



**WEB TUTORIALS**

# Customer Profiles



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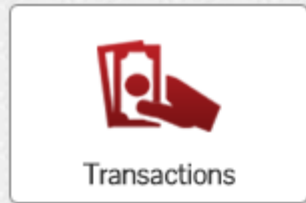
Create a New Customer Profile  
Look Up and Edit Existing Customer Profile

# THE AVFUEL HUB

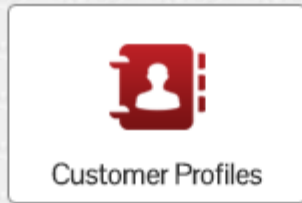


Home ▾ Transactions ▾ Lookup ▾ Customer Profiles ▾ Products and Pricing ▾ AVTRIP Promotions ▾ Merchant Account ▾ Help

Selected Account: 2985 - Merchant Training Account (Switch Account)



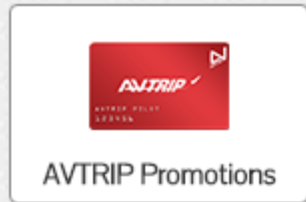
Transactions



Customer Profiles



Products and Pricing

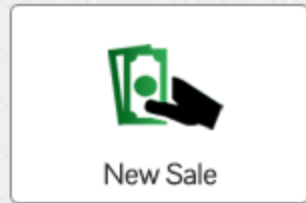


AVTRIP Promotions



Merchant Account

quickLINKS



New Sale



AVTRIP Points

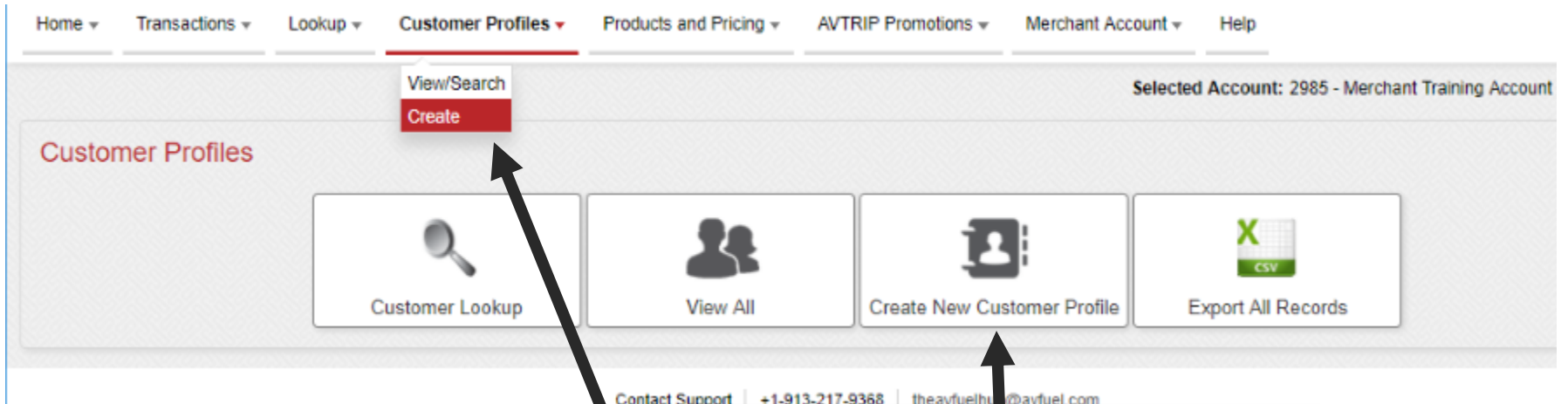


Customer Lookup

## Note

To begin, click the "Customer Profiles" link from the main menu navigation or the "Customer Profiles" button. The "Customer Profiles" link will give access to a dropdown menu, showing options to "View/Search" or "Create" (displayed in the next slide).

# Create New Customer Profile



Click “Create” from the top menu or “Create New Customer Profile” from the button options.

# Enter Customer Data



Home Transactions ▾ Lookup ▾ **Customer Profiles ▾** Products and Pricing ▾ AVTRIP Promotions ▾ Merchant Account ▾ Help

\* Customer/Company Name

Customer Email

Country

Address

City

State/Province

Zip/Postal Code

Phone No.

Vat Registration No.

