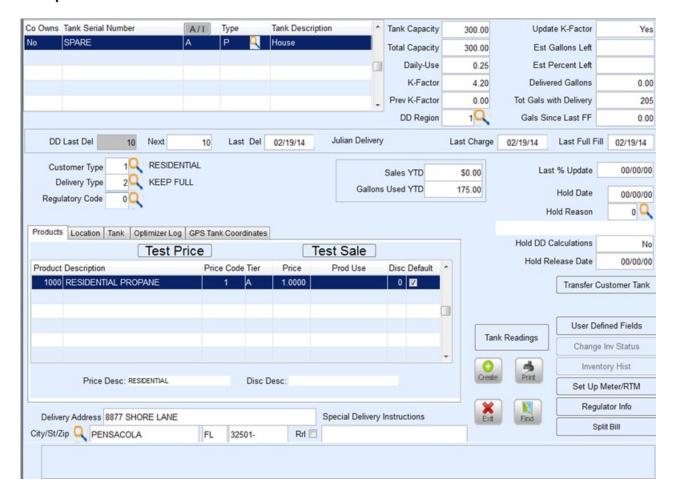
Add Tank to Customer Account

Last Modified on 04/03/2024 3:27 pm EDT

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.
 - 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*.



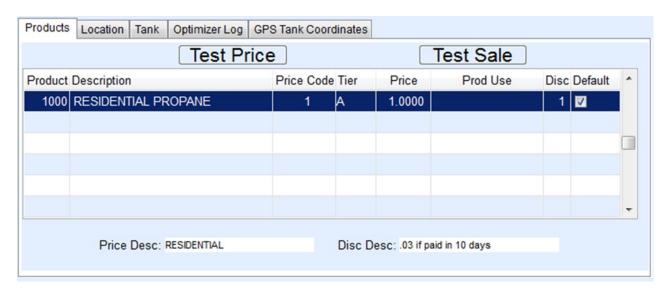
- 1. Enter the Route code.
- 2. Enter the Route Seq # if there is a particular time this customer needs to have a delivery.
- 3. Enter the Location code if tanks are validated by location
- 4. Enter the County. Use F5 or select the Browse icon and choose from the list.
- 5. Enter the *Township*. Use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



- 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



- 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.

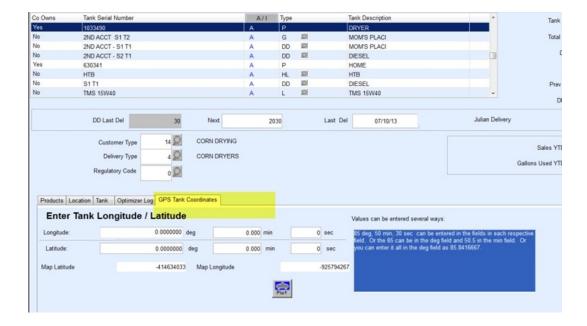
Additional Notes

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.

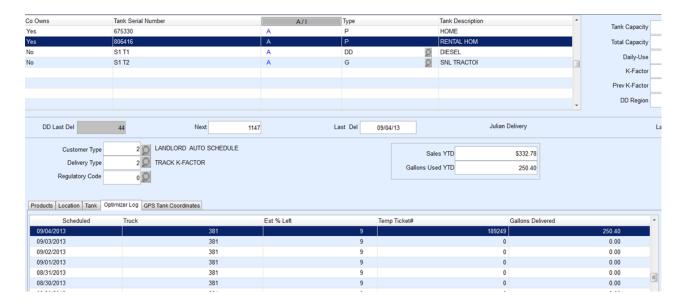
Step 5: GPS Tank Coordinates

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.



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.



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.



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.



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.



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.

