices grid to select the item to be deleted.

2 Click **Delete**. A confirmation message is displayed.

3 Click **OK.**

6.4.2.4 Printing the Devices Report

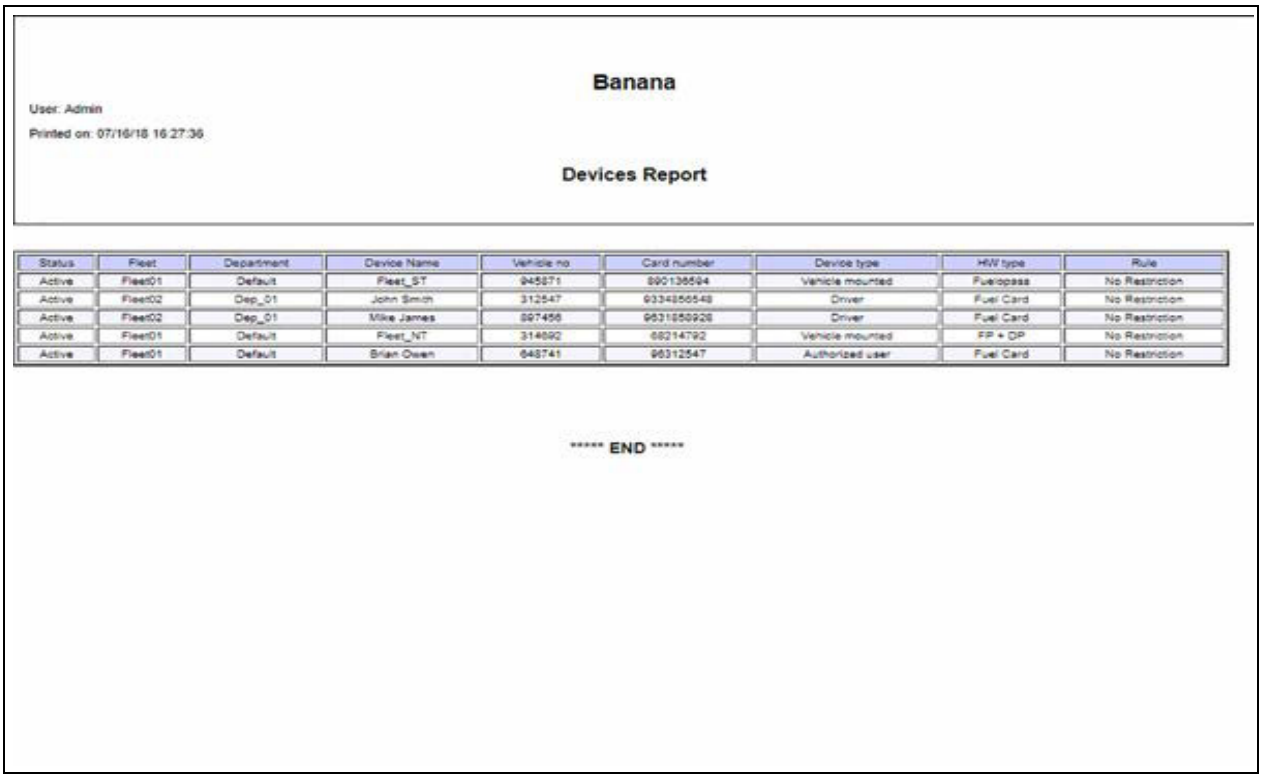
This feature enables you to print the devices data displayed on the grid.

To generate this report, proceed as follows:

1 (Optional) Filter the grid using the drop-down lists in the headers.

2 Click **Print**. A preview of the report opens (see Figure 64).

Figure 64: Devices Report - Example



3 The Print dialog box opens enabling you to send the report to a printer.

6.4.2.5.Exporting Devices Data

To export your devices data from the SiteOmat360 database, click **Export**. The data is written into a .CSV file.

6.4.2.6 Importing Fleets Data

To import your devices data into the SiteOmat360 database, without needing manual data entry, click **Import**, and use the browsing dialog box to search for a .CSV file.

All of the entities can be imported from a single file or from separate files for each entity. If so, the files should be imported according to priorities: model, fleets, department, and devices.

Lines that starts with two slashes (//) will be ignored by the system.

The first three fields in all entities should be as follows:

- Action - The type of action intended on the line in the list: R - Replace, A - Add, D - Delete.
- Record Type - Type of entity, the type need to be precise.
- Name - Device Name (Information Screen).

Notes: 1) The first line in the imported file is ignored, as it is assumed to be a header.

2) In cases where errors were found in the format of the imported file, a dialog box opens, specifying the errors.

6.4.2.7 Clearing Filters

To clear the previously defined filters, click **Clear Filters**.

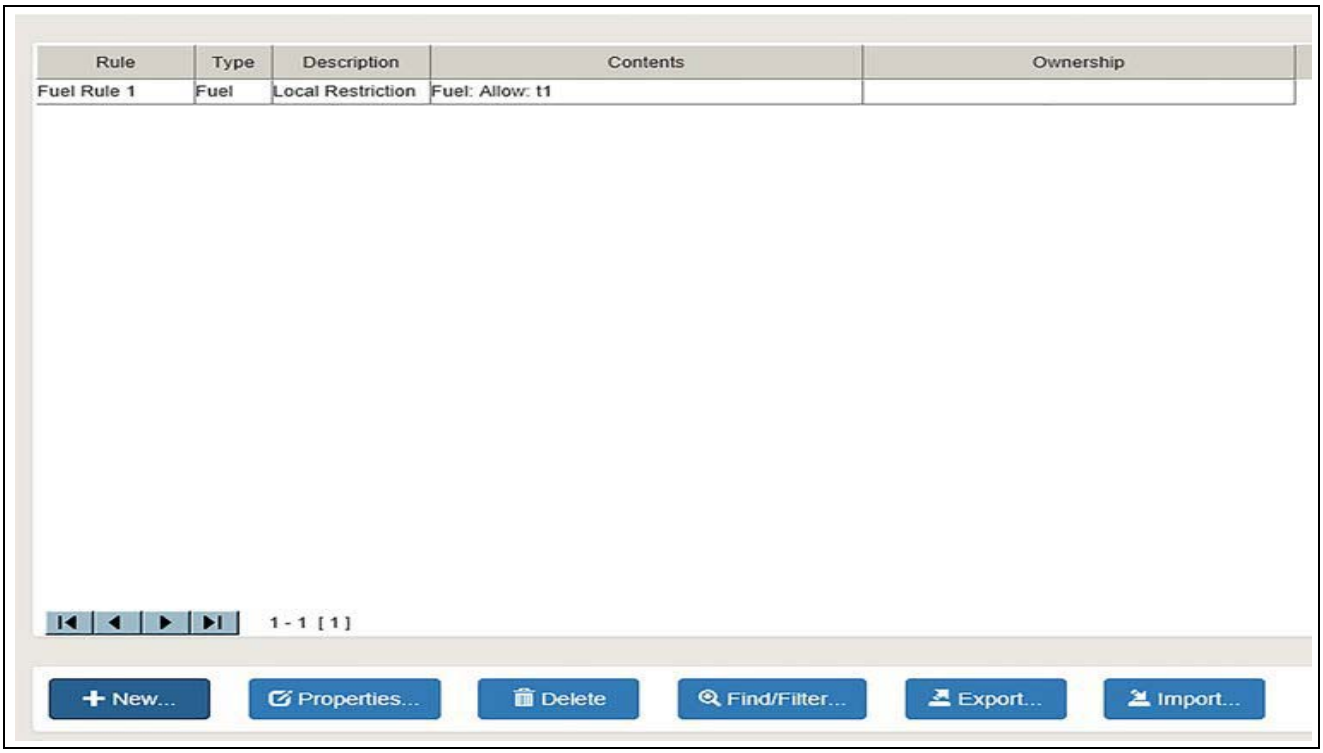
The filters are reset, and the grid is refreshed displaying all of the devices.

6.5 Rule

The rules defined in this section are individual units, and are not applied directly to a fleet/department/vehicle. Instead, once the rules are defined, you may create group rules that consist of a number of rules (see 6.6 Group Rules on page 96). These group rules are then applied to the fleet/department/vehicle to limit refueling.

To access the Rules page, click **Local Mgmt** in the navigation bar and then select **Rules**.

Figure 65: Rules Page



The Rules page consists of a grid listing the existing rules, and several action buttons. Each row in the grid describes the rule's name, type, description, and contents.

6.5.1 Rule Types

The following rule types are available:

a Time: Defines the days and times (for each day), during which the vehicle may refuel.

b Limit: Defines fuel limits per day/week/month, set in money/volume for the device.

c Visit: Specifies the maximum number of visits to fuel stations allowed for the vehicle per day/week/month/year.

