

# Add Tank to Customer Account

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Pressing **Tab** moves through the fields.

## Step 1: Tank Info

Co Owns	Tank Serial Number	A / I	Type	Tank Description
No	SPARE	A	P	House

Product Description	Price Code Tier	Price	Prod Use	Disc Default
1000 RESIDENTIAL PROPANE	1 A	1.0000		0 <input checked="" type="checkbox"/>

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.

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	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

Products	Location	Tank	Optimizer Log	GPS Tank Coordinates
<b>Master Asset ID</b> 3		<b>Tank Rental Management</b>		
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

Product	Description	Price Code	Tier	Price	Prod Use	Disc	Default
1000	RESIDENTIAL PROPANE	1	A	1.0000	1		<input checked="" type="checkbox"/>

Price Desc: RESIDENTIAL      Disc Desc: .03 if paid 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 (see [Applications, Product, and Use](#)). 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.)
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.

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

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: 0.000000 deg    0.000 min    0 sec  
 Latitude: 0.000000 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
Yes	806416	A	P	RENTAL HOM
No	S1 T1	A	DD	DIESEL
No	S1 T2	A	G	SNL TRACTOI

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

Customer Type: 2    LANDLORD AUTO SCHEDULE  
 Delivery Type: 2    TRACK K-FACTOR  
 Regulatory Code: 0

Sales YTD: \$332.78  
 Gallons Used YTD: 250.40

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

Scheduled	Truck	Est % Left	Temp Ticket#	Gallons Delivered
09/04/2013	381	9	189249	250.40
09/03/2013	381	9	0	0.00
09/02/2013	381	9	0	0.00
09/01/2013	381	9	0	0.00
08/31/2013	381	9	0	0.00
08/30/2013	381	9	0	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/State/Zip: BROWNSBURG IN 46112-    Rfr     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 <input type="checkbox"/>	Do not drive on lawn
South on US 267 to county road 100 (morris 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 <input type="checkbox"/>	Do not drive on lawn
South on US 267 to county road 100 (morris 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	\$1.7000	\$377.40
	Sale # 1/1000 Gal Lp/QA7107		
	End %: 80.00		
75.0 G	PROPANE RESIDENTIAL	\$4.0000	\$300.00
	Sale # 2/trailer hous/93339		
	End %: 80.00		
	Contract # 90840 / L.P. 100% P		
	PO# thisismyponumber1234567		
221.0 G	PROPANE RESIDENTIAL	\$2.1000	\$464.10
	Sale # 4/po#test/PO#TESTING		
	End %: 80.00		
	PO# ihaveaponenumberoutthere		