Personalized Pricing Record


Notes/Preferences

Enter the Customer/Company Name (required) and any additional data you would like to include in the profile.

Click here if you want to add a Personalized Pricing Record.

Documents

No existing documents on file.

 Attach Document

Cancel Save & Close Continue

# Attach Document



Home Transactions ▾ Lookup ▾ **Customer Profiles ▾** Products and Pricing ▾ AVTRIP Promotions ▾ Merchant Account ▾ Help

\* Customer/Company Name

Customer Email

Country

Address

City

State/Province

Zip/Postal Code

Phone No.

Vat Registration No.

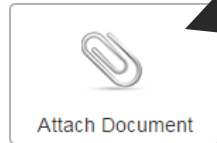
Personalized Pricing Record

Notes/Preferences

To add a document to the customer profile, click "Attach Document".

Documents

No existing documents on file.



Cancel

Save & Close

Continue

# Attach Document



Close

## Attach Document

Document

No file chosen

Description

To upload, select the file by clicking "Choose File" and click "Attach".

# Attach Document



Phone No.

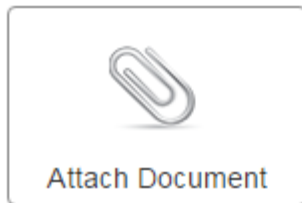
Vat Registration No.

Personalized Pricing Record

Notes/Preferences

The attached document will be visible here.

Documents



EXISTING DOCUMENTS

	Document	Description
Download	Signed-Receipt.pdf	(no description defined)

Cancel

Save & Close

Continue



# Complete Customer Profile



Home Transactions ▾ Lookup ▾ **Customer Profiles ▾** Products and Pricing ▾ AVTRIP Promotions ▾ Merchant Account ▾ Help

\* Customer/Company Name

Customer Email

Country

Address

City

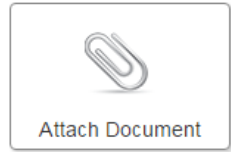
State/Province

Zip/Postal Code

Once all customer data entry is completed, select "Continue" to enter payment card information. If no payment card information is needed, select "Save & Close" to complete the customer profile.

Vat Re  
Personalized P  
Note

Documents



EXISTING DOCUMENTS

	Document	Description
Download	Signed-Receipt.pdf	(no description defined)

Cancel Save & Close **Continue**

# Enter Card Information



Choose the card type from the dropdown menu and the fields to enter the card information will appear.

\* Card Type

-- Select One -- ▼

Cancel

Add To Profile

Continue

# Enter Card Information



\* Card Type

\* Card Number

\* Cardholder Name

\* Expiration Date  /

-- Select One -

Notes

Enter the required card information to be saved to the customer profile.

Cancel

Add To Profile

Continue

# Enter Card Information



\* Card Type

\* Card Number

\* Cardholder Name

\* Expiration Date  /

\* Billing Zip Code

Reason For Use

Once the information is entered,  
select "Add To Profile".

Cancel

Add To Profile


Continue

# Card Information Saved



Account    **Card Info**    Aircraft    Contacts

### Card On File

	Avfuel Pro Card Abby *****0012	Delete
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Displaying records 1 - 1 of 1

Add Another    Save & Close    **Continue**


To add another card click here.

After you have added all card information, click "Continue" to enter aircraft information. If you do not want to add aircraft information click "Save & Close".

# Add Aircraft




Customer Profile




Account



Card Info



Aircraft



Contacts

Selected Account: 2985 - Merchant Training Account

## Add Aircraft

\* Tail Number

Aircraft Type

Fuel Type

Personalized Pricing

Notes

If applicable, select the Personalized Pricing record here.

Once the information is entered, select "Add To Profile".

# Add Aircraft



Account    Card Info    **Aircraft**    Contacts

## Aircraft

Tail Number	Aircraft Type	Fuel Type	Personalized Pricing	
Tail12				<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Displaying records 1 - 1 of 1

To add another aircraft click here.

Add Another

Save & Close

Continue

After you have added all tails, click "Continue" to enter new contact information. If you do not want to add contacts click "Save & Close".

# Add New Contact



Account    Card Info    Aircraft    **Contacts**

### Contacts

First Name	Last Name	Nickname	Title	Phone/Email	AVTRIP #	Additional Customer Notes	
<a href="#">Add New</a>							

To add a new contact click "Add New".



