OPIS PricePro

User Guide

Version 1.5

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OPIS PricePro

About PricePro

Backed by the power of OPIS's renowned database of nearly 135,000 retail fuel stations comes PricePro, a brand new, web-based system that allows you to:

- Get real-time competitor fuel prices throughout the day.
- Set rules for monitoring how you want your station(s) priced against competitors.
- React instantly from alerts that tell you when your rules are violated.
- Compare competitor historical prices back to January 1, 2012.

Methodology

Every day, OPIS captures station-specific retail gasoline and diesel prices for up to 135,000 gas stations throughout the United States and Canada. Through exclusive relationships with credit card companies, direct feeds from fuel retailers, and an exclusive data partnership with GasBuddy and its user-input prices from over 60 million downloads of the GasBuddy mobile app, OPIS is able to provide the most comprehensive and accurate pump prices in the industry.

OPIS PricePro

Definitions

PRICE TYPES

- **Lowest** – If there are multiple prices for the same grade of fuel due to discounts (ex. Cash) then the lowest price is shown
- **Cash** – Display prices that we know are cash; if there's no cash discount, then there's no price
- **Standard** – Typical methodology; most recent credit price
- **GasBuddy Only –** Uses only user-input data from GasBuddy mobile and web sources
- **Credit Only –** Uses only electronic data sources from fleet card swipes
- **Combined Sources –** Uses all types of data available, including both GasBuddy and Credit Card sources

OPIS PricePro

Getting Started

http://app.opispricepro.com

Welcome to PricePro, your tool for station-by-station analytics. Once you login, the first thing you will see is a complete list of your stations:

Hitting the gear icon will allow you to choose either 'Real-Time Prices' or our 'Suggested Prices' that will satisfy as many of your existing pricing rules as we can. You can also set what fuel type and price type to showcase on the Overview screen.

The 'Margin' column is only displayed for users who have permission to use and view costs. This will provide an at-a-glance look at how your stations are currently performing based on either the purchase information you enter, or if that is unavailable the OPIS implied cost.

Main Menu Bar

The main menu bar is located at the top of the page:
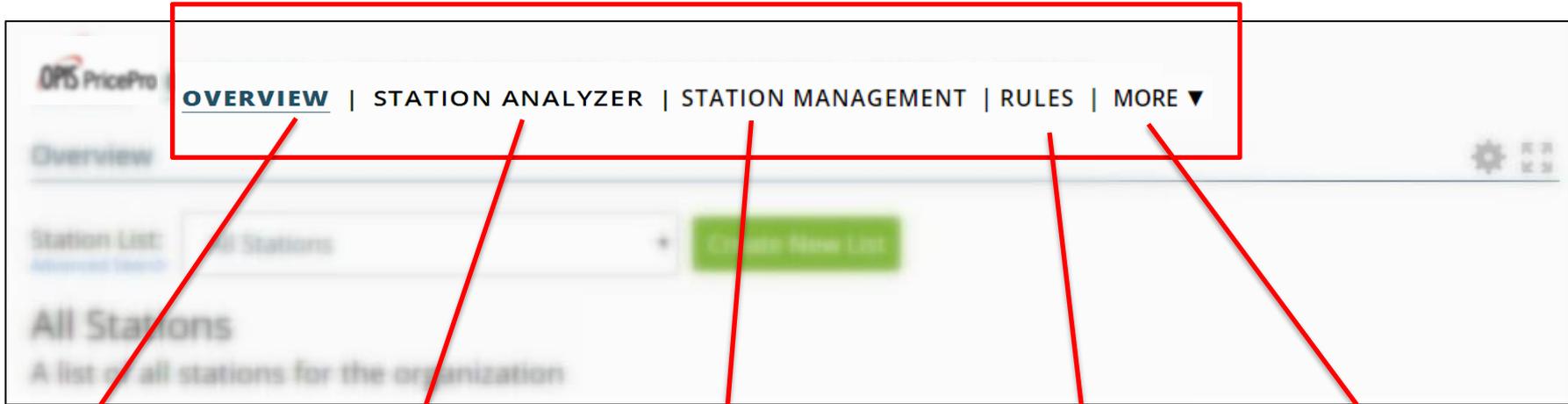
Overview:
The default screen; shows your list of stations

Station Analyzer:
Where you choose a particular station and compare it to competitors

Station Management:
Create competitor lists for each of your stores; create multiple lists for the same store if user wants to monitor multiple groups of competitors

Rules:
Create rules based on competitor pricing in relation to your station, or competitor price moves; set alerts to be notified when rules are broken

More:
Options for adjusting users and contact lists, a help feature, and customizing settings

Overview: Setting Up Station Lists

Station lists allow you to group certain stations together by creating subsets of all of your organization's settings, pertaining to individual users. Larger chains will have many managers responsible for certain regions, while smaller chains will only have need for one or two station lists

1. Click on "Create New List"

RVIEW | STATION ANALYZER | STATION MANAGEMENT | RULES | MORE ▼

Station List: All Stations   Create New List
Advanced Search
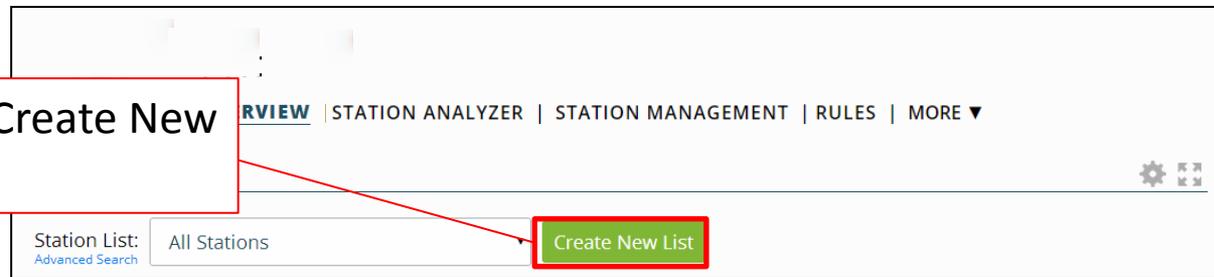
2. Name your list anything. *In this example, we want a station list with only stores in Minnesota so we've named it "Minnesota Stores"*

3. Allow access to the list for yourself only, your whole organization of employees, or another user

4. Describe the station list

5. If you'd like this to be your main default list used, check the box next to "Yes" – otherwise, leave it unchecked

6. Click the "Next" button
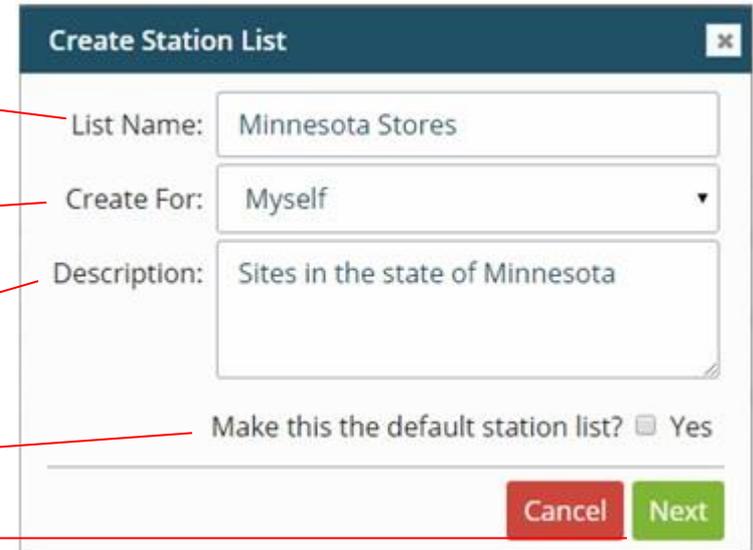
Create Station List

List Name: Minnesota Stores

Create For: Myself

Description: Sites in the state of Minnesota

Make this the default station list? ☐ Yes

Cancel   Next

Overview: Setting Up Station Lists

To add a station to the list, simply check the box next to the stores you want to add. You can also filter the stations by city, state/province, or by stores already on a different station list

In the example below, we wanted only Minnesota stations on the list so we filtered by "State/Province" then selected "MN" - now, only the sites in that state appear so we can hit "Select All" to add them

Once you have selected all the stations you want, hit "Save List"

Overview: Setting Up Station Lists

Your station list will now be accessible from the drop-down menu on the Overview home page. Your default list will always display, however you can toggle between other station lists as needed

