

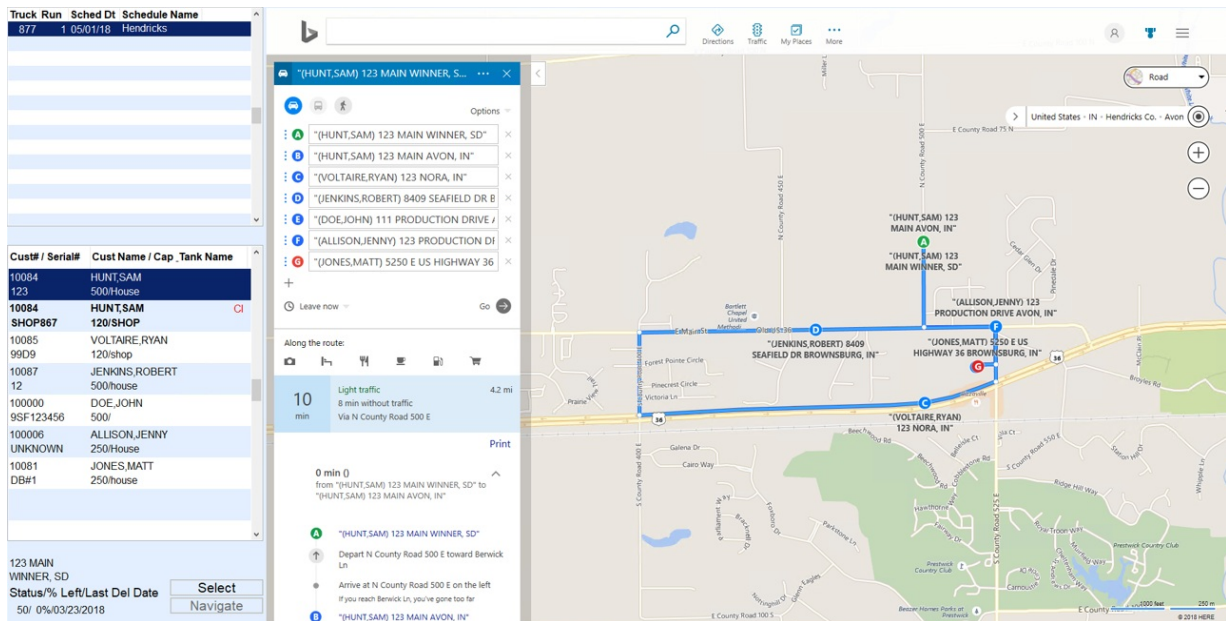
Scheduled Delivery - Propane

Last Modified on 01/06/2025 5:30 pm EST

The Scheduled Delivery program displays scheduled deliveries generated from Energy Force (via Optimizer, EnergyMap, etc.).

Overview

- Each schedule is listed by Truck/Route number and scheduled delivery date in the upper left area of the screen.
- Scheduled tanks appear in delivery order in the lower left area of the screen.
- Tanks listed in **bold font** with **CI** indicate Call-In tanks.
- The *Route Preview* screen displays an overview of the route within Wi-Fi range only. If not within Wi-Fi range, a message will appear indicating *No internet connection* if the route is generated from the Optimizer or EnergyMap routing systems.
- If the route is generated via the Schedule Tank Deliveries program in Energy Force, it will not display a map preview.
- Voice activated Turn-by-Turn Navigation will be available in an enhanced EnergyTrack version at a later date.



Make a Scheduled Delivery

1. Select **Scheduled Delivery**.
2. Choose the Schedule in the top left column of the screen.
 - The customer and tank information will display in the left area of the screen.
 - If using Optimizer Plus or EnergyMap, the scheduled items will appear in order for delivery.
3. Highlight the customer account/tank and choose **Select**. This will display the customer account information.

Truck Run	Sched Dt	Schedule Name
877	1 05/07/18	Hendricks

Cust# / Serial#	Cust Name / Cap_Tank Name
10084	HUNT,SAM
123	500/House
10084	HUNT,SAM
SHOP867	300/SHOP
10085	VOLTAIRE,RYAN
99D9	120/shop
10087	JENKINS,ROBERT
12	500/house
100000	DOE,JOHN
9SF123456	500/
100006	ALLISON,JENNY
UNKNOWN	250/House

123 MAIN
WINNER, SD
Status: % Left/Last Del Date
0/ 0%/03/23/2018

Select
Navigate
Back

4. Select Tanks to advance to the Tank screen.

Name	Customer#	Division#
HUNT,SAM	10084	1

Phone: (555)555-5555 Budget Payment Amount: 0.00
 Work Phone: () - # Budget Pymnts: 0 # Times Billed: 0
 Credit Limit: \$0.00 Budget Begin: 00/0000 End: 00/0000
 Current: Terms: 30 DAYS
 30 Day: Safety Info Date: 06/20/17 Alt Credits
 60 Day: Last Pay: 12/19/17 \$1.00
 90 Day: Tanks Payment Back
 Total:

