State of Maryland
Customer Portal User Guide
https://portal.carrollmotorfuels.com
** To request access to the Customer Portal – please submit the below information to Jack.Phelps@carrollfuel.net and Nicole.Geisendaffer@carrollfuel.net **

  – First & Last Name
  – Email Address
    – Phone #
  – Agencies needing portal access to
## Contents

### I. PORTAL LOGIN:

   ................................................................................................................................................4

### II. PORTAL HOME PAGE:

   ................................................................................................................................................4

   A. Navigation Bar ..................................................................................................................5

      1. Documents ..................................................................................................................5

      2. Reports .........................................................................................................................5

      3. Resources .....................................................................................................................6

      4. Accounts ........................................................................................................................6

      5. Help ................................................................................................................................7

      6. Profile .............................................................................................................................8

   B. Account Summary ................................................................................................ ..........10

   C. Recent Activity ..................................................................................................................10

   D. Quick Menu ....................................................................................................................10

### III. DOCUMENTS TAB:

   ................................................................................................................................................11

   A. Invoice History ................................................................................................................11

   B. Other Documents ............................................................................................................13

### IV. REPORTS TAB:

   ................................................................................................................................................15

   A. Purchase Summary .........................................................................................................15

   B. Invoice Summary ............................................................................................................17

   C. Account History ...............................................................................................................18

   D. Open Transactions Report ............................................................................................19

   E. Daily Site Summary .........................................................................................................20

   F. Daily Driver Summary ....................................................................................................21

   G. Daily Department Summary ..........................................................................................22

   H. Daily Vehicle Summary ..................................................................................................23

   I. Driver Listing ..................................................................................................................24

      4. Driver Modifications/Updates or Creating a New Driver ...........................................25

   J. Vehicle Listing ................................................................................................................27

      4. Vehicle Modifications and New Requests ..................................................................28

   K. Cardlock Exceptions .......................................................................................................31

   L. Cardlock Detail ................................................................................................................33

### V. RESOURCES TAB:

   ................................................................................................................................................35

   A. Environmental Portal .......................................................................................................35

   B. Price Advantage Price Survey .......................................................................................35

   C. Prokee Management .......................................................................................................35

   D. Titan Cloud .......................................................................................................................35
I. PORTAL LOGIN:
   A. Open the webpage https://portal.carrollmotorfuels.com
   
   ![Login Image]

   B. Login with your email address and password
      1. If you forgot your password, select Forgot Password & a password reset email will be sent to email address
      C. Click Sign In

II. PORTAL HOME PAGE
A. Navigation Bar

![Navigation Bar Image]

1. Documents
   a) Invoice History – report reflecting all bulk delivery invoices, service invoices and consigned/fleet daily transactions
   b) Other Documents – report reflecting all posted Documents including the consigned/fleet Bi-Monthly Invoices & Invoice Details

![Invoice History and Other Documents Image]

2. Reports
   a) Purchase Summary – Summary of all fuel purchases
   b) Invoice Summary – Total dollar amount for all invoices including taxes
   c) Account History – History of all transactions within a specific date range
   d) Open Transactions – Current open transactions
   e) Daily Site Summary – Report showing all consigned purchases in a specific date range by site
   f) Daily Driver Summary – Report showing all consigned purchases in a specific date range by driver
   g) Daily Department Summary – Report showing all consigned purchases in a specific date range by department
   h) Daily Vehicle Summary – Report showing all consigned purchases in a specific date range by vehicle
   i) Driver Listing – Report of all drivers *this is where interactive updates can be made*
   j) Vehicle Listing – Report of all vehicles *this is where interactive updates can be made*
   k) Cardlock Exceptions – Exception report containing consigned/fleet transaction level details
   l) Cardlock Detail – Report containing all consigned/fleet transactions in a specific date range
   m) Tank Readings – not applicable for State of Maryland agencies
   n) Tank Reports – not applicable for State of Maryland agencies
3. Resources
   a) Environmental Portal – not applicable for State of Maryland agencies
   b) Price Advantage Price Survey – not applicable for State of Maryland agencies
   c) Prokee Management – All Driver & Vehicle modifications should be handled under the Driver & Vehicle reports. Removing from Portal Website 12/15/22.
   d) Titan Cloud – Link to compliance portal for State of Maryland Consigned Fueling Locations