Once you have selected your list, you will have the option of adding or removing stations by using the "Edit Current List" button

You can also delete a station list entirely by hitting the "Delete Current List" button

Overview: Current Prices

View your stores' prices as well as update them or report wrong pricing information

Click on the price of one of your stations to view the current prices by grade and source. You can update the prices or report wrongly entered pricing information

Overview: Update/Suggested Prices

Update your stores' prices as well as view suggested prices based off the rules you have created (Pages 33-50)

Enter #1 American Oil Prices

		current	suggested	new	margin	change
⊖	Regular Standard	$2.20⁹ 3.5 hours ago	$2.20⁹ [Use]	− 2.20 +	+19.0c	0.0c
⊖	Midgrade Standard	$2.19⁹ 5.8 hours ago	$2.19⁹ [Use]	− 2.19 +	-1.6c	0.0c
⊖	Premium Standard	$2.51⁹ 5.8 hours ago	$2.51⁹ [Use]	− 2.51 +	+8.7c	0.0c
⊖	Diesel Standard	$2.59⁹ 5.8 hours ago	$2.59⁹ [Use]	− 2.59 +	+31.4c	0.0c
⊕	Regular Cash	--	Would you like to enable regular-cash prices for this station?			
⊕	Midgrade Cash	--	Would you like to enable midgrade-cash prices for this station?			
⊕	Premium Cash	--	Would you like to enable premium-cash prices for this station?			
⊕	Diesel Cash	--	Would you like to enable diesel-cash prices for this station?			

Attach Comment

[Cancel] [Submit]

We will suggest the smallest possible price move that satisfies the rules you have created for this station in PricePro.

In this example, the user's current prices satisfy the rules for this station, so no price move is suggested.

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Overview: Report Bad Prices

Report wrong pricing information for your own stations

When you click "Report Bad Prices", select the incorrect prices and hit submit

Station Management

View statistics of your stores' competitors by going to the station management screen

You can select particular competitor stations you'd like to view for your station by hitting "Create New List"

The competitor summary will show you how many competitors are within a 5, 10, and 25 mile radius of your store

Station Management: Setting Up Competitor Lists

Creating competitor lists allows you to closely monitor selected stores' pricing. Pick and choose the most important competitors for each of your stores

1. Name your list anything. *In this example, we want competitor stations within a 2-mile radius of our chosen site*

2. Allow access to the competitor list for yourself only, your whole organization of employees under 'Company Name (Shared)', or another user

3. Describe the competitor list

4. Use tags for stores with same pricing philosophies for more efficient rule creation

5. If you'd like this to be your main default list used, check the box next to "Yes" – otherwise, leave it unchecked

6. Hit "Save List"

Create Competitor List

List Name: 2 Mile Competitors

Create For: American Oil 22 (Shared) ▼

Description: Selected competitors within a 2 mile radius of my station

Tags: 2 miles

Make this the default competitor list? ☑ Yes

Cancel   Save List

Station Management: Setting Up Competitor Lists

Choose the competitors to be on the list by selecting either from the list or by clicking on the pins

This is a list of all competitors surrounding your station within 25 miles. The selected stores will be added to the competitor list after you hit "Save Competitors" – you can uncheck any stations you do not wish to be included as a competitor

You can drag the radius circle around your station to make it bigger or smaller, or you can type the distance you want in the box above

When you have chosen all the competitor stations you want included on your station's competitor list, hit "Save Competitors"

NOTE: In this section, a **GREEN** number/pin indicates that your competitor's price is higher than your store's price, while a **RED** number indicates your competitor's price is lower than your store's price. A **BLACK** number indicates that it matches

Your station appears as the blue pin

Green pins indicate competitors included on your list; grey pins indicate excluded competitors

Station Management: Purchases

Enter your fuel purchase information to be used in real-time cost and margin analysis throughout your Price Pro experience.

Add purchase information to be used in cost and margin calculations throughout your instance of PricePro

Manage Purchases   View All Purchases

Fuel Type	Product	Cost	Freight	Adjustment	Volume	Tax	Total	Date

No purchases have been reported for this station.

+ Add a New Purchase

Save New Purchases   No changes have been made.

This information is completely confidential and will never be shared outside of your instance of PricePro. Purchases will not be visible or used in calculations for other PricePro customers.

Station Management: Purchases

Enter your fuel purchase information to be used in analysis throughout your Price Pro experience

Choose the rack location and supplier information for the purchase you are entering, then select the product you purchased for your station.

Minneapolis, MN Rack Products

City:	Minneapolis, MN
Supplier:	Valero

Valero

CBOB Ethanol 10% (Unbranded) Octane Rating: 87 RVP Level: 9	$1.9785 May 13, 12:00 AM	
CBOB Ethanol 10% (Unbranded) Octane Rating: 89 RVP Level: 9	$2.0485 May 13, 12:00 AM	
CBOB Ethanol 10% (Unbranded) Octane Rating: 91 RVP Level: 9	$2.0975 May 13, 12:00 AM	
Conv. Clear (Unbranded) Octane Rating: 87 RVP Level: 9	$2.1120 May 13, 12:00 AM	
Conv. Clear (Unbranded) Octane Rating: 91 RVP Level: 9	$2.2165 May 13, 12:00 AM	
Conv. Sub-Octane (Unbranded) Octane Rating: 84 RVP Level: 9	$2.0445 May 13, 12:00 AM	
ULSD Winter #2 (Unbranded) Octane Rating: -- RVP Level: --	$2.0860 May 13, 12:00 AM	

Purchase

Product:	Valero CBOB Ethanol 10% (91)
Fuel:	Premium
Date:	May 14, 2015
Cost:	− 2.098 + $/gal
Volume:	− 1000 + gal
Freight:	− 0.005 + $/gal
*Tax: Exclude Tax	0.4719 $/gal
Total:	$2574.90

+ Add Purchase Adjustments

* The tax value is an estimate based on your current retail price of $3.029

Cancel   Add

Enter the fuel type, date of purchase, cost information, gallons purchased, and freight for that delivery. Tax information will automatically populate from the OPIS tax database, which is up-to-date with all federal, state, and local taxes across the country.

If you have any cost adjustments, such as a percentage discount or a cents per gallon discount, you can add that by clicking on the "+ Add Purchase Adjustments" link below your Total cost.

Manage Purchases   View All Purchases

Fuel Type	Product	Cost	Freight	Adjustment	Volume	Tax	Total	Date
Premium	Valero CBOB Ethanol 10% (91)	$2.0980	$0.005	$0.0000	1000 gal	$0.4719	$2574.90	May 14, 2015

+ Add a New Purchase

Save New Purchases   You have unsaved changes.

Once complete, hit "Save New Purchases" and this cost information will be used for real-time margins at this location.

Station Analyzer

You can analyze statistics and details of your individual stations using the Station Analyzer, which you can get to one of two ways:

On the "Overview" page, you hit "Analyze" next to the station you'd like to view

- OR -

From the main menu bar, hit "Station Analyzer"
1. Hit "Select the Station"
2. Click on the station you'd like to view

Station Analyzer

Once you have chosen the site you want, you will be brought to a page that is broken up into three different sections.

NOTE: If you haven't set up "Rules" or a "Competitor List" yet, you will see the below alerts in yellow above the station you're analyzing. If you click on the alert, it will take you to the respective place to set these up. (See "Station Management: Setting Up Competitor List" on pages 15-16 and/or "Rules" on pages 33-50)

⚠ Please **create a pricing rule** to begin receiving alerts about your competitors.

⚠ Please **create a competitor list** to begin analyzing competing stations.

Station Analyzer: Details

The **first section** at the **top** of the page shows you an overview of your station statistics.

