

Cylinder Exchange Setup & Sales Posting

Last Modified on 06/18/2025 11:45 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	PAYMENT - 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 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	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 (All, Meters, Tanks) **All**
Status (Everything In Out, Sold Not in Svc, At Cust, Destroyed, Lost/Stolen) **Everything**

Division (blank for all) 0
Location (blank for all) 0

Refresh Inventory

Type	Div	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	S8993		Out
Meter	1	10	SILICON	SLJ111		In
Meter	1	9	PEDIGREE	P32055		At Customer
Meter	1	9	PEDIGREE	PS88977		Out
Meter	1	9	PEDIGREE	PED123		In
Meter	1	8	CENTERON	C44566		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	WE59887		In
Meter	1	7	WESROC	WE59887		In
Meter	1	7	WESROC	WE585432		In
Meter	1	7	WESROC	WE5987		Out
Meter	1	7	WESROC	WE554433		In
Meter	1	7	WESROC	WE5332211		In
Meter	1	7	WESROC	WE5889977		In
Meter	1	7	WESROC	WE59900		Out
Meter	1	7	WESROC	WE59901		In
Meter	1	7	WESROC	WE59902		In

Additional Info
Division Number ABC PROPANE COMPANY
Purchase Date 00/00/00
Purchase Amount \$0.00
Manufactured By 1 AMERICAN TANK AND WELDING
Manufactured Date 00/00/00

Additional Info
Location Number 1 AVON PROPANE PLANT
Total Cyl Quantity 100
Total Cyl in WH 100
Master RRN 12

Save

Save and enter another

User Defined

View History

Enter Repairs

Save

Exit

* indicates that this is an underground tank
Last Changed by, on, at: sreasons (06/21/18 14:26)

- 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	0 Mechanical	1	1	9999.0
C3	9999	0.0	0	0.0	0	0	0 Mechanical	1	2	9999.0
C4	9999	0.0	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.

Co Owns	Tank Serial Number	A / I	Type	Tank Description
Yes	20# CYLINDER	A	C2	page 10

DD Last Del	Next	Last Del	Julian Delivery	Last Charge	Last Full Fill
0	0	00/00/00		00/00/00	00/00/00

Customer Type	Delivery Type	Regulatory Code	Public Assembly?	Underground?
2 COMMERCIAL	1 WILL CALL	0	<input type="checkbox"/>	<input type="checkbox"/>

Products	Location	Tank	Optimizer Log	GPS Tank Coordinates	Cylinder
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Product Description	Price Code Tier	Price	Prod Use	Disc	Default
100# 20 LB CYLINDER	50 A	24.9900		0	

Price Desc:	Disc Desc:
20# CYLINDER EXCHANGE	

Delivery Address	City/St/Zip	IN	46112	Rt	Special Delivery Instructions	PO Number
345 PRODUCTION DRIVE	BROWNSBURG					

Tank Capacity	Total Capacity	Daily-Use	K-Factor	Prev K-Factor	DD Region
1.00	1.00	0.00	0.00	0.00	1

Update K-Factor	Est Gallons Left	Est Percent Left	Delivered Gallons	Tot Gals with Delivery	Gals Since Last FF
Yes			0.00	0	0.00

Last % Update	Hold Date	Hold Reason
00/00/00	00/00/00	0

Hold DD Calculations	Hold Release Date
No	00/00/00

Tank Readings	Transfer Customer Tank
Use Tank Templates	User Defined Fields
Change Inv Status	Inventory Hist
Set Up MeterRTM	Regulator Info
Split Bill	

8. Select the *Cylinder* Tab.

Products	Location	Tank	Optimizer Log	GPS Tank Coordinates	Cylinder
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<input checked="" type="checkbox"/> Exchange Only	Fulfilled	<input type="checkbox"/>
Requested Inventory Qty onsite	Requested Date	01/01/1901
Estimated Usage (Cyl / Wk)	Estimate Last Calc	10/02/2024
Total Cylinders Onsite	Total Inv Cyl Onsite	0
Optimal Cylinder Quantity	Inventory Last Update	10/02/2024
Number of scrapped Cylinders	Cyl Tran History	

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 EnergyTrack 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.

The screenshot shows the 'Cylinder Data Entry' modal window. The modal contains the following fields and values:

- Total cylinders onsite: 20
- Out of those: 0 are inventory
- Full cylinders dropped: 10
- Empty Cylinders Picked Up: 10
- Full Cylinders Picked Up: 0
- Price per Cylinder: \$5.0000
- Delivery Transaction Reason: (dropdown menu)
- Change of Inventory Transaction Type: (dropdown menu)
- Change of Inventory Transaction Type: (dropdown menu)
- Exit button

The background window shows the following information:

- Ticket Date: 10/03/24
- Ticket #: 1225
- Customer #: 10094 DOE JOHN
- Tank Serial #: CYL20
- Tank Name: exch C2 20# Cylinder
- Split Bill?: No
- Department: 1005 20 LB CYLINDER
- Trans Code: 13 Charge
- Reference: 20 LB CYLINDER
- Driver #: 4 CURT
- Truck #: 0
- Lbs. of Gas: 0.00
- Gals. Delivered: 0.00
- Quantity Parts: 0.00
- Cylinder Price: 0.0000
- Line Amount: \$0.00
- Balance: \$519.90
- 30 DAYS
- 1234 ANYWHERE ST
- SUITE 100
- AVON, IN 46123
- RESIDENTIAL
- WILL CALL
- Sales Tax: 0.00
- Total Amount: \$0.00
- Ticket Total: \$0.00
- New Ticket button
- Another Item button

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#	Dnr	Jnl	Ticket#	Code	Dept	Posting Reference	Quantity	Category	Unit Price	Line Amt	Sales Tax	Debit Amt	Credit Amt	Balance
10/03/24	3	4	1204	1205	13	1005	20 LB CYLINDER	0.00	10.00	25.0000	\$250.00	\$0.00	\$250.00		\$769.90
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		(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		\$589.90
07/01/22	0	0	1169	99999999	13	99999	Balance Forward	0.00		0.0000	\$0.00	\$0.00	\$60.00		\$559.90
01/11/21	0	4	1166	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	1166	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 ☐

Email
Show in Ascending Order
History Transactions

Products Location Tank Optimizer Log GPS Tank Coordinates Cylinder

☒ Exchange Only

Requested Inventory Qty onsite

Estimated Usage (Cyl / Wk)

Total Cylinders Onsite

Optimal Cylinder Quantity

Number of scrapped Cylinders

Fulfilled ☐

Requested Date

Estimate Last Calc

Total Inv Cyl Onsite

Inventory Last Update

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.