(1) If access is needed to compliance portal, please contact StateService@carrollfuel.net

4. Accounts – Portal users with access to more than one Carroll Fuel Account Number can move between the different accounts by selecting the account from the list. Use the Search Field to limit list if preferred.
5. Help

a) Support – will display any tickets that were submitted via the Contact Us button

b) Contact Us – allows you to send a message with attachments to our Customer Portal email address. **Please note, this mailbox is monitored monthly and not on a daily basis. Response time may be delayed**

c) Send Message – allows you to send a message to our Customer Portal email address. **Please note, this mailbox is monitored monthly and not on a daily basis. Response time may be delayed**
6. Profile

a) Profile & Settings
   (1) User Profile – can edit your name and phone number

(2) Password – this is where you will modify your Customer Portal password

(3) Notifications – notifications are set for each account the user has access to.
(a) To edit an existing notification, select options & edit notification
(b) To delete an existing notification, select options & remove notification

<table>
<thead>
<tr>
<th>Account No</th>
<th>Alert Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>6001324</td>
<td><a href="mailto:kurt.butler@maryland.gov">kurt.butler@maryland.gov</a></td>
</tr>
<tr>
<td>6001325</td>
<td><a href="mailto:kurt.butler@maryland.gov">kurt.butler@maryland.gov</a></td>
</tr>
<tr>
<td>6001326</td>
<td><a href="mailto:kurt.butler@maryland.gov">kurt.butler@maryland.gov</a></td>
</tr>
</tbody>
</table>

(c) To add a new notification select Add Notification at the bottom left. Always ensure to turn on notifications for both Documents & Invoices. Repeat for all accounts.

(4) Devices – this is not applicable for State of Maryland Agencies

b) Mobile Apps – User can download the app on both Google Play and Apple Store to access 24/7 on a mobile device

c) Logoff – This is where the user can come to log out of the Customer Portal
B. Account Summary
   1. Current Balance – Total of all open items on the account
   2. Last Payment – Date and total of last payment received

C. Recent Activity
   1. This section will display the 10 most recent transactions on the account

D. Quick Menu – This section is a quick access menu bar to the top used items on the portal
   1. Invoice History – will take the user to the invoice history page
   2. Document History – will take the user to the document history page
   3. Tank Readings – this is not applicable for State of Maryland Agencies
   4. Reporting – will take the user to the Purchase Summary Report
   5. Settings – will take the user to the User Settings page
   6. Contact Us – will take the user to the Contact Us Form
III. DOCUMENTS TAB

A. Invoice History – report reflecting all bulk delivery invoices, service invoices and consigned/fleet daily transactions within a specific date range. This will show daily consigned/fleet transactions for inventory purposes but will not contain the bi-monthly invoices

1. Search Criteria – click in the white area of the search criteria box to see all available search filters for this report

2. Search Options
   a) Date Range – Enter the start and end date to run the invoice history report for
   b) Location – From the dropdown select the location to run the invoice history report for. Select All Locations if this should be run for all locations for the account being viewed on the portal
   c) Invoice – Can leave blank or enter a specific invoice number. This report will not show the consigned/fleet bi-monthly invoices
   d) BOL – Can leave blank or enter a specific BOL/delivery ticket number
   e) P.O. – Can leave blank or enter a specific PO #
   f) Invoice Date or Ship Date – Field will default to invoice date. Best practice is to leave the selection on Invoice Date
   g) Include All Assigned Accounts – Select this field if user wants to view invoices for all Carroll Fuel Accounts assigned to their User within the Portal
   h) Export – Select this field if user wants to immediately export the report to excel
3. Invoice History Report – Will show all invoices within the search options selected. This report can be exported to excel or printed to PDF by selecting Options in the lower left corner.

**To View a Copy of the Invoice – Click the options button and click view, download or export**

(1) **View** – This will open a copy of the invoice in another internet tab **Preferred method to view the invoice**

(2) **Download** – This will open a copy of the invoice to download and save

(3) **Export** – This will take you to the search options and allow you to export the report
B. Other Documents – This is where the Bi-Monthly Consigned Invoices and Invoice Details can be found, in addition to other Documents that may be applicable for State of Maryland Agencies.