5. Choose Deliver to advance to the Delivery screen.

Tank Serial Number	Type	Size	Tank Name	Last Delivery
123	P	500	House	03/23/18

HUNT,SAM Bus Owns N Add Comment Deliver Back
 Route Contracts Directions Call In / Hold Update % Regulators
 Last Delv: 100.00 % Left: 0 Product: 1001 COMMERCIAL PROP
 K-Factor: 0.39 DailyUse: 0.00 Price: 1.0000 View History
 Next Julian: 00/00/00 % Upd: 08/26/16 Route: 1 ROB
 Cust: RESIDENTIAL Loc: 2 BROWNSBURG
 Delv: KEEP FULL Reg Cd:
 DD Last Delv: 20 DD Next Delv: 79 Tank Leak Test: 02/19/18
 Calc. Dollars Prod. Deliv. Meters Navigate Gas Check Date: 00/00/00

6. The Multi-Delivery Pumping screen will appear. Begin pumping gallons. Multiple gallon deliveries can be pumped and invoiced on one ticket.

> MULTI-DELIVERY PUMPING >

Customer HUNT,SAM

Meter/Sale/Gal	Tank/Name/Size	Cm	Contract#
			1

Memo
 1 P
 Back Clear
 Finished Pumping

7. For electronic registers:

- **LCR II** – Turn the red knob to *Run*. Pump the fuel and then turn the red knob to *Stop*. Allow the switch to rest on *Stop* for two seconds and then turn to *Print*. After the delivery is complete, a meter block will print on the Blaster Printer located in the cab of the truck. The delivered gallons will also be imported into EnergyTrack in the *Meter/Sale/Gal* column.
 - **LC IQ** – Press **Start** on the register to begin pumping fuel. Press **End/Print** when finished. After the delivery is complete, a meter block will print on the Blaster Printer located in the cab of the truck. The delivered gallons will also be imported into EnergyTrack in the *Meter/Sale/Gal* column.
 - **MidCom ECount** – Press **Start/Stop** on the register. The register will reset to 0.00. Pump the product and press **Start/Stop** when finished pumping. Press the **Print** button. A meter block will print on the Blaster printer located in the cab of the truck and the delivered gallons will be imported into EnergyTrack in the *Meter/Sale/Gal* column.
 - **Neptune E4000** – Press the **Start/Enter** button on the register. The Neptune register will reset to 0.00. Pump the product and press **Stop/Cancel** when finished. A meter block will print on the Blaster Printer located in the cab of the truck and the delivered gallons will be imported into EnergyTrack in the *Meter/Sale/Gal* column.
 - **TCS 3000**

Method 1: Press **Start/Enter** on the register. Use the navigation arrows to select the product and press **Start/Enter**. If performing a direct delivery, press the **Start/Enter** button to begin pumping. Press **Stop/Cancel** to pause the delivery when finished pumping and then press **Stop/Cancel** a second time to finish the delivery. A meter block will print on the Blaster Printer located in the cab of the truck and the delivered gallons will be imported into EnergyTrack in the *Meter/Sale/Gal* column.

Method 2: If performing a preset delivery, press the **Preset** button and enter the preset amount. Press the **Start/Enter** button to begin pumping. Once the preset amount is reached, the meter will automatically finish the delivery and print the meter block and the delivered gallons will be imported into EnergyTrack in the *Meter/Sale/Gal* column.
8. For non-interfaced registers:
- a. Pump gallons on the register as usual.
 - b. Enter the gallons pumped in the *Meter/Sale/Gal* column of the *Multi-Delivery Pumping* screen by tapping in the field and using the on-screen keyboard.
9. Select **Finished Pumping** when gallon deliveries appear on the *Multi-Delivery Pumping* screen. If the customer has one tank, the tank will automatically default in the *Tank/Name/Size* field. Proceed to Step 11.

> MULTI-DELIVERY PUMPING >

Customer HUNT,SAM

Meter/Sale/Gal	Tank/Name/Size	Cm	Contract#
1/58719/250.0			
1/58720/250.0			

Memo

1 P

Back Clear

Finished Pumping

- If the customer has multiple tanks, highlight the gallons pumped and select in the *Tank/Name/Size* column.
- Customer tanks will display. Select the tank and choose **Select** to return to the *Delivery* screen.

Choose a Tank

Tank Serial Number	Min Tank Name	Type	Size
123	S House	P	500.00
SHOP867	CI SHOP	P	300.00

Minimum Gallon Delivery 0

Select Cancel

- While the delivery gallons are still highlighted, select the compartment (*Cm*) for the delivery (**1 P** located in bottom left corner of *Delivery* screen). An optional memo can be added to the delivery gallons. This memo prints on the Invoice and is specific to the highlighted gallons.