# Add New Contact



First Name	Last Name	Nickname	Title	Phone/Email	AVTRIP #	Additional Customer Notes
------------	-----------	----------	-------	-------------	----------	---------------------------

## Add Contact

**\* First Name**  **Car Rental #1**  **Reward #**

**\* Last Name**  **+ Add**

**Nickname**  **Preferences**

**Title**

**Mobile Phone**

**Office Phone**  **Hotel Rental #**  **Reward #**

**Email**  **+ Add**

**AVTRIP #**  **Additional Customer Notes**

If you want to add a second Car Rental or Hotel option click +Add

After you have entered the contacts information, click "Add to Profile"

# Add New Contact



## Contacts

First Name	Last Name	Nickname	Title	Phone/Email	AVTRIP #	Additional Customer Notes	
- John	Doe	Johnny	Vice President	555-555-5555 555-555-5555 john@domain.com	554654	John prefers a standard King room on the first floor if available. Greet John in the lobby with a cold bottle of water upon arrival.	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Car Rental		Reward #	Car Preferences	Hotel	Reward #		
Enterprise		789654	John prefers a black SUV. Arrange for car rental delivery within 30 minutes of arrival.	Hilton	654789		

Click the + next to the contact's first name to expand for details.

Click "Add Another" to add additional contacts, or "Save & Close" if you are done.

# Complete Customer Profile



Home Transactions ▾ Lookup ▾ **Customer Profiles ▾** Products and Pricing ▾ AVTRIP Promotions ▾ Merchant Account ▾ Help



Account



Card Info



Aircraft

Selected Account: 2985 - Merchant Training Account

Edit

Delete

**Customer/Company Name** Bob Catt  
**Customer Email** bacatt@flyingsquirrel.com  
**Address** 123 Fly Away Lane  
Ann Arbor, MI 48108  
United States  
**Phone No.** 555-867-5309

**Vat Registration No.**

**Personalized Pricing Record**

**Notes/Preferences**

**Documents**



Attach Document

**EXISTING DOCUMENTS**

	Document	Description
Download	Signed-Receipt.pdf	(no description defined)

Save & Close

Continue

Note

The Account customer profile is now created. From this screen it can be edited, updated or deleted. For instructions on this process, please continue in this section of the manual.

# Customer Profiles



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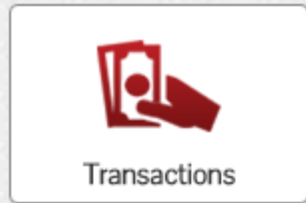
Look Up Customer Profiles

# Accessing Customer Profiles

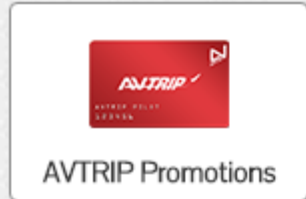


Home ▾ Transactions ▾ Lookup ▾ Customer Profiles ▾ Products and Pricing ▾ AVTRIP Promotions ▾ Merchant Account ▾ Help

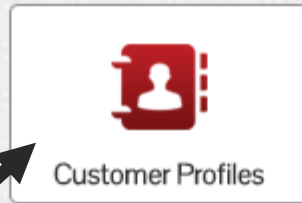
Selected Account: 2985 - Merchant Training Account (Switch Account)



Transactions



AVTRIP Promotions



Customer Profiles

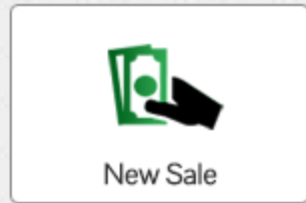


Merchant Account



Products and Pricing

quickLINKS



New Sale



AVTRIP Points



Customer Lookup

To begin, select "Customer Profiles" from the top navigation bar or the main menu button options.

# Search Customer Profile



Home ▾ Transactions ▾ Lookup ▾ **Customer Profiles ▾** Products and Pricing ▾ AVTRIP Promotions ▾ Merchant Account ▾ Help

View/Search  
Create

Selected Account: 2985 - Merchant Training Account

### Customer Profiles

Customer Lookup    View All    Create New Customer Profile    Export All Records

Contact Support +1-913-217-9368 | theavfuelhub@avfuel.com

Select "View/Search" from the top menu or "View All" from the button options.