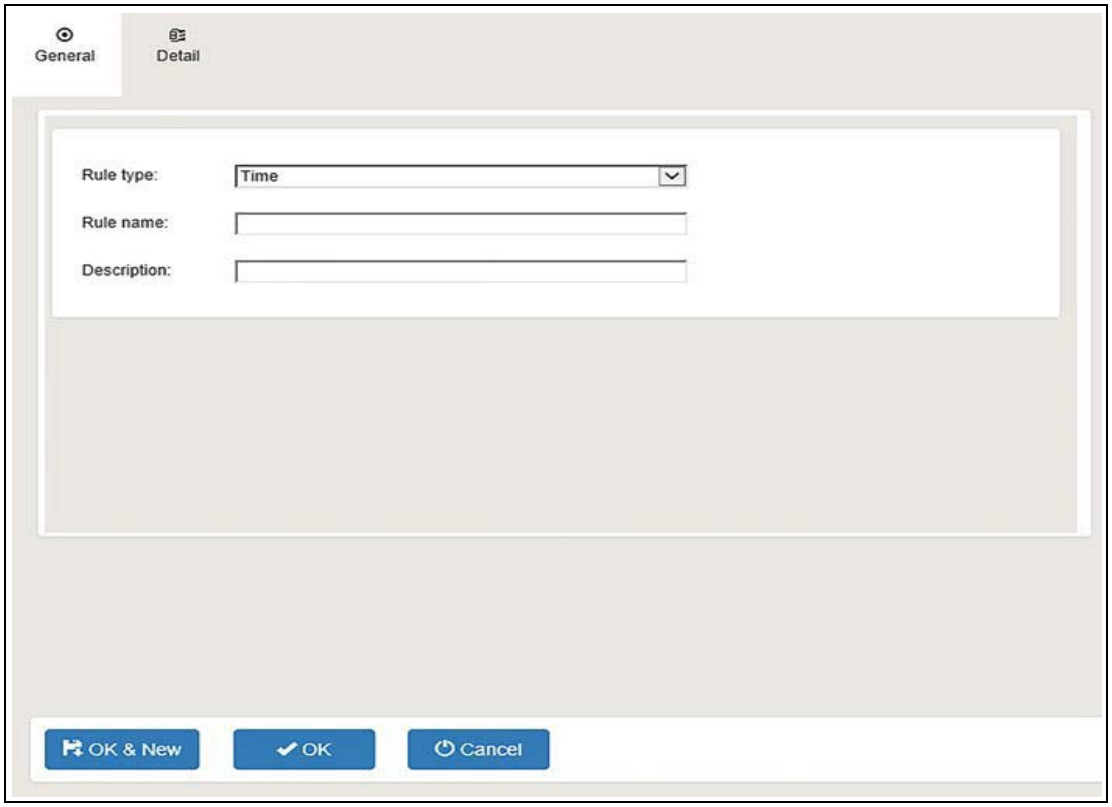
d Fuel: Limits the refueling vehicle to certain types of fuel.

6.5.2 Adding a New Rule

To define a new rule, proceed as follows:

1 Click **New**. The Rule Properties dialog box opens (see Figure 66). The New Rule window consists of two tabs: **General** and **Detail**. While the General tab is fixed, the contents of the Detail tab change depending upon the selected rule type.

Figure 66: Rule Properties Dialog Box



2 From the General tab, select the **Rule type** from the drop-down list.

3 Enter a Rule name and Description for the rule.

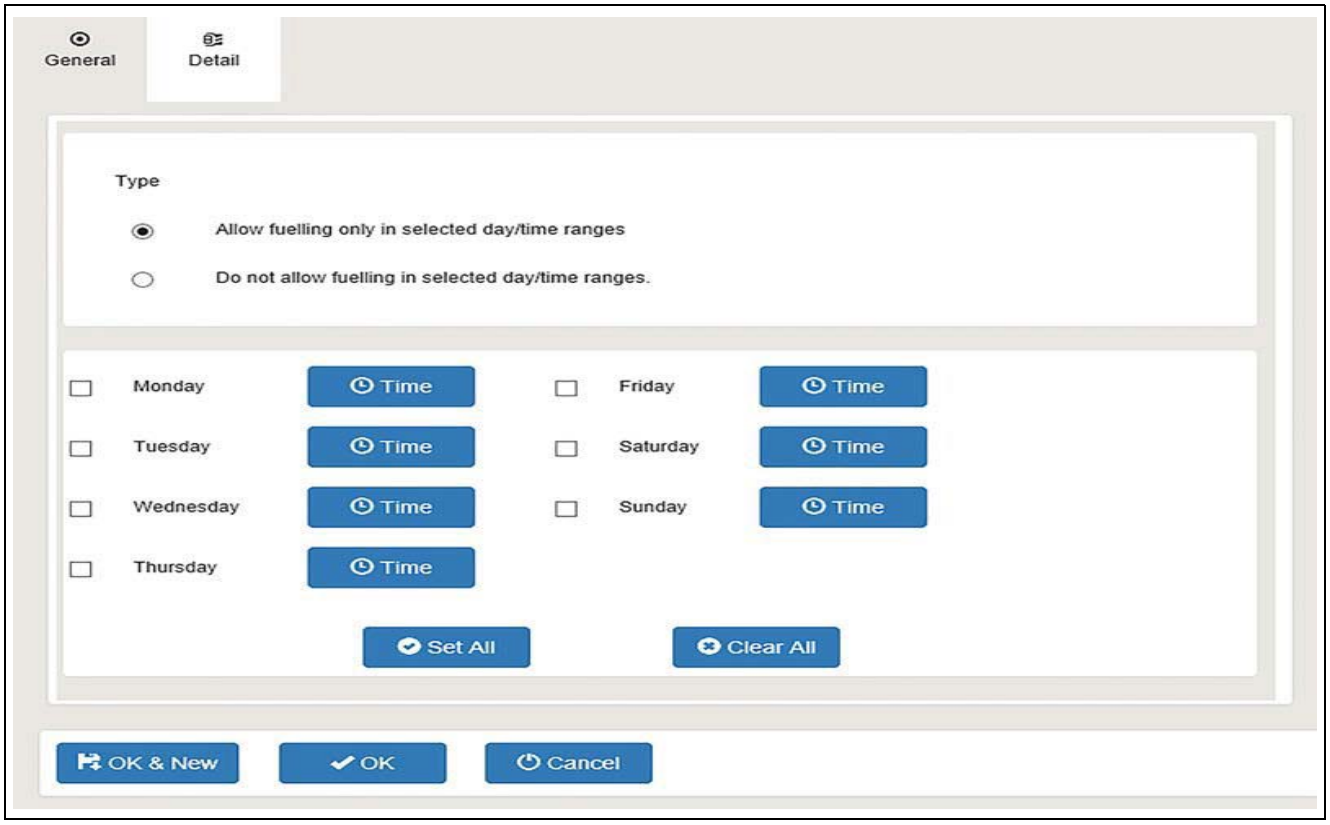
4 Select the **Detail** tab. The Detail tab for each rule type is described on page 90.

6.5.2.1 Time Range Rule

The Time Range rule is meant to limit refueling of a vehicle to specific days and time periods during the day. By applying this rule to a vehicle, it can only refuel in the specified times.

If the selected rule type in the Rule Properties screen was Time Range, the Detail tab displays the following fields (see Figure 67):

Figure 67: Time Range Rule Detail Tab



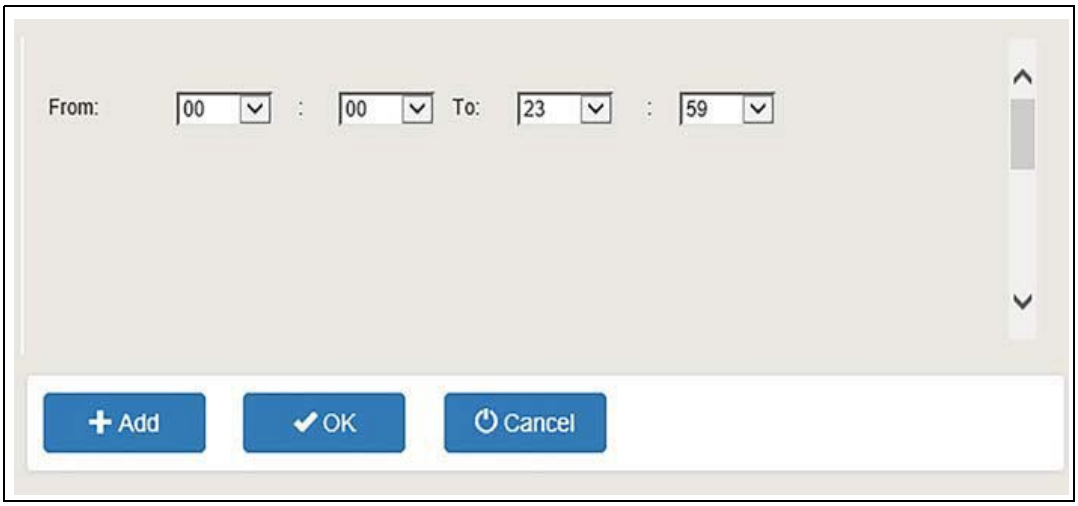
To define a Time Range rule, proceed as follows:

1 Select whether to allow or disallow refueling in the time ranges to be defined.

2 Select the check boxes next to the days in which refueling is to be allowed/disallowed, or click **Set All** to mark all days.

3 By default, selecting a certain day allows/disallows refueling during the entire day, from 00:00 to 23:59. To change the time within a certain day, click **Time** next to the day. The Rule Time Range dialog box opens (see Figure 68).

Figure 68: Rule Time Range Dialog Box



4 Define the desired time range (from HH:MM to HH:MM).

5 Click **Add** to define another time range. Clicking **Delete** button next to a time range row deletes that time range.