Station Analyzer

#2 American Oil 💬 (1/7) ▸

6950 Brooklyn Blvd & 70th Ave N
Brooklyn Center, MN 55429
Ph: (763)252-0145
✎ Choose a different station

Quick Stats (Lowest Prices)

Regular:	$2.19^9	27 mins ago
Midgrade:	$2.21^9	5.2 hours ago
Premium:	$2.36^9	5.2 hours ago
Diesel:	$2.73^9	27 mins ago

You can find the name, address, phone number and an optional picture of your chosen station

The Quick Stats shows you the current prices for fuel types at this station, derived from either GasBuddy or provided by you. Next to the prices are the dates and times of the last reported price

Station Analyzer: Details

If you'd like to customize your view of the statistics for this station, click on the gear-wheel icon on the right, which brings up a menu that allows you choose custom dates, fuel type, and price type

Date Type:
- Allows you to choose either "Real-Time" prices, "Price Changes", or "Historical" prices (you can input the date range you'd like to view.) Historical data within PricePro goes back to Jan. 1, 2012 and can be viewed in increments of up to 90 days at a time

Fuel Type:
- Allows you to choose the grade of fuel from "Regular," "Midgrade," "Premium," or "Diesel"

Price Type:
- Allows you to choose from "Cash," "Standard," or "Lowest" ("Lowest" is the default choice)

Station Ana

American

Liberty

12175 Darnestown Rd & Quince

Alerts

undock

Date Type: Real-Time

Jul 18, 2014 1:51 PM

Fuel Type: Regular

Price Type: Lowest

Apply   cancel

To view your new settings, hit "Apply"

Station Analyzer: Alerts

The **second section** in the **middle** of the page, headlined "Alerts" only shows information when a pricing rule you have set is being broken

If you'd like to receive alerts about this station's pricing, see "Rules" on pages 33-50. If you already have a pricing rule for this station set, the "Alerts" section of your Station Analyzer page will look like below:

Hitting "view details" will bring up a box that shows all of the competitors (in this case, 4) that break this particular rule

Station Analyzer: Comparisons

The **third section** at the **bottom** of the page, headlined "Comparisons" shows your station in comparison to the averages of all stations within the defined regions in which your station operates

Comparisons				Mar 5, 2015 1:00 PM

Area Price Comparison (Regular-Lowest Prices)   **View Detailed Comparison**

Zip	City	MSA	County	State
55443	Brooklyn Park	Minneapolis-St. Paul-Bloomington, MN-WI	Hennepin	Minnesota
5¢ $	5¢ $	5¢ $	8¢ $	5¢ $

The numbers indicate where your chosen station compares to the indicated region's average. *In this example, our station is 9cts ABOVE the average of the stations within this zip code, and again 5cts ABOVE the average of stations in the city of Brooklyn Park and the MSA of Minneapolis-St. Paul-Bloomington*

Clicking on "View Detailed Comparison" will open up a window that shows detailed trends on how your site compares with the area

NOTE: In this section, a **GREEN** number indicates that the region's average is higher $ than your store's price, while a **RED** number indicates the region's average is lower than your store's price. A **BLACK** number indicates that it matches. The symbol indicates there is a cash price factored into the regional average

Station Analyzer: Area Price Comparisons

After clicking on "View Detailed Comparison," a pop-up window will open, like below:
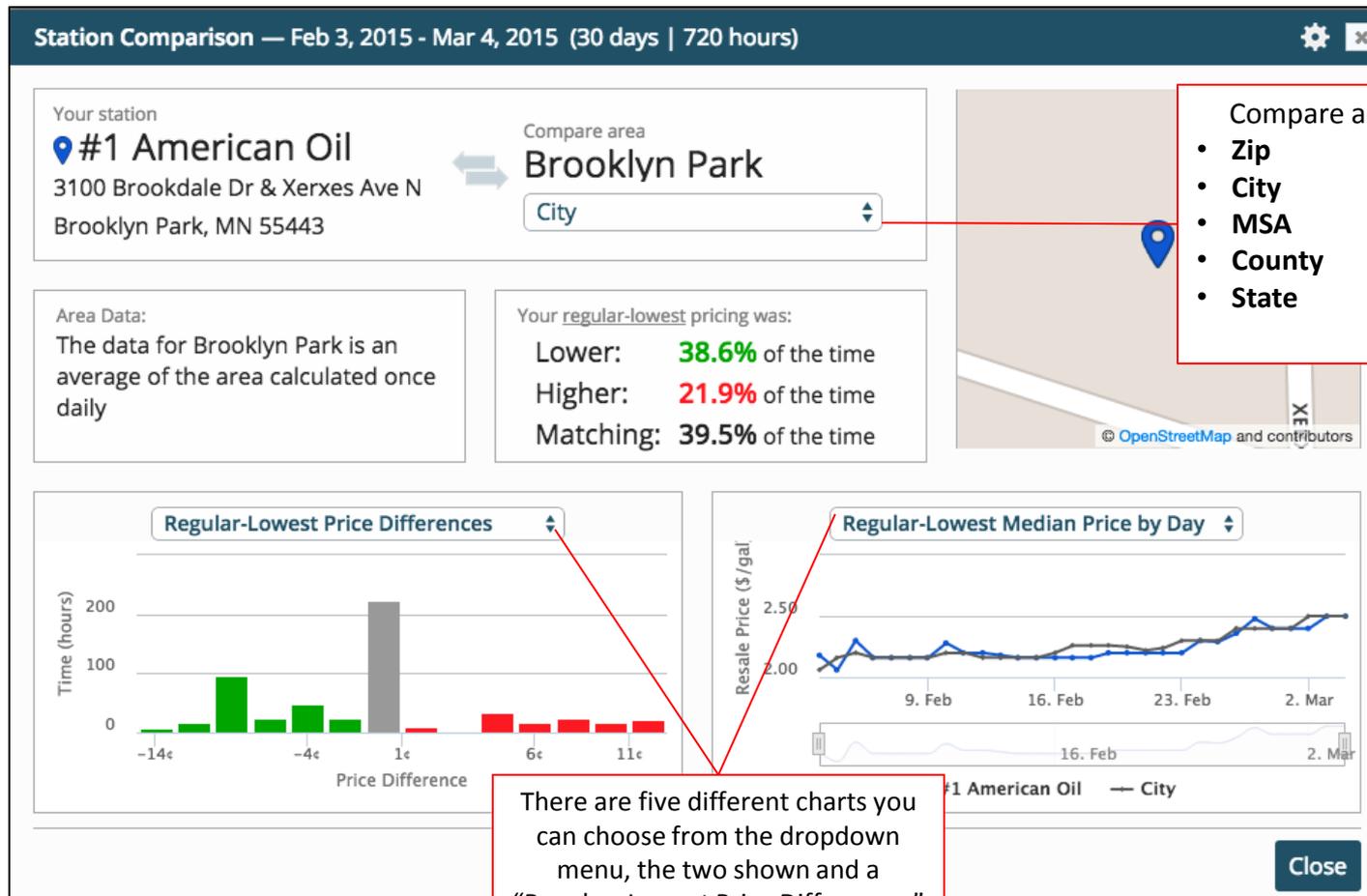
Station Analyzer: Comparisons

Once you've set up a competitor list, you can select one of your competitors from the list or click its pin on the map and get a side-by-side comparison of how they are priced versus your site. (To setup a competitor list, see "Station Management: Setting up Competitor List" on pages 15-16)

Station Analyzer: Comparisons

By clicking on a competitor's price, you can see all of the price sources

Hitting the competitor's station name will open a new tab that links to their station page on GasBuddy with more information, photos, and features

Export real time competitor prices to a .csv file format

By clicking on the price, you can also update the price for your competitor station yourself if the price has not been updated.

The date and time show when the price was last updated

Flag and Report Inaccurate Prices

A blank means that the price has not been updated for 48 hours, or that the station does not sell this product

Station Analyzer: Comparisons

Once you click on the link to update the competitor's price, a pop-up window will appear, where you will be able to update the competitor's prices as well as see implied margins based on corresponding wholesale prices

Use the red- or green+ buttons to decrease or increase the price

When another user views the station on the analyzer page, they will be able to see recently made comments; these comments are within your organization's PricePro account only, not passed along to GasBuddy users or anyone else

You have the option to export your inputted prices to the GasBuddy website and app, which you can delay up to 3 hours

See Preferences (Page 68) to set a default price export option

Margin information is tied to the corresponding rack less taxes and freight. For margin methodology, visit www.OPISnet.com

Station Analyzer: Comparisons

By selecting a competitor, you can see a summary comparison of your site's prices/margins versus the chosen competitor's prices/margins

Station Analyzer: Comparisons

You can toggle back and forth between price and margin comparisons versus the chosen competitor

Clicking on "Price Comparison" will switch the box back to show you side-by-side comparisons of your station's prices versus your selected competitor

