Add Tank to Customer Account

Last Modified on 03/05/2025 1:46 pm EST

Pressing **Tab** moves through the fields.

Step 1: Tank Info

o Owns Tank Serial Number	A/I	Туре	Tank Descrip	tion	Tank Capacity	300.00	Unda	te K-Factor	Yes
No SPARE	A	P Q	House		Total Capacity	300.00		Gallons Left	10.
					Daily-Use	0.25		Percent Left	
					K-Factor	4.20	Delive	red Gallons	0.00
				-	Prev K-Factor	0.00	Tot Gals w	with Delivery	205
					DD Region	10	Gals Sir	nce Last FF	0.00
DD Last Del 10 Next	10	Last Del	02/19/14	Julian Delivery		Last Charge	02/19/14	Last Full Fil	02/19/14
Customer Type 1 RESIDE	NTIAL				Sales YTD	\$0.00	Las	st % Update	00/00/00
Delivery Type 2 KEEP F	ULL				Used YTD	175.00			
Regulatory Code 0 🔍				Gairona		115.00		Hold Date	00/00/00
							н	fold Reason	0 Q
Products Location Tank Optimizer Lo	g GPS Ta	nk Coordinates	3						
Test F	Price		T	est Sale				Calculations	No
Product Description	Prie	ce Code Tier	Price	Prod Use	Disc Default	*	Hold R	elease Date	00/00/00
1000 RESIDENTIAL PROPANE		1 A	1.0000		0 🔽			Transfer C	ustomer Tank
						Tan	k Readings	User De	fined Fields
						-	j.	Change	Inv Status
								Inven	tory Hist
Price Desc: RESIDENTIAL		Disc	Desc:			Create	Print	Set Up	Meter/RTM
Delivery Address 8877 SHORE LANE				Special Delivery	Instructions	Ext	Find	Regu	lator Info
City/St/Zip Q PENSACOLA	FL	32501-	Rrl 🕅			LA		Sp	lit Bill
		OF AN I.		I					

- 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.
 - 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:
 - A company-owned tank will automatically display the tank size.
 - 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.

Length 🚺 X Width	n 0 = S	quare Feet In I	House 2500	X Ceiling Hei	ght 10 =	Cubic Feet	25000
Heat Loss 175000	(7 BTU Per CuFt)/Hr		Insul	ation Deductions 35	Average I	nsulation = 35	
Fuel	Type Propane	Oil	Example: storm wind	Good insulation plus ows and doors = 50	Good Ins	ulation = 40	
	erropane	00				ulation = 50	
Degree Days An	nually 5500				Storm W	indows and Doors	= 10
Gross Heating G	allons 4130						
Net Heating G	allons 2685						
	Daily Use Gallon	s					
	Cookin	ig 40					
	Water Heatin	g 40 40 g	gals per person)				
	Clothes Dry	er 75					
	Othe	er 0 (Est	timated Usage)				
	Total Add On	155					
	Daily Use	0.42		Estimated Annual Usa	age	2840	
				K-Fac		2.05	

- 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*.

Products Location	Tank Optimizer Log GPS Tank Coordinates
Route	3 MIKE
Route Seq #	0
Location	
County	1 C HENDRICKS
Township	
School District	

- 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 Ma	nager	ment
Company Paints	Yes	Manufacture D	ate (00/00/00
Year Painted	2012	2 Deposit A	mt	\$0.00
Type Of Paint	ALUN	Deposit D	ate (00/00/00
Tank Condition	Good	Date Tank	Set	12/31/13
Price Chgs?	Yes	Gas Check D	ate	12/31/13
		Leak Test D	ate	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 companyowned. 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

Test F		Test Sale				
Product Description	Price Code Tier	Price	Prod Use	Disc Default	^	
1000 RESIDENTIAL PROPANE	1 A	1.0000		1 🔽		
					-	
					Ŧ	
Price Desc: RESIDENTIAL	Disc	Desc: .03 if paid	1 in 10 days			

- 1. Press **F5** to Select a *Product* Type.
- 2. Enter a Price Code or press F5 to choose from a list.
- 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. 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.
- 8. 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.

oOwns	Tank Serial Number	A/1	1	Туре		Description	^	Tank Capacity	500.00)	Update K-Factor	
	414407				OWN	IERS TAN		Total Capacity	500.00		Est Gallons Left	
								Daily-Use	0.00		Est Percent Left	
								K-Factor	4.00		Delivered Gallons	
							~	Prev K-Factor	0.00		Tot Gals with Delivery	
							¥	DD Region	1Q		Gals Since Last FF	
DD Last Del	0	Next	0	Last D	Del 00/00/00	Julian Delivery			Last Charge	00/00/00	Last Full Fill	00/00/0
Customer Ty		ITIAL									Last % Update	00/0
Delivery Ty	ype 2 SCHEDUL											
Regulatory Co	ode 0Q	45									Hold Date	00/0
Public Assem	nbly?	Inderground?									Hold Reason	0
Products Locatio	on Tank Optimizer Log GP	S Tank Coordinate	s									
		Save	Test	Sale							Hold DD Calculations	
Product	Description	Guite	Price Co		Price	Prod Use	Disc	Default	^		Hold Release Date	00/0
1	PROPANE - HOME HEATING	1	1	A	1.4900		10				Transfer Cus	stomer Tank
5	OUT OF GAS CALL		6	A	100.0000		C		la	nk Readings		
6	AFTER HOURS CALL		7	A	100.0000		C					
11	LEAK CHECK		10	A	100.0000		C		Creat	e Print	User Defir	ned Fields
12	TRUCK TIME		11	A	100.0000		C				Change In	nv Status
									▼ È		Invento	ny Hist
Pric	e Desc: LP HOME HEATING	Diec D	esc: \$.10 PER GAL I						Save			
1 110	o Deac. of frome fibering	Diac Di	bad, entrender								Set Up M	eter/RTM
					Special Delivery Inst	ructions PO Number					Regula	tor Info
livery Address 92	2843 Wiegand Station											
elivery Address 92 City/St/Zip 🔍 W		ND	58795-		OWNERS TANK	PT#73970-55					Split	Bill