1. Search Criteria – click in the white area of the search criteria box to see all available search filters for this report

2. Search Options
   a) Date Range – Enter the start and end date to run the invoice history report for
   b) Category – Select a category from the drop down or leave defaulted to ALL
   c) Reference – Always leave this field blank – Carroll Fuel does not use reference #'s when posting Documents to the portal
   d) Location – Leave this defaulted to ALL to ensure seeing all necessary documentation
   e) Update Date or Reference Date – Leave defaulted to Update Date. Carroll Fuel does not use reference dates
3. Document History – Will show all documents within the search options selected. This report can be exported to excel or printed to PDF by selecting Options in the lower left corner.

a) To View a Copy of the Document – Click the view button and the document will open based on the Document Type (.xls, .pdf, .doc, etc.)
IV. REPORTS TAB

A. Purchase Summary – Summary of all fuel purchases with a prior year comparison

1. Search Criteria – click in the white area of the search criteria box to see all available search filters for this report

2. Search Options
   a) Year – Select the year to review a summary for from the drop down
   b) Report – Select either Units or Dollars from drop down
   c) Units – Gallons
   d) Dollars
   e) Group By – Select either Product Group or Product from drop down
   f) Product Group – Will display the report by product grouping (Dyed Diesel, Clear Diesel, Gas etc.)
   g) Product – Will display the report by indivual products
   h) Location – Select the location from the dropdown list. To see all locations for the account being viewed on the portal, select All Locations
   i) Decimals – Default is set to 0 decimals. Chose from dropdown the number of decimals to display. Recommended to keep at 0 decimals
   j) Ship Date or Invoice Date – Portal will default to ship date, recommended to leave that selected
   k) Include All Assigned Accounts – Select this field if user wants to view invoices for all Carroll Fuel Accounts assigned to their login on the portal
   l) Export Detail – Select this field if user wants to immediately export the report to excel
3. Purchase Summary Report - Will show a summary of all purchases within the search options selected. This report can be exported to excel or printed to PDF by selecting Options in the lower left corner.
B. Invoice Summary – Total dollar amount for all invoices including taxes
   1. Search Criteria – click in the white area of the search criteria box to see all available search filters for this report

   ![Search Criteria](image)

   ![Invoice Summary Report](image)

   2. Search Options
   a) Year – Select the start and end year to show in report
   b) Location – Select the location from the dropdown list. To see all locations for the account being viewed on the portal, select All Locations
   c) Decimals – Default is set to No decimals. User can change to Yes if they want to see report with decimals

   3. Invoice Summary Report – will show the total dollar amount for all invoices (consigned, bulk and service) including taxes for each period. This report can be exported to excel or printed to PDF by selecting Options in the lower left corner.

   a) View Chart – This will show the report results in Chart Form as show below

   ![View Chart](image)
C. Account History – History of all transactions within a specific date range

1. Search Criteria – click in the white area of the search criteria box to see all available search filters for this report

2. Search Options
   a) Date – Select the start and end date to show in report
   b) Location – Select the location from the dropdown list. To see all locations for the account being viewed on the portal, select All Locations
   c) Export Detail - Select this field if user wants to immediately export the report to excel

3. Account History Report – will reflect service invoices, bulk invoices, consigned daily transactions/invoices included on Bi-Monthly Invoice and payments. This report will not contain the Bi-Monthly Invoices. This report can be exported to excel or printed to PDF by selecting Options in the lower left corner.
a) To view a copy of an invoice, click the blue font reference number and the invoice detail screen will pop up. From there, click Print & an invoice PDF will open to screen.

b) If the below error message pops up when attempting to view an invoice, this is a daily consigned transaction, and the gallons should be included on the bi-monthly invoice.

D. Open Transactions Report – Current open transactions
1. Open Transactions Report – this report will reflect any open service invoices, bulk invoices, consigned daily transactions/invoices included on Bi-Monthly Invoice and any unapplied payments. By default the report will display 10 transactions, you can hit the drop down and change the number of transactions to display. This report can be exported to excel or printed to PDF by selecting Options in the lower left corner.
a) To view a copy of an invoice, click the blue font reference number and the invoice detail screen will pop up. From there, click Print & an invoice PDF will open to screen.

b) If the below error message pops up when attempting to view an invoice, this is a daily consigned transaction, and the gallons should be included on the bi-monthly invoice.

