Lakeview Petroleum

Introduces the Petroleum RX

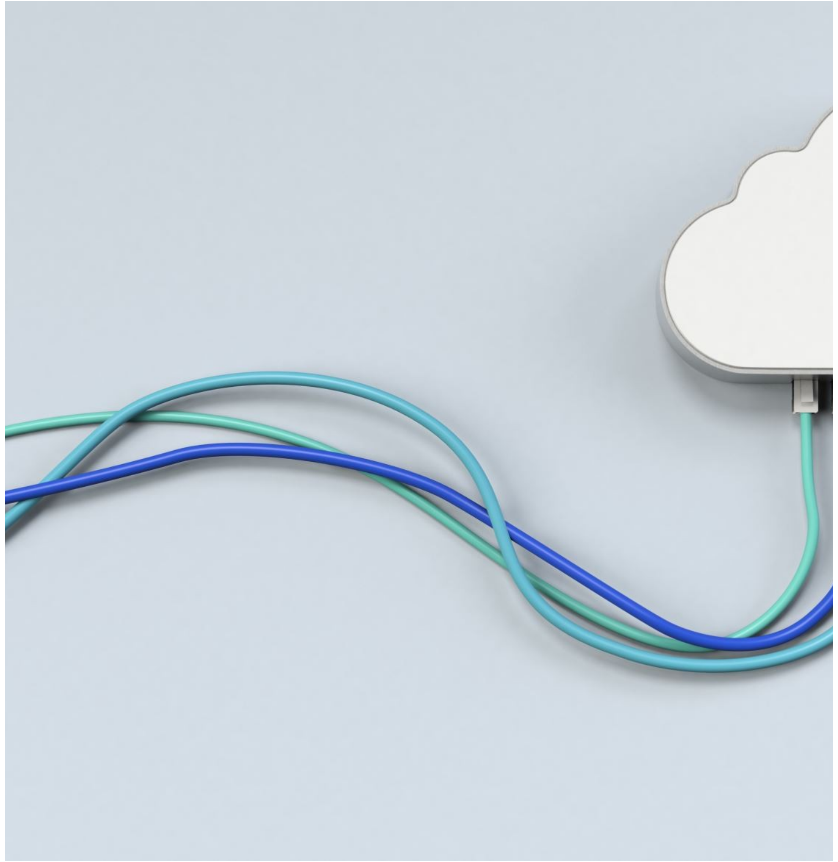
Online Portal for Customer Data

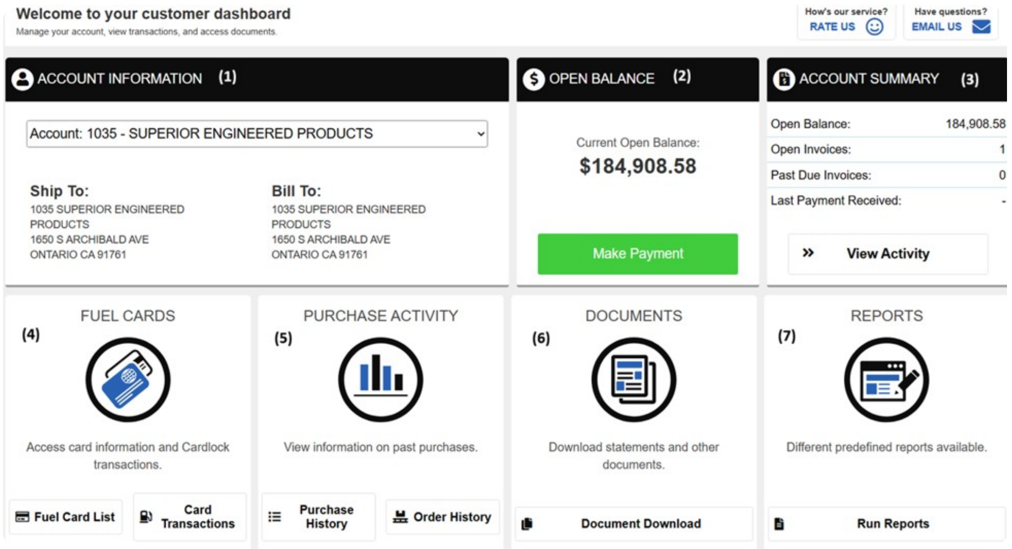
OCTANE CONNECT

Next-Gen Cloud-Based Customer Portal

Octane Connect is our cloud-based customer portal, designed as a next-generation improvement to the **ViewFuel** portal.

