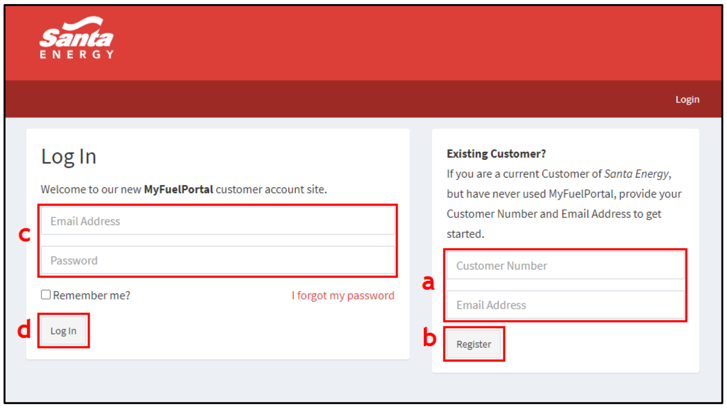
Abstract

This document is to be used as a reference guide for using MyFuelPortal and how to access a customer account.

How to Start

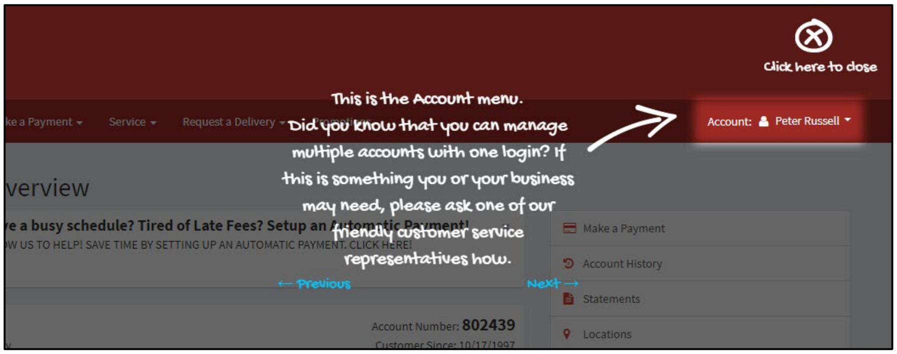
1. Go to **santaenergy.myfuelportal.com**
2. Log in using your account credentials
   a. If you have not yet used MyFuelPortal, you will need to first register your account. Enter your customer number and email address associated with the account.
      b. Select **Register** when the information has been entered.
   c. Now that the account is registered, enter your email address and password you've created.
   d. Select **Login** to enter your account.



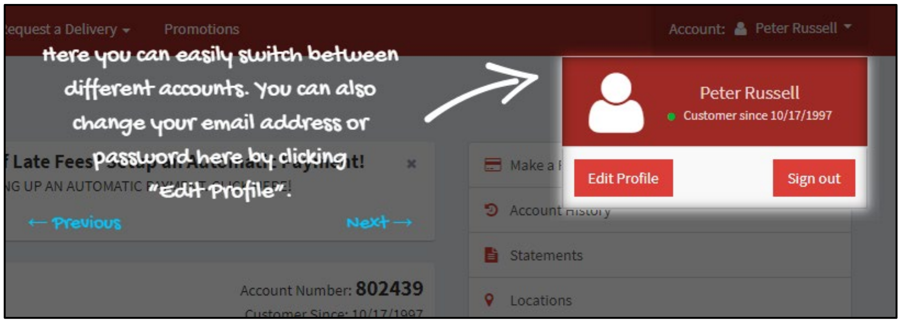
First Login Tutorial

Once in the account, MyFuelPortal tutorial will showing you around the portal.

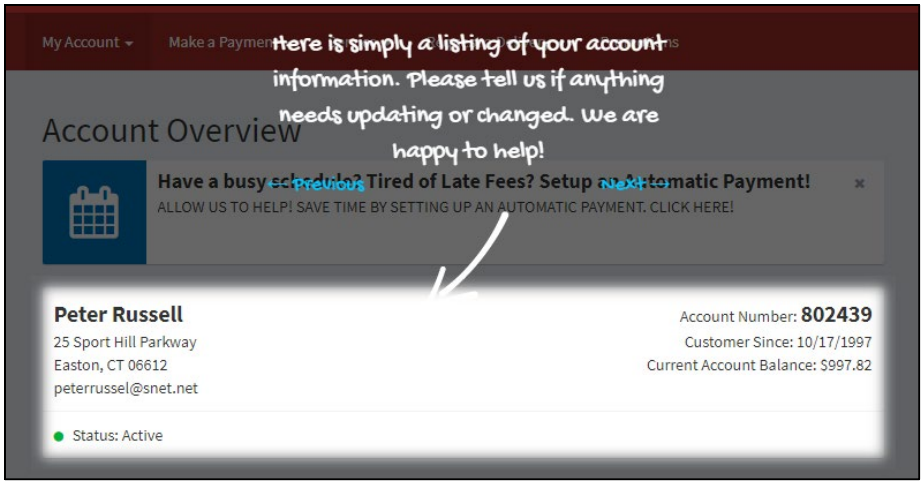
1. Select **Next** to move on to the next part of the tutorial. Or you can select the close option in the top right.
   a. The premade tutorial will take you through the basic functionalities of MyFuelPortal.
2. To the right you can see where the **Account menu** is located and where you can manage multiple accounts.



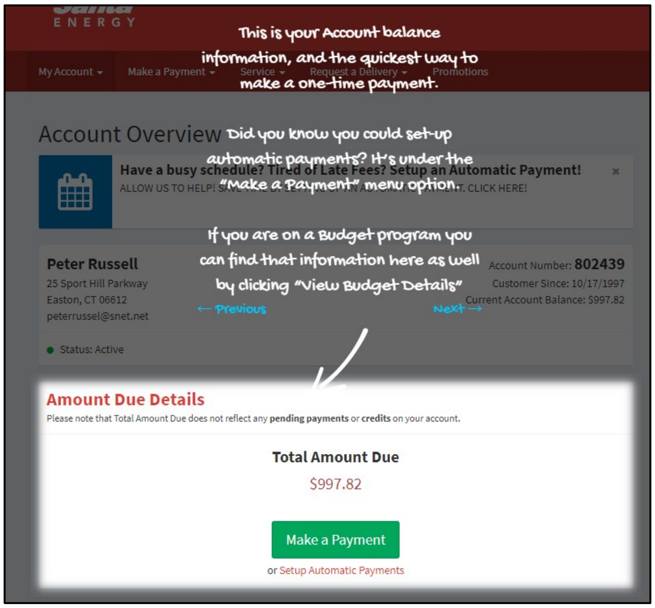
3. By selecting the **Account:** dropdown, you can switch between different accounts and change the email address or password through the **Edit Profile** button.