E. Daily Site Summary – Report showing all consigned purchases in a specific date range by site

1. Search Criteria – click in the white area of the search criteria box to see all available search filters for this report

2. Search Options
   a) Date – Select the start and end date to show in report
   b) Include all assigned accounts - Select this field if user wants to view transactions for all Carroll Fuel Accounts assigned to their login on the portal
3. Daily Site Summary – this report will show all consigned/fleet purchased sorted by DGS Fueling Location. By default the report will display 100 transactions, you can hit the drop down and change the number of transactions to display. This report can be exported to excel or printed to PDF by selecting Options in the lower left corner.

F. Daily Driver Summary – Report showing all consigned purchases in a specific date range by driver
   1. Search Criteria – click in the white area of the search criteria box to see all available search filters for this report

   2. Search Options
      a) Date – Select the start and end date to show in report
      b) Include all assigned accounts - Select this field if user wants to view transactions for all Carroll Fuel Accounts assigned to their login on the portal
3. Daily Driver Summary – this report will show all consigned/fleet purchased sorted by driver. By default, the report will display 100 transactions, you can hit the drop down and change the number of transactions to display. This report can be exported to excel or printed to PDF by selecting Options in the lower left corner.

G. Daily Department Summary – Report showing all consigned purchases in a specific date range by department
1. Search Criteria – click in the white area of the search criteria box to see all available search filters for this report

2. Search Options
   a) Date – Select the start and end date to show in report
   b) Include all assigned accounts - Select this field if user wants to view transactions for all Carroll Fuel Accounts assigned to their login on the portal
3. **Daily Department Summary** – this report will show all consigned/fleet purchased sorted by department. By default, the report will display 100 transactions, you can hit the drop down and change the number of transactions to display. This report can be exported to excel or printed to PDF by selecting *Options* in the lower left corner.

![Daily Department Summary](image)

**H. Daily Vehicle Summary** – Report showing all consigned purchases in a specific date range by vehicle

1. **Search Criteria** – click in the white area of the search criteria box to see all available search filters for this report

![Search Criteria](image)

2. **Search Options**
   a) **Date** – Select the start and end date to show in report
   b) **Include all assigned accounts** - Select this field if user wants to view transactions for all Carroll Fuel Accounts assigned to their login on the portal

![Search Options](image)
3. Daily Vehicle Summary – this report will show all consigned/fleet purchased sorted by vehicle. By default, the report will display 100 transactions, you can hit the drop down and change the number of transactions to display. This report can be exported to excel or printed to PDF by selecting Options in the lower left corner.

I. Driver Listing – Report showing all drivers assigned to the account being viewed on the Portal. This is where you can make driver modifications and request new drivers
   1. Search Criteria – click in the white area of the search criteria box to see all available search filters for this report

   ![Search Criteria](image)

2. Search Options
   a) Include all assigned accounts - Select this field if user wants to view transactions for all Carroll Fuel Accounts assigned to their login on the portal

   ![Search Options](image)
3. Driver Listing – this report will show all drivers setup on the account being viewed on the portal. By default, the report will display 25 drivers, you can hit the drop down and change the number of transactions to display. This report can be exported to excel or printed to PDF by selecting Options in the lower left corner.

4. Driver Modifications/Updates or Creating a New Driver
   a) Modify an Existing Driver – Find the driver in the list and select Options > Edit Driver. An Update Driver box will pop up. Update the First or Last Name accordingly and hit update. The user submitting the driver modification will receive an email once the Updates have been made.
   **Please note – it will take 24 hours for the changes to reflect on the fueling pumps**
5. Inactivate an Existing Driver – Find the driver in the list and select Options > Disable Driver. A Status box will pop up asking if you are sure you want to disable. If so, click Disable, if not, click Cancel. The user submitting the driver inactivation will receive an email once the Inactivation has been completed. **Please note – it will take 24 hours for the changes to reflect on the fueling pumps**

6. Creating a New Driver – At the bottom left of the driver Listing, click Options > Add Driver. A Add Driver box will pop up requesting the below information. Hit add once all information entered. The user submitting the driver creation will receive an email with the PIN # once the Driver has been setup. **Please note – it will take 24 hours for the changes to reflect on the fueling pumps**
   a) Location – Select the only location in the list
   b) Driver Number – No entry required. This will populate with the PIN # once created
   c) First Name – Enter the Drivers First Name
   d) Last Name – Enter the Drivers Last Name
J. Vehicle Listing – Report showing all vehicles assigned to the account being viewed on the Portal. This is where you can make vehicle modifications and request new or replacement prokees

