

Add Tank to Customer Account

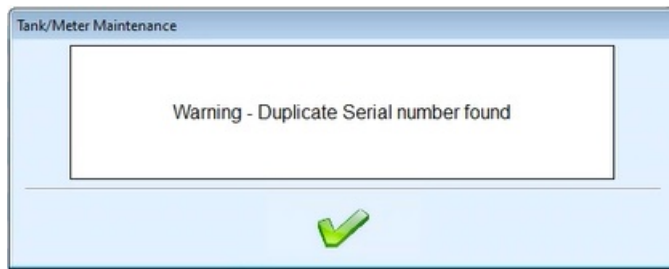
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Pressing **Tab** moves through the fields.

Step 1: Tank Info

1. Press **Ctrl+C** or select **Create**.
2. In the **Co Owns** field, enter **Y** for company-owned or **N** for customer-owned.
 - a. If **Y** is entered, highlight the tank from the *Tank/Meter Maintenance* window and choose **Select**.
 1. The *Tank Serial Number* and *Type* will autofill based on the tank selected from inventory.
 2. Enter *Est Gallons Left* in the Tank if applicable and select **OK**.
 - b. If **N** is entered:
 1. Enter the *Tank Serial Number*.

Note: If the serial number matches the serial number of another active tank, a message stating it is a duplicate serial number will display. Once the message is acknowledged the tank can be entered.



For customer owned tanks that are modified to inactive at a later date, a user right will be required.

2. Select the Tank Type by pressing **F5** or by selecting the **Browse** button.
3. In the *Tank Description* field, enter a description for the tank.
4. In the *Total Capacity* field:
 - o A company-owned tank will automatically display the tank size.
 - o Non company-owned tanks require the size of the tank to be entered manually.
5. Enter the *Total Capacity* of the tank.
6. Enter *Daily-Use* gallons (gallons used on a daily basis for non-heating appliances).
7. Enter the *K-Factor*. Press **F5** in this field if the K-Factor is unknown to navigate to a *Calculation* screen.

8. If using the K-Factor Calculator, enter known *House Information*. *Daily-Use* gallon information (non-heating appliance usage) can be entered as well to calculate a more accurate daily usage. Choose **Select** when finished to return to the *Tank* screen. The *K-Factor* and *Daily-Use* will automatically populate.
9. Tab through the *Prev K-Factor* field. This information will auto-populate as deliveries are made.
10. In the *DD Region* field, enter the degree day region the tank is in.
11. In the *Update K-Factor* field, enter Y to update the K-Factor automatically during sales ticket posting or N so the system does not update the K-Factor automatically.
12. The system automatically updated the *Est Gallons Left* and *Est Percent Left* fields based on the value entered in Step 4.
13. **Tab** through *Delivered Gallons*, *Tot Gals with Delivery*, *Gals Since Last FF*, *DD Last Del*, *Next*, *Last Del*, *Last Charge*,

and *Last Full Fill*. These fields automatically get updated at the time of the delivery posting.

14. In the *Customer Type* field, press **F5** or select the **Search** button and choose accordingly. This information can be entered manually as well.
15. Press **F5** or the **Search** button to select the *Delivery Type*. This information can be entered manually as well.
16. The *Regulatory Code* is an optional field. Press **F5** to select a Fee or **Tab** to the next field.

Step 2: Location Tab

This area is very important as it ensures the correct taxing will be applied if based on *County, Township, or School District*.

Route	3	MIKE
Route Seq #	0	
Location	1	AVON
County	1	HENDRICKS
Township	999	NONE
School District	999	UNKNOWN

1. Enter the *Route* code.
2. Enter the *Route Seq #* if there is a particular time this customer needs to have a delivery.
3. Enter the *Location* code if tanks are validated by location
4. Enter the *County*. Use **F5** or select the **Browse** icon and choose from the list.
5. Enter the *Township*. Use **F5** or select the **Browse** icon and choose from the list.
6. Enter the *School District*. Use **F5** or select the **Browse** icon and choose from the list.