- 9. Enter driving Directions for how to get to the delivery address.
- 10. 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.



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.

wns	Tank Serial Numbe	r	A/I	Type		Tank Description	^		
	675330		A	P		HOME		Tank Cap	pacity
	806416		A	P		RENTAL HOM		Total Cap	pacit
	S1 T1		A	DD	Q	DIESEL		Daily	v.l le
	S1 T2		A	G	Q	SNL TRACTOF			
								K-F	Fact
								Prev K-F	Fact
								DD R	2 a ai
							-	DUR	legi
DD Last Del	44	Next	1147	Last Del 09	/04/13	Julian Delivery	y		
Customer	Type 2 D LAI	NDLORD AUTO SCHEDUL					2.78		
Customer Delivery Regulatory C	Type 2 LAI Type 2 TR Code 0 0	NDLORD AUTO SCHEDUL ACK K-FACTOR			Sal Gallons Us		2.78 0.40		
Customer Delivery Regulatory C	Type 2 LAI Type 2 TR Code 0 0	NDLORD AUTO SCHEDUL ACK K-FACTOR		T		ed YTD 25			
Customer Delivery Regulatory C ducts Location Ta Scheduled	Type 2 LAI Type 2 TR Code 0 0	NDLORD AUTO SCHEDUL ACK K-FACTOR	E	Ti 9	Gallons Us	ed YTD 25	0.40	250.40	
Customer Delivery Regulatory C ducts Location Ta Scheduled 9/04/2013	Type 2 LAI Type 2 TR Code 0 0	NDLORD AUTO SCHEDUL ACK K-FACTOR	E		Gallons Us	ed YTD 25	0.40	0.00	
Customer Delivery Regulatory C ducts Location Ta Scheduled 9/04/2013 9/03/2013	Type 2 LAI Type 2 TR Code 0 0	NDLORD AUTO SCHEDUL ACK K-FACTOR nk Coordinates 381 381 381	E	9	Gallons Us	ed YTD 25 Gallon 189249	0.40		
Customer Deirvery Regulatory C ducts Location Ta Scheduled 9904/2013 9903/2013 9902/2013 990/2/2013	Type 2 LAI Type 2 TR Code 0 0	NDLORD AUTO SCHEDUL ACK K-FACTOR nk Coordinates 381 381 381 381	E	9 9	Gallons Us	ed YTD 25 Gallon 189249 0 0 0	0.40	0.00 0.00 0.00	
Customer Delivery Regulatory C Dducts Location Ta	Type 2 LAI Type 2 TR Code 0 0	NDLORD AUTO SCHEDUL ACK K-FACTOR nk Coordinates 381 381 381	E	9 9 9	Gallons Us	ed YTD 25 Gallon 189249 0 0	0.40	0.00 0.00	

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 Q BROWNSBURG	IN	46112-	Rrl 📃	Do not drive on lawn	
South on US 267 to county road 100 (morris road). Hous	e 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.

Directions

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

	987 RONALD REGAN PARKWAY				Special Delivery Instructions
City/St/Zip	ROWNSBURG	IN	46112-	Rrl 🛅	Do not drive on lawn
South on US 2	267 to county road 100 (morris road). House	is on the left.			

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 🗹		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.

Description	Unit Price	Amount
PROPANE COMMERCIAL	\$1.7000	\$377.40
Sale # 1/1000 Gal Lp/QA7107 End %: 80.00		
PROPANE RESIDENTIAL	\$4.0000	\$300.00
Sale # 2/trailer hous/93339		
End %: 80.00		
Contract # 90840 / L P 100% F		
smyponumber1234567		
PROPANE RESIDENTIAL	\$2.1000	\$464.10
Sale # 4/po#test/PO#TESTIN(
End %: 80.00		
	PROPANE COMMERCIAL Sale # 1/1000 Gal Lp/QA7107 End %: 80.00 PROPANE RESIDENTIAL Sale # 2/trailer hous/93339 End %: 80.00 Contract # 90840 / LP 100% P smyponumber1234567 PROPANE RESIDENTIAL Sale # 4/po#test/PO#TESTIN(PROPANE COMMERCIAL \$1.7000 Sale # 1/1000 Gal Lp/QA7107. \$1.7000 End %: 80.00 \$4.0000 PROPANE RESIDENTIAL \$4.0000 Sale # 2/trailer hous/93339 \$4.0000 Sale # 2/trailer hous/93339 \$4.0000 Contract # 90840 / LP 100% P \$5.000 Contract # 90840 / LP 100% P \$5.000 Sale # 4/po#test/PO#TESTIN(\$2.1000