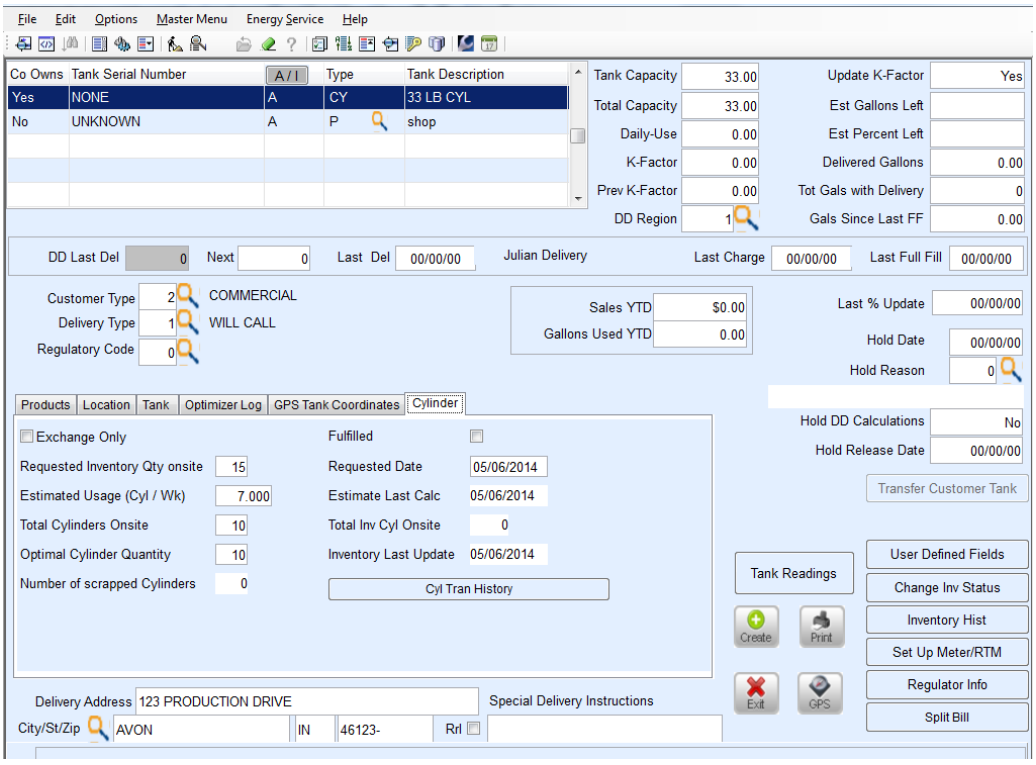
# Cylinder Tracking

Last Modified on 07/14/2025 4:38 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 Quanity*, and *Total Cyl in WH* (Yard). Whenever there is a transaction, these fields will be adjusted automatically. The Cylinder *Type* only needs entered once.
3. Continue with the setup similar to a regular propane or refined fuel tank by entering *Customer Type*, *Delivery Type*, etc.




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

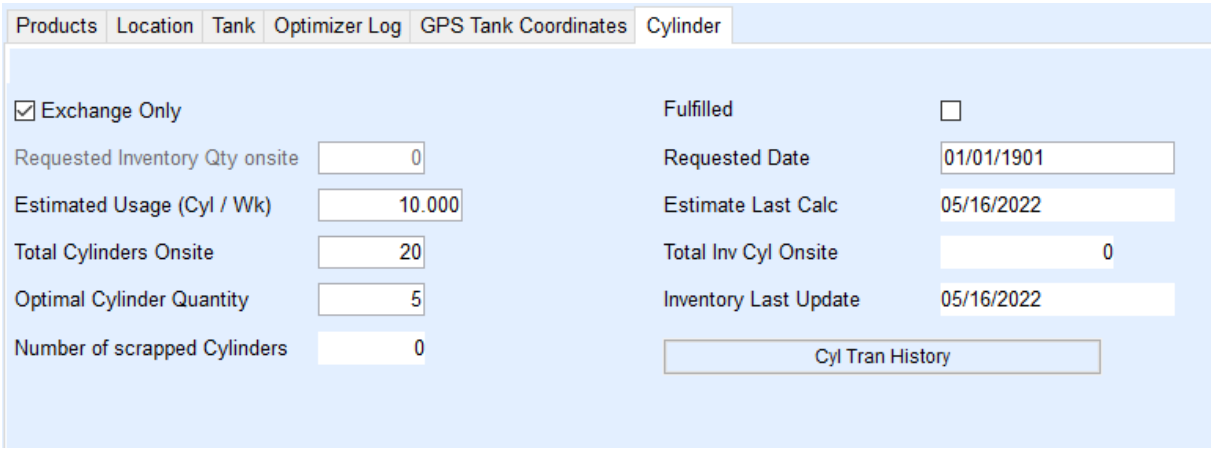
quantity and show the available quantity. The system will allow a *Requested Quantity* greater than the quantity on hand but will issue a warning.

- **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.




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.