6 Once you've defined all time ranges, click **OK** to save changes and close the window.

7 Repeat steps 3 to 6 for all of the days in which the time ranges are to be defined.

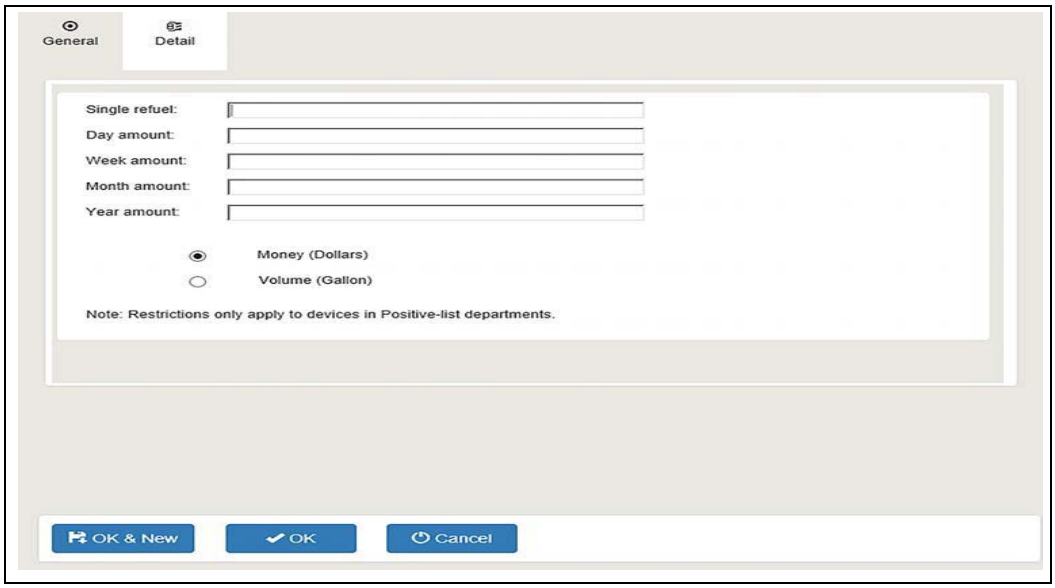
8 Click **OK** to save changes and close the window.

6.5.2.2 Limits Rule

The Limits rule defines fuel limits per a single refuel or per day/week/month, set in money or volume.

If the selected rule type in the Rule Properties screen was Limit, the Detail tab displays the following (see Figure 69):

Figure 69: Limits Rule Detail Tab



Note: The limits per day/week/month/year can only be applied to departments classified as positive lists. The reason is that a negative list restricts the devices associated to it ad-hoc, and does not reference any information, as the amount of credit used, regarding the devices.

To define a Limits rule, proceed as follows:

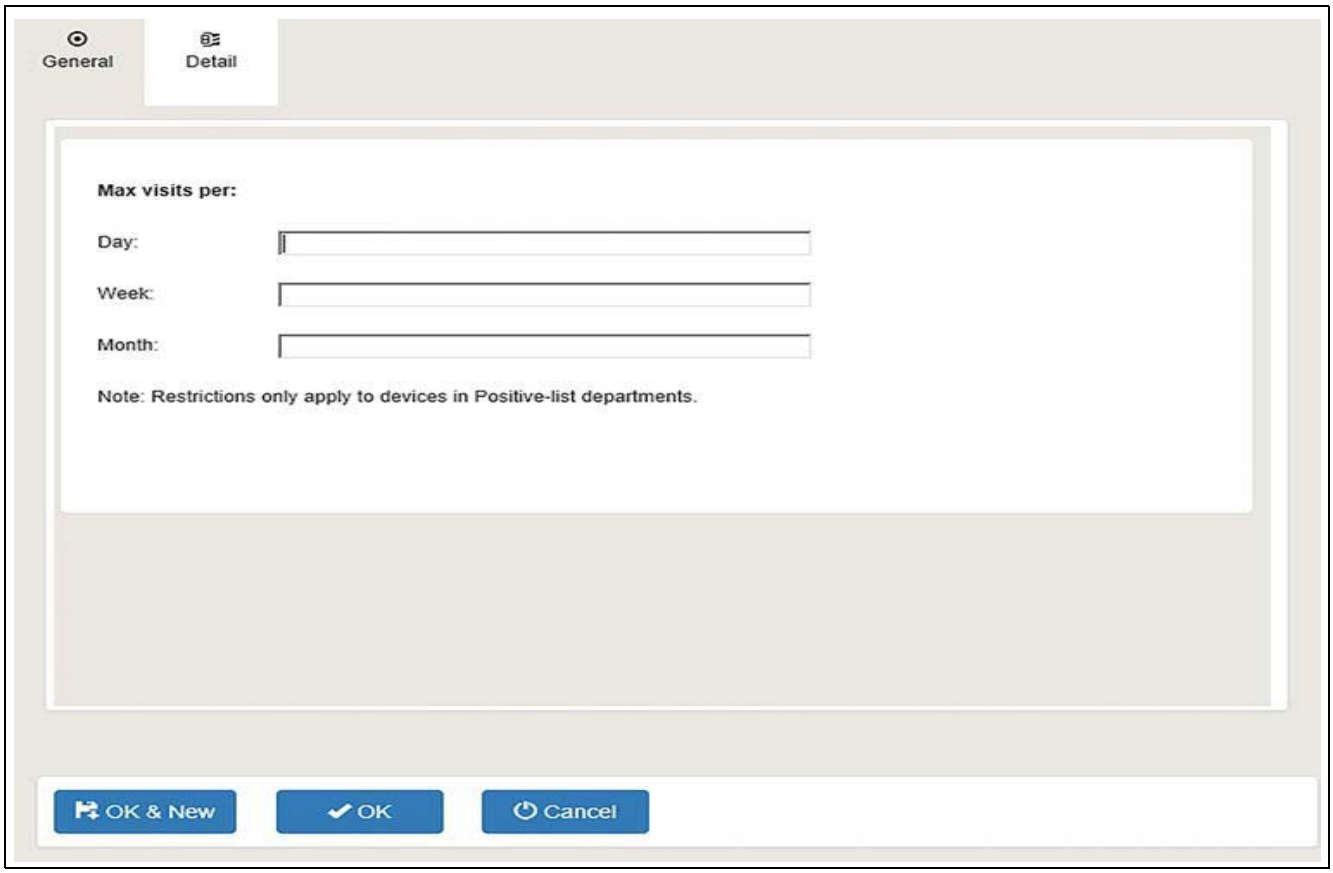
1. Select whether the limits to be defined refer to Money or to fuel Volume**.**
2. In the Single refuel field, enter a limit applied per single refuel.
3. In the Day amount field, enter a limit applied per day.
4. In the Week amount field, enter a limit applied per week.
5. In the Month amount field, enter a limit applied per month.
6. In the Year amount field, enter a limit applied per year (starting from January 1st, unless otherwise specified in FHO).
   Note: There is no need to enter limits in all of the fields. It depends on the kind of limit to be applied. However, verify that the limits are entered in a logical way (e.g. the day limit should be less than the week limit).
7. Click **OK** to save changes and close the window

6.5.2.3 Visits Rule

The Visits rule is meant to limit a vehicle refuel in a given period of time. For example, a vehicle may be limited to refueling twice a day at maximum.

If the selected rule type in the Rule Properties screen was Visits, the Detail tab displays the following (see Figure 70):

Figure 70: Visits Rule Detail Tab



To define a Visits rule, proceed as follows:

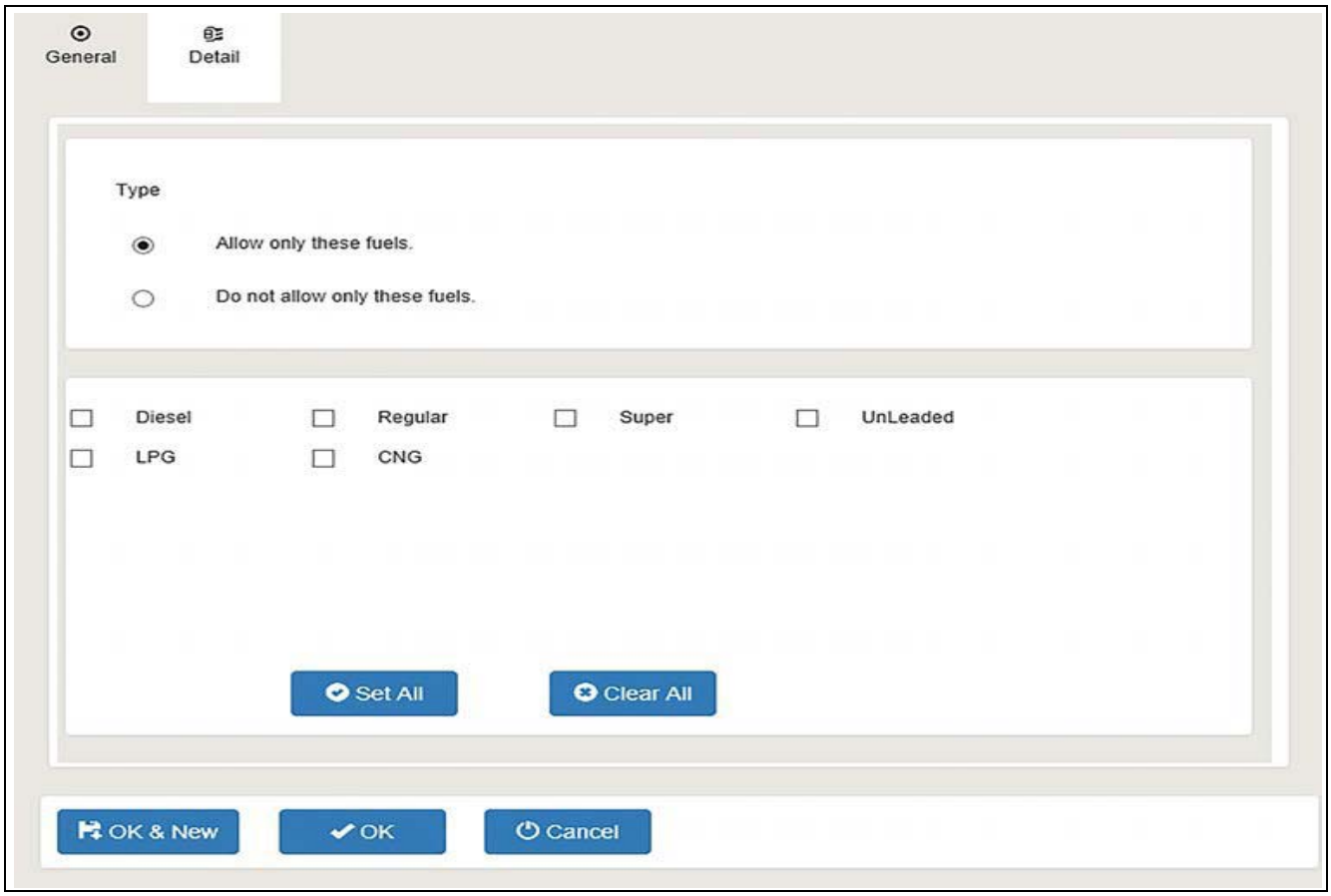
1. In the Day field, enter the maximum Visits allowed per day.
2. In the Week field, enter the maximum Visits allowed per week.
3. In the Month field, enter the maximum Visits allowed per month.
4. Click **OK** to apply changes and close the window.
   Note: There is no need to enter limits in all of the fields. It depends on the kind of limit to be applied. However, verify that the limits are entered in a logical way (e.g. the day limit should be less than the week limit). Error messages may be displayed when entering incorrect data.

