

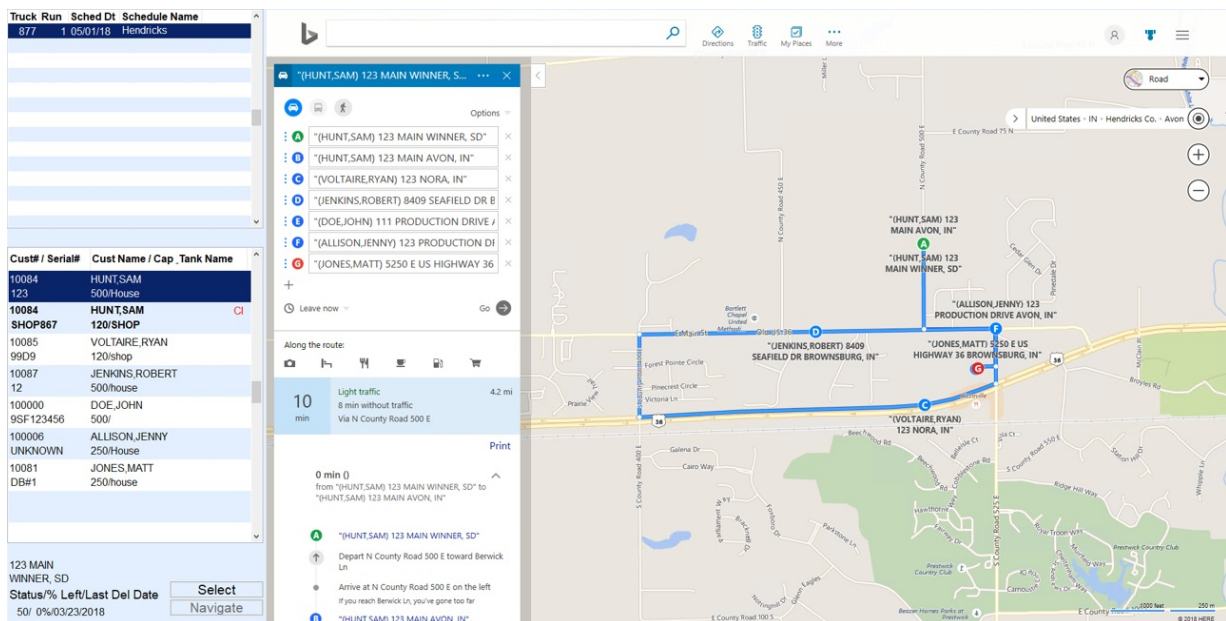
# Scheduled Delivery - Refined Fuels

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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.



## Making 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 05/01/18	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.

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

5. Choose **Deliver** to advance to the *Delivery* screen.

<b>HUNT,SAM</b>	Bus Owns	N	Add Comment	<b>Deliver</b>	Back
Route Contracts Directions Call In / Hold Update %					

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

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

Memo

1 P

Back Clear

Finished Pumping

7. For electronic registers:

- o **LCR** – 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.
- o **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 register as usual.
- b. Enter 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.

Gallons	Tank/Name/Size	Cm	Contract#
112.0			
497.0			

Memo

Back Clear

1 CD 2 DD 3 DD 4 G 5 G **Finished Pumping**

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

10. If the customer has multiple tanks, highlight the gallons pumped and select in the *Tank/Name/Size* column.

11. Customer tanks will display. Select the tank and choose **Select** to return to the *Delivery* screen.

Tank Serial Number	Min Tank Name	Type	Size
BARN	FIELDTANK	DD	500.00
SHOP	SHOP	DD	120.00

Minimum Gallon Delivery 0

Select Cancel

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

Gallons	Tank/Name/Size	Cm
112.0	DD/SHOP/120.00	2
497.0		

Memo

1 CD 2 DD 3 DD 4 G 5 G

13. Repeat Steps 8 - 11 for each set of gallons. Select **Finished Assigning** once all gallons have been assigned. The *Invoicing* screen will appear.
14. 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. EnergyTrack will automatically default to 99%. If an adjustment is required, tap in the *End %* field and use the on-screen keyboard to enter ending percent.
  - **PO#** – Optionally tap in the *PO#* field to enter the Purchase Order number. This number prints on the customer Invoice.
  - **Add Item** – If additional items, such as labor or delivery fees, need to be added to the invoice, select the Add Item button. This will add a line to the invoice with a qty of zero.

Customer: HUNT,SAM  
 Contract#: No Contract  
 Tank Serial #: SHOP  
 Tank Name: SHOP  
 Department: 0  
 Gals / Qty: 0.00  
 Total Capacity: 120.00  
 Split Bill?:  Splits  
 PO#:

Preview	Price	Line Amount	All Taxes	Total Amount
0.0000		0.0000	0.00	0.0000
112.00	1.9900	DYED DIESEL FUE		
497.00	1.9900	DYED DIESEL FUE		
0.00	0.0000			

Buttons: Remove, Out of Gas, Discount, Payment, Add Item, Continue

Total: \$1,211.91

Customer: HUNT,SAM  
 Contract#: No Contract  
 Tank Serial #: 123  
 Tank Name: House  
 Department: 0  
 Gals / Qty: 0.00  
 Total Capacity: 500.00  
 Split Bill?:  Splits  
 PO#:

Preview	Price	Line Amount	
0.0000		0.0000	
250.00	1.0000	COMMER	
250.00	2.0000	COMMER	
0.00	0.0000		

Buttons: Remove, Out of Gas, Discount, Payment, Add Item, Continue

Total: \$1,211.91

Product List:


- 2 CLEAR DIESEL FUEL
- 2 COMMERCIAL PROPANE
- 2 DYED DIESEL FUEL
- 2 EXEMPT PROPANE
- 2 FUEL SURCHARGE
- 2 GASOLINE
- 2 HYDRAULIC OIL
- 2 LABOR
- 2 LUBE OIL
- 2 METER READING FEE

Buttons: Select, Back

- i. Highlight the 0.00 line item.
  - ii. Select **Choose** to assign a department.
  - iii. Select the Department from the product listing that appears. Tap in the *Product* column and begin typing to search for a product if necessary.
  - iv. Choose **Select** to update the Department associated with the added item.
  - v. Enter the *Qty* and *Price* associated with the department selected.
  - vi. 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.

## 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.
- **Out of Gas** – This button is not utilized for EnergyTrack – Refined Fuels.
- **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.