Cylinder Tracking

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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.

Co Owns Tank Serial Number A/I Type Tank Description * Tank Capacity 33.00 Update K-Factor	Yes			
Yes NONE A CY 33 LB CYL Total Capacity 33.00 Est Gallons Left				
No UNKNOWN A P Q shop Daily-Use 0.00 Est Percent Left				
K-Factor 0.00 Delivered Gallons	0.00			
Prev K-Factor 0.00 Tot Gals with Delivery	0			
DD Region 1Q 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 Sales YTD \$0.00 Delivery Type 1 WILL CALL Gallons Used YTD 0.00 Regulatory Code 0 0 Hold Date 00/00/00				
Products Location Tank Optimizer Log GPS Tank Coordinates Cylinder				
Exchange Only Fulfilled	110			
Requested Inventory Qty onsite 15 Requested Date 05/06/2014	00/00/00			
Estimated Usage (Cyl / Wk) 7.000 Estimate Last Calc 05/06/2014	Customer Tank			
Total Cylinders Onsite 10 Total Inv Cyl Onsite 0				
Optimal Cylinder Quantity 10 Inventory Last Update 05/06/2014 User I	Defined Fields			
Number of scrapped Cylinders 0 Cyl Tran History Chan	ge Inv Status			
Inv	entory Hist			
Create Print Set U	p Meter/RTM			
	gulator Info			
City/St/Zip Q AVON IN 46123- Rrl	Split Bill			

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.

- 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 Optim	mizer Log GPS Tank Coor	dinates Cylinder		
Exchange Only		Fulfilled		
Requested Inventory Qty onsite	0	Requested Date	01/01/1901	
Estimated Usage (Cyl / Wk)	10.000	Estimate Last Calc	05/16/2022	
Total Cylinders Onsite	20	Total Inv Cyl Onsite	0	
Optimal Cylinder Quantity	5	Inventory Last Update	05/16/2022	
Number of scrapped Cylinders	0	Cyl Tran H	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.