6.5.2.4 Fuel Rule

The Fuel rule restricts the refueling vehicle to certain types of fuel. This is a helpful rule to prevent drivers from refueling with unsuitable fuel types.

If the selected rule type in the Rule Properties screen was Fuel, the Detail tab displays the following (see Figure 71):

Figure 71: Fuel Rule Detail Tab



To define a Fuel rule, proceed as follows:

1. Select whether to allow or disallow the specified fuel types.
2. The lower section includes all of the fuel types defined in the SiteOmat360 database. Click the check boxes adjacent to the fuel types which are to be allowed/disallowed, or click **Set All** to mark all check boxes.
3. Click **OK** to apply changes and close the window.

6.5.3 Modifying a Rule

To modify the attributes of an already defined rule, proceed as follows

1. Click any row in the **Rules** grid to select the item to be modified.
2. Click **Properties** to open the Rule Properties dialog box described above.
3. Edit the required fields.
4. Click **OK** to save changes and close the dialog box, or **Cancel** to close the dialog box without saving the changes.

6.5.4 Deleting a Rule

To delete an existing rule, proceed as follows:

1. Click any row in the Rules grid to select the item to be deleted.
2. Click **Delete**. A confirmation message is displayed.
3. Click **OK.**

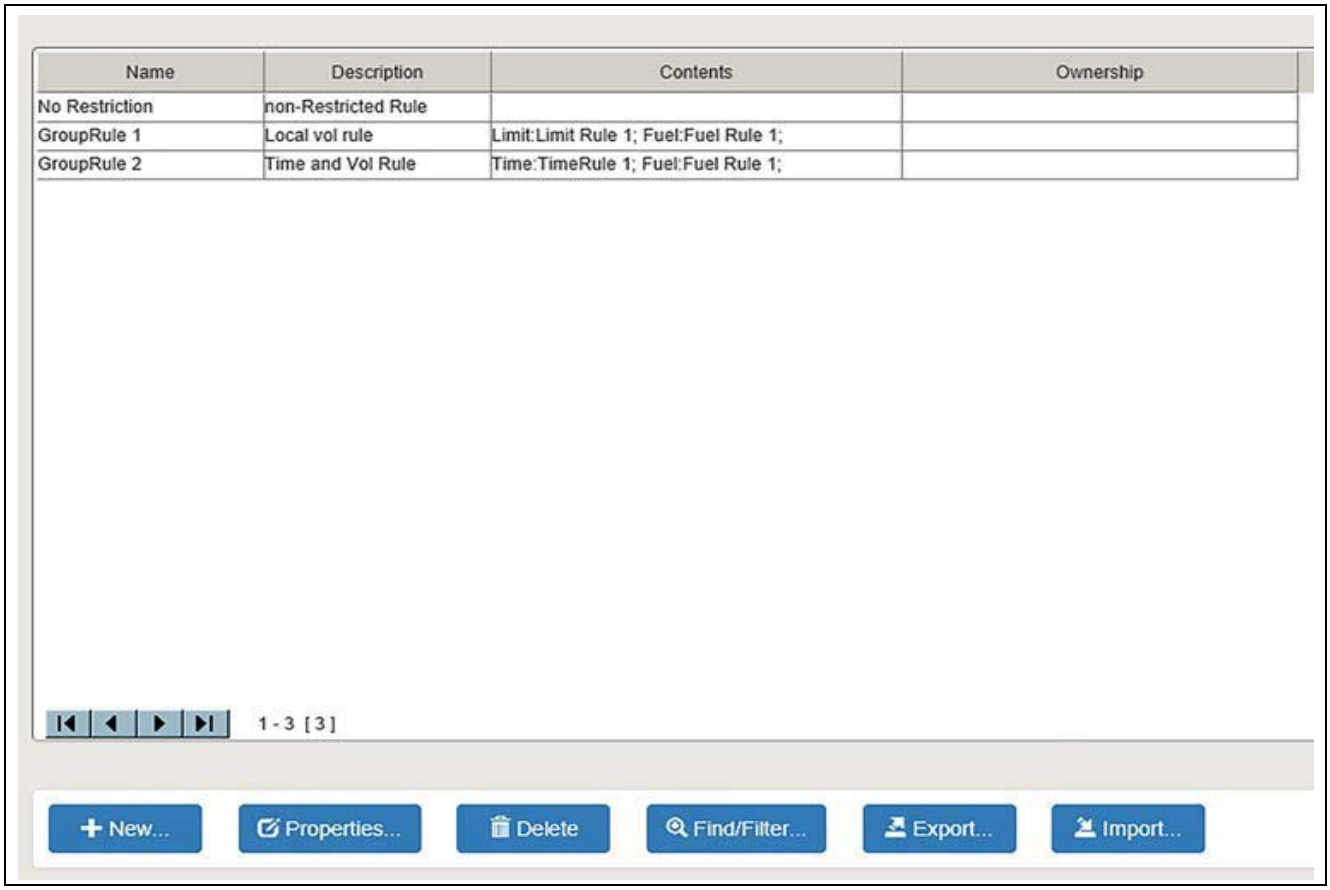
Notes: 1) The type of a rule may be changed if it is not part of any group rule. Whenever it is done, you will be prompted.
2) A rule may not be deleted while being part of a group rule.
3) Any part of a rule may be changed (including its name), and the group rules that include it automatically reflect the change.

6.6 Group Rules

The Group Rules gather combinations of previously defined rules, and are applied on the fleet/department/vehicle to limit refueling.

To access the Group Rules page, click **Local Mgmt** in the navigation bar and then select the **Group Rules** (see Figure 72).

Figure 72: Group Rules Page



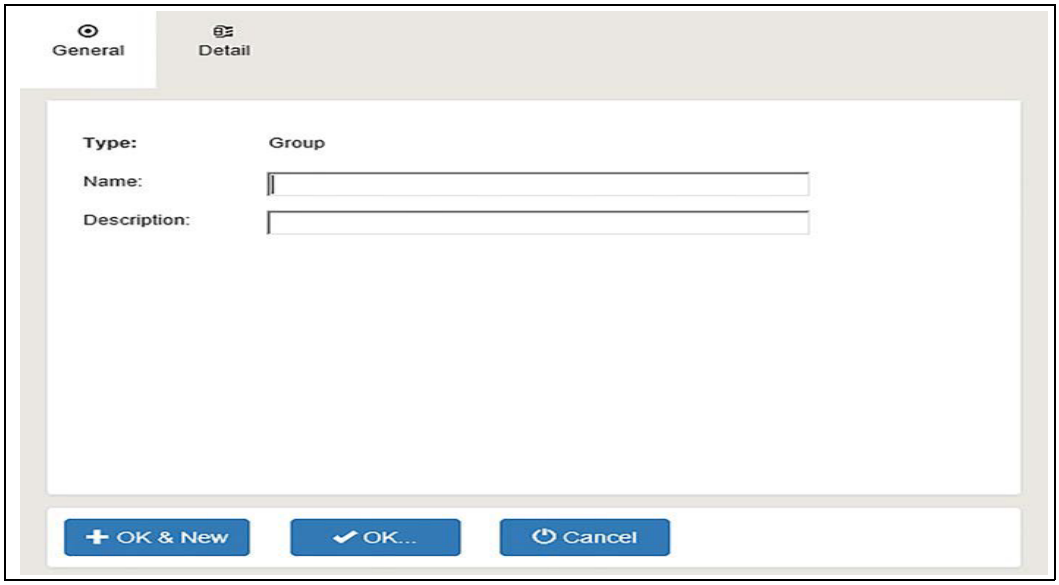
The Group Rules page consists of a grid listing the existing rules, and several action buttons. Each row in the grid describes a group rules name, type, description, and the contents of the group rule.

6.6.1 Adding a New Rule

To define a new group rule, proceed as follows:

1 Click **New** on the Group Rules page. The Rule Properties dialog box opens (see Figure 73). The New Rule window consists of two tabs: **General** and **Detail**. While the General tab is fixed, the contents of the Detail tab change depending upon the selected rule type.