Station Analyzer: Comparisons

After clicking on "View Detailed Comparison," a pop-up window will open, like below:
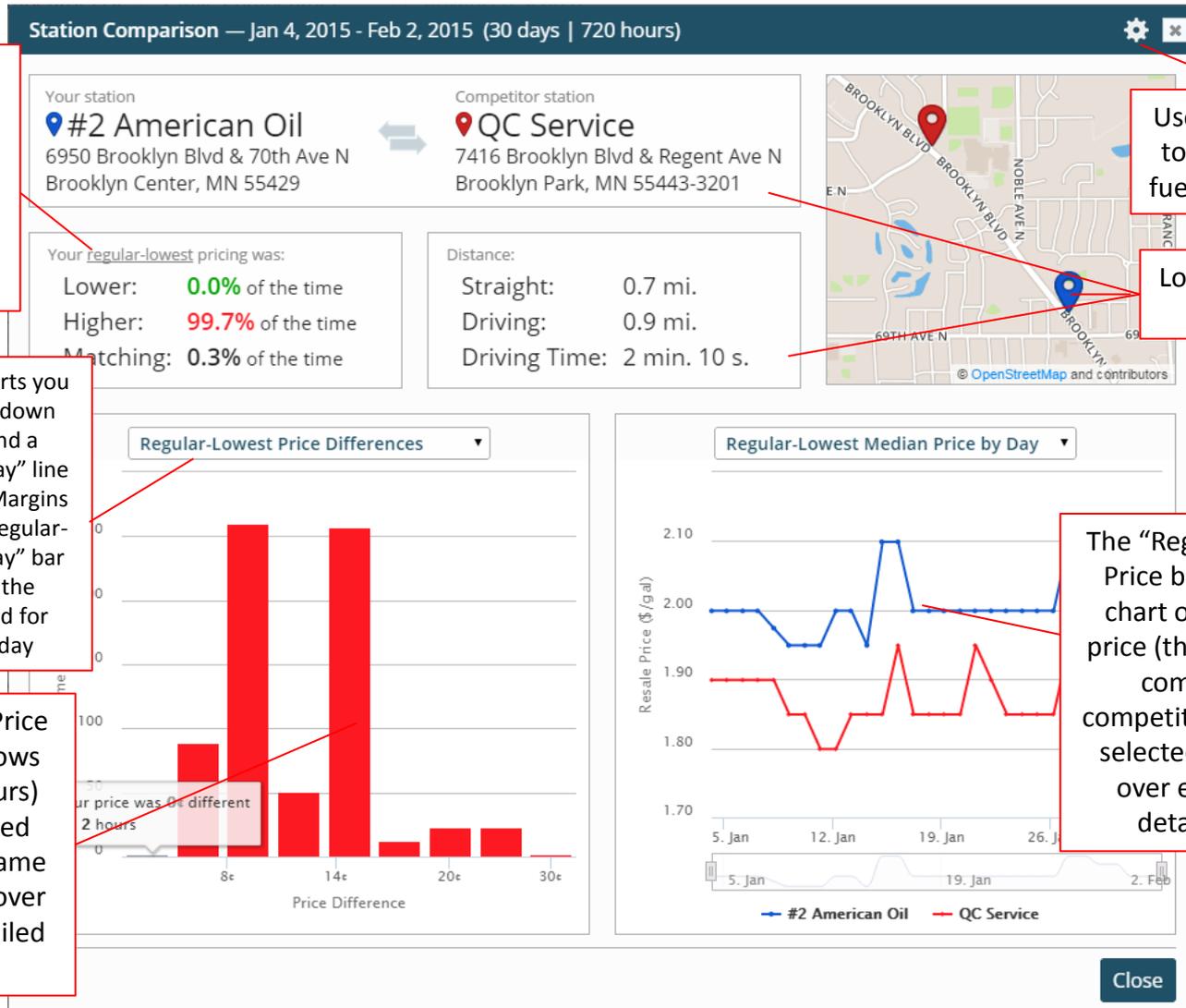
Percentage of time during the selected date range that your station was priced lower than, higher than, or the same as this competitor station

Use the "Settings" icon to change date range, fuel type and price type

Location data and map for both stations

There are five different charts you can choose from the dropdown menu, the two shown and a "Regular-Lowest Cost by Day" line graph, a "Regular-Lowest Margins by day" bar chart, and a "Regular-Lowest Price Reports by Day" bar chart, which shows you the number of prices reported for each chosen station by day

The "Regular-Lowest Median Price by Day" shows you a chart of how your median price (the blue line) each day compares with your competitor's (red line) for the selected date range. Hover over each data point for detailed information

The "Regular-Lowest Price Differences" chart shows you how often (in hours) your station was priced lower, higher, or the same as your competitor. Hover over each bar for detailed information

Station Analyzer: Comparisons

Use the 'Advanced Search' to further filter competitors

Use the 'Advanced Search' feature to filter all your own stations or your competitors by *All Competitors, Competitor List, or Tagged Competitor Lists*

Rules

Pricing rules can be created to monitor your station's price as compared to your competitors. No matter your pricing philosophy (whether you want to match a station, be higher than competitors, or be priced lower than competitors) a pricing rule can be created to monitor competitor pricing data for you.

Rules can be created for one of your stores, or for multiple of your locations. If many of your stores share the same pricing strategy, one rule can be created that analyzes multiple stores that you select by using the "tag" function when creating competitor lists (See Page 15)

Rules can be created based on competitors within a certain distance, or based on selected competitors from a specific competitor list that you have created. You do not need a competitor list set up to create a rule for a station.

OPIS PricePro OVERVIEW | STATION ANALYZER | STATION MANAGEMENT | **RULES** | MORE ▼

Rules

Custom Rules   New Custom Rule   Quick Actions   New Quick Action

Custom Rules let you identify and be alerted to important pricing events. Take full control and get notified when you need to take action.

To set a new rule, hit "New Custom Rule" (pages 33-50) or "Get Started with Custom Rules"(page 50) to get an initial feel

Get Started with Custom Rules

Rules: Step 1

Select which station(s) to apply rule

OPIS PricePro OVERVIEW | STATION ANALYZER | STATION MANAGEMENT | **RULES** | MORE ▼

Rule Creator

Cancel Save Rule

You can save your rule at any time and come back to it later by hitting "Save Rule"

You can create rules for multiple stores or just one

Step 1/8 - Choose Station(s) to Apply Rule

Apply to: one of my stations

one of my station lists

Rules: Step 1

Select which stations to apply rule

*In our example, we want to apply to only **one of our stations**, the American Oil #1 site*

You can choose to have this rule only apply to one of the stations of your choice…

Step 1/8 - Choose Station(s) to Apply Rule

Apply to: one of my stations   ↶ Undo Selection

☑ **#1 American Oil** (Brooklyn Park)
3100 Brookdale Dr & Xerxes Ave N

Continue ➜

- OR -

…you can choose to have this rule apply to multiple stations, via your station lists

Step 1/8 - Choose Station(s) to Apply Rule

Apply to: one of my station lists   ↶ Undo Selection

Select your station list: Minnesota Stores ▾

Continue ➜

Rules: Step 2

Choose the number and/or type of competitors you want to trigger the alert for your station. There are 9 choices below, but in reality there are 3 choices with three sets of logic for each

Step 2/8 - Choose Trigger

When: at least "_#_" competitors...

at least "_#_" competitors in a competitor list...

at least "_#_" competitors in a list tagged as...

at least "_%_" of competitors...

at least "_%_" of competitors in a competitor list...

at least "_%_" of competitors in a list tagged as...

If you choose a trigger that begins with "**at least '#' competitors**," a rule is considered broken only when that **#** of competitors has violated the conditions.
For example, if you chose "at least **2** competitors in a competitor list" as your trigger, and your competitor list has 8 stations included, your rule would be considered broken when **2** of the 8 have violated the conditions of the rule

If you choose a trigger that begins with "**at least '%' competitors**," a rule is considered broken only when that **%** of competitors has violated the conditions.
For example, if you chose "at least **40%** of competitors in a competitor list" as your trigger, and your competitor list has 10 stations included, your rule would be considered broken when **40%** of the 10 have violated the conditions of the rule (in this case,**4**)

Rules: Step 2

Step 2/8 - Choose Trigger

When: at least "#" competitors...

*In our example, we want the Lowest Price Rule to alert us when **one or more competitor(s)** of our station that are included in our competitor list are priced **higher** than American Oil #1 (second option from bottom)*

at least "#" competitors in a competitor list...

at least "#" competitors in a list tagged as...