Octane Connect runs on the same backend software as Octane and provides much smoother and faster data synchronization with the PDS system. Octane Connect allows both customers and jobbers to view account activity, make payments, place orders, download documents and reports, manage fuel cards, and much more!





Loggin In and Dashboard

Octane Connect uses the same credentials for **ViewFuel**, so if you have a current online account, you will use the same credentials to access Octane Connect.

Account Dashboard

Clicking on an account will take you to the account dashboard.

Your Customer Dashboard Provides Access To Your Account Information and Reports

1. **Account Information**: This panel shows the account name and number, as well as the ship-to and bill-to addresses. If an account has sub-accounts linked in PDS, the drop-down menu with the account number can be used to access the dashboards for the sub-accounts.

2. **Open Balance and Payment Module:** This panel shows the open AR balance on the account and has a link to the payment module. The Open Balance is the sum of the open invoices on the account and may be different from the total account balance if the customer has open credits on their account. (See ‘Payment Module’ section below)

3. **Account Summary**: This panel shows the account’s open balance, the number open and past-due invoices, and the date of last payment. It also gives a link to the Account Activity page, which shows the accounts full AR history in greater detail.

4. **Card Activity**: This module shows the registered cards and card activity for active cardlock customers. There needs to be at least one active card on the account for this module to show up on the account dashboard.

5. **Purchase History**: This module shows a table of the products (including pack codes and quantities) that have been purchased by the selected account.

6. **Documents**: PDFs of account-level documents, such as Statements and EFT Advice, can be downloaded from this tab. Invoice PDFs are downloaded from the Account Summary tab.

7. **Reports**: Octane Connect can run the following reports:

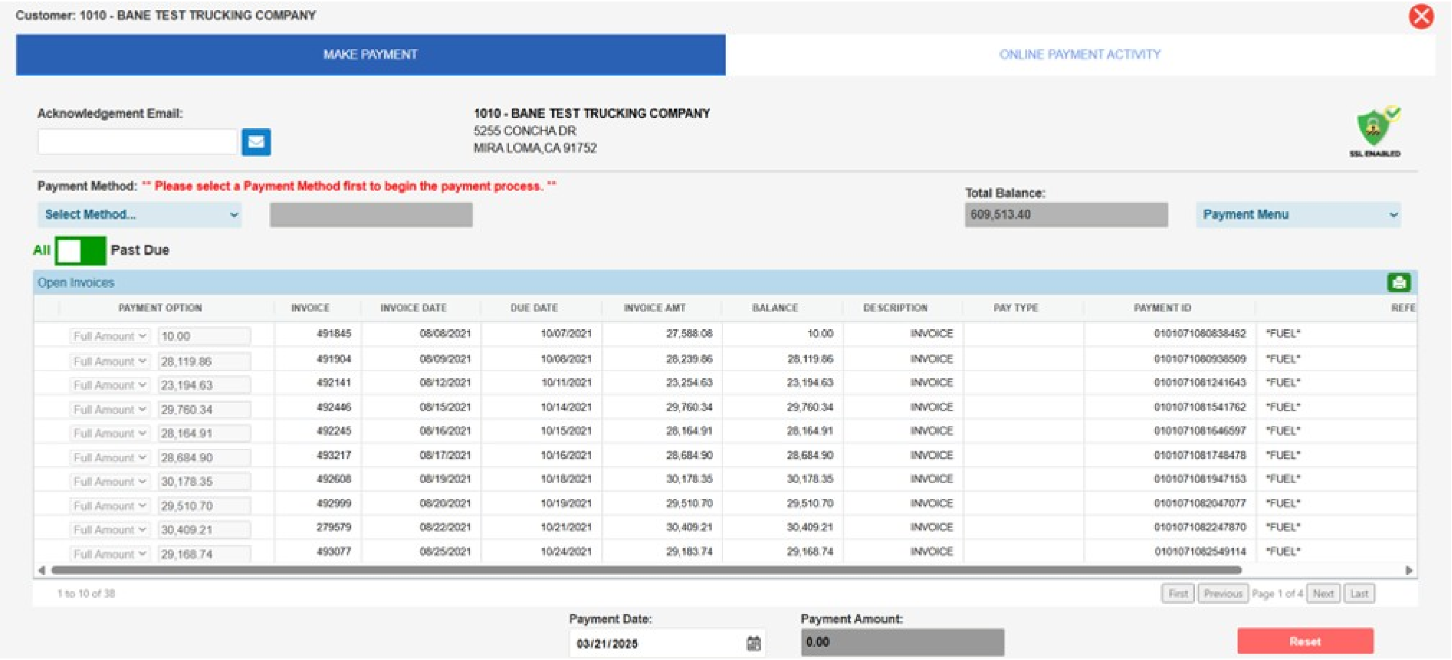
- Cardlock Card Summary by Card and Product
- Cardlock International Fuel Tax Agreement (IFTA)
- Cardlock International Fuel Agreement (IFTA) for Diesel
- Cardlock Totals by Card
- Cardlock Totals by Fuel Type
- Cardlock Totals by Vehicle
- Product Sales Report