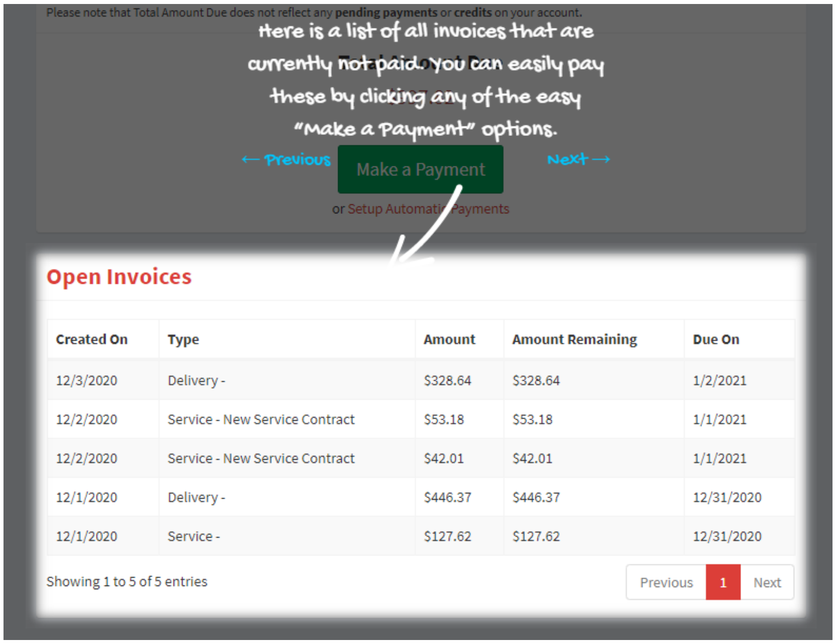
4. On the main **Account Overview** page there is the quick description of the account.



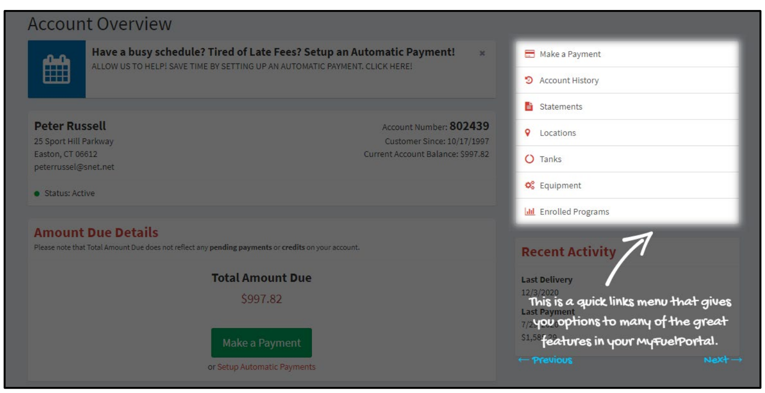
5. Below the quick description is the Account balance information in addition to a quick access button to make a payment on the balance due.



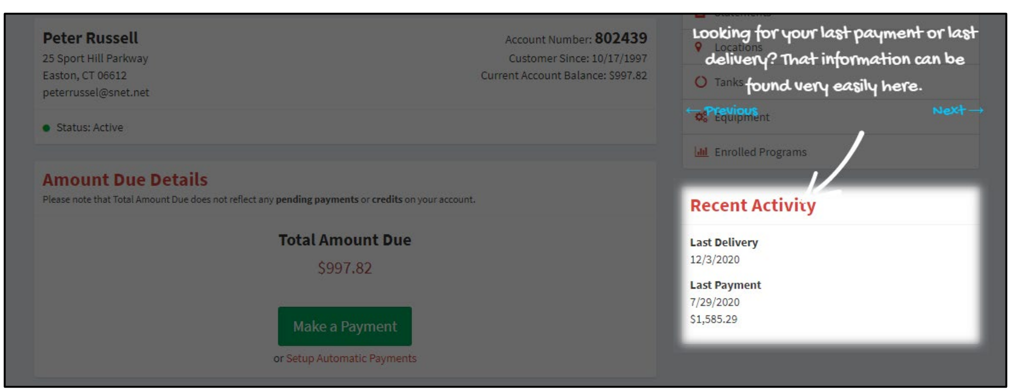
6. Below the Amount Due Details are the **Open Invoices** on the account. These are a list of all invoices that are currently not paid. You can make a payment on any invoice by selecting the **Make a Payment** option, above.



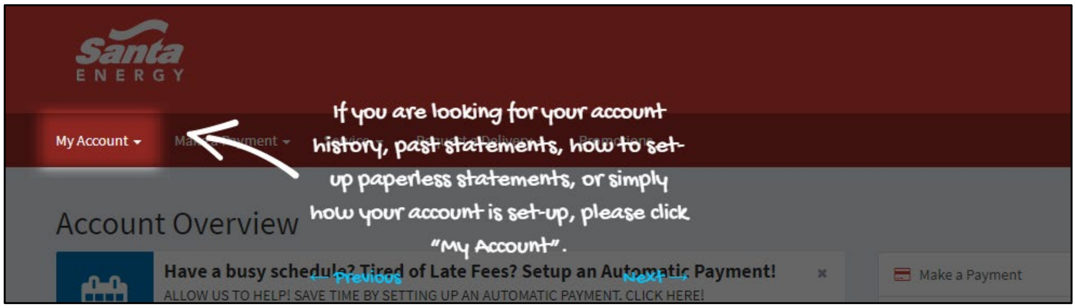
7. On the right hand side of the screen, there is a quick links menu that allows you to access many great features in your MyFuelPortal.



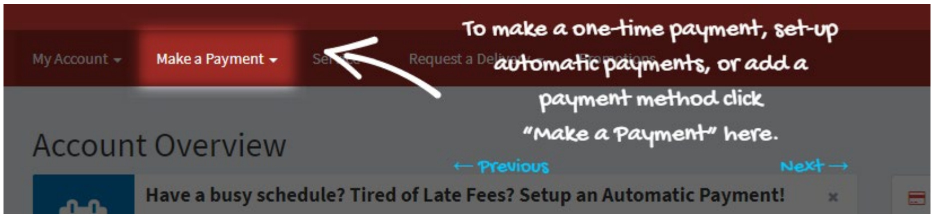
8. Last payments and deliveries made on the account will show up underneath the quick links menu.



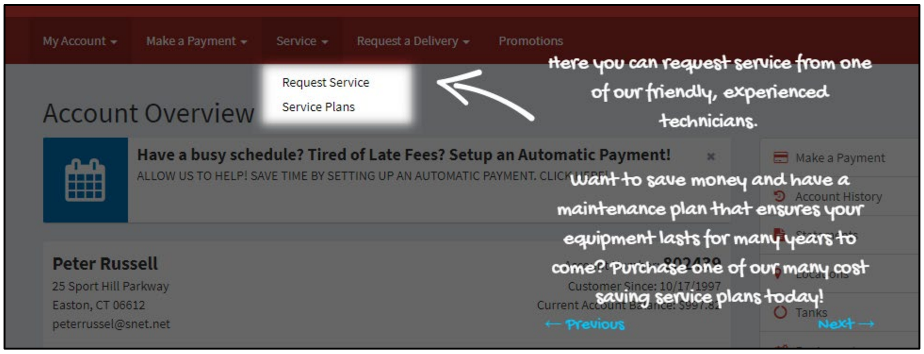
9. To view account history, past statements, set up paperless statements, or to view how the account is setup, select **My Account** in the top left of the screen on the navigation bar. Options include: Account Overview, Account History, Statements, Locations, Tanks, Equipment, Paperless Statements.