Step 2/8 - Choose Trigger

When: at least "#" competitors in a competitor list...   ↩ Undo Selection

At least [1] competitor(s) [in ▾] [Select Station List ▾]

in

not in

Continue ➜

You also have the option to apply rules to competitors not in a given competitor list

Rules: Step 3

Choose the distance of the competitors away from your site

If you are basing your rule on a competitor list, choose option 4, as distance does not matter. If you are NOT using a competitor list, the first three options allow you to filter competitor stations down by distance

Step 3/8 - Choose Distance

That:

are any distance away (up to 25 miles away)

After selecting either of these three options, you can filter the distance in terms of 'Straight Distance' or 'Driving Distance'

are less than "_#_" miles away

are between "_#_" and "_#_" miles away

are greater than "_#_" miles away

In our example, we are using a competitor list to narrow down our competitors, therefore we would choose option 4, as distance is not a factor

Rules: Step 4

Choose the fuel and price type that you want to be alerted about

Step 4/8 - Choose Fuel Type

Have a:	<any fuel type>	<any price type>	ⓘ
	regular	standard price	ⓘ
	midgrade	cash price	ⓘ
	premium	lowest price	ⓘ
	diesel		

*In our example, we want the Lowest Price Rule to alert us about **regular fuel** (second-from-top, left option) and **lowest prices** (bottom right option) that are **less than 48 hours old** (right picture)*

Once you have chosen price type, you will be asked to specify the age of the price you want for alerts.

Step 4/8 - Choose Fuel Type

Have a: regular   lowest price

Regular-lowest price [less ▼] than [48] hours old

Continue ➡

Rules: Step 5

Price Change Conditions: These conditions are based on your competitor(s) prices changing. Get notified whenever one or multiple competitors moves their price by a certain amount, or even set up a rule to notify when anyone moves at all

Rules: Step 5

Choose and build the conditions of your rule.

Step 5/8 - Choose Pricing Conditions

That:

➕ is " # " cents less
ex. a competitor's price is at least 5¢ lower than yours

➕ is different by " # " and " # " cents
ex. a competitor's price is between 5¢ less and 3¢ more than yours

➕ is " # " cents greater
ex. a competitor's price is at least 5¢ higher than yours

...s lower than $3.500

..." # "
...s between $3.000 and $3.500

...s greater than $3.000

✏️ has decreased by " # " cents
ex. a competitor's price has decreased by more than 5¢

✏️ has increased by " # " cents
ex. a competitor's price has increased by more than 5¢

✏️ has changed by " # " cents
ex. a competitor's price has decreased by more than 1¢ or increased by more than 5¢

*In our example, we want the Lowest Price Rule to alert us when any competitor is priced **lower** than our station (top option)*

Step 5/8 - Choose Conditions

That:

➕ is " # " cents less
ex. a competitor's price is at least 5¢ lower than yours

↩ Undo Selection

A price that [is ▾] at least [5] ¢ lower than me

[x Remove] [+ Add Another] [Continue ➡]

You can have more than one condition that competitor stations must meet in order to get alerted including the "Sleep Timer." Hit the "+ Add Another" button

Rules: Step 6

Choose the time frame when you would like the rule to be running, and when to receive email notifications and SMS messages.

Step 6/8 - Choose Time Restriction

And:
🕐 The current time is between "_#:##_" and "_#:##_"
ex. the current time is between 8:00 AM and 5:00 PM

Rules: Step 7

Choose the importance of the rule's alert and how often it will update

The default rule status choices are "High," "Medium," and "Low" – these are customizable in your settings (see "More: Settings" on page 68.) For rules that are critical to your pricing strategy, use a higher severity. For rules that are less important, choose a lower severity.

Step 7/8 - Choose Status Of Rule

Then: mark station(s) with a status

Mark station(s) with a status of: Medium ▼

Refresh the station(s) status every 24 hours ❓

Continue ➜

*In our example, we want the Lowest Price Rule to mark these chosen stations with a **medium status** that refreshes every **24 hours***

1. If the status has been dismissed by a user, but the conditions are still met after this time period, the status will reappear
2. If the conditions are no longer met after this time period, the status will be automatically dismissed

Rules: Step 8

Choose the notification setting for your rule. You can choose to receive emails and/or SMS messages when a rule is violated, keeping you informed any time, anywhere

Step 8/8 - Choose Notifications

And: do not send any messages

*In our example, we **want a contact list to receive an email alert** (second option)*

send an email to contact list members

send an SMS message to contact list members

Step 8/8 - Choose Notifications

And: send an email to contact list members   ↩ Undo Selection

Send an email to members of: Minnesota Users ▾

The rule "Lowest Price Rule" has been broken.

Choose the list of members you'd like the notification to be sent to (To setup a contact list, see pages 63-64)

Enter the message everyone will receive with the alert

x Remove   + Add Another   ✓ Done

You can add another email alert if there are more than one set of contacts receiving the notification. You can also add a text message alert at the same time as an email alert

Rules: Step 8

Choose how often the notifications will be repeatedly sent, and name your rule.

Step 8/8 - Choose Notifications

And: send an email to contact list members

send an email to members of: Maryland Users

The rule "Lowest Price Rule" has been broken.

Repeat: notification(s) every " # " hours

Repeat notifications every 24 hours if conditions are still met

Save

When a rule is violated but is not dismissed by the user, choose how often you would like alerts to be repeated

For our example, we would like alerts sent every 24 hours if the conditions are still met and we have not dismissed the exception

Hit "Save" to name your rule and give it a description

Save As...

Save As: Lowest Price Rule

Description: Notify whenever American Oil #1 is NOT the lowest-priced among its competitors

Cancel   Save

Hit "Save" when you're satisfied with the name and description of your rule

Rules: Summary

Once you have saved your rule, a summary will be available on your "Rules" page, where you can also edit the rule, delete it, or "Save As" to duplicate the rule.

Rules: Getting Started Shortcut

Hit "Get Started with Custom Rules" to set up a basic rule that allows new users to edit and get an initial look

Rules

Custom Rules

New Custom Rule

Custom Rules let you identify and be alerted to important pricing events. Take full control get notified when you need to take action.

Get Started with Custom Rules

Getting Started

We've setup a simple custom rule for you. Take a look and then you can customize the setup to meet your needs.

Here's what we did:
- Setup the custom rule "**Comp with a Lower Price**" that will send you a message when conditions are met

Close

Comp with a Lower Price

A nearby comp has a lower price than my station for regular gas

Monitor stations in the station list "All Stations"

When at least 1 competitor

That is less than 2.50 miles away by straight distance

Has a regular-lowest price less than 48 hours old

That is at least 1¢ lower than me

Then mark station(s) with the status "Low" ◆ (refresh status every 6 hours)

And send an email to contacts in the list "Minnesota Users" with the following message:
"The rule "Comp with a Lower Price" has been broken"

Repeat the email notifications every 24 hours

Edit Rule

Quick Actions

Quick Actions will allow you to quickly setup notifications for when your competitors change price or simply to get a 'snapshot' summary of your stations and their default competitors' prices

Quick Actions
Getting Started

Hit "New Quick Action" to select and customize everything on your own

Quick Actions

New Quick Action

Quick Actions are a fast and simple way to start receiving realtime pricing information that can impact your decisions.

Get Started with Quick Actions

Hitting "Get Started with Quick Actions" will help you setup two basic notifications

Getting Started

We've setup some basic quick actions for you. Take a look and then you can customize the setup to meet your needs.

Here's what we did:
- Created a **snapshot notification** that sends you pricing details daily at 8:00am
- Setup a **change notification** for some of your potential competitors

Close

Quick Actions

New Quick Action

Snapshot of **All Stations**
@ **8:00 AM** (GMT-05:00) Eastern Time (US & Canada)
to **Minnesota Users**

Change Alert of **Competitors of #1 American Oil**
in competitor list **2 Mile Competitors**
to **Minnesota Users**

Quick Actions
Getting Started: Snapshot

A 'Snapshot of All Stations' is an email containing the prices of the specified station list and it's competitors to any specified contacts list at any time indicated.

If the time has already passed for the current day, the snapshot will not be sent for that day

Quick Actions
Getting Started: Change Alert

A 'Change Alert' is an email sent to the specified contacts list whenever a competitor changes their prices for a single station or an entire station list. You can apply a Change Alert to your own stations as well

Quick Actions   New Quick Action

Snapshot of All Stations   ✕
@ 8:00 AM (GMT-05:00) Eastern Time (US & Canada)
to Minnesota Users

Change Alert of Competitors of #1 American Oil   ✕
in competitor list 2 Mile Competitors
to Minnesota Users

Price Changes can be sent via Email or SMS(text). The message will show the competitor's new price(s) and what station they are a competitor of

Quick Actions

Action:	Change Alert (My Competitors) ▾
Competitors Of:	Single Station / Station List
Station List:	All Stations ▾
Competitors:	2 Miles ▾
Sent To:	Minnesota Users ▾
Send Via:	Email / SMS

Competitor Change Alert:

An email or SMS sent whenever one of the specified competitors changes their price.