Payment Module

The payment module is where jobber representative and customers can submit payments. Octane Connect supports Credit Card, ECheck (Bank Account), and EFT payments, depending on which payment options are supported by your jobber.

Payment Module – Main Page and Payment Set-Up

The payment screen can be used to submit payments, as well as view a list of open AR and access your web payment history.

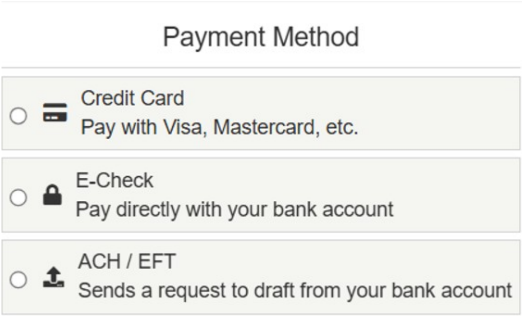


Payment Module – Making a Payment

Upon entering, you will see a list of open AR activity on the account. **You will first need to select a payment option before selecting an invoice.**

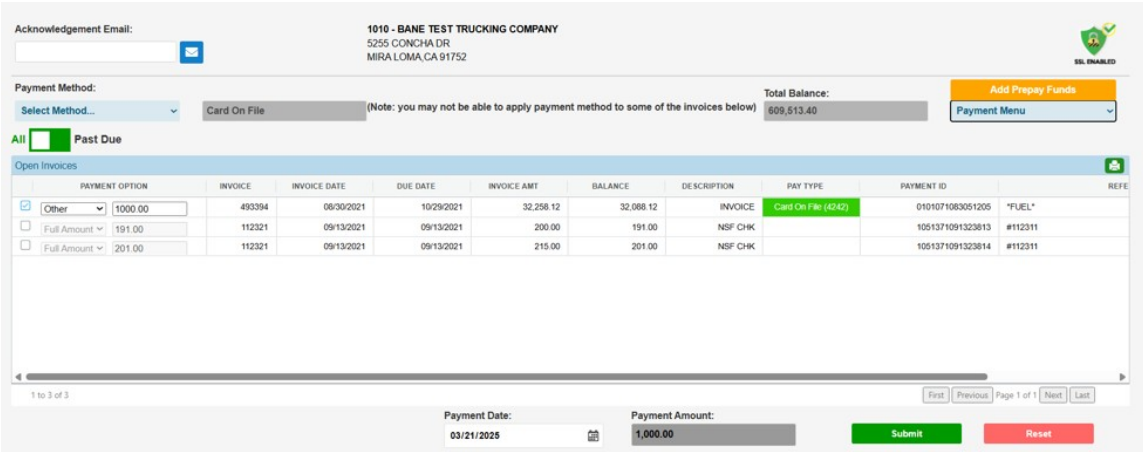
The options are 1) credit card or bank account one-time payment (aka. AdHoc payments), 2) credit card or bank account on file, or 3) EFT.

1



Once you have the payment type selected, select the invoice or transaction that you want to pay. You can choose to pay the full or a partial amount.

2

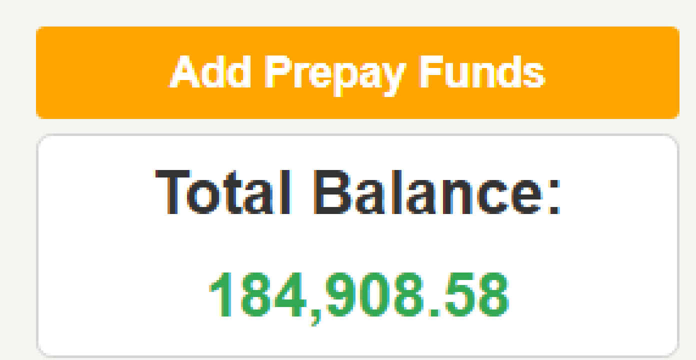


Hit the **Submit** button to submit the payment. The Payment Status table below will display a message for whether the payment was successful or failed. Failed payments will return an error message with additional information on why the payment failed.