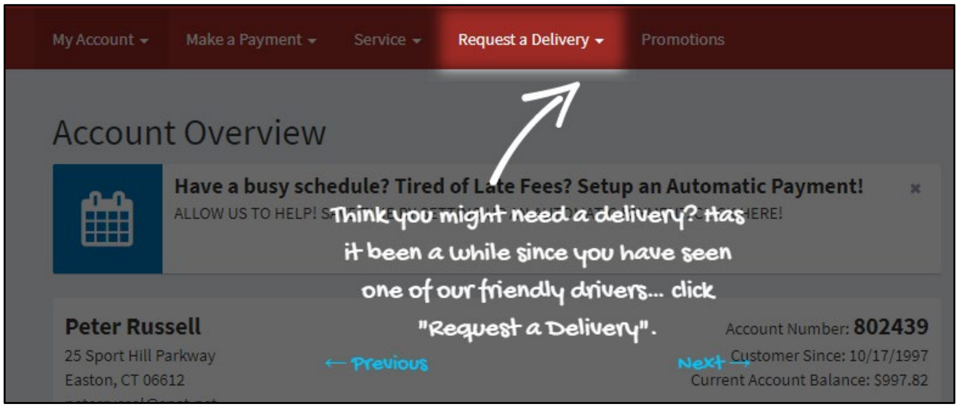
10. To make a one-time payment, setup automatic payments, or add a payment method select the **Make a Payment** option at the top of the screen.



11. From the **Service** dropdown, you can Request Service or view Service Plans.



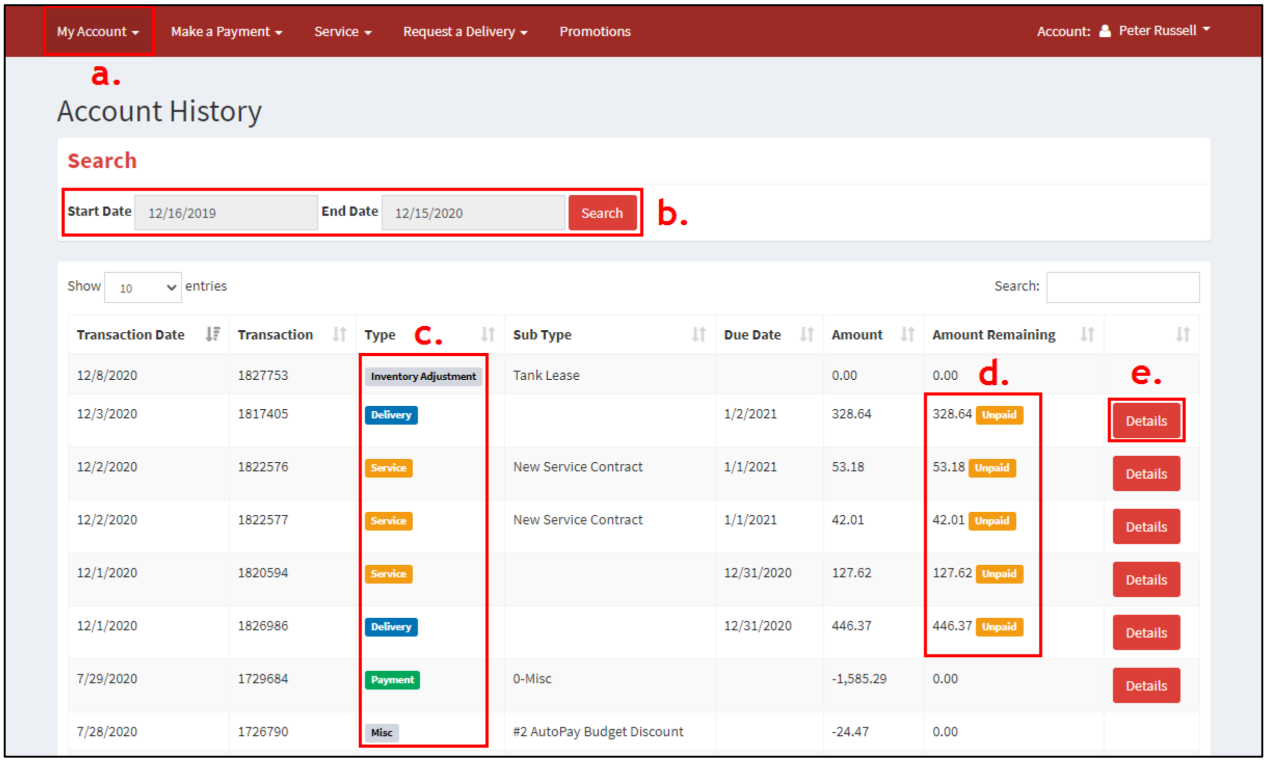
12. Select **Request a Delivery** to schedule a delivery.



Account History

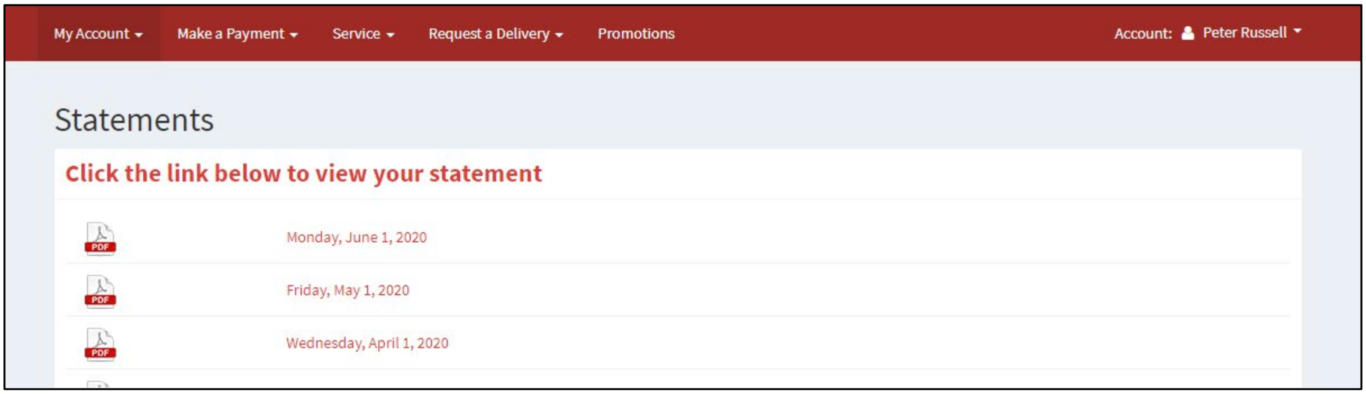
The first section you can view under the **My Account** dropdown, is the Account History. This is where you can view all transactions that have taken place on the account.

a. A specific time frame can be set to view the transactions found within the dates.
b. Different transaction types will be identified with colored tags to make it easy to view differences.
c. A yellow colored tag of “Unpaid” will show up next to all transactions that have not been paid for.
d. Select **Details** to open up a window showing the specific transaction. You can then View or Print the transaction from the window.