1. Search Criteria – click in the white area of the search criteria box to see all available search filters for this report

2. Search Options
   a) Include all assigned accounts - Select this field if user wants to view transactions for all Carroll Fuel Accounts assigned to their login on the portal

3. Vehicle Listing – this report will show all vehicles setup on the account being viewed on the portal. By default, the report will display 25 vehicles, you can hit the drop down and change the number of transactions to display. This report can be exported to excel or printed to PDF by selecting Options in the lower left corner.
4. Vehicle Modifications and New Requests

a) Modify an Existing Vehicle – Find the vehicle in the list and select Options > Edit Vehicle. An Update Vehicle box will pop up. Update the fields requiring an update and click Update. The user submitting the vehicle modification will receive an email once the Updates have been made.

**Please note – it will take 24 hours for the changes to reflect on the fueling pumps**

1. Location – This field will never need to be changed
2. Department – Chose the department from the drop down list. If a department is missing from the list, please email ProkeeRequest@carrollfuel.net to have the department created.
3. Sub-Department – Each agency uses this field for something different, but this is a “Sub Department” or how the invoice is being filtered. It is a free form field, so be sure to be consistent with naming for invoice purposes.
4. Number – This field is the Vehicle ID and can’t be modified
5. Name – This field is used for identifying the vehicle on the Bi-Monthly Invoices. It should contain a full description of the vehicle and any other required fields by the Agencies AP department.
6. Make – Vehicle Make
7. Model – Vehicle Model
8. Year – Vehicle Year
9. VIN # - Vehicle VIN # - This field is not able to be edited since it is a unique identifier of a vehicle
10. License Plate – Vehicle Tag #
11. Fill Limit – Tank Size of the Vehicle

![Update Vehicle Form](image-url)
b) **Inactivate an Existing Vehicle/Prokee** – Find the vehicle in the list and click Options > Disable Vehicle. A Status box will pop up asking if you are sure you want to disable. If so, click Disable; if not, click Cancel. The user submitting the vehicle inactivation will receive an email once the Inactivation has been completed. **Please note – it will take 24 hours for the changes to reflect on the fueling pumps**

![Status](image1)

![Prokee Replacement](image2)

b) **Inactivate an Existing Vehicle/Prokee** – Find the vehicle in the list and click Options > Disable Vehicle. A Status box will pop up asking if you are sure you want to disable. If so, click Disable; if not, click Cancel. The user submitting the vehicle inactivation will receive an email once the Inactivation has been completed. **Please note – it will take 24 hours for the changes to reflect on the fueling pumps**

![Status](image1)

![Prokee Replacement](image2)

c) **Request a Replacement Prokee** – Find the vehicle in the list and click Options > Replace Prokee. A Prokee Replacement box will pop up asking for the Prokee Delivery Method. Click the Pick Up Method from the Drop Down and click request. The user submitting the prokee replacement will receive an email once the Prokee is ready for delivery. **Please note – it will take 48 hours for the changes to reflect on the fueling pumps**

(1) Method – Select Pickup Method from drop down list

(a) Delivery – Enter delivery address for the replacement prokee to be mailed

(b) Pickup Curtis Bay – Select if user wants to pick up prokee at our Curtis Bay office – 6401 Chemical Rd Curtis Bay MD 21226

(c) Pickup Loveton – Select if user wants to pick up prokee at our Loveton Main Corporate office – 18 Loveton Cir Sparks Glencoe MD 21152
d) Creating a New Vehicle – At the bottom left of the vehicle Listing, click Options > Add Vehicle. A Add Vehicle box will pop up requesting the below information. Hit add once all information entered (all fields are required for setup). The user submitting the new vehicle will receive an email once the Prokee is ready for delivery. **Please note – it will take 48 hours for the changes to reflect on the fueling pumps**