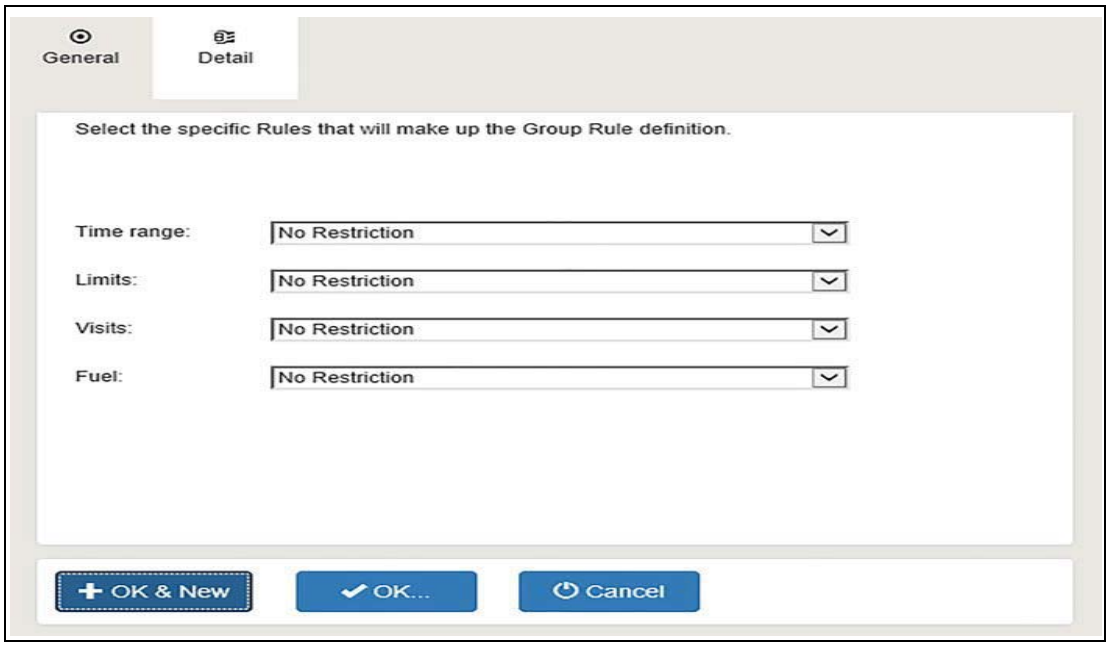
Figure 73: Group Rule Properties - General Tab



2 Enter a descriptive name and a description for the rule.

3 Select the **Detail** tab (see Figure 74).

Figure 74: Group Rule Properties - Detail Tab



4 Select the rules to be included in the Group Rule out of the defined rules (one type of each rule maximum).
Note: There is no need to enter limits in all of the fields, as it depends on the kind of limit to be applied. However, at least one rule must be defined.

5 Click **OK** to save changes and close the window.

6.6.2 Modifying a Group Rule

To modify the attributes of an already defined group rule, proceed as follows:

1 Click any row in the Group Rules grid to select the item to be modified.

2 Click **Properties** to open the Group Rule Properties dialog box described above.

3 Edit the required fields.

4 Click **OK** to save changes and close the dialog box, or **Cancel** to close the dialog box without saving the changes.

6.6.3 Deleting a Group Rule

To delete an existing group rule, proceed as follows:

1 Click any row in the Group Rules grid to select the item to be deleted.

2 Click **Delete**. A confirmation message is displayed.

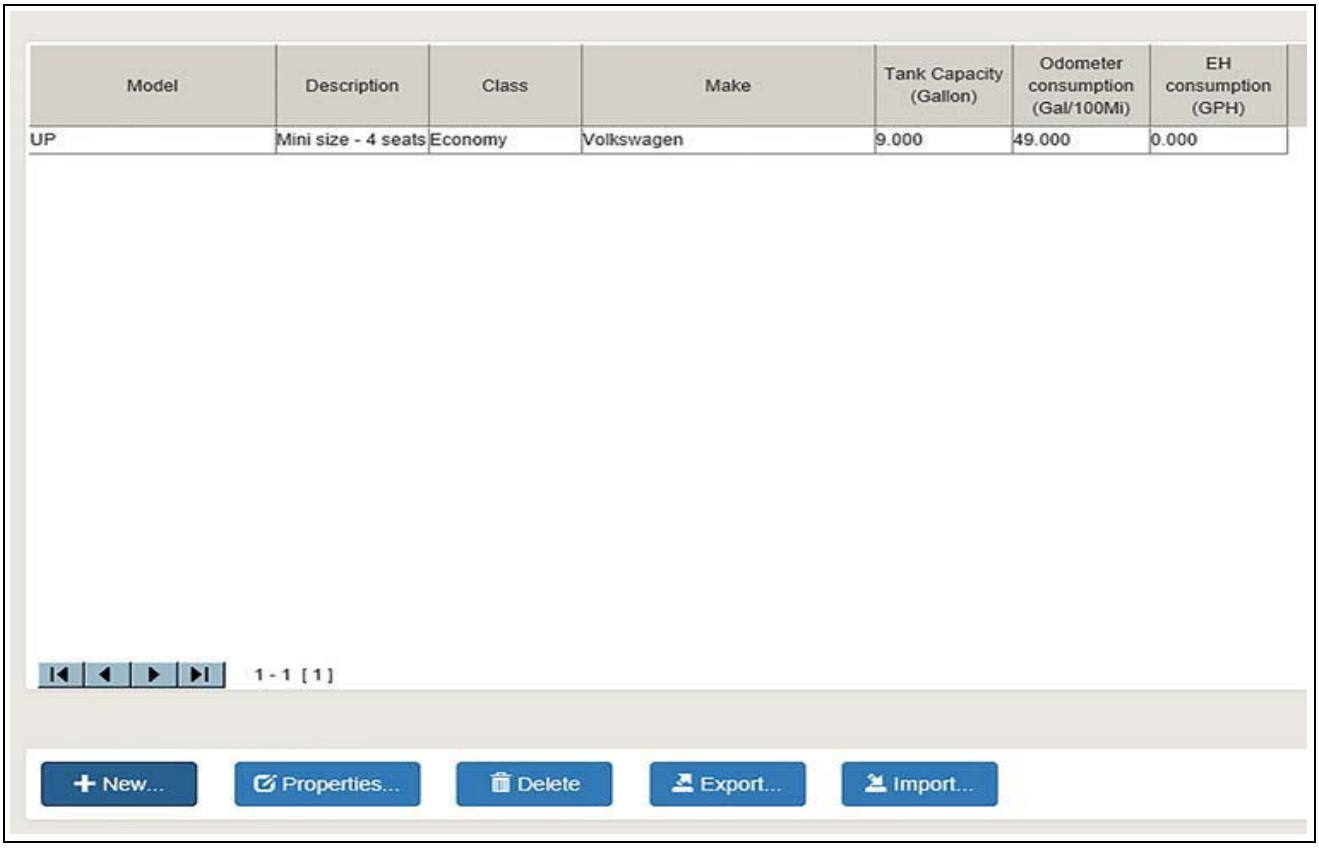
3 Click **OK.**
Note: A Group Rule may not be deleted while referenced by a fleet, department, or a device (vehicle).

6.7.Models

Defining vehicle models is not a mandatory stage in the vehicle management process, yet it is meant to ease the task of defining the vehicles at a later stage. When defining vehicle models, the type, manufacturer, tank capacity, and standard fuel consumption should be defined. Then when defining a vehicle, selecting its model from a list automatically fills in this information.

To access the Vehicle Models page, click **Local Mgmt** in the navigation bar and then select the **Models** (see Figure 75).

Figure 75: Models Screen



Note: The information in the figure above is for example purposes only, and does not reflect the actual information of the specified vehicle models.

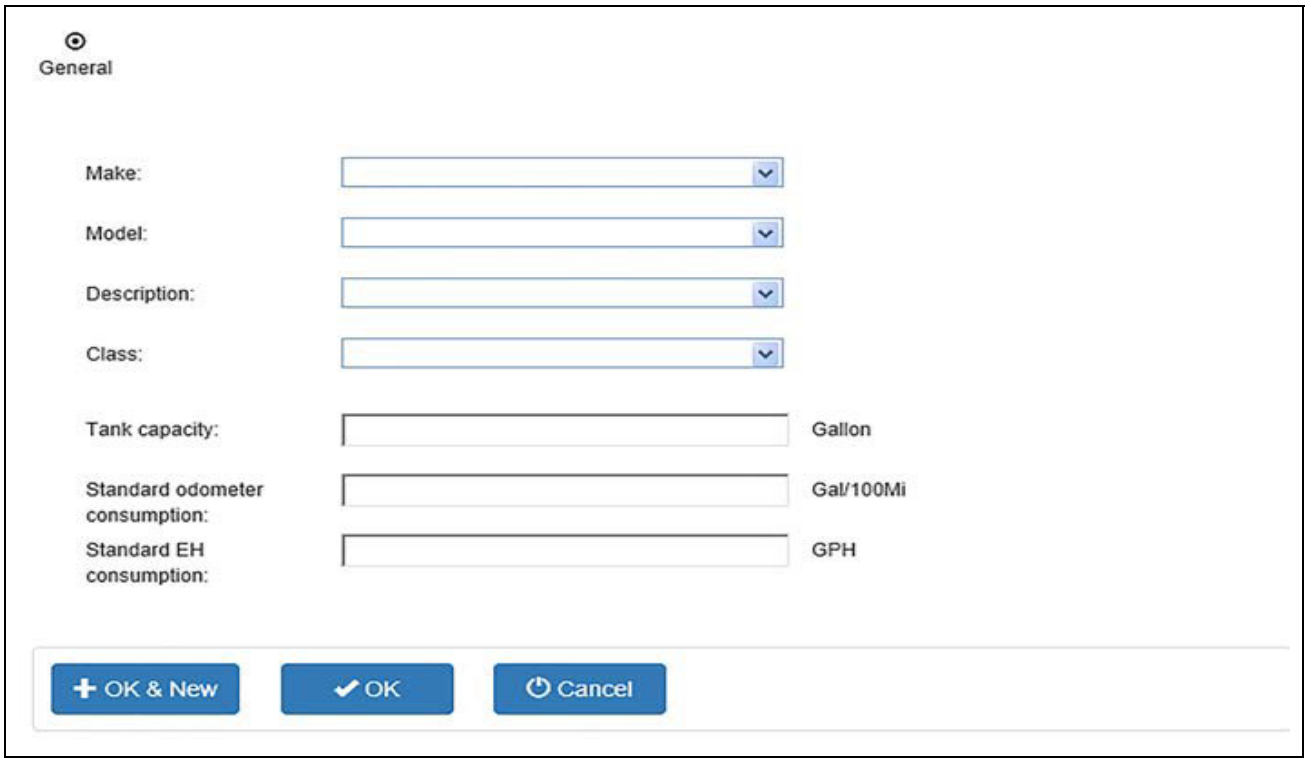
6.7.1 Adding a New Model

Unless a database for models was imported, the models grid is empty.

