

# Cylinder Exchange Setup & Sales Posting

Last Modified on 10/03/2024 11:02 am EDT

## Cylinder Exchange Setup Tables

### Maintenance Table Setup:

The first section of this document pertains to setting up maintenance tables in order to properly utilize the Cylinder Exchange feature in Energy Force and EnergyTrack.

### Tank Types

Begin by determining the cylinder tank types that will be tracked by Energy Force. It is suggested to add a Tank Type for each cylinder size for inventory tracking purposes.

**Example:** Main Menu\Supervisor\Maintenance Menu\Maintenance Tables\Tank Type

Div	Loc	Type	Description	Red	Green	Blue	Symbol	Tank Assoc?	Track By
1	0	C2	20# Cylinder	0	255	64	1	Yes	Cylinder
1	0	C3	33# Cylinder	0	0	0	0	No	Cylinder
1	0	C4	40# Cylinder	0	255	64	1	No	Cylinder
1	0	CD	CLEAR DIESEL	0	0	0	0	Yes	Gallon

20# Cylinder = C2

33# Cylinder = C3

40# Cylinder = C4

Each cylinder Tank Type needs to indicate No for Tank Assoc? and to Track By Cylinder. This tells the system to treat it as an exchange cylinder, rather than a cylinder fill.

### Add Cylinder Departments

Departments will need to be added to the Department table to indicate a Cylinder Tank Type and flagged Global to send to EnergyTrack.

Div	Dept	Description	Department Type	Sale	Fed. Tax	Other	Tank Type	Gas Dept
1	999	PROPANE PARTS	Sale	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
1	1000	RESIDENTIAL PROPANE	Sale	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	P	Y
1	1001	COMMERCIAL PROPANE	Sale	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	P	Y
1	1002	EXEMPT PROPANE	Sale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	P	Y
1	1005	20 LB CYLINDER	Sale	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	C2	Y
1	2000	GASOLINE	Sale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	G	Y
1	3000	DYED DIESEL FUEL	Sale	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	DD	Y
1	4000	CLEAR DIESEL FUEL	Sale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CD	Y
1	5000	APPLIANCES	Sale	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
1	9998	TANK RENT	Sale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
1	9999	LABOR	Sale	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
2	99	DISCOUNT	Discount	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
2	100	HYDRAULIC OIL	Sale	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	H	Y
2	101	LUBE OIL	Sale	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	O	Y
2	128	PAVIMENT - CHECK	Payment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
2	500	REG FEE	Sale	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
2	877	FUEL SURCHARGE	Sale	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		N
2	997	MISCELLANEOUS OIL ITEMS	Sale	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
2	998	METER READING FEE	Sale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
2	999	PROPANE PARTS	Sale	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
2	1000	RESIDENTIAL PROPANE	Sale	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	P	Y
2	1001	COMMERCIAL PROPANE	Sale	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	P	Y
2	1002	EXEMPT PROPANE	Sale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	P	Y
2	1005	20 LB CYLINDER	Sale	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	C2	Y
2	1234	TANK RENT	Sale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
2	2000	GASOLINE	Sale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	G	Y
2	3000	DYED DIESEL FUEL	Sale	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	DD	Y

General Ledger

0.0000

Interface Billing Code

0

Posting Transaction Code

13

Allow Discounts

Inactive Departments

False

Global Department

Footnotes

No

- Indicate the appropriate Tank Type code to coincide with the Department Description added.
- Gas Dept will need to be set to Y to function properly with EnergyTrack.
- Gallons will not be physically pumped by the truck; therefore, the Posting Transaction Code will be 13 to charge the customer account.
- Make sure to apply the Department code to Division 1 along with any other location that may perform cylinder exchanges.

## Price Table

Price codes and Tiers will need to be established in the Price Table for each cylinder type that is to be exchanged. The Price Code must exist in Division 1 along with any other locations that may utilize cylinder exchanges.

Division	Price Code	Price Description	Price Type	Avgd Price Y/N	Rack Code	Rack Price Description
1	50	20# CYLINDER EXCHANGE	0	No	0	
1	99	PREBUY CONTRACT PRICE 2017	0	No	0	
1	999	DYED DIESEL CONTRACT 2020	0	No	0	
2	1	RESIDENTIAL	0	No	0	
2	2	COMMERCIAL	0	No	0	
2	3	AGRICULTURAL	0	No	0	
2	4	GASOLINE	0	No	0	
2	5	DYED DIESEL	0	No	0	
2	6	LABOR	0	No	0	
2	7	NO PRICE	0	No	0	
2	99	PREBUY CONTRACT PRICE 2014	0	No	0	

  

Pricing Tiers	Starting Gallons	Ending Gallons	Low Cap	High Cap	Margin
A Tier	24.9900	0	0.0000	0.0000	

## Add Cylinders to Tank and Meter Inventory

Add company owned cylinders to the Tank and Meter Inventory screen for tracking purposes at Main Menu\Tank and Meter Inventory\Tank & Meter Maintenance.