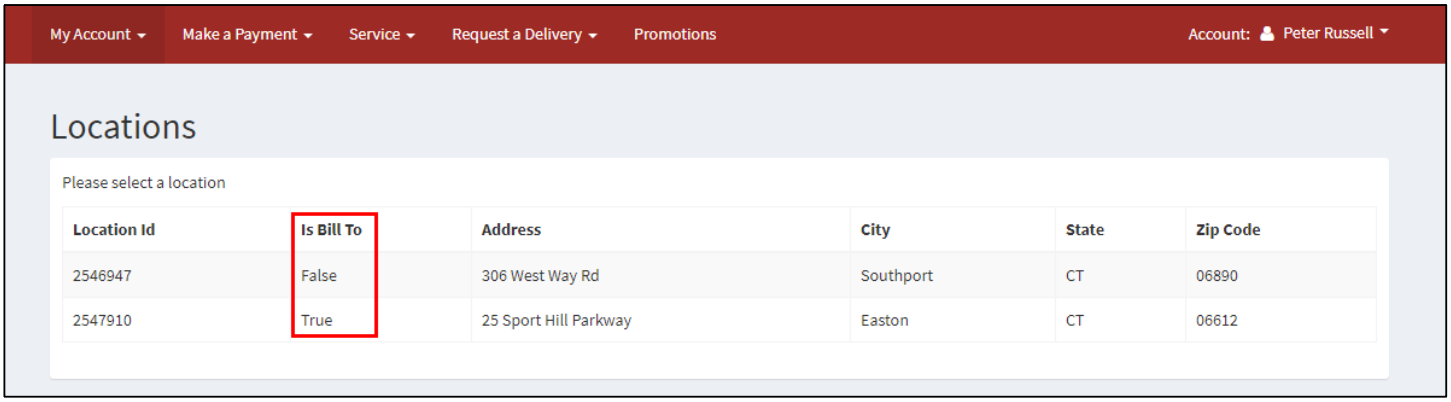
Statements

The **Statements** section under **My Account** is a simple view of all statements attached to the account. Click any line to view the statement.



Locations

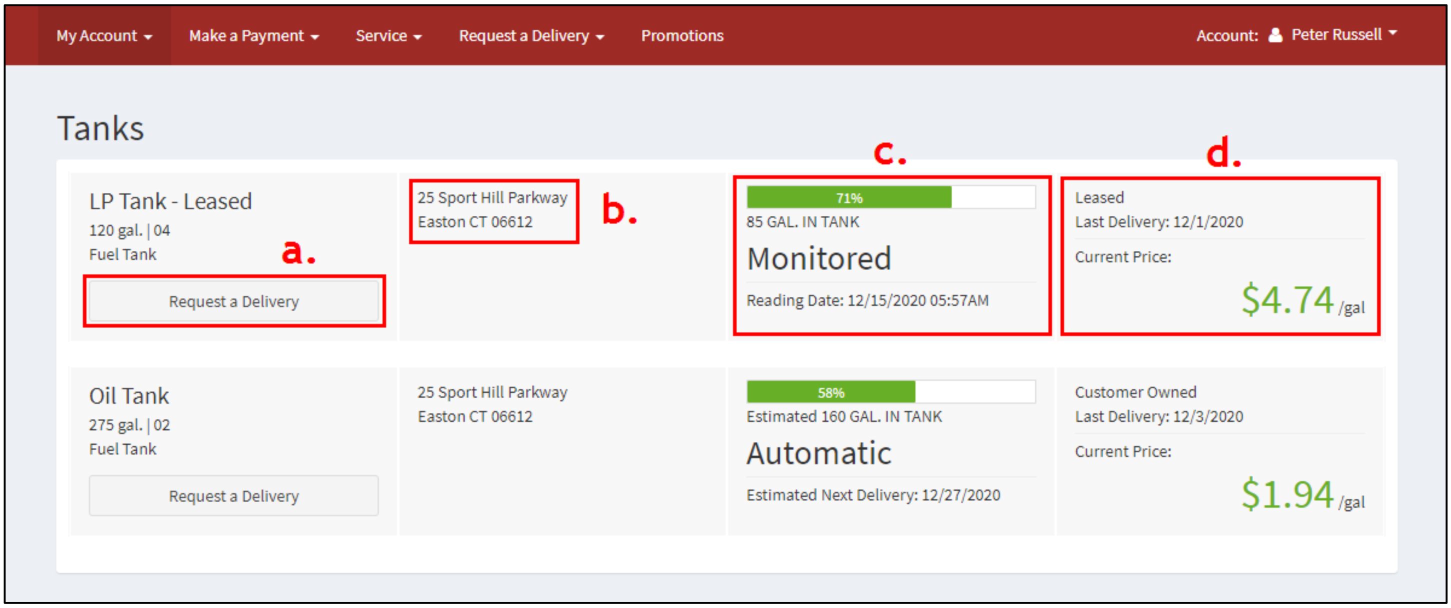
The **Locations** section under **My Account** shows all locations (addresses) attached to the account.
The section highlighted below shows which of the locations the account is billed to. If it says **True**, that is the location that receives the billing.



Tanks

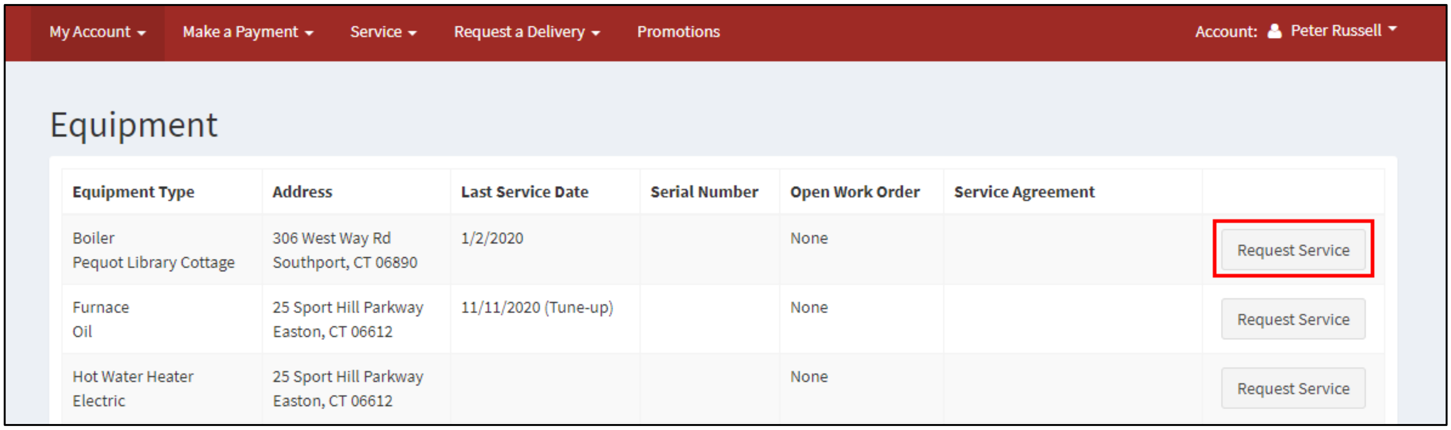
The **Tanks** section under **My Account** shows all tanks (oil and propane) associated with the account.

