Admin Use - MyFuelPortal



MyFuelPortal

Version: 1.29.21

ID: SE-001

Abstract

This is a reference guide for performing key tasks on the admin side of the Santa Energy customer portal.

Dashboard

When you first login to the admin side of the MyFuelPortal (info.santaenergy.com/Admin/) you are brought to the main screen Dashboard.

From this screen you can access a customer's account by clicking on the **Users** dropdown on the left then selecting **Customers**.

\delta MyFuelPortal	=			Chabotg@santaenergy.com
• Online	Dashboard			
Main Menu	1150 New Users	581 Payments	\$255,067.10 Payments Amount	1164 Registered Users
🛓 Users 🗸 🗸	Last 30 Days More info O	Last 30 Days More info 🚭	Last 30 Days More info 🗨	Total More info 오
Customers Staff Registration Attempts	Customer Efficiency			- ×
New Customer Checklist New Customer Attempts	20000 18000 16000			
Payments	14000 12000 10000			
 Reports < Promotions 	8000 6000 4000 2000			

From the Customer section, you can then:

- a. Search for the customer you are looking for by customer number, email address, register date, or name
- b. Select Search when the information has been filled out
- c. Click on the **Details** button next to the customer you want to view.

\delta MyFuelPortal	≡	Chabotg@santaenergy.com
• Online	Customers	
MAIN MENU	Search	
Lill Dashboard	Customer Number Email Address	
🔺 Users 🗸 🗸	a. 30008414	
Customers	Register Date Name	
Staff	Register Date Name	
Registration Attempts		
New Customer Checklist	Search b .	
New Customer Attempts		
Payments	Registered Customers	
🖹 Reports 🛛 <	Export to CSV Print Fil	iter:
Promotions	C. ↓↑ Email ↓↑ Register Date ↓₹ Disabled ↓↑ Email Confirmed ↓↑ Locked Out ↓↑	Customer Number 1
Pricing <	Details test@test.com 1/26/2021 3:06:57 PM No Yes	Multiple +
Place an Order Hobile Payments	Details Chabotg@santaenergy.com 12/14/2020.4:29:21 PM No Yes	Multiple +



Edit Customer Information

\delta MyFuelPortal	≡						Chabotg@santaene	rgy.con
Online	Customer Detai	ls						
MAIN MENU	MyFuelPortal Login		Customers Linked to the	his Login				
🔟 Dashboard	test@test.com		Export to CSV Print					
🐣 Users 🗸 🗸	~	Enabled	Customer Number	J≞ Status ↓↑	Name 🕸	Billing Zip Code	11 Last Payment Amount	11
Customers	Register Date	1/26/2021 3:06:57 PM	30008414	Active	Tiffany Test	06605		
	Email Confirmed	Yes	30008629	Terminated	test	41		
Registration Attempts New Customer Checklist	Last Login	1/26/2021 3:48:31 PM	1 You can click a Customer	Number to view the Cu	istomer in Cargas E	nergy		
	Locked Out	Not Locked	Deumeenteur					
Payments			Payments Made on My	uelPortal				
🖹 Reports 🛛 <	Actions		Export to CSV Print					
Promotions	Actions		Ji Date	1 Customer	↓↑ Amount	11 Approved	1 Cargas Reference #	ĴĴ
	Edit Login Information		No data available in table					
Pricing <	🗮 Link Custo	omers To This Login						
Place an Order	Ø Dis	able Account						
🖨 Mobile Payments								
📽 Settings 🛛 <								

From the Customer's page you can then click on the Edit Login Information button:

A popup window will then appear where you can edit the customer's email or password:

Edit Login Information	×
Email	
test@test.com	
Change Password?	
New Password	
Confirm Password	
	Cancel Save changes

Link Customers to the Same Login

On the same Customer's page you can also select the blue **Link Customers To This Login** button in order to attach another customer account to the same login.

This is for customers who have multiple accounts but would like to access each of them from the same login point on the Fuel Portal.

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🎒 MyFuelPortal	Ξ					Chabotg@santaenerg	y.com		
• Online	Customer Details								
	MyFuelPortal Login	Customers Linked to this L	ogin						
📶 Dashboard	test@test.com	Export to CSV Print							
🚢 Users 🗸 🗸	✓ Enabled	Customer Number 斗	Status ↓↑	Name 1	Billing Zip Code	Last Payment Amount	↓ ↑		
Customers	Register Date 1/26/2021 3:06:57 PM	30008414	Active	Tiffany Test	06605				
	Email Confirmed Yes	30008629	Terminated	test	41				
	Last Login 1/26/2021 3:48:31 PM	You can click a Customer Nur	mber to view the Cu	stomer in Cargas E	nergy		_		
New Customer Checklist New Customer Attempts	Locked Out Not Locked						_		
		Payments Made on MyFuel	Portal						
Payments		Export to CSV Print							
Reports <	Actions	li Date l↑	Customer	Amount	Approved	Cargas Reference #	11		
Promotions		No data available in table							
Pricing <		ivo uaca avaliable ili table							
	Link Customers To This Login								
Place an Order	 Disable Account 								
🖨 Mobile Payments									
📽 Settings 🛛 <									

After selecting the Link Customers To This Login button, a popup will appear.

lumber		Name			
		Name			
✓ entries			Filter:		
Customer Number	.↓†	Name	11	Status	11
1091735		Jamie & Tiffany Bachman		Active	
L of 1 entries				Previous 1	Next
	2. • entries Customer Number 1091735	✓ entries Customer Number It 1091735	Name Q. • entries Customer Number 11 Name 1091735 Jamie & Tiffany Bachman	Name 2. • entries Filter: Customer Number 11 1091735 Jamie & Tiffany Bachman	Name 2. entries Filter: Customer Number 11 Name 11 Status 1091735 Jamie & Tiffany Bachman Active

- 1. Enter in the Customer Number or Name
- 2. Select Search
- 3. Click the check box to the correct customer in the search results
- 4. Select **Save changes** to link that account to the customer's login.