- Hide Options

Include: ☐ My Prices ☐ My Margins

Watch: ☑ Regular ☑ Midgrade ☑ Premium ☑ Diesel

Cancel   Save Action

There are advanced options that will allow you to specify only certain fuel types and include the current prices and/or current margin information at your location when you get an alert

Quick Actions
New Competitor Alert

Choosing the "New Competitor" Quick Action will send notifications when a new competitor opens near your stations

Overview: Alert Status

After creating your rules, you will be alerted on your "Overview" page whenever one of your stores is in violation of a rule you created

Stores in violation of a rule will be highlighted with an icon to indicate the rule status you have assigned to the broken rule

In this example, the "Lowest Price Rule" we created was violated by a competitor as of Jan 13 at 4:37 PM

To dismiss a rule exception so that it no longer appears as a violated rule, click on the red "X"

This number indicates how many competitors are in violation of the rule

Clicking on "view details" will open a pop-up window that will show a list of the competitor stations that violate the rule you have created

Overview: Alert Status

After hitting "View Details," a pop-up window will show you a detailed list of your station's competitors, including what rule it's violating and the option to "Dismiss" or ignore the rule

Exception Details — Stations Causing Alert

#1 American Oil analyze station
$1.97⁹ 20 mins ago

▼ **Lowest Price Rule** view rule
Notify whenever American Oil #1 is NOT the lowest-priced among …

Dismiss

Exception 1 of 1

Fuels	Competitor	Distance	Regular-Lowest Price ▼	Price Diff.
R S M P D	QC Service 7416 Brooklyn Blvd & Regent Ave N Brooklyn Park, MN	1.37 mi.	$1.84⁹ S 2 mins ago	-13c compare

The "R," "M," "P," and "D" represent "Regular," "Midgrade," "Premium," and "Diesel" respectively

You can edit settings by clicking on the gear icon.

You can ignore this alert by hitting the "Dismiss" button

You can choose to show all the competitor stations evaluated by the rule being viewed, regardless of whether or not they match the pricing triggers. (Competitor list and distance conditions are still evaluated)

Display:	Stations Causing Alert ▼
Data:	**Stations Causing Alert** All Analyzed Stations
Fuel Type:	Regular ▼
Price Type:	Lowest ▼

Apply cancel

More: User Management

To add and/or delete users, or edit their permissions on your PricePro subscription, go to the "User Management" option, under the "More" choice from the navigation bar

You can search for a user by their name or email, and by their role (permission level)

Here you will find a list of all your PricePro users

You can also add users to PricePro by clicking on the "Add New User" button

More: User Management

After hitting "Add New User," you will be taken to a page to input all the user's information

Role:
You can choose how much the user is allowed to do on the site by picking from the levels of:
- **Super Admin**
- **Management**
- **Standard**
- **View Only**
- **Contact only**

Name:
The name of the user, or how he/she will be listed

Email:
Where this user can be contacted via email *(format as "user@DOMAIN.com")*

Phone:
Optional other mode of contact. Must be included for the user to receive text messaging alerts (Page 47)

When you're finished, hit "Create User"

OPIS PricePro OVERVIEW | STATION ANALYZER | STATION MANAGEMENT | RULES | **MORE** ▼

User Manager

Role: Standard

Name: John Smith

Email: jsmith@example.com

*Phone: 555 - 555 - 5555

* optional
** at least one required

Create User

◉ Email password link to the user
◯ Set user's password later

You can choose to have the password sent to the user's inputted email address, or you can choose to set the user's password later, at your discretion

More: User Management

Once you have created the new user, you can customize settings and add him or her to lists

After creating the user, the next screen allows you to delete the user from the system or reset the password

More: User Management

You can set the time preference, price preference, and if/how often the prices will automatically refresh

Don't forget to save your changes as you make them

Your price preference choices are:
- Combined Sources (default)
- GasBuddy Only
- Credit Card Swipe Only

More: User Management

Under "Station Lists," you can grant access to users with limited roles to a particular list of stations that has been created. (See "Overview: Setting Up Station Lists" on pages 8-10)

You can create new station lists for this user by clicking "Create Station List" or copy this user to an existing station list by clicking "Copy Station List"

More: User Management

Under "Contact Lists," you can add this user to a list or lists of contacts. (See "More: Contact Lists" on pages 64-65)

You can add the user to a pre-made contact list or make a new one

More: Contact Lists

You can create contact lists for users to better organize who receives which alerts by going to the "Contact Lists" option, under the "More" choice from the navigation bar
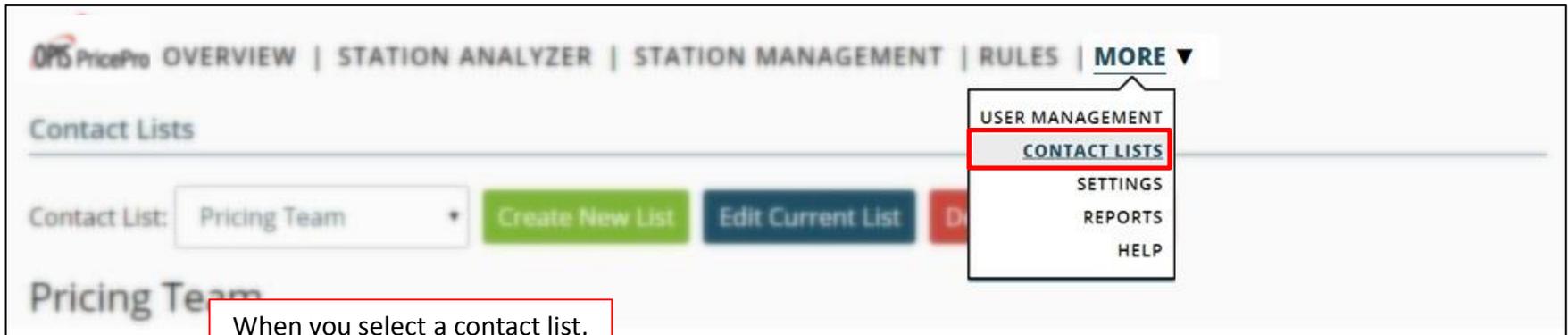
When you select a contact list, the people on the chosen list will appear here, with their email, phone number, and PricePro permissions role

Hit "Create New List" to make a new contact list; a pop-up window will open

This example shows our "Pricing Team" contact list, which has three users on it

Name ▼	Email	Phone #	Role
GB User	amoil@example.com	--	Standard
John Smith	jsmith@example.com	555-555-5555	Standard
Kelsey Lu	KLu@opisnet.com	--	Super Admin

More: Contact Lists

After hitting "Create New List," a pop-up window will appear for you to fill out about the new contact list you want to create

1. Name your list anything. *In this example, we want a contact list with only users in Minnesota we've named it "Minnesota Users"*

2. Choose the people (or group of people) for whom you are making the list. It can be just for you, just for another user, or for a group of users

3. Describe the contact list

4. If you'd like this to be your main default list used, check the box next to "Yes" – otherwise, leave it unchecked

5. Click the "Next" button

Edit Contact List

List Name: Minnesota Users

Create For: Myself

Description: List of contact information for those in Minnesota

Make this the default contact list? ☑ Yes

Cancel   Next

Create Contact List

You can filter the contacts you'd like to add by all the contacts you currently have, contacts on an existing list already, by name or email, or by user role

Filter contacts by: All Contacts
All Contacts
Existing List
Name/Email
User Role

Select All   Sele

GB User (Standard)
amoil@example.com
Ph: --

John Smith (Standard)
jsmith@example.com
Ph: 5555555555

Click on the user or users you'd like to add to the list and it will move to the right