(1) Location – Chose the location from the drop down list. Should be the MD###CL
(2) Department – Chose the department from the drop down list. If a department is missing from the list, please email ProkeeRequest@carrollfuel.net to have the department created.
(3) Sub-Department – Each agency uses this field for something different, but this is a “Sub Department” or how the invoice is being filtered. It is a free form field, so be sure to be consistent with naming for invoice purposes.
(4) Product – Select one or more products from the drop down
(5) Method – Select pickup Method from drop down list
(6) Delivery – Enter delivery address for the replacement prokee to be mailed
(7) Pickup Curtis Bay – Select if user wants to pick up prokee at our Curtis Bay office – 6401 Chemical Rd Curtis Bay MD 21226
(8) Pickup Loveton – Select if user wants to pick up prokee at our Loveton Main Corporate office – 18 Loveton Cir Sparks Glencoe MD 21152
(9) Number – This field is the Vehicle ID and can’t be modified
(10) Name – This field is used for identifying the vehicle on the Bi-Monthly Invoices. It should contain a full description of the vehicle and any other required fields by the Agencies AP department.
   (a) If requesting a Master Prokee, please enter Master + Department
(11) Make – Vehicle Make
   (a) If requesting a Master Prokee, please enter Master
   (b) If requesting for Equipment, please enter Equip
(12) Model – Vehicle Model
   (a) If requesting a Master Prokee, please enter Master
   (b) If requesting for Equipment, please enter Equip
(13) Year – Vehicle Year
   (a) If requesting a Master or Equipment Prokee, please enter the year the prokee is being requested
(14) VIN # - Vehicle VIN #
   (a) If requesting a Master Prokee, please enter Master
   (b) If requesting for Equipment, please enter Equip
(15) License Plate – Vehicle Tag #
   (a) If requesting a Master Prokee, please enter Master
   (b) If requesting for Equipment, please enter Equip
(16) Fill Limit – Tank Size of the Vehicle
K. Cardlock Exceptions – Exception report containing consigned/fleet transaction level details and the corresponding exceptions

1. Search Criteria – click in the white area of the search criteria box to see all available search filters for this report

2. Search Options

   a) Date – Select the start and end date to show in report

   b) Include all assigned accounts - Select this field if user wants to view transactions for all Carroll Fuel Accounts assigned to their login on the portal
3. Cardlock Exceptions – this report will show all transactions that have any type of exception related to them. This will correspond with the DGS Exception Audits sent to the agencies. This report can be exported to excel or printed to PDF by selecting Options in the lower left corner.

   a) Exception Listing

   (1) 2-9 – Multiple Fuelings in one day
   (2) A – Fueling after hours
   (3) W – Fueling on weekends
   (4) C – Calculated MPG Error
   (5) G – Gallons / Day
   (6) M – Master Prokee was used for fueling
   (7) D – Duplicate transaction
   (8) X – Exceeds tank size of vehicle being filled
L. Cardlock Detail – Report containing consigned/fleet transaction level details for a specific date range. This report will be used for the tax refund (if applicable to your agency)

1. Search Criteria – click in the white area of the search criteria box to see all available search filters for this report

2. Search Options
   a) Date – Select the start and end date to show in report
   b) Location – Leave defaulted to All or select the account MD###CL
   c) Site – Leave defaulted to All or select the DGS Fueling site to contain on the report
   d) Card – Leave defaulted to All
   e) Driver – Leave defaulted to All or select the specific driver to contain on the report
   f) Vehicle – Leave defaulted to All or select the specific vehicle to contain on the report
   g) Invoice # - Always leave this field blank
   h) Group – Chose how the report is sorted (Card, Driver or Vehicle)
M. Cardlock Detail Summary – this report will show all consigned/fleet transactions that meet the search options selected. This report can be exported to excel or printed to PDF by selecting Options in the lower left corner. **Please Note – Pricing and Amount will reflect as $0.00 until processed in our system, typically within 48 hours**
V. RESOURCES TAB

A. Environmental Portal – not appliable to the State of MD Agencies
B. Price Advantage Price Survey – not appliable to the State of MD Agencies
C. Prokee Management – This option will be going away. All Prokee or Driver requests and modifications should be made under the Vehicle or Driver Listing Reports
D. Titan Cloud – Link to the State of MD Compliance Portal. This portal is for environmental compliance for State of MD Fueling Locations with Prokee access. If user access is needed for the Compliance Portal, please reach out to StateService@carrollfuel.net.