a. Under the tank name, there is an option to **Request a Delivery** for that specific tank.
b. The location (address) where the tank is located is here.
c. The estimated or precise (dependent on if it is monitored or not) fuel level is shown here.
d. Pricing information on the fuel for that tank is found at the end.



Equipment

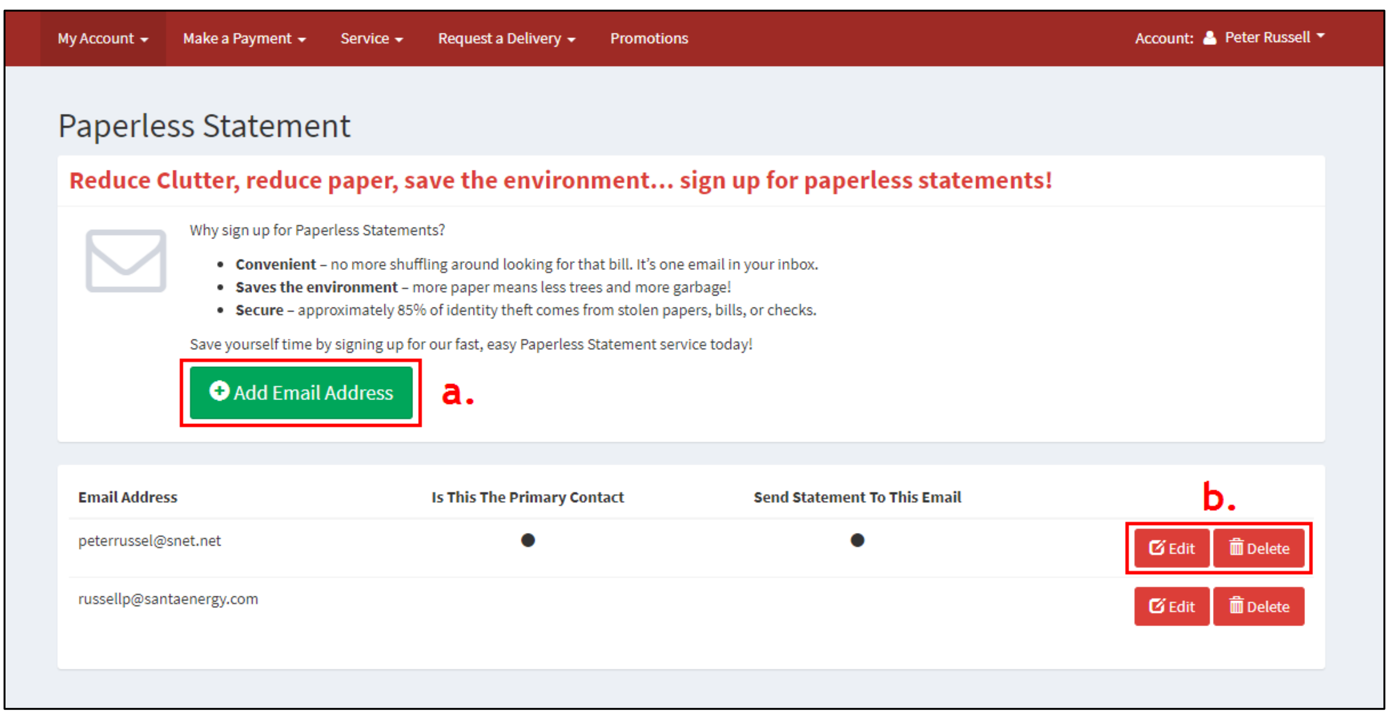
The **Equipment** section under **My Account** shows all equipment associated with the account.
A column will show if there are any Open Work Orders for the equipment and the option to **Request Service** for a certain piece of equipment.



Paperless Statements

The **Paperless Statements** section under **My Account** allows you to activate the option for paperless statements sent digitally to an email address of your choice.

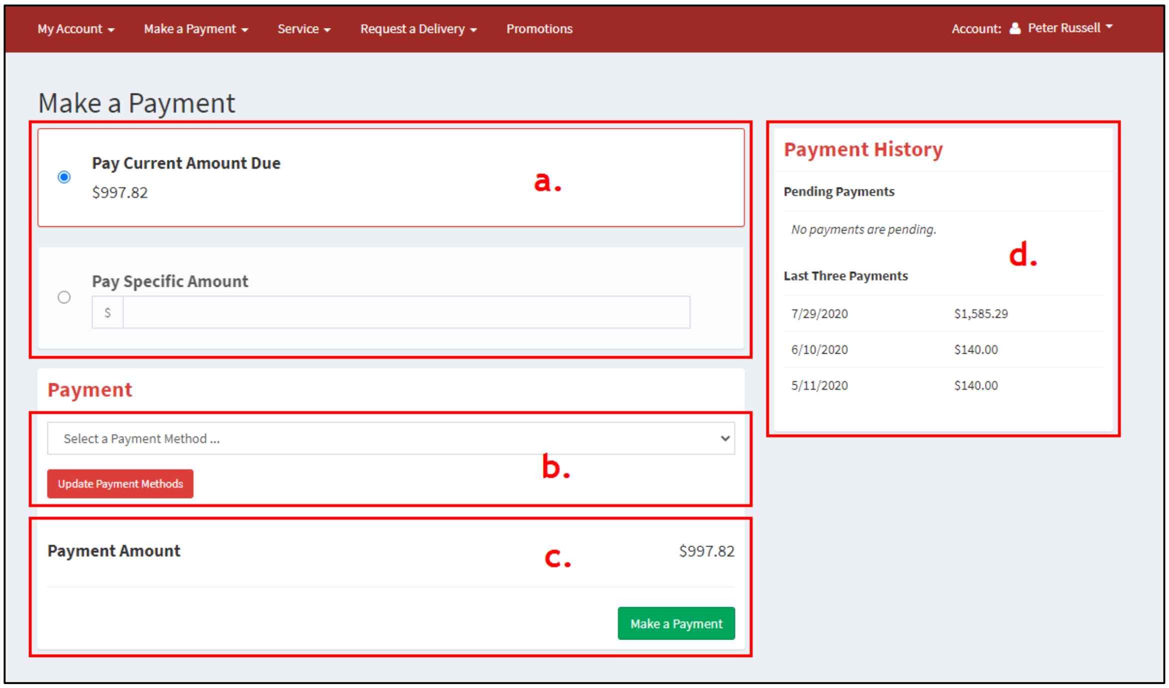
a. It's easy to add an additional email address to the account to receive a paperless statement.
b. You can then edit the email address or options for it as well as remove the email from the account.