1 contacts currently selected

GB User (Standard)
amoil@example.com
Ph: --

Hit "Save" when you are finished adding all the contacts to the list

Cancel   Back   Save List

More: Settings

To adjust and customize your PricePro settings, go to the "Settings" option, under the "More" choice from the navigation bar
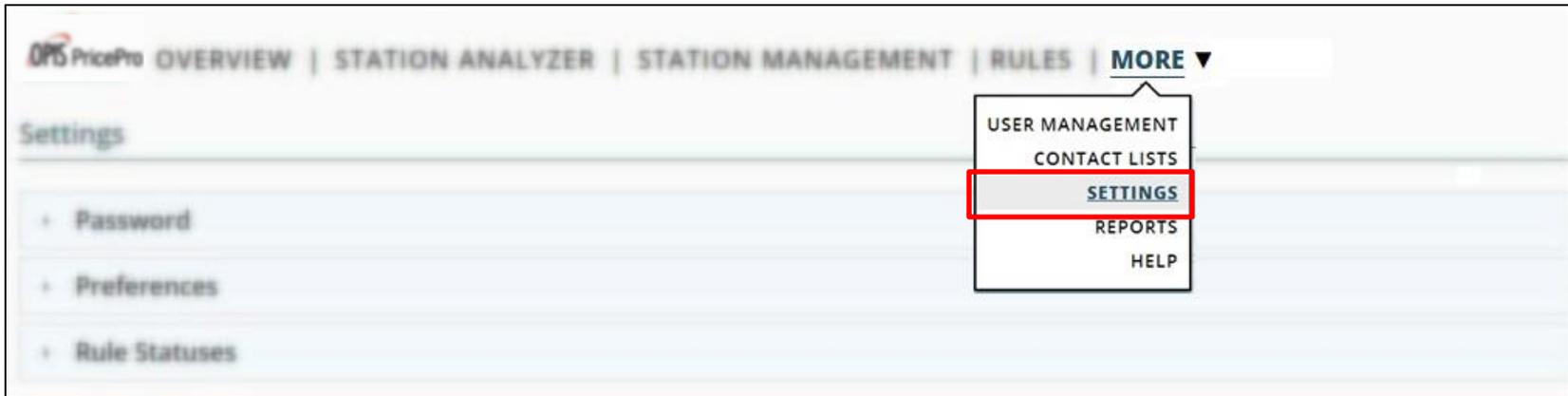
There are three categories available for customization and/or adjustment: Password, Preferences, and Rule Statuses

More: Settings

The top category, **Password**, allows you to change your password for logging into PricePro.

Fill-in the appropriate fields with your current password and new desired password, then hit "Update Password."

Settings

▾ Password

Current: ••

New:

Re-type New:

Update Password

▸ Preferences

▸ Severities

More: Settings

The middle category, **Preferences**, allows you change and customize a variety of settings, such as your preferred default pricing and fuel types.

"Price Preference" options are:
Combined Sources
Credit Card Swipe Only
GasBuddy Only

"Fuel Type" options are:
Regular
Midgrade
Premium
Diesel

"Price Type" options are:
Cash
Standard
Lowest

- If "Auto-Refresh" is set to "**On**," the Overview page will automatically refresh its station content (statuses, prices, etc.) at the specified time interval.

- "Export Delay" allows the option of delaying price change exports to GasBuddy up to 3 hours

- If "Show Corrected Exceptions" is set to "**On**," rule exceptions are displayed until they are dismissed or the refresh status time period specified by the rule has passed.
- If this setting is "**Off**," rule exceptions will disappear as soon as competitors no longer meet the rule.

More: Settings

The bottom category, **Rule Statuses**, allows you to customize the severity rankings for your rules and alerts, as well as show how the level appears on PricePro

You can easily change the order of the levels by clicking and dragging, as well as edit or delete the existing default levels

You can also add another severity level by hitting "Create" – a pop-up window will appear

Choose the icon for the level:
- Green Circle
- Orange Triangle
- Red Square
- Yellow Diamond
- Blue Hex
- Blue Square

Name your rule status. *For example: Low, Medium, High*

When you're finished, click "Save"

More: Reports

Reports show a log of the changes made to lists and rules for a chosen period of time, by selecting "Reports" under the "More" option
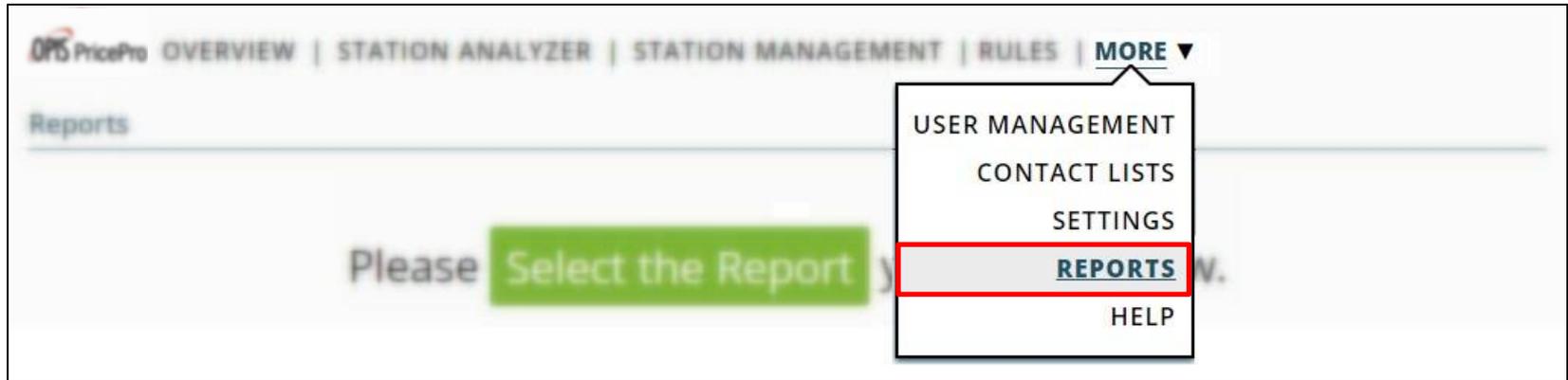
1. Choose the date range you'd like to view

2. Choose the type of history change log you want to view. *In this example, we have chosen the "Competitor List"* Reports are also available for "Rule", "Station List", and "Price Updates"

3. Choose from the options provided. *In this example, we want to view the history of changes for competitors of "American Oil #1" from the "2 Mile Competitors" competitor list*

3. Hit "Select"

More: Reports

The report will then show you all of the changes made to your selection within the time period you chose

Reports can be exported to .CSV files

In this example, we can see that three competitors were removed on January 14th, 2015 at 10:17 AM by the user Klu@opisnet.com

Reports

Competitor List: [2 Mile Competitors ▾]   **Change Report**   ⬇ Download

Changes to "2 Mile Competitors" from Dec 15, 2014 to Jan 14, 2015

Date	User	Changes
▼ Jan 14, 2015 10:17 AM	KLu@opisnet.com	competitors removed

Competitors	Marathon @ 1505 69th Ave N & Humboldt Ave N, Brooklyn Center, MN
	Shell @ 8517 Zane Ave N & 85th Ave N, Brooklyn Park, MN
	Two Rivers @ 6840 Humboldt Ave N & 69th Ave N, Brooklyn Center, MN

▶ Jan 12, 2015 12:33 PM	KLu@opisnet.com	CREATED

More: Reports

Price Updates Reports show a log of the changes made to station prices and whether or not those prices have been exported to GasBuddy

In this example, we can see that prices have been updated and exported to GasBuddy for American Oil #1 on January 15th 2015 at 2:10 PM as well as for for American Oil #2 on January 15th at 2:10 PM by the user Klu@opisnet.com

Prices were updated but not exported to GasBuddy for American Oil #3 on January 15th, 2015 at 2:10 PM by the user Klu@opisnet.com

Select a Report

Date Range:	Dec 24, 2014 - Jan 15, 2015
History for:	Price Updates

☐ Limit to Price Exports

Cancel   Select

Check the 'Limit to Price Exports' option if you only want to see which prices have been exported to GasBuddy

OPIS PricePro OVERVIEW | STATION ANALYZER |

Dev Reports

Change Report   ⬇ Download

Price exports from Dec 15, 2014 to Jan 14, 2015

Export	Submitted	User	Station	Fuel Types	Statuses
▶ Not Exported	Jan 15, 2015 2:10 PM	KLu@opisnet.com	American Oil #3 7525 Brooklyn Blvd ...	Multiple	
▼ Jan 15, 2015 5:10 PM	Jan 15, 2015 2:10 PM	KLu@opisnet.com	American Oil #2 6335 Brooklyn Blvd ...	Multiple	Upcoming

Fuel Type	Price	Status	
Regular	$2.09⁹	Upcoming	Cancel
Midgrade	$2.19⁹	Upcoming	Cancel
Premium	$2.29⁹	Upcoming	Cancel
Diesel	$2.99⁹	Upcoming	Cancel

