

Energy Force Templates