Make a One-Time Payment

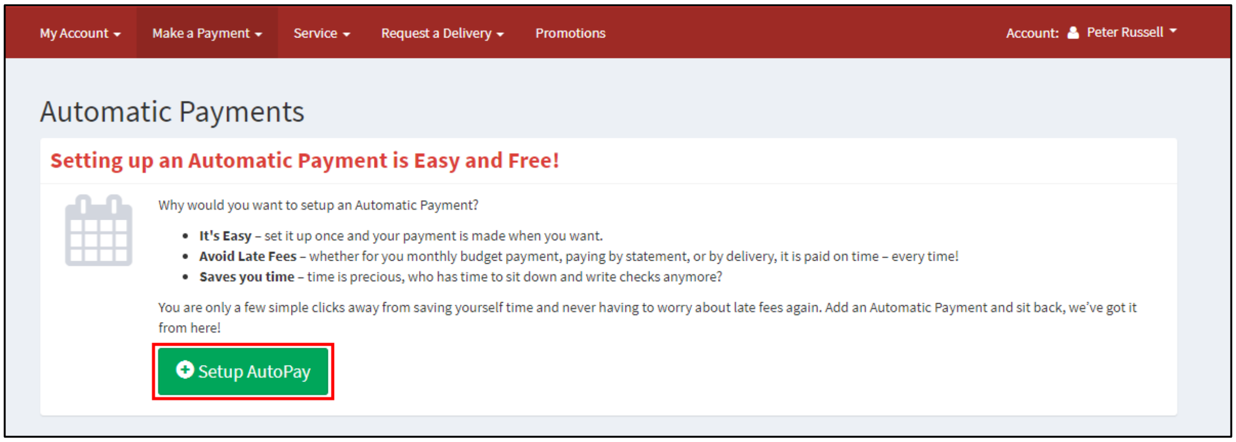
Under the **Make a Payment** dropdown, the first option is to **Make a One-Time Payment**.

a. Here you can select whether you'd like to make a payment covering the full amount currently due, or to pay a specific amount.
b. Select from the dropdown a saved Payment Method or you can update your payment method.
c. After selecting the Payment Method, you can then select the button to **Make a Payment**.
d. On the right side of the screen, you can see any pending payments and the last three payments made on the account.



Setup Automatic Payments

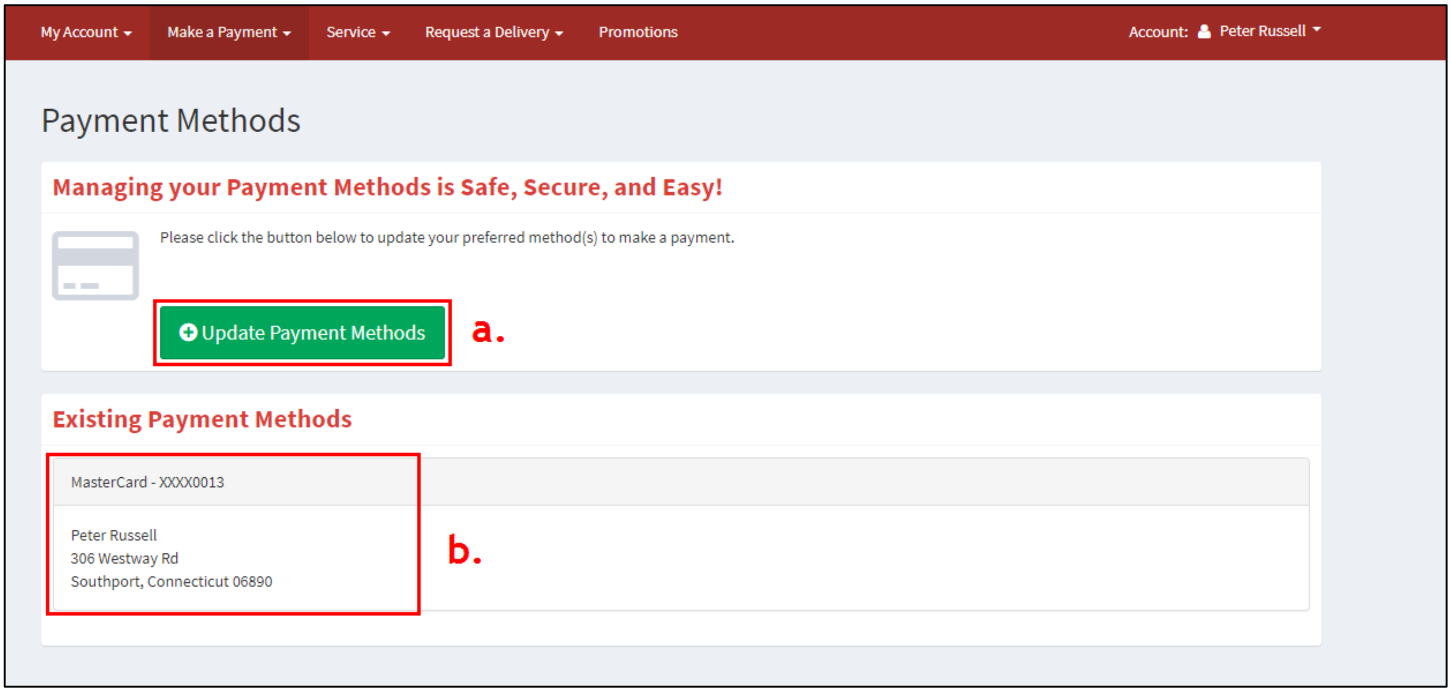
Under the **Make a Payment** dropdown, you can choose to **Setup Automatic Payments**.
From this screen you can easily set up Autopay to have your payments set when you want.