To define a new vehicle model, proceed as follows:

1 Click **New**. The Model Properties dialog box opens (see Figure 76, Table 19).

Figure 76: Model Properties Dialog Box



2 Fill in the model characteristics (see Table 19). All fields are mandatory.

3 Proceed with the following:
- Click **OK & New** to save the definition and define another model.
- Click **OK** to save changes and close the dialog box.
- Click **Cancel** to close the dialog box without saving the changes.

Table 19: Model Properties Fields

Field Name	Description
Make	Vehicles manufacturer.
Model	Vehicles model.
Description	General description.
Class	Additional description.
Tank Capacity	Vehicles tank capacity.
Standard Odometer Consumption	Vehicles average fuel consumption.
Standard EH Consumption	Vehicles average fuel consumption per engine hour.

6.7.2 Modifying a Model

To modify the attributes of an already defined model, proceed as follows:

1. Click any row in the Models grid to select the item to be modified.
2. Click **Properties** to open the Model Properties dialog box described above.
3. Edit the required fields.
4. Click **OK** to save changes and close the dialog box, or click **Cancel** to close the dialog box without saving the changes.

6.7.3 Deleting a Model

To delete an existing vehicle model, proceed as follows:

1. Click any row in the Models grid to select the item to be deleted.
2. Click **Delete**. A confirmation message is displayed.
3. Click **OK.**

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7 – Events and Alarms

7.1 General

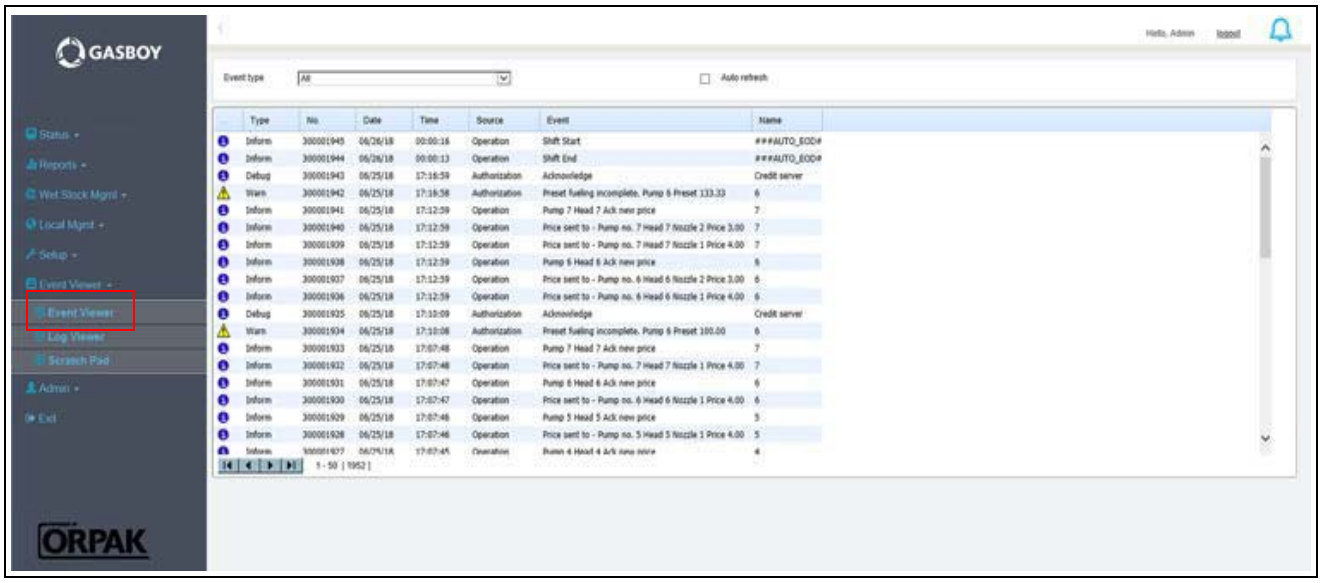
This section describes the Event Viewer feature of SiteOmat360, which enables viewing system warnings, logins, and the alarms screen.

Alarms are generated for urgent incidents that require immediate attention. Most of the alarms apply to fuel inventory (Low volume in tanks, No communication to station, etc.).

Events register more common incidents for record purposes. Most of the events apply to devices behavior and are for viewing purposes only.

To access the Event Viewer page, click **Event Viewer** in the navigation bar (see Figure 77).

Figure 77: Event Viewer Page

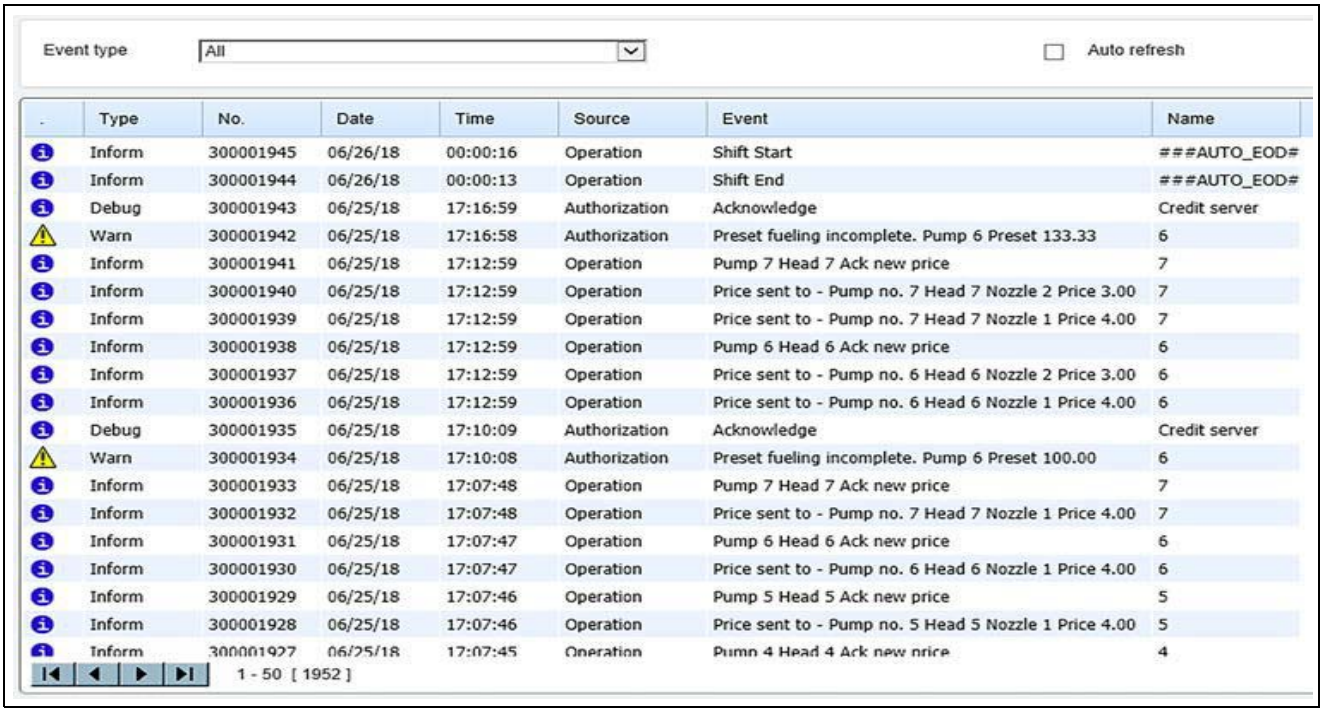


7.2 Event Viewer

The Event Viewer provides a list of system messages, warnings, and alerts.

To access the Event Viewer page, click **Event Viewer** in the navigation bar and then select **Event Viewer** (see Figure 78).

Figure 78: Event Viewer Page



The **Event Type** drop-down list enables you to narrow down the events displayed to a specific type. The predefined options available are:

- **All**: All types
- **Authorization**: Events regarding refueling authorization incidents (e.g. Fleet credit has been exceeded).
- **Communication**: Events regarding connections to devices (e.g. Communication error with device).
- **Screens**: Events regarding changes made in setup screens (e.g. Sysinit called).
- **Operation**: Events regarding the continuous operation of the system (e.g. Shift Start).
- **System**: Events regarding system errors (e.g. Service denied).

The **Auto Refresh** check box enables automatic update to include new messages.

