Customer Account with PIDX Report

This document provides information on the Customer Account w/ PIDX Report, which is a standard report available in FuelsManager.

Prerequisites: The Customer Account w/ PIDX Report should have been preconfigured for your Site, and your User account should belong to a User Group that has been assigned to view the report. See the *Report Assignment Configuration* help page for more information.

The Customer Account w/ PIDX Report allows you to view Ship To (customers) company names and addresses grouped by Shipper for all or a particular Site(s). It also allows you to filter the report by Active or Inactive Ship To companies.

Only Ship To companies that are part of the Company Hierarchy, assigned to a Bill To, and assigned a Load/Off-Load ID are included on the report. For more information, refer to the *Assigning Load/Off-Load IDs and Drivers* section on the *Company Hierarchy Configuration* help.

See the *Report Header Field Descriptions* and *Report Column Descriptions* sections below for more information.

You must belong to a FuelsManager user group with appropriate security access rights to view and modify data. Some pages may not be available for entry or edit depending on your user security rights.

Viewing the Customer Account w/ PIDX Report

You may view the Customer Account w/ PIDX Report from the Reports menu. Follow the steps below:

1) Log in to a **Site** or **Site Group** in FuelsManager.
2) From the menu, select **Reports > Operations > Customer Account w/ PIDX**. The report header displays.
3) In the **Site** field, select all or a particular Site(s)/ Site Group(s) to filter the table data.
4) Select all or a particular **Shipper** from the list.
   This is a required field. The report will not run if no Shipper is selected.
5) Select if you want to view **Active Only** or **Inactive Only** Ship To companies (customer accounts).
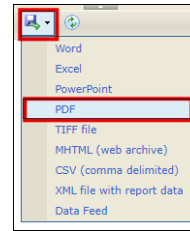6) Click **View Report**. The report values are refreshed based on your selections.

Printing the Report

You may print the report from the header. Follow these steps:

1) Click the **Export** dropdown menu.
2) Select **PDF** from the list and then save the file in your desired folder location.
   Varec recommends to use the PDF format for exporting reports.
3) Open the **PDF** file and then **print** the report.

Report Header Field Descriptions

Field	Description
Site	Filters the table to only show data for all or the selected Site(s).
Shipper	Filters the table to only show data associated with the selected Shipper. This is a required field. The report will not generate if no Shipper is selected.
Select	Allows you to include or exclude data for active or inactive Ship To accounts: • **Active Only** - indicates only active Ship To companies (customer accounts) are shown on the report. • **Inactive Only** - indicates only inactive Ship To companies (customer accounts) are shown on the report. If a Ship To company is not included on the report, ensure that the Ship To is part of the Company Hierarchy, assigned to a Bill To, and is assigned a Load/off-Load ID. For more information, refer to the *Assigning Load/Off-Load IDs and Drivers* section on the *Company Hierarchy Configuration* help.
View Report	Click to view the report based on the selected criteria.

Report Column Descriptions

Column	Description
ID	Lists the Ship To company IDs that identify the customer.
TABS1	Lists the PIDX ID for the DTN (Diamond) interface. The column name that appears on the report is based on the PIDX profile configured (Site-only configuration) in FuelsManager. Refer to the *Data Exchange Profiles Configuration* help page for more information.
TDSY2	Lists the PIDX ID for TDS (Toptech Data Services) interface. The column name that appears on the report is based on the PIDX profile configured (Site-only configuration) in FuelsManager. Refer to the *Data Exchange Profiles Configuration* help page for more information.
Customer Name	Lists the Ship To company names.
Address, City, State	Lists the addresses, cities, and states of the corresponding Ship To companies.