# View All Customer Profiles



## Customer Profiles: Manage Database



Customer Lookup



View All



Create New Customer Profile



Export All Records

## Search Results

Customer / Company	City	Card On File?	Tail No.	Aircraft Type	Contacts
<a href="#">ABC Company</a>	Overland Park	<a href="#">Yes</a>	<a href="#">Multiple</a>		<a href="#">Multiple</a>
<a href="#">Abigail's Flying Service</a>	Ann Arbor	<a href="#">Yes</a>	<a href="#">N867SD</a>	Bombardier BD-700 Global Express	<a href="#">Abigail "Abby" Ross</a>
<a href="#">Accommack Flight</a>	New Bruin	<a href="#">Yes</a>	<a href="#">Multiple</a>		<a href="#">N/A</a>
<a href="#">Ace Aviation LLC</a>	ann arbor	<a href="#">Yes</a>	<a href="#">Multiple</a>		<a href="#">TEST TEST</a>
<a href="#">American Airlines</a>	Dallas	<a href="#">No</a>	<a href="#">N/A</a>		<a href="#">N/A</a>
<a href="#">ammerman jet center</a>	Ann Arbor	<a href="#">No</a>	<a href="#">Multiple</a>		<a href="#">Multiple</a>
<a href="#">Anthony's FBO</a>		<a href="#">No</a>	<a href="#">N456AB</a>		<a href="#">N/A</a>
<a href="#">avfuel 123</a>		<a href="#">No</a>	<a href="#">N/A</a>		<a href="#">N/A</a>
<a href="#">Avfuel Corporation</a>	Ann Arbor	<a href="#">No</a>	<a href="#">N1234</a>	AEA Explorer	<a href="#">Multiple</a>
<a href="#">Avfuel Corporation</a>		<a href="#">No</a>	<a href="#">N/A</a>		<a href="#">N/A</a>

Displaying records 1 - 10 of 141

< First Prev 1 2 3 4 5 6 7 8 9 10 Next Last >

Select the desired customer profile from the search results by clicking on the Customer/Company, Card on File, Tail No., or Contacts hyperlink.

# Customer Lookup




Home ▾ Transactions ▾ Lookup ▾ **Customer Profiles ▾** Products and Pricing ▾ AVTRIP Promotions ▾ Merchant Account ▾ Help


View/Search  
Create

Selected Account: 2985 - Merchant Training Account


### Customer Profiles




Customer Lookup



View All



Create New Customer Profile



Export All Records


Contact Support | +1-913-217-9368 | theavfuelhub@avfuel.com

To find a specific customer or profile, select the “Customer Lookup” button.



# Enter Search Criteria



 **Customer Lookup** Search by one or more criteria

<b>Tail No.</b> <input type="text"/> <input checked="" type="checkbox"/> Exact Match	<b>Customer / Company Name</b> <input type="text"/>	<b>First Name</b> <input type="text"/>
<b>Aircraft Type</b> <input type="text"/>	<b>City</b> <input type="text"/>	<b>Last Name</b> <input type="text"/>
	<b>Card Number</b> <input type="text"/>	<b>Nickname</b> <input type="text"/>
	<b>Personalized Pricing Record Name</b> <input type="text"/>	<b>AVTRIP #</b> <input type="text"/>
	<input type="text" value="-- Select One --"/>	

When the search criteria is entered, select "Search".

**Note** When searching by tail for more extensive results uncheck "Exact Match" box.

# Search Results



Customer Lookup    View All    Create New Customer Profile    Export All Records

## Search Results

Customer / Company	City	Card On File?	Tail No.	Aircraft Type	Contacts
<a href="#">ABC Company</a>	Overland Park	<a href="#">Yes</a>	<a href="#">Multiple</a>		<a href="#">Multiple</a>

Displaying records 1 - 1 of 1

Select the page of the customer profile that you wish to access by clicking the related hyperlink.



# Customer Profiles

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Edit Existing Customer Profiles

# Edit Customer Profile Data



**Customer/Company Name** Joe's Flight Center

**Customer Email** joe@flyjoe.com

**Address** 123 Fly Lane  
Flyville, 66210

**Phone No.** 555-555-1234


**Vat Registration No.**

**Personalized Pricing Record**

Enterprise  
Hilton or Marriot

**Notes/Preferences**

**Documents**

  
Attach Document

EXISTING DOCUMENTS		
	Document	Description
Download	Signed-Receipt.pdf	(no description defined)

To update the profile, select "Edit". To delete the profile select "Delete".