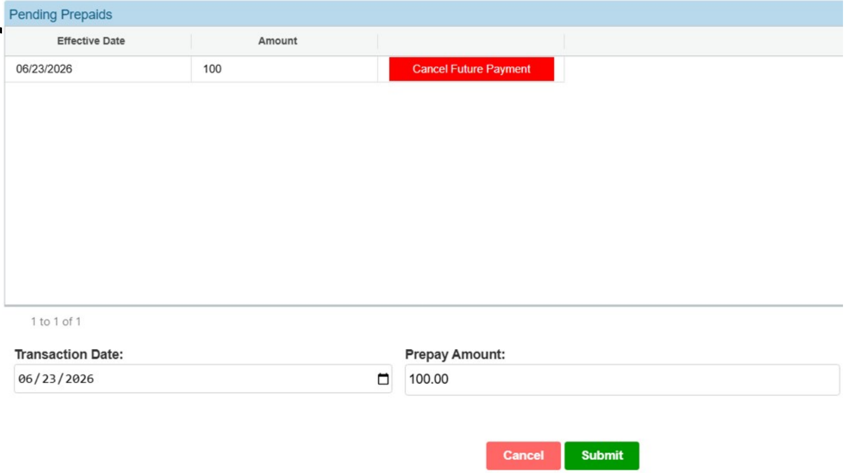
Prepayments

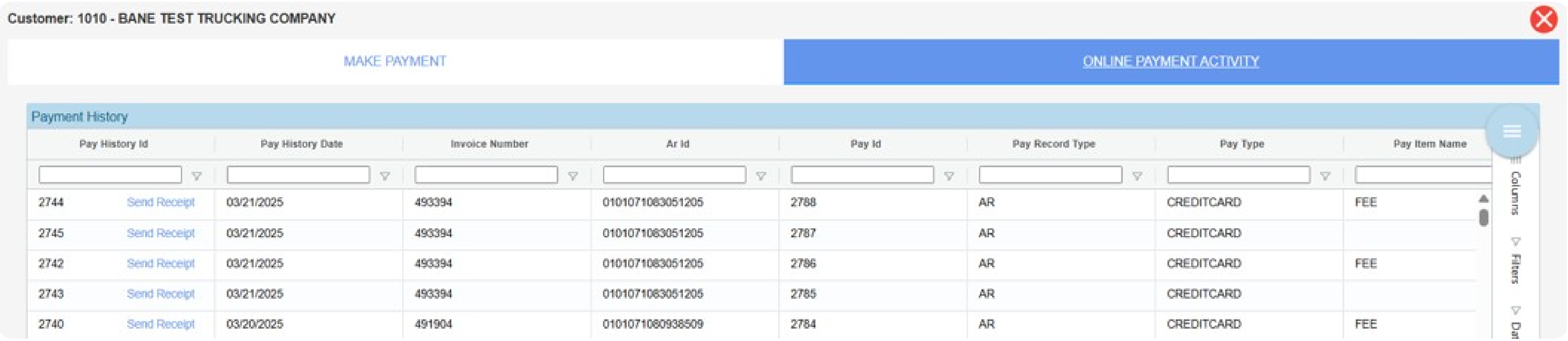
Clicking the orange “Add Prepay Funds” button in the top right part of the payment screen will allow you to make a pre-payment, which will add a credit on your account to be applied to a future invoice.

Pre-payments can be scheduled up to 30 days in the future.



Pre-payments set for a future date will show up in the “Pending Prepaids” list.