Step 3: Tank Tab

Master Asset ID	3	Tank Rental	Management
Company Paints	Yes	Manufacture Date	00/00/00
Year Painted	2012	Deposit Amt	\$0.00
Type Of Paint	ALUM	Deposit Date	00/00/00
Tank Condition	Good	Date Tank Set	12/31/13
Price Chgs?	Yes	Gas Check Date	12/31/13
		Leak Test Date	12/31/13

1. Enter *Yes* or *No* to indicate if the *Company Paints*.

2. *Year Painted* and *Type of Paint* automatically displays from the *Tank/Meter Maintenance* screen if company-owned. Otherwise, enter the information accordingly.
3. Enter the *Tank Condition* (*Good, Needs Painting, etc.*).
4. Indicate if price changes are allowed by entering *Yes* or *No* in the *Price Chgs?* field.
5. The *Manufacture Date* is automatically populated from the *Tank/Meter Maintenance* screen.
6. Enter the *Date Tank Set*.
7. Enter the last date the gas was checked in the *Gas Check Date* field.
8. Enter the last date the leak test was performed in the *Leak Test Date* field.

Step 4: Products Tab

Products Location Tank Optimizer Log GPS Tank Coordinates

Market Based Pricing Test Sale

Product	Description	Price Code	Tier	Price	Prod Use	Disc	Default
1000	RESIDENTIAL PROPANE	1	A	2.0000		1	<input checked="" type="checkbox"/>

Price Desc: RESIDENTIAL

Disc Desc: .03 if paid in 10 days

Hide Price On Energy Track Delivery?

1. Press **F5** to Select a *Product Type*.
2. Enter a *Price Code* or press **F5** to choose from a list. (See Step 7 below for information about hiding prices on Delivery Tickets.)
3. Select the *Tier* or press **F5** to select from Tier list. The *Price* will populate when the *Tier* is chosen.
4. Select *Product Use* if special taxing conditions apply. Otherwise, leave this field blank
5. Enter a Discount Code in the *Disc* column or press **F5** to select from a list. If a discount does not apply, leave this field blank.
6. Opt to set as *Default*. More than one product can be listed on the *Products* tab. Be sure to select the correct defaulted product.
7. Energy Track has the ability to hide the price on a Delivery Ticket. This is handled at the Tank level within Energy Force by checking the *Hide Price on Energy Track Delivery?* box in the lower right corner of the *Products* tab, this will apply to all products listed on the tank.
 - a. The Price per Gallon, Taxes and Totals will not display on the Invoice, but they will be priced in the History. For a multi-delivery, if any tank is marked to *Hide the Price on Energy Track Delivery?*, then all deliveries on the Invoice will be hidden. When a split is used on a tank and marked to *Hide the Price on Energy Track Delivery?*, then all Invoices for the split will hide the pricing details. This does not apply to manually entered Invoices. Below is an example of an Invoice with the price hidden.

TEST DIVISION
P.O. BOX 367
AKRON, IN 46910-

(574)893-4733

Customer# 14231
TEST,TEST
1234 TEST AVE
115 CRM FIRMS, NY 11597-
() -

Ticket # 1061385
Date: 03/05/2026
Time 09:11
Split%: 50.00

*** ORIGINAL ***

Delivery Address:
2748S 100E NEWAYGO, MI
Driver: CRAIG ADAMS

Quantity	Description		
9.7 G	LP RESIDENTIAL BULK		
	Sale # 948/Im changing tank name in ET/250		
	End %: 80.00		

Net Due

Customer PO #

Customer Signature

This is the corresponding delivery in the customers history.