Payment Methods

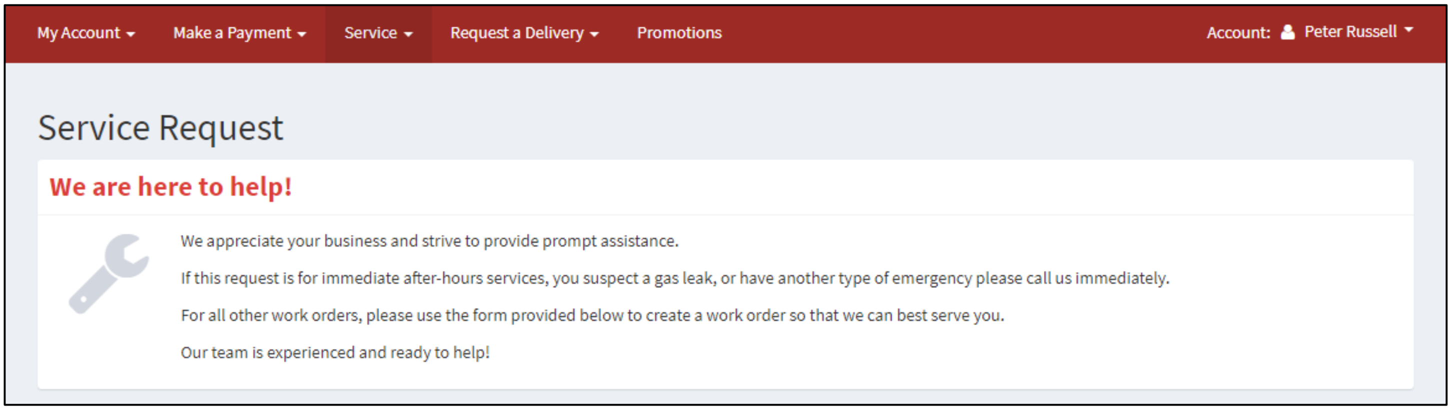
Under the **Make a Payment** dropdown, you can manage your **Payment Methods.**

a. You can add another payment method or update the current one from this button.
b. All existing payment methods are found below.

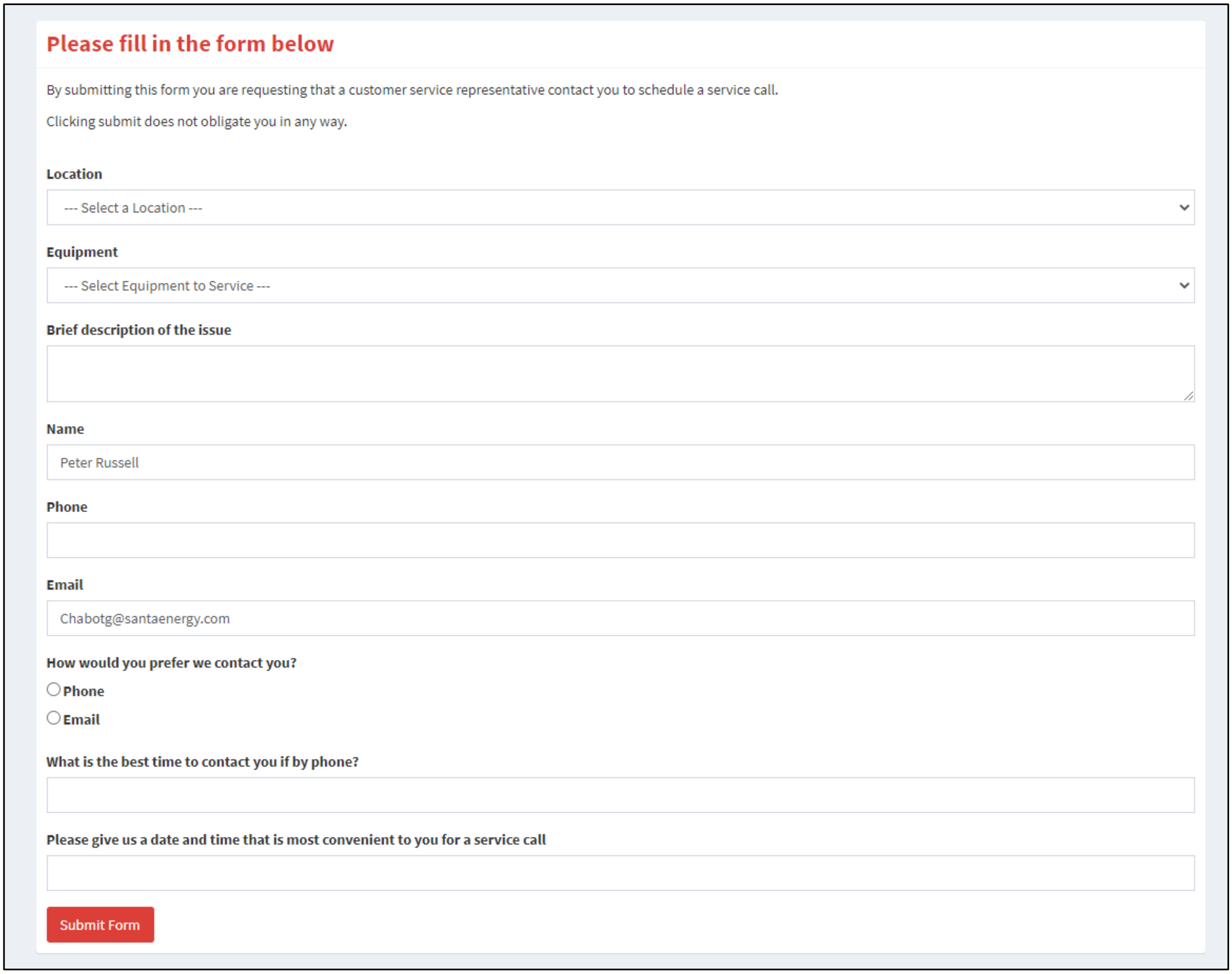


Request Service

Under the **Service** dropdown, you can choose to **Request Service** on a certain piece of equipment you own.
The top part of the screen will give the descriptor of what we offer and instructions for different types of service.



The bottom part of the Request Service screen is the form a customer can fill out to submit for service.
After filling out the form with all appropriate information, the **Submit Form** button will send the request to the Service department.



Please fill in the form below

By submitting this form you are requesting that a customer service representative contact you to schedule a service call.

Clicking submit does not obligate you in any way.

Location

--- Select a Location ---

Equipment

--- Select Equipment to Service ---

Brief description of the issue

Name

Peter Russell

Phone

Email

Chabotg@santaenergy.com

How would you prefer we contact you?

Phone

Email

What is the best time to contact you if by phone?

Please give us a date and time that is most convenient to you for a service call

Submit Form

Service Plans

Under the **Service** dropdown, you can view the different **Service Plans** available through Santa Energy.