7.3 Log Viewer

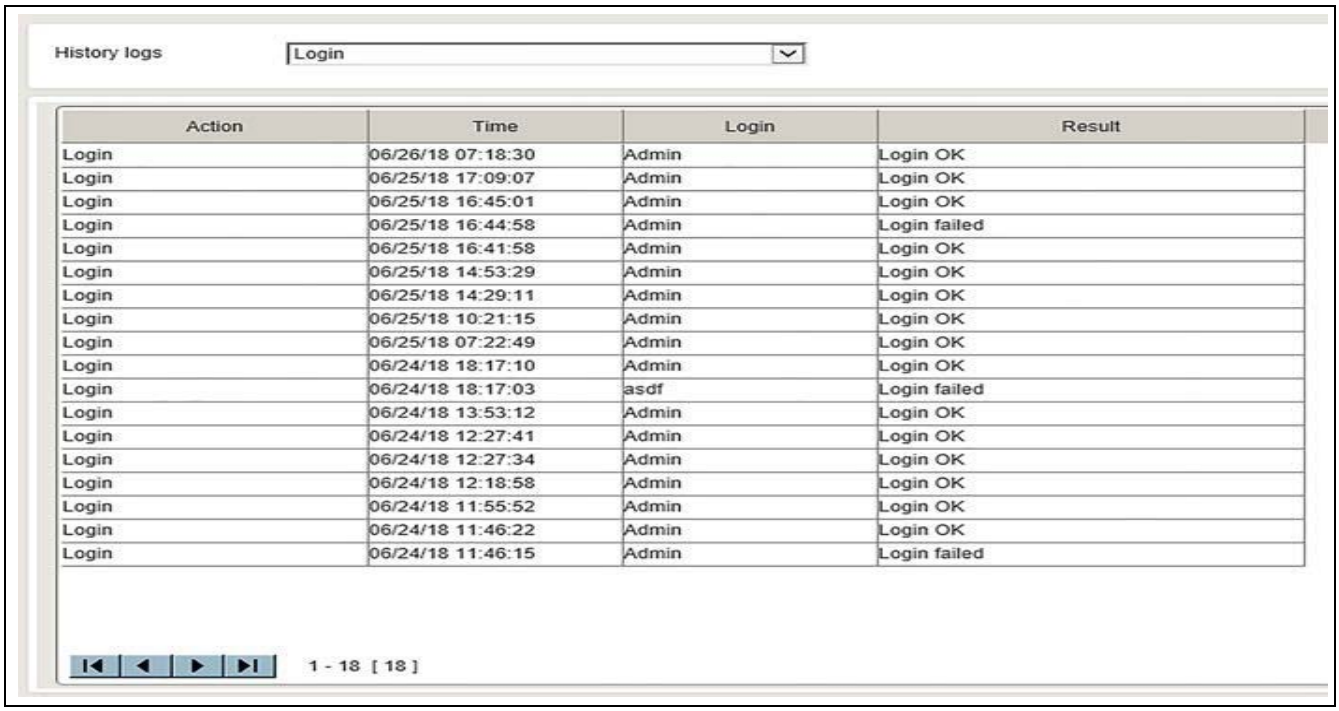
The Log Viewer page provides login and report generation logs.

To access the Log Viewer page, click **Event Viewer** in the navigation bar and then click **Log Viewer**.

The page includes the following:

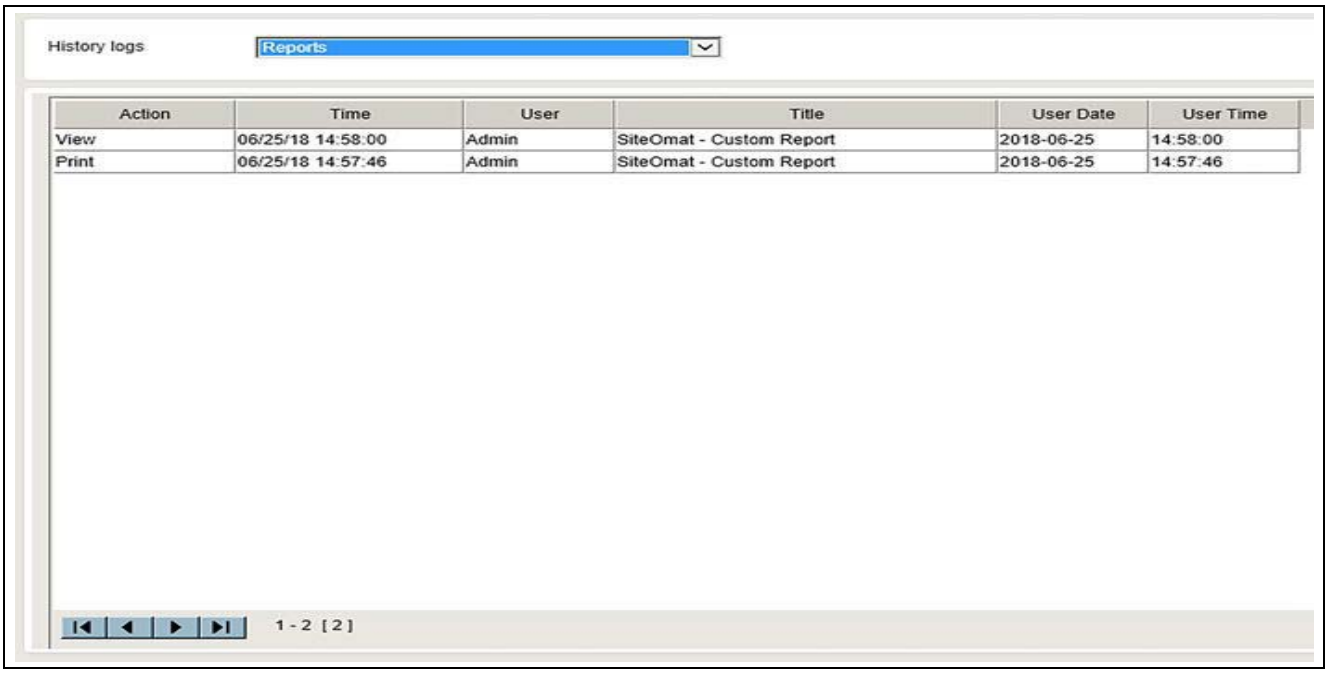
- A list of all of the successful and unsuccessful logins into the system, including the date, time, username, and result.

Figure 79: Log Viewer Page - Login



- A list of all the reports produced in the system, including the date and time, the user who produced the report, and the title of the report (see Figure 80).

Figure 80: Log Viewer Page - Reports



To toggle between the two lists, select **Login** or **Reports** in the **History Logs** drop-down list.

7.4 Scratch Pad

The Scratch Pad feature allows you to add log entries, comments, and observations.

To access the Scratch Pad page, click **Event Viewer** in the navigation bar and then click **Scratch Pad** (see Figure 81).

Figure 81: Scratch Pad Page

You may do the following:

- Click **Refresh** to update the list.
- Select a date using the date menu to view comments added on a specific date.
- Add a comment by entering free text in the text box and then click **Add**. The comment is added to the scratch pad.
- Click **Clear** to clear the comment entry text box.

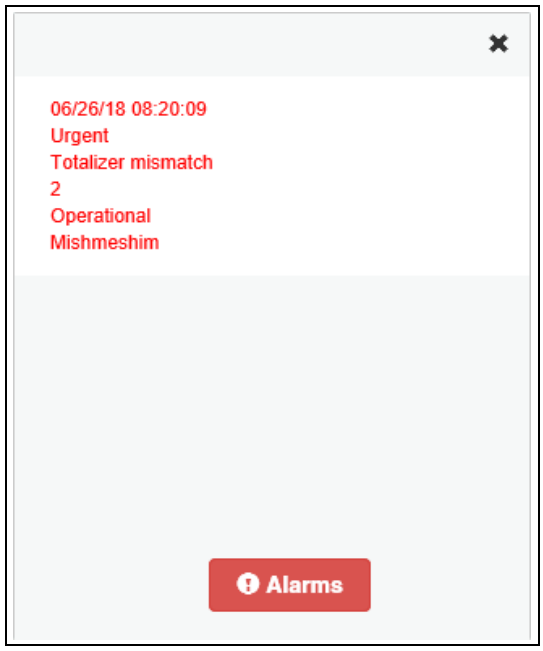
7.5 Alarms

The Alarms page enables you to view all of the alarms, and acknowledge an alarm or a group of alarms, where adding an acknowledgment is considered as closing the alarm.