Type	Dv	Tank Type	Description	Serial Number	Tank Capacity	Inventory Status
Tank	1	C2	20# Cylinder	CYL20	1.00	In
Meter	1	12	OTODATA	7899983		Out
Meter	1	12	OTODATA	123456789		Out
Meter	1	12	OTODATA	9987		In
Meter	1	12	OTODATA	88776		In
Meter	1	12	OTODATA	876543		Out
Meter	1	11	ENERTRAC	E899		At Customer
Meter	1	10	SILICON	S89963		Out
Meter	1	10	SILICON	SLJ111		In
Meter	1	9	PEDIGREE	P33255		At Customer
Meter	1	9	PEDIGREE	PS98977		In
Meter	1	9	PEDIGREE	PED123		Out
Meter	1	8	CENTERON	C4556		Out
Meter	1	7	WESROC	ABC123		In
Meter	1	7	WESROC	ABC234		At Customer
Meter	1	7	WESROC	ABC345		In
Meter	1	7	WESROC	ABC456		Out
Meter	1	7	WESROC	88999		Out
Meter	1	7	WESROC	WES9887		In
Meter	1	7	WESROC	WES9887		In
Meter	1	7	WESROC	WES86432		In
Meter	1	7	WESROC	WES987		Out
Meter	1	7	WESROC	WES564433		In
Meter	1	7	WESROC	WES332211		In
Meter	1	7	WESROC	WES889977		In
Meter	1	7	WESROC	WES9900		Out
Meter	1	7	WESROC	WES9901		In
Meter	1	7	WESROC	WES9902		In

  

Additional Info	Additional Info
Division Number: ABC PROPANE COMPANY	Location Number: 1 AVON PROPANE PLANT
Purchase Date: 00/00/00	Total Cyl Quantity: 100
Purchase Amount: \$0.00	Total Cyl in WH: 100
Manufactured By: 1 AMERICAN TANK AND WELDING	Master RRN: 12
Manufactured Date: 00/00/00	

- Add each cylinder Tank Type to the Inventory screen.
- Input the Tank Capacity as 1 (This is a required field, but has no effect on how cylinders are exchanged).
- Indicate the overall total of Company-Owned cylinders in the Total Cyl Quantity field.
- Indicate the total number of cylinders that are currently in the warehouse in the Total Cyl in WH field.
- As cylinders are applied to customer accounts, the number of total cylinders in the warehouse will be reduced.
  - When cylinder tanks are picked up from a customer account utilizing the Change Inventory feature in the Tank screen, the cylinders will be added back into the overall Total Cyl in WH count.

## Add Cylinder Trucks to Truck Maintenance Tables

If performing cylinder exchanges with EnergyTrack, the cylinder exchange trucks will need to be added to the *Truck Maintenance Tables at Main Menu\Bulk Truck Delivery\Truck Maintenance*.

Div	Truck #	Truck Name	Type	Odometer	GPS Type	Printer Type	# of Compartments	Register 1 #	Register 2 #
1	3	Test	Cylinder	0		Blaster	1	1	0
1	84	Cylinder	Cylinder	0		3" Printer	3	1	0
1	250	BULK OIL TRUCK	Fuel	0		Blaster	8	1	2
1	497	FREIGHTLINER	Fuel	0		Blaster	5	1	2
1	877	Kenworth 88	Bulk Gas	0		Blaster	1	1	0
1	1111	cylinder	Cylinder	0			3	1	0
1	12345	16 Freightliner	Bulk Gas	0		Blaster	1	1	0
1	123456	Bulk 2	Bulk Gas	0			1	1	0

  

Comp Type	Cap.	Beg Totalizer	Beg %	Beg Galls	Beg Full Cyls	Beg Empty Cyls	Totalizer Type	Reg#	Compartment#	Capacity
C2	9999	0.0	0	0.0	0	0	Mechanical	1	1	9999.0
C3	9999	0.0	0	0.0	0	0	Mechanical	1	2	9999.0
C4	9999	0.0	0	0.0	0	0	Mechanical	1	3	9999.0

Each Cylinder *Tank Type* code will need to be added as a Compartment so they can be loaded with EnergyTrack when starting a shift. If you do not add the *Comp Types*, the system will not allow you to perform an exchange.

## Add Cylinder Tanks to Customer Account

Once maintenance tables have been set up in Energy Force, cylinders can be applied to customer accounts for exchange purposes.

### Add Cylinder

1. Navigate to the *Customer Maintenance Menu* and select the customer.
2. Select *Tank Info*.
3. Press **Ctrl+C** to add a tank.
4. Enter *Yes* for *Co Owns*.
5. Search for the cylinder *Tank Type* (C2, C3, etc).
6. Select the cylinder *Tank Type* to be applied to the customer account. This will return you to the *Tank Set-up* screen.
  - a. A new tab will now appear next to *GPS Coordinates* called *Cylinder*.
7. Continue with setting the cylinder up as you normally would for a standard tank, indicating *Customer Types*, *Delivery Types*, *Products*, *Pricing* and etc.

