

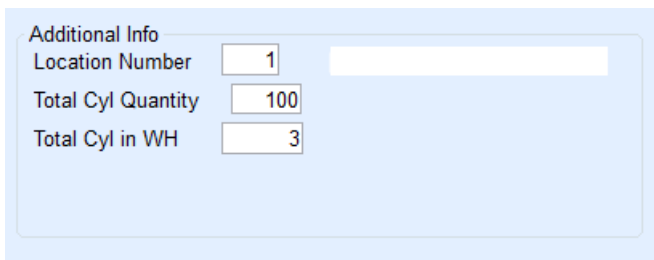
Cylinder Tracking

Last Modified on 11/02/2023 2:17 pm EDT

Overview

Cylinder Tracking allows for the setup of Cylinders in the customer tank file to keep track of exchanges that are made with each delivery.

1. On the *Tank Info* screen, press **Ctrl+C** to create an entry for a Cylinder.
2. Select Y for company-owned or N for customer-owned. If company-owned, a list of Inventory Tanks will be displayed. Select the Cylinder. If the Cylinder is not present in the Inventory file, it will need to be created.
 - a. Under *Tank/Meter Maintenance*, set up a tank with a *Tank Type* of CY or a custom Tank Type. (Ex: C4 for 40# cylinder or C2 for 20# cylinder).
 - b. Under *Additional Info* add the *Location* code of the Cylinders (if tracking), *Total Cyl Quantity*, and *Total Cyl in WH* (Yard). Whenever there is a transaction, these fields will be adjusted automatically. The *Cylinder Type* only needs entered once.



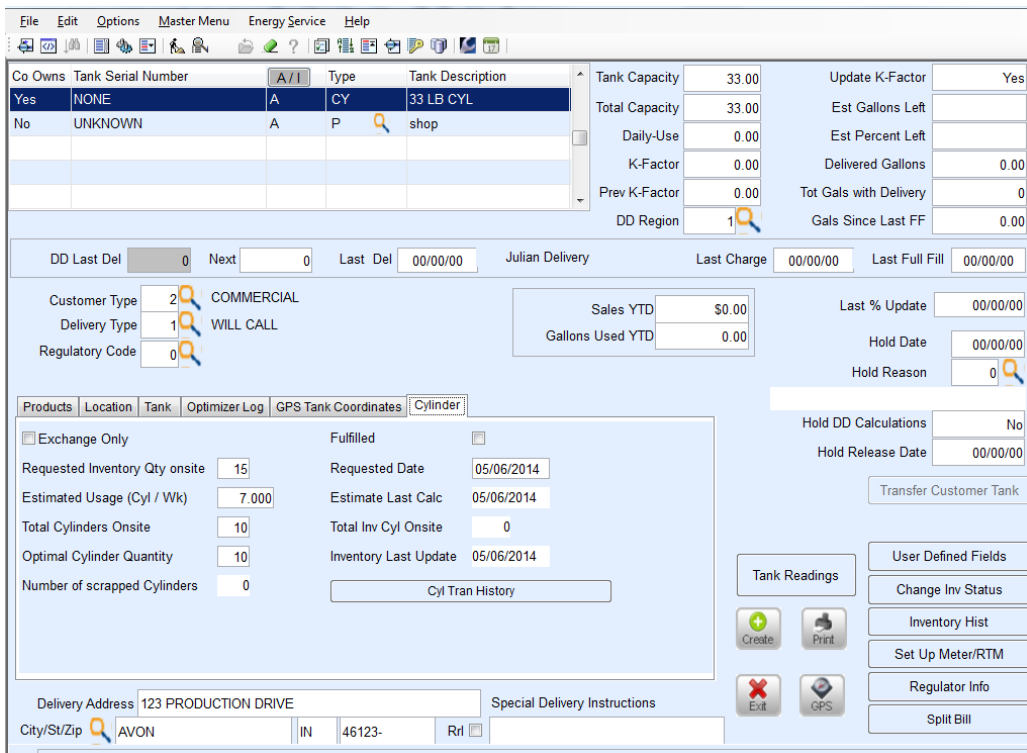
Additional Info

Location Number

Total Cyl Quantity

Total Cyl in WH

3. Continue with the setup similar to a regular propane or refined fuel tank by entering *Customer Type*, *Delivery Type*, etc.



