

Accounting & Technical Support For Petroleum Marketers!

We have created another means of imposing miscellaneous fees in Cardlock. Two originating jobbers will use this for a “Regulatory Compliance Fee”, a common occurrence now on the wholesale side. Typically, this is a \$3-\$5 charge tacked onto every invoice. Jobbers have found this to be a relatively painless way to boost profit by thousands of dollars per month while staying competitive on fuel pricing.

Fees can be exempted by customer, via a flag in the Process Flag A. Or the operator can choose to leave fees out of the whole batch, useful when one only wants to impose the fee once a month.

There already exists one means of adding fees in Cardlock, but these jobbers did not like the method, where the fee is assigned a fuel type, is assigned to a dummy site, and appears on the customers’ invoices attached to a random card and vehicle. They felt that this proved confusing to the customer, inviting calls about why a particular card got the fee, while others did not, and that any such call would lead to having to justify the fee in the first place.

And so we created something simpler. Without messing with the body of the invoice, we just print a Fee Line before the Grand Total, similar to the way Sales Tax or Drum Charges precede the total on bulk invoices. We post the fee “sale” to Customer and Product history, and to PDSTRAN, much as a line on a bulk order would post. But we do not touch the history for sites, cards or vehicles.

Cost to install and customize: 6 hours.