▶ Jan 15, 2015 2:10 PM	Jan 15, 2015 2:10 PM	KLu@opisnet.com	American Oil #1 45 Brookdale Dr & 7...	Multiple	Completed

More: Help

You can see what the latest updates to PricePro have been, edit roles of certain types of users, see our methodology, and find the help desk number by selecting the "Help" option from the "More" menu
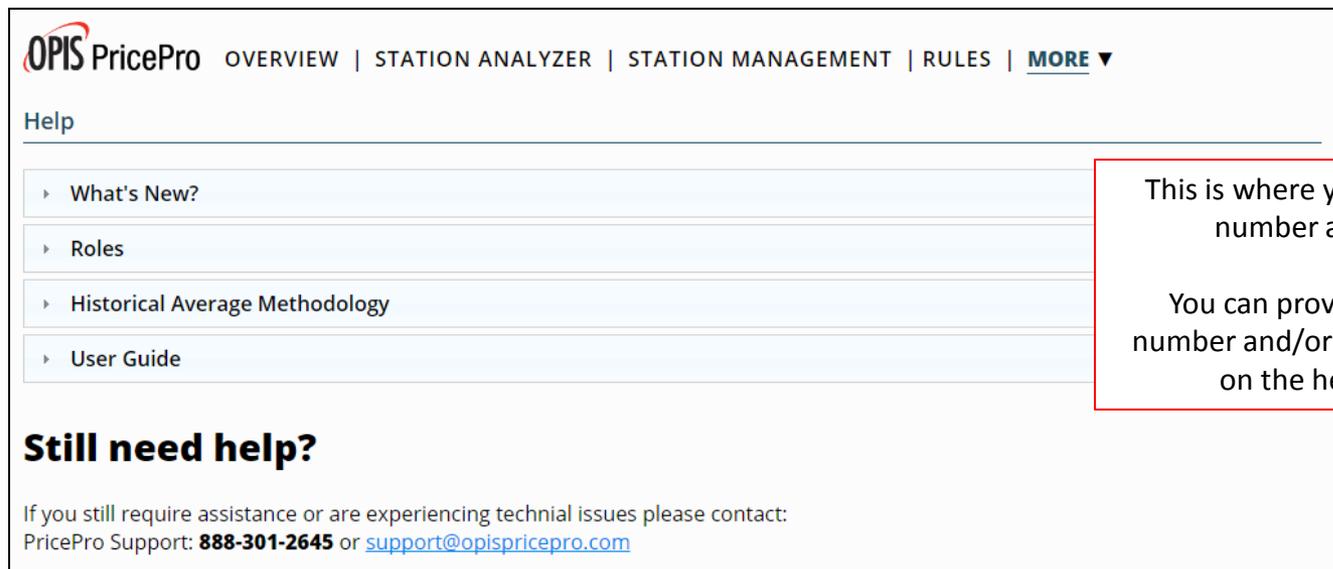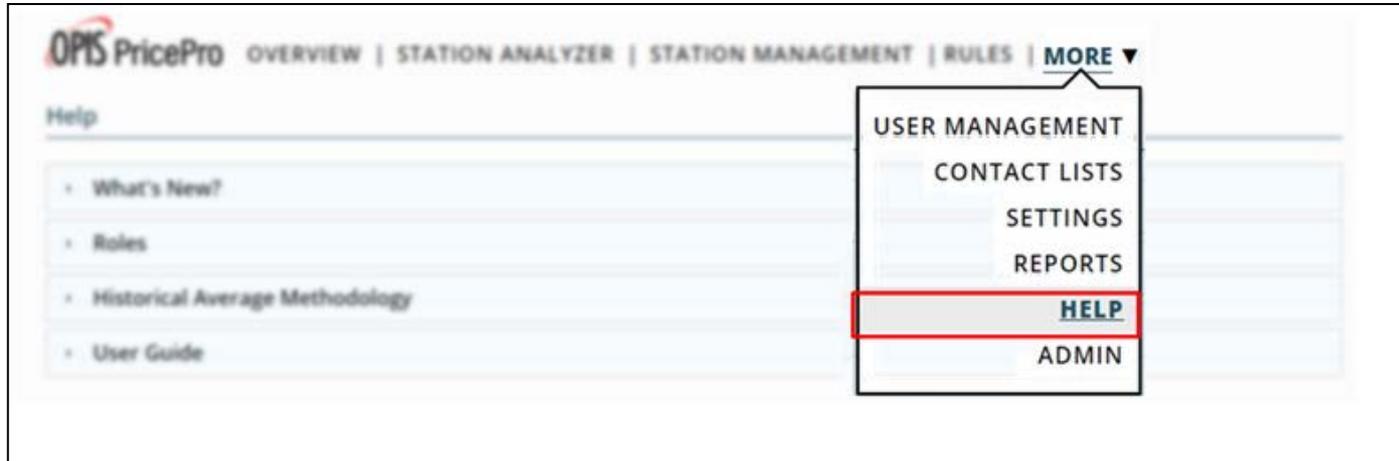
This is where you'll find the Help Desk number and support email.

You can provide your own support number and/or email address to display on the help screen instead

More: Help

By clicking on "What's New?" you'll be able to see all of the latest updates and changes made to PricePro

More: Help

Under "Roles," you can manage all of the various user permissions for each different type of user role

Choose from the drop-down menu which role you want to edit permissions

NOTE: No one can delete accounts

Depending on your user role, you'll be able to choose which permissions each role can see by checking or unchecking the boxes here

More: Help

By clicking on "Historical Average Methodology", you'll be able to see detailed information on the OPIS data methodology that is used within PricePro

More: Help

Under "User Guide," you can download the Price Pro user guide for in depth explanations and how to instructions to get the most out of PricePro

Help

| ▸ What's New? |
| ▸ Roles |
| ▸ Historical Average Methodology |
| ▾ User Guide |

The User Guide provides a step-by-step detailed explanation of how to get the most out of PricePro.

Download your User Guide

Click here to download the user guide in a pdf format

Impersonation of Other Users and Global Search

As a super admin, you can choose to "impersonate" any other user with a different level role to see their access to the PricePro subscription, as well as perform actions as that person

At the top of the page, you'll see your user email address. Click on it bring up a pull-down menu
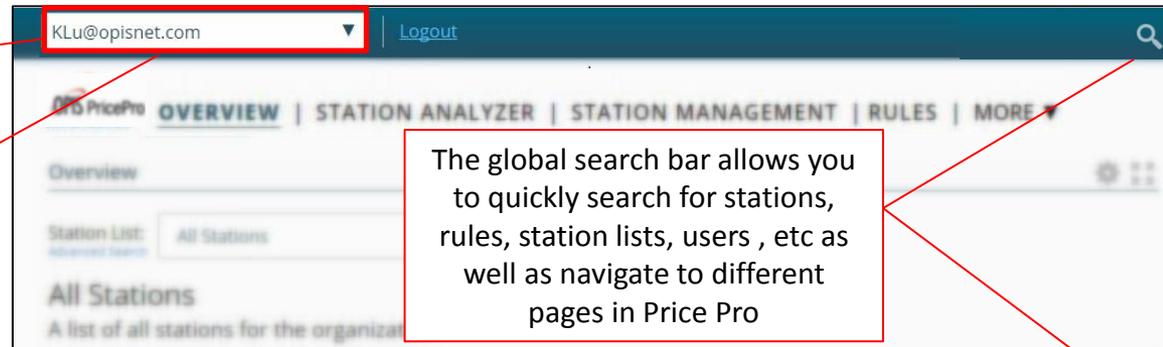
The global search bar allows you to quickly search for stations, rules, station lists, users , etc as well as navigate to different pages in Price Pro

Choose the role you'd like to impersonate by choosing a user email address that is associated with that role. *In this example, we want to impersonate a "Standard" user, so we have chosen the Standard user jsmith@example.com*

SUPER ADMIN USERS ONLY

For More Help:

If you're still having trouble, have questions, or need more assistance, please contact:

- **Customer Support**
  - Phone: 612-875-2766
  - Email: support@opispricepro.com
- **Brian Norris**
  - Phone: 301-287-2413
  - Email: bnorris@opisnet.com

- **Kelsey Lu**
  - Phone: 301-287-2421
  - Email: klu@opisnet.com
- **Danielle Levine**
  - Phone: 301-287-2014
  - Email: dlevine@opisnet.com

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