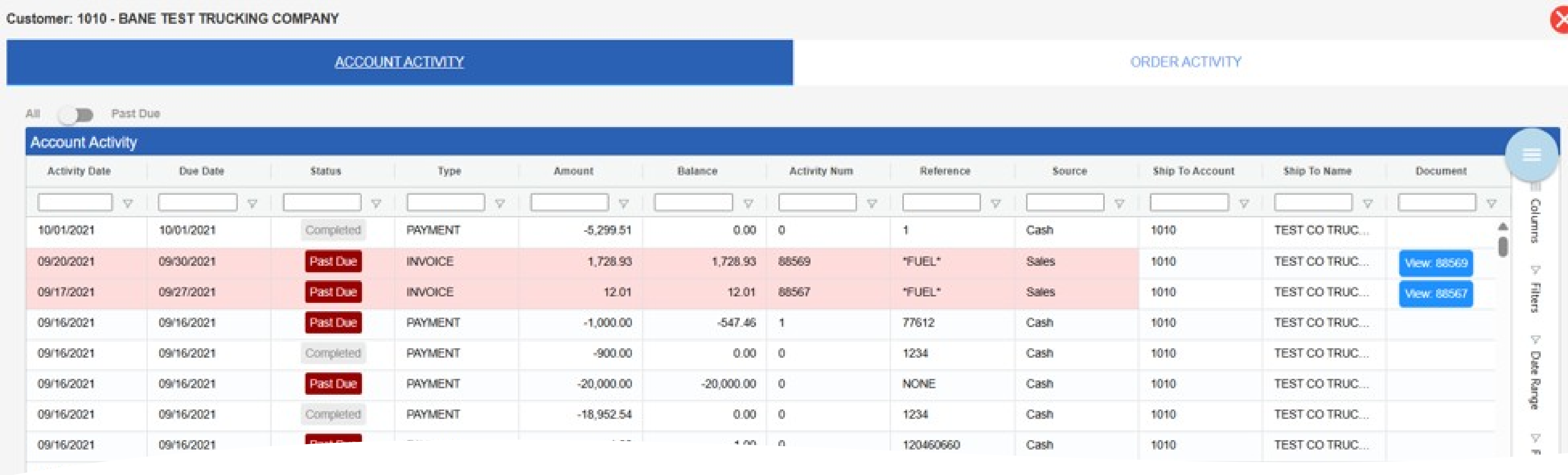




Pay History Id		Pay History Date	Invoice Number	Ar Id	Pay Id	Pay Record Type	Pay Type	Pay Item Name
2744	Send Receipt	03/21/2025	493394	0101071083051205	2788	AR	CREDITCARD	FEE
2745	Send Receipt	03/21/2025	493394	0101071083051205	2787	AR	CREDITCARD	
2742	Send Receipt	03/21/2025	493394	0101071083051205	2786	AR	CREDITCARD	FEE
2743	Send Receipt	03/21/2025	493394	0101071083051205	2785	AR	CREDITCARD	
2740	Send Receipt	03/20/2025	491904	0101071080938509	2784	AR	CREDITCARD	FEE

Payment History

Past web payment records, including failed payments and their associated error codes, can be accessed in the Online Payment Activity tab.



Activity Date	Due Date	Status	Type	Amount	Balance	Activity Num	Reference	Source	Ship To Account	Ship To Name	Document
10/01/2021	10/01/2021	Completed	PAYMENT	-5,299.51	0.00	0	1	Cash	1010	TEST CO TRUC...	
09/20/2021	09/30/2021	Past Due	INVOICE	1,728.93	1,728.93	88569	*FUEL*	Sales	1010	TEST CO TRUC...	View: 88569
09/17/2021	09/27/2021	Past Due	INVOICE	12.01	12.01	88567	*FUEL*	Sales	1010	TEST CO TRUC...	View: 88567
09/16/2021	09/16/2021	Past Due	PAYMENT	-1,000.00	-547.46	1	77612	Cash	1010	TEST CO TRUC...	
09/16/2021	09/16/2021	Completed	PAYMENT	-900.00	0.00	0	1234	Cash	1010	TEST CO TRUC...	
09/16/2021	09/16/2021	Past Due	PAYMENT	-20,000.00	-20,000.00	0	NONE	Cash	1010	TEST CO TRUC...	
09/16/2021	09/16/2021	Completed	PAYMENT	-18,952.54	0.00	0	1234	Cash	1010	TEST CO TRUC...	
09/16/2021	09/16/2021	[illegible]	[illegible]	[illegible]	[illegible]	0	120460660	Cash	1010	TEST CO TRUC...	

Account Summary

- The Account Summary panel shows the account’s open balance, the number open and past-due invoices, and the date of last payment. It also gives a link to the Account Activity page, which shows the accounts full AR history in greater detail. Open invoices will be highlighted in light red in this table.
- The past-due toggle at the top of the table can be switched to only show past-due invoices.
- Invoice PDFs can be downloaded from the ‘Document’ column if available.
- The table can be downloaded as an Excel file using the ‘Export’ button in the bottom right.

Any Questions?

For questions regarding utilizing your online customer portal, or help with setting up your online access, please contact our Lakeview Petroleum Customer Service Team at 530.742.7614.

We are ready and happy to help!