1/58720/250.0	P/SHOP/300.00
---------------	---------------

Memo

1 P

Back Clear

Finished Assigning

- Repeat Steps 8 - 11 for each set of gallons. Select **Finished Assigning** once all gallons have been assigned. The *Invoicing* screen will appear.
- Review the Invoice for accuracy. If the Invoice has more than one product, tap on the product line in the lower left portion of the screen to display details.
 - Department** – The product is defaulted based on the tank default in Energy Force. Select **Choose** if modification of the product is necessary. For gallon deliveries, the system will only allow a selection of pumpable products.
 - Gallons** – Gallons cannot be modified if received from an electronic register. If using a non-interfaced register, tap in the *Gals/Qty* field and use the on-screen keyboard to modify as necessary.
 - Price** – Tap in the *Price* field and use the on-screen keyboard to modify pricing as necessary. If gallons apply to a contract, the price cannot be modified.
 - End %** – Each set of gallons delivered require an ending percentage (the *Start %* is calculated from here based on tank size). Tap in the *End %* field and use the on-screen keyboard to enter ending percent. Make sure to enter the ending percent for each set of gallons listed on the Invoice.

Total Amount	Start %	30
250.0000	End %	80
Remove	Out of Gas	
Discount	Payment	
	Add Item	
\$750.00	Continue	

- e. **PO#** - Optionally tap in the *PO#* field to enter the Purchase Order number. This number prints on the customer Invoice.
- f. **Add Item** - If additional items such as labor or delivery fees need to be added to the Invoice, select **Add Item**. This will add a line to the Invoice with a Qty of zero.
- Highlight the 0.00 line item.
 - Select **Choose** to assign a department.
 - Select the Department from the product listing that appears. Tap in the *Product* column and begin typing to search for a product if necessary.
 - Choose **Select** to update the Department associated with the added item.
 - Enter the *Qty* and *Price* associated with the department selected.


Gals / Qty	1.00		
Preview	Price	Line Amount	All Taxes
	50.0000	50.0000	0.00
250.00	1.0000	COMMERCIAL PR	
250.00	2.0000	COMMERCIAL PR	
1.00	50.0000	LABOR	

- Repeat these steps for any additional added items.

15. Choose **Continue**. The *Confirm Delivery* screen will appear.

Confirm Delivery

Invoice Total: \$835.00



Signature

Continue

16. If a customer requires a signature on the Invoice, tap in the *Signature* field, have the customer sign, and select **Continue**. If a signature is not required, select **Continue**.
17. Select the number of invoices to print. The *Scheduled Delivery* screen will appear and the previously selected tank will be removed.

ABC SUB LOCATION
 5250 E US HWY 36
 SUITE 100
 AVON, IN 46123-
 (800)783-6560

Customer#: 10084
 HUNT, SAM
 123 MAIN
 WINNER, SD 57580-
 (655)555-5555

Invoice #: 232949
 Date: 05/02/2018
 Time: 10:56

Delivery Address:
 123 MAIN WINNER, SD
 PO# PO12345
 Driver: BOB

*** ORIGINAL ***

Quantity	Description	Unit Price	Amount
250.0 G	COMMERCIAL PROPANE Sale # 39313/House/123 End #: 80.00	\$1.0000	\$250.00
250.0 G	COMMERCIAL PROPANE Sale # 39314/SHOP/SHOP867 End #: 87.00 Annual Fill	\$2.0000	\$500.00
1.00	LABOR Sale # 0/SHOP/SHOP867	\$50.0000	\$50.00
	Invoice Sub		\$800.00
	Tax		\$35.00
	Total		\$835.00

PO12345
 Customer PO # _____ Customer Signature _____

Invoice Screen Additional Options

- **Preview** – This allows the driver to see an overall preview of the Invoice prior to finalization. If the Invoice appears correctly, **Continue** can be chosen and EnergyTrack will proceed to the *Signature* screen. If further changes are necessary, select **Modify** to return to the *Invoice* screen.
- **Remove** – This requires a user right to be utilized. Select this button to remove non-pumpable items from an Invoice. Pumpable items cannot be removed from an Invoice.
- **Discount** – Discount codes can be associated with a tank in Energy Force. If a discount needs to be modified or removed, select this button and choose accordingly.
- **Remove All Taxes** – This option requires a user right to be utilized. Select this button to remove ALL taxes on an Invoice. Taxes will be removed from ALL line items. Once taxes have been removed, they cannot be added back to the Invoice.
Note: Notify office staff if taxing/product information needs modified for the tank.
- **Out of Gas** – This option requires a user right to be utilized. When an Out of Gas situation occurs (*Start % = 0*), the driver can select this button to perform an Out of Gas check. If the driver does not utilize this function within the *Invoice* screen, EnergyTrack will automatically prompt for an Out of Gas check once the **Continue** button is selected to finalize an Invoice. For more information, see [Out of Gas](#).
- **Payment** – The driver can select this to enter a payment from the customer. Reference [Payments](#) for proper procedures for entering payments in EnergyTrack.
- **Continue** – Finalize the Invoice.