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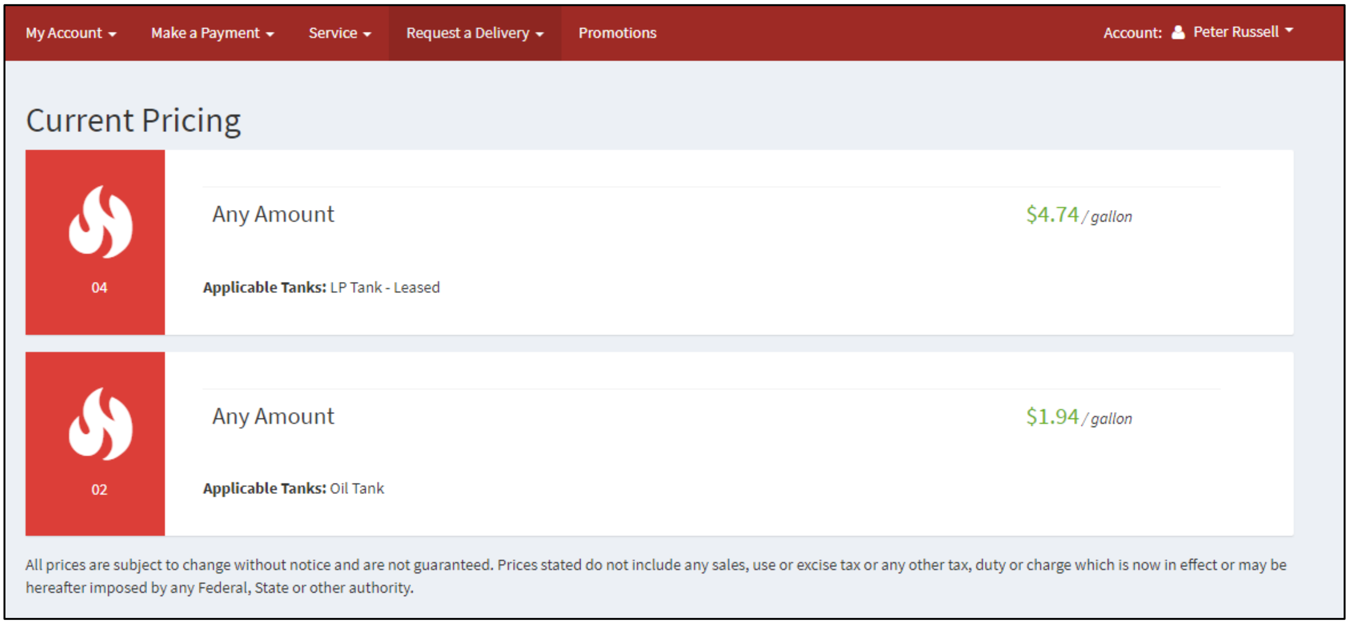
Current Pricing

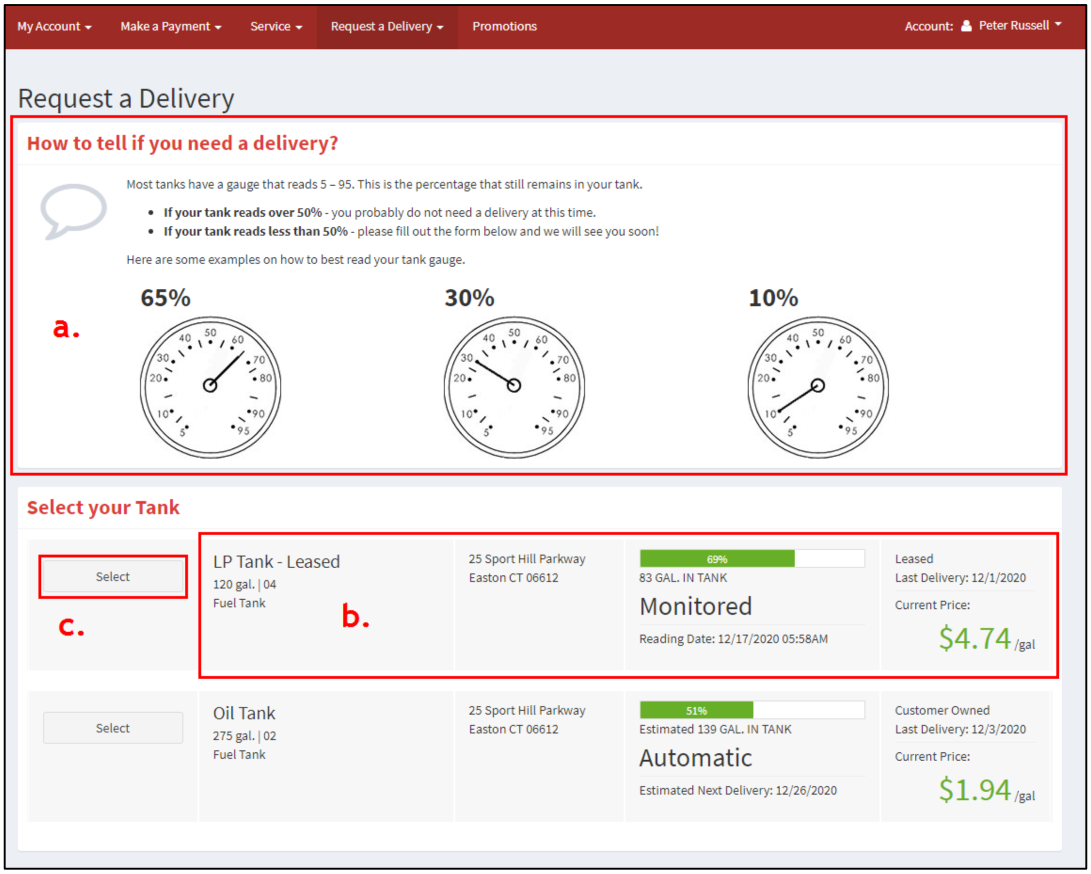
Under the **Request a Delivery** dropdown, you can view the **Current Pricing** set for your oil or propane.



Fuel or Propane Delivery

Under the **Request a Delivery** dropdown, you can choose to **Request a Delivery** of oil or propane.

a. This part of the screen will give information on how to tell if you need a delivery based upon your tank level reading.
b. The tank’s line will include basic information including size, location, fill level, and pricing.
c. If you’d like to request a delivery for a certain tank, choose the **Select** button on the left side.


My Account
Make a Payment
Service
Request a Delivery
Promotions
Account: Peter Russell
Request a Delivery
How to tell if you need a delivery?
Most tanks have a gauge that reads 5 – 95. This is the percentage that still remains in your tank.
If your tank reads over 50% - you probably do not need a delivery at this time.
If your tank reads less than 50% - please fill out the form below and we will see you soon!
Here are some examples on how to best read your tank gauge.
65%
30%
10%
a.
Select your Tank
Select
c.
LP Tank - Leased
120 gal. | 04
Fuel Tank
b.
25 Sport Hill Parkway
Easton CT 06612
69%
83 GAL. IN TANK
Monitored
Reading Date: 12/17/2020 05:58AM
Leased
Last Delivery: 12/1/2020
Current Price:
$4.74 /gal
Select
Oil Tank
275 gal. | 02
Fuel Tank
25 Sport Hill Parkway
Easton CT 06612
51%
Estimated 139 GAL. IN TANK
Automatic
Estimated Next Delivery: 12/26/2020
Customer Owned
Last Delivery: 12/3/2020
Current Price:
$1.94 /gal