8. Select the *Cylinder* Tab.

9. Select *Exchange Only*.

10. Enter the number of estimated cylinders to be used per week (optional).

11. Enter the *Total Cylinders* to be applied to the site (this will reduce the inventory available in the warehouse for the Tank Type).

12. Enter *Optimal Cylinder Quantity* to keep on-site.

13. Select **Save**. Cylinder exchanges can now be performed in Energy Force and EnergyTrack.

## Energy Force Sales Posting

The following section outlines how to post a cylinder exchange in Energy-Force. Separate documentation is available for Energy-Track Cylinder Exchanges and provided to delivery drivers during the training process.

### Sales Posting

1. Navigate to *Main Menu\Posting Menu\Enter Sales*.
2. Create a Sales Journal indicating *Posting Division, Date, and User ID*.
3. Enter a *Ticket* number or, press **Tab** to allow Energy Force to generate an *Invoice Number*.

4. Enter the *Customer#* number (or **F5** to search by name) and press **Tab**.
5. Select the Cylinder Tank to be exchanged.
  - a. If customer has one tank on file it will automatically populate.
6. The *Department* should automatically default based on the product assigned to the Cylinder Tank when added to Energy Force, as will the *Transaction Code*.
7. **Tab** to the *Driver #* field and choose the driver.

8. The *Cylinder Data Entry* screen will appear. Enter the *Full cylinders dropped* value.
  - a. If you do not pick up the same number of empty cylinders from the site, select *Override Exchange*.
9. The *Empty Cylinders Picked Up* field will populate with the same value from Step 8.
  - a. If *Override Exchange* was chosen, type in the number of *Empty Cylinders Picked Up*.
  - b. Enter the number of *Full Cylinders Picked Up*.
  - c. Select the *Delivery Transaction Type* from the drop-down menu (change in usage, too much inventory, etc.).
  - d. Select the *Delivery Transaction Reason* (Summer, return to yard, etc).
10. The *Price Per Cylinder* will populate based on the Price Code\Tier assigned to the Customer Tank. Modify if necessary.
11. Press **Exit** to return to the Ticket. The screen will automatically populate based on the information entered in the *Cylinder Data Entry* screen. Review for accuracy and select **New Ticket** if finished, or **Another Item** to add other items to the ticket.
  - a. During this process, the Sales Posting Routine updates the customer account information such as *History Inquiry* and the *Cylinder* tab in the *Tank Info* screen.

Date	Truck#	Qty	Truck#	Code	Dist	Posting Reference	Quantity	Cost/Unit	Unit Price	Line Amt	Sales Tax	Debit Amt	Credit Amt	Balance
10/03/24	3	4	1204	1225	13	1005	20 LB CYLINDER	0.00	10.00	25.0000	\$250.00	\$0.00	\$250.00	\$1769.90
10/01/22	0	0	1169	99999999	13	99999	Balance Forward	0.00	0.0000	\$0.00	\$0.00	\$10.00		\$519.90
10/01/22	0	0	1169	99999999	13	99999	Balance Forward	0.00	0.0000	\$0.00	\$0.00	\$0.00	(100.00)	\$509.90
09/01/22	0	0	1169	99999999	13	99999	Balance Forward	0.00	0.0000	\$0.00	\$0.00	\$20.00		\$609.90
08/01/22	0	0	1169	99999999	13	99999	Balance Forward	0.00	0.0000	\$0.00	\$0.00	\$30.00		\$689.90
07/01/22	0	0	1169	99999999	13	99999	Balance Forward	0.00	0.0000	\$0.00	\$0.00	\$60.00		\$659.90
01/11/21	0	4	1165	1190	13	1005	20 LB CYLINDER	0.00	10.00	25.0000	\$250.00	\$0.00	\$250.00	\$499.90
01/11/21	0	4	1165	1189	13	1005	20 LB CYLINDER	0.00	10.00	24.9000	\$249.90	\$0.00	\$249.90	\$249.90

**More Information**

Cylinders

PO Number

Disc. Code/Amt

# Paid By

Group

Products Location Tank Optimizer Log GPS Tank Coordinates **Cylinder**

Exchange Only  Fulfilled

Requested Inventory Qty onsite  Requested Date

Estimated Usage (Cyl / Wk)  Estimate Last Calc

Total Cylinders Onsite  Total Inv Cyl Onsite

Optimal Cylinder Quantity  Inventory Last Update

Number of scrapped Cylinders

b. Requested Date and Inventory Last Update fields will update.

c. If a cylinder was picked up as damaged, the Number of scrapped Cylinders will update.

12. Return to the Journal screen when finished posting to finalize.