Co Owns	Tank Serial Number	A/I	Type	Tank Description
Yes	NONE	A	CY	33 LB CYL
No	UNKNOWN	A	P	shop

Tank Capacity: 33.00
Total Capacity: 33.00
Daily-Use: 0.00
K-Factor: 0.00
Prev K-Factor: 0.00
DD Region: 1

Update K-Factor: Yes
Est Gallons Left:
Est Percent Left:
Delivered Gallons: 0.00
Tot Gals with Delivery: 0
Gals Since Last FF: 0.00

DD Last Del: 0 Next: 0 Last Del: 00/00/00 Julian Delivery Last Charge: 00/00/00 Last Full Fill: 00/00/00

Customer Type: 2 COMMERCIAL
Delivery Type: 1 WILL CALL
Regulatory Code: 0

Sales YTD: \$0.00
Gallons Used YTD: 0.00

Last % Update: 00/00/00
Hold Date: 00/00/00
Hold Reason: 0

Hold DD Calculations: No
Hold Release Date: 00/00/00

Transfer Customer Tank

Tank Readings
User Defined Fields
Change Inv Status
Inventory Hist
Set Up Meter/RTM
Regulator Info
Split Bill

Create Print
Exit GPS

Exchange Only Fulfilled
Requested Inventory Qty onsite: 15 Requested Date: 05/06/2014
Estimated Usage (Cyl / Wk): 7.000 Estimate Last Calc: 05/06/2014
Total Cylinders Onsite: 10 Total Inv Cyl Onsite: 0
Optimal Cylinder Quantity: 10 Inventory Last Update: 05/06/2014
Number of scrapped Cylinders: 0 Cyl Tran History

Delivery Address: 123 PRODUCTION DRIVE Special Delivery Instructions
City/ST/Zip: AVON IN 46123 Rrl

When entering a Cylinder Tracking Tank Type (i.e. Cy, C4, C8, etc.), the system will display a form asking for additional information relevant to Cylinder customers. Important information includes:

- **Exchange Only** – The system will not allow dropping Cylinders in a quantity different than the quantity picked up. If that option is marked, *Requested Quantity* will be disabled.
- **Requested Quantity** – The system will check the quantity on hand and the total requested unfulfilled quantity and show the available quantity. The system will allow a *Requested Quantity* greater than the quantity on hand but will issue a warning.
- **Requested Date** – This is available for Will Call customers only. The system will create a single Julian date record with the requested information.
- **Estimated Usage** – This field will have an initial estimate of Cylinders per week from the customer and will be updated every posting.
- **Cyl Tran History** – The Cyl Tran History automatically gets updated at the time of Cylinder Sales Processing.

Set Up New Cylinder Tracking

1. Navigate to the *Customer Maintenance Menu* and select the appropriate Customer.
2. Select **Tank Info** and press **Ctrl+C** to add a tank.
3. Enter *Yes* for *Co Owns*.
4. Search for the Cylinder Tank Type (C2, C3, etc.).
5. Select the Cylinder Tank Type to be applied to the Customer account. This will return to the *Tank Setup* screen.

Note: A *Cylinder* tab will appear next to the *GPS Tank Coordinates* tab.

6. Continue with setting up the cylinder similar to setting up a standard tank indicating Customer Types, Delivery Types, Products, pricing, etc.
7. Select the *Cylinder* tab.

Products	Location	Tank	Optimizer Log	GPS Tank Coordinates	Cylinder
<input checked="" type="checkbox"/> Exchange Only					Fulfilled <input type="checkbox"/>
Requested Inventory Qty onsite	<input type="text" value="0"/>				Requested Date <input type="text" value="01/01/1901"/>
Estimated Usage (Cyl / Wk)	<input type="text" value="10.000"/>				Estimate Last Calc <input type="text" value="05/16/2022"/>
Total Cylinders Onsite	<input type="text" value="20"/>				Total Inv Cyl Onsite <input type="text" value="0"/>
Optimal Cylinder Quantity	<input type="text" value="5"/>				Inventory Last Update <input type="text" value="05/16/2022"/>
Number of scrapped Cylinders	<input type="text" value="0"/>				<input type="button" value="Cyl Tran History"/>

8. Choose *Exchange Only*.
9. Optionally enter the number of estimated Cylinders to be used per week in the *Estimated Usage (Cyl / Wk)* field.
10. Enter the total Cylinders to be applied to the site in the *Total Cylinders Onsite* field. This will reduce the inventory available in the warehouse for the Tank Type.

11. Enter the *Optimal Cylinder Quantity* to keep on site.
12. Select **Save**. Cylinder exchanges can now be performed in Energy Force and EnergyTrack.