03/05/26	14	14	103385	1061385	13	100	LP RESIDENTIA	9.65	0.00	2.5690	\$24.79	\$1.49	\$26.28
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- Directly below the *Products* tab is the *Delivery Address*. The address will automatically default to the customer address. Update this information to display the ACTUAL delivery address.
- Enter *Special Instructions* for the driver (i.e. Do not drive on lawn, Key under rock, etc.) up to 30 characters in the *PO Number* field. A user right is required for this field. The *PO Number* will automatically populate onto the *EnergyTrack Invoice* and *Manual Sales Posting* screens and will also print on the Invoice. The *PO Number* can be modified on the *Invoice* screen if necessary.

Co Owns	Tank Serial Number	A / I A / I	Type	Tank Description	Master Asset#
No	123	A	P	House	0
No	BARN	A	DD	FIELDTANK	0
No	SHOP	A	DD	SHOP	0
No	SHOP867	A	P	SHOP	0

Tank Capacity	500.00	Update K-Factor	Yes
Total Capacity	500.00	Est Gallons Left	100.00
Daily-Use	0.45	Est Percent Left	20
K-Factor	1.44	Delivered Gallons	230.00
Prev K-Factor	2.40	Tot Gals with Delivery	400
DD Region	1	Gals Since Last FF	0.00

DD Last Del	30	Next	30	Last Del	07/15/20	Julian Delivery	Last Charge	07/15/20	Last Full Fill	07/15/20
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Customer Type	1 RESIDENTIAL	RTM	Last Read	07/17/2020	Last % Update	11/10/21	
Delivery Type	2 KEEP FULL	Target Refill	25%	Critical Refill	15%	Read Information	
Regulatory Code	0	Hold Date	00/00/00	Hold Reason	0		
Public Assembly?	<input type="checkbox"/>	Underground?	<input type="checkbox"/>	Hold DD Calculations	No	Hold Release Date	00/00/00

Product Description	Price Code	Tier	Price	Prod Use	Disc	Default
1000 RESIDENTIAL PROPANE	1	A	2.0000		1	<input checked="" type="checkbox"/>

Price Desc:	RESIDENTIAL	Hide Price On Energy Track Delivery?	<input type="checkbox"/>
Disc Desc:	03 if paid in 10 days		

Delivery Address	123 MAIN	Special Delivery Instructions	PO Number
City/St/Zip	WINNER SD 57580-	Rf <input type="checkbox"/> OWNERS TANK	PT#73970-65

- Enter driving *Directions* for how to get to the delivery address.

11. Press **Ctrl+Q** to save or select the **Save** button.

Additional Notes

On the *Products* tab, a feature called *Test Sale* allows the option to test a 100 gallon sale to see if taxes are applied properly. If there is more than one product, select the item in question and select **Test Sale**.

If the customer is not being taxed properly, look to see that the delivery address is correct.

Step 5: GPS Tank Coordinates

The *GPS Tank Coordinates* tab displays the coordinates associated to a tank that has been plotted on the EnergyMap. To modify this information, press **Ctrl+M** and manually input the information. Press **Ctrl+Q** to save. Use the **Plot** button on the *Tank* screen (if the tank has never been plotted before) and it will open EnergyMap to manually plot. Manual plots and handheld postings from handhelds with internal GPS will automatically update the *GPS Tank Coordinates* tab.

Co Owns	Tank Serial Number	A / I	Type	Tank Description
Yes	1033490	A	P	DRYER
No	2ND ACCT - S1 T2	A	G	MOMS PLACI
No	2ND ACCT - S1 T1	A	DD	MOMS PLACI
No	2ND ACCT - S2 T1	A	DD	DIESEL
Yes	630341	A	P	HOME
No	HTB	A	HL	HTB
No	S1 T1	A	DD	DIESEL
No	TMS 15W40	A	L	TMS 15W40

DD Last Del	30	Next	2030	Last Del	07/10/13	Julian Delivery
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Customer Type	14	CORN DRYING
Delivery Type	4	CORN DRYERS
Regulatory Code	0	

Products | Location | Tank | Optimizer Log | **GPS Tank Coordinates**

Enter Tank Longitude / Latitude

Longitude: 0.0000000 deg 0.000 min 0 sec
Latitude: 0.0000000 deg 0.000 min 0 sec
Map Latitude -414634033 Map Longitude -925794267

Values can be entered several ways:
85 deg. 50 min. 30 sec. can be entered in the fields in each respective field. Or the 85 can be in the deg field and 50.5 in the min field. Or you can enter it all in the deg field as 85.8416667.