# Edit Customer Profile Data



Home Transactions ▾ Lookup ▾ **Customer Profiles ▾** Products and Pricing ▾ AVTRIP Promotions ▾ Merchant Account ▾ Help

\* Customer/Company Name

Customer Email

Country

Address

City

State/Province

Zip/Postal Code

Phone No.

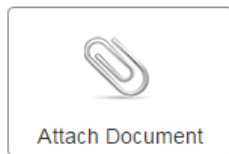
Vat Registration No.

Personalized Pricing Record

Enter  
Hilton

Notes/Preferences

Documents



EXISTING

	Document	Description
Download	Signed-Receipt.pdf	(no description defined)

Once the customer profile data has been updated, select "Continue" to view or delete the payment card data. If finished, select "Save & Close".

# Delete or Add Card Info




## Customer Profile

Account    **Card Info**    Aircraft    Contacts

Selected Account: 2985 - Merchant Training Account

## Card On File

	Avfuel Pro Card Abby *****0012	<input type="button" value="Delete"/>
--	--------------------------------------	---------------------------------------

Displaying records 1 - 1 of 1

If you wish to delete the card on file select "Delete". To add another select "Add Another".

# Return to Customer Profile



## Customer Profile

Account    Card Info    Aircraft    Contacts

Selected Account: 2985 - Merchant Training Account (Switch Account)

## Card On File

	AIR Card Test Customer *****1953 06/22	Delete
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Displaying records 1 - 1

Once updates to the card on file have been made, select "Continue" to view or delete the payment card data. If finished, select "Save & Close".

Add Another    Save & Close    **Continue**

# Edit Aircraft




## Customer Profile

Account      Card Info      **Aircraft**      Contacts

Selected Account: 2985 - Merchant Training Account

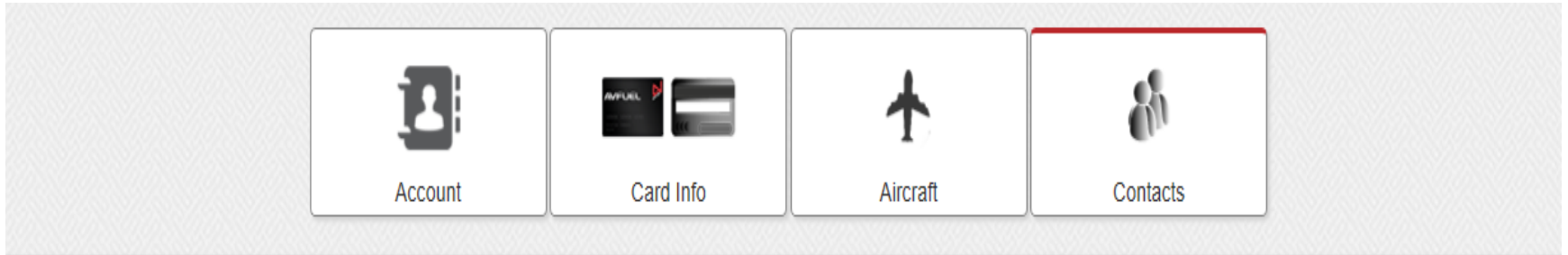
## Aircraft

Tail No.	Aircraft Type	Fuel Type	Personalized Pricing	
 N888A				<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Click here to Edit or Delete the aircraft or click "Add Another".



# Edit Contact



## Contacts

First Name	Last Name	Nickname	Title	Phone/Email	AVTRIP #	Additional Customer Notes	
Test	Acct						<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Click here to Edit or Delete existing Contact, or select "Add Another".



# Return to Top Navigation Bar




## Customer Profile

Account      Card Info      **Aircraft**      Contacts

Selected Account: 2985 - Merchant Training Account

### Aircraft

Tail No.	Aircraft Type	Fuel Type	Personalized Pricing	
 N888A				<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Displaying records 1 - 1 of 1

Add Another

Save & Close

Use the top navigation bar to return to other sections of the Avfuel Hub.