To access the Alarms page, proceed as follows:

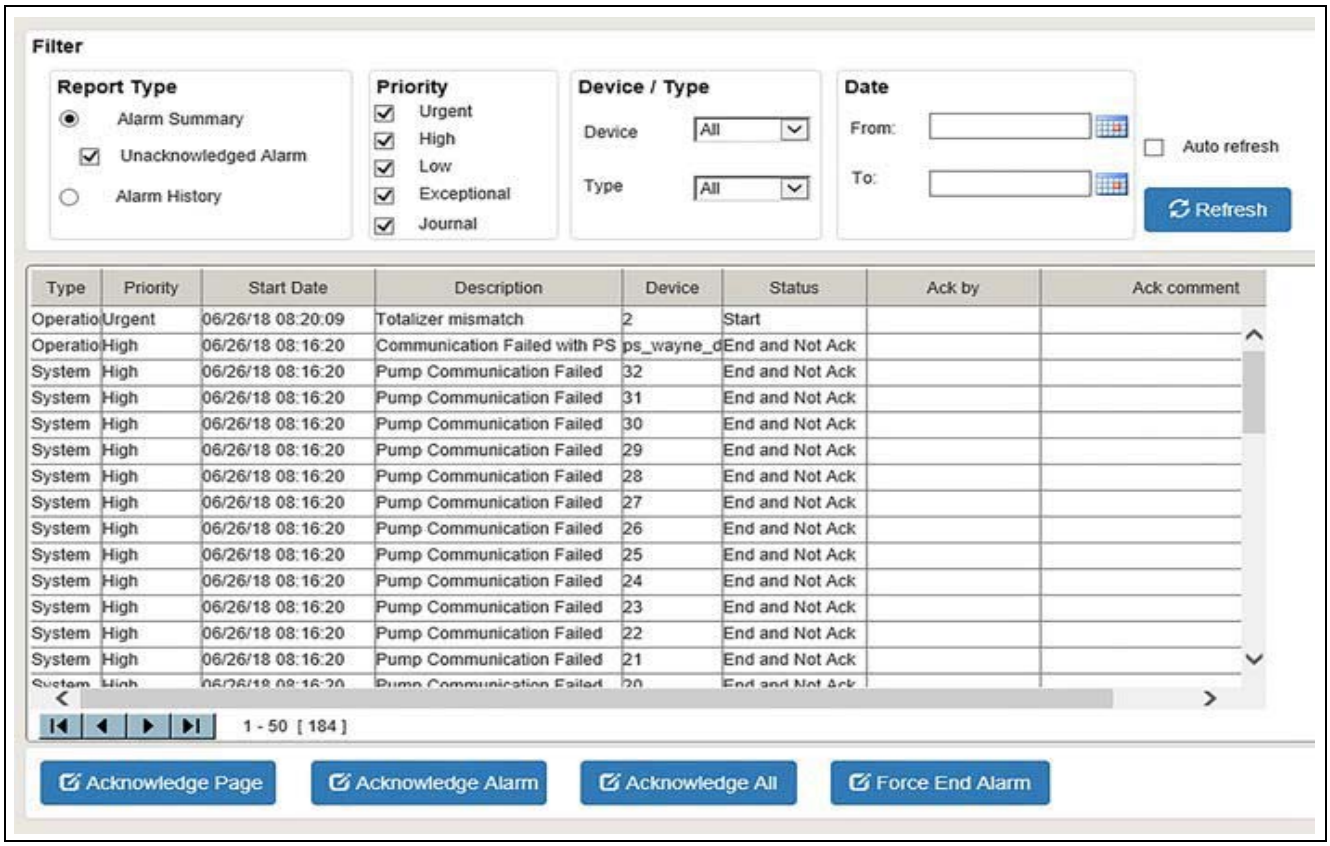
1 Click **Alarms** icon on the top-right corner. The last significant alarm is displayed (see Figure 82):

Figure 82: Last Alarm Message



2 Click **Alarms**. You will be redirected to the Alarms page (see Figure 83).

Figure 83: Alarms Page



The Alarms feature has four states:

- Started (Active)
- Started and acknowledged (Active)
- Ended and not acknowledged
- Ended (History)

Note: The system activates a single alarm per event.

7.5.1 Filtering the Alarms Grid

You may filter the alarms grid, proceed as follows:

- Select the **Alarm Summary**, to display a summary of currently active alarms. Any alarm that has not ended, or is ended but not acknowledged, is listed in the grid, or select the **Alarm History** to view alarms that are both ended and acknowledged.
- By a specific urgency level using the **Priority** check boxes.
- By device, to view alarms triggered by a specific device only, using the **Device** drop-down list.
- By type, using the **Type** drop-down list.
- By time range, to view alarms generated within the selected time range, using the **From** and **To** date menus.

You may also:

- Click **Refresh** to view the updated list.
- Select the **Auto Refresh** check box to automatically update the list and include new alarms.

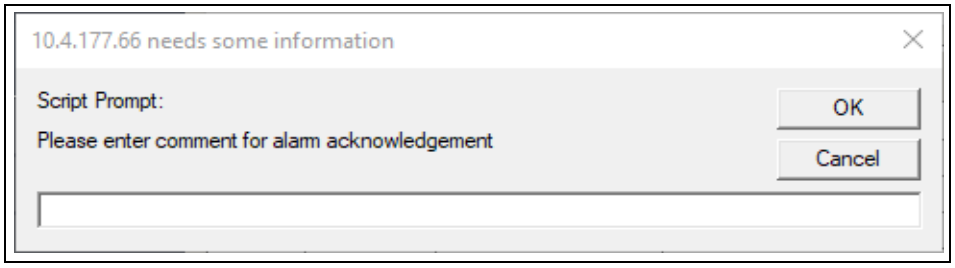
7.5.2 Acknowledging Alarms

To acknowledge alarms, complete of the following:

- Click **Acknowledge Page** to acknowledge all open alarms displayed on the screen.
- Select an alarm by clicking the row and then click **Acknowledge Alarm**.
- Click **Acknowledge All** to acknowledge all unacknowledged alarms.

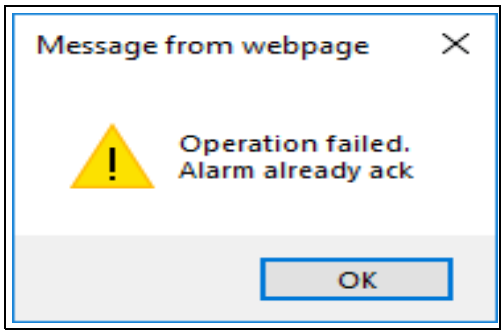
When an alarm is acknowledged, a dialog box opens enabling you to enter a free comment that explains the action (see Figure 84). The comment and the user who performed the operation are saved in the database.

Figure 84: Comment Entry Dialog Box



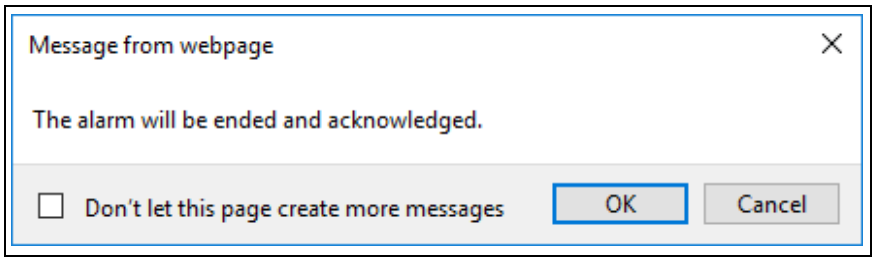
Note: You cannot acknowledge an alarm that has been already acknowledged (see Figure 85).

Figure 85: Alarm Already Acknowledged Message



Occasionally, it is required to force an alarm to end. For example, a communication error with a device that is no longer in the system. Select **Alarm** and click **Force End Alarm**. The following message is displayed (see Figure 86):

Figure 86: Alarm Ended and Acknowledged Message



Click **OK**. The alarm is acknowledged and forced to end.

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8 – Glossary

8.1 SiteOmat Glossary

Term	Description
ADMIN	Administrator
BOS	Back Office system
BSP	Board Support Package
CommVerter	LAN/232/485/422/C.L./Tokheim Communication Converter
DataPass	Vehicle Data Transceiver
EFT	Electronic Funds Transfer
FCC	Forecourt Controller
FHO	Fleet and Fuel Head Office
IP	Internet Protocol
LAN	Local Area Network
Mag	Magnetic card
MIFARE®	Industry standard for contactless and dual interface smart card schemes
MPI	Mechanical Pump Interface
MPI-C	Mechanical pumps Interface Card
OPOS	OLE for Point Of Sale (OrPT display)
OrCU	Orpak Controller unit (embedded)
OrCU 3000 (CFN Plus)	Orpak Controller unit (Controller box)
Islander PLUS	Island Controller
ICR PLUS	Orpak Island Terminal
OrPT	Orpak Outdoor Payment Terminal
FTC	Fuel Truck Controller
OrTR	Orpak Outdoor Tag Reader
PIN	Personal Identification Number
PPL	Price Per Liter
PPV	Price Per Volume
SAM	Security Application Module (security card in the VIT/UPI)
Sundries	All non-fuel products
VIU	Vehicle Identification Unit

8.2 Communication Glossary

Term	Description
Access Point	An Internet working device that seamlessly connects wired and wireless networks together.
Ad Hoc	A peer- to-peer wireless network without Access Point. A group of wireless clients consistent an independent wireless LAN.
Backbone	The core infrastructure of a network, the portion of the network that transports information from one central location to another central location. The information is then offloaded onto a local system.
BSS	Basic Service Set. An Access Point associated with several wireless stations.
DES	LANs with high level of security. A method of data encryption.
DHCP	Dynamic Host Configuration Protocol
ESS	Extended Service Set. More than one BSS can be configured as an Extended Service Set. An ESS is basically a roaming domain.
ESSID	Extended Service Set Identifier. The length of the ESSID information is between 0 and 32 octets. A zero-length identifier indicates the broadcast SSID.
Ethernet	A popular local area data communications network, originally developed by Xerox Corp., which accepts transmission from computers and terminals. Ethernet operates on 10/100 Mbps transmission rate overshielded coaxial cable or overshielded twisted pair telephone wire.
Infrastructure	An integrated wireless and wired LAN is called an infrastructure configuration.
LAN	Local Area Network
Roaming	A function that allows one to travel with a mobile end system (wireless LAN mobile station, for example) through the territory of a domain (an ESS, for example) while continuously connecting to the infrastructure.
TCP/IP	Communication protocol used in Ethernet/Internet.
Triple DES	A method of data encryption.
WAN	Wide Area Network
WEP	Wired Equivalent Privacy. The optional cryptographic confidentiality algorithm specified by IEEE 802.11 used to provide data confidentiality that is subjectively equivalent to the confidentiality of a wired local area network (LAN) medium that does not employ cryptographic techniques to enhance privacy.
WG	Wireless Gateway

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