Step 6: Optimizer Log Tab

The *Optimizer Log* tab displays each time the tank has been scheduled within the last six months. Information will only display in this tab for Optimizer Plus users.

Co Owns	Tank Serial Number	A / I	Type	Tank Description	
Yes	675330	A	P	HOME	Tank Capacity
Yes	806416	A	P	RENTAL HOM	Total Capacity
No	S1 T1	A	DD	DIESEL	Daily-Use
No	S1 T2	A	G	SNL TRACTOR	K-Factor
					Prev K-Factor
					DD Region

DD Last Del: 44 Next: 1147 Last Del: 09/04/13 Julian Delivery: _____

Customer Type: 2 LANDLORD AUTO SCHEDULE Sales YTD: \$332.78
 Delivery Type: 2 TRACK K-FACTOR Gallons Used YTD: 250.40
 Regulatory Code: 0

Scheduled	Truck	Est % Left	Temp Ticket#	Gallons Delivered
09/04/2013		381	9	189249
09/03/2013		381	9	0
09/02/2013		381	9	0
09/01/2013		381	9	0
08/31/2013		381	9	0
08/30/2013		381	9	0

Step 7: Delivery Information

Delivery Address

The *Delivery Address* listed on the *Tank* screen should reflect the actual address of the tank. Having the correct *Delivery Address* is especially important for taxing purposes and is also transferred to EnergyTrack Re-Engineered.

Delivery Address: 987 RONALD REGAN PARKWAY Special Delivery Instructions

City/St/Zip: BROWNSBURG IN 46112- Rrl Do not drive on lawn

South on US 267 to county road 100 (morriss road). House is on the left.

Special Instructions

This information pertains to special instructions drivers need to follow when making deliveries. This information transfers down to EnergyTrack Re-Engineered.

Delivery Address: 987 RONALD REGAN PARKWAY Special Delivery Instructions

City/St/Zip: BROWNSBURG IN 46112- Rrl Do not drive on lawn

South on US 267 to county road 100 (morriss road). House is on the left.

Directions

This section is for directions on how to get to the customer tank and also displays on EnergyTrack Re-Engineered.

Delivery Address: 987 RONALD REGAN PARKWAY Special Delivery Instructions

City/St/Zip: BROWNSBURG IN 46112- Rrl Do not drive on lawn

South on US 267 to county road 100 (morriss road). House is on the left.

PO

Energy Force stores and processes a standing PO # manually entered in a field to the right of *Special Delivery Instructions* on the Tank screen. A user right is required to modify this field.

Special Delivery Instructions	PO Number
Rrl <input checked="" type="checkbox"/>	thisismyponumber1234567

The PO # will automatically populate onto the EnergyTrack Invoice and Manual Sales Posting screens and will also print on the Invoice. The PO # can be modified on the Invoice screen if necessary.

Quantity	Description	Unit Price	Amount
222.0 G	PROPANE COMMERCIAL Sale # 1/1000 Gal Lp/QA7107 End %: 80.00	\$1.7000	\$377.40
75.0 G	PROPANE RESIDENTIAL Sale # 2/trailer hous/93339 End %: 80.00 Contract # 90840 / L.P. 100% P	\$4.0000	\$300.00
	PO# thisismyponumber1234567		
221.0 G	PROPANE RESIDENTIAL Sale # 4/po#test/PO#TESTING End %: 80.00	\$2.1000	\$464.10
	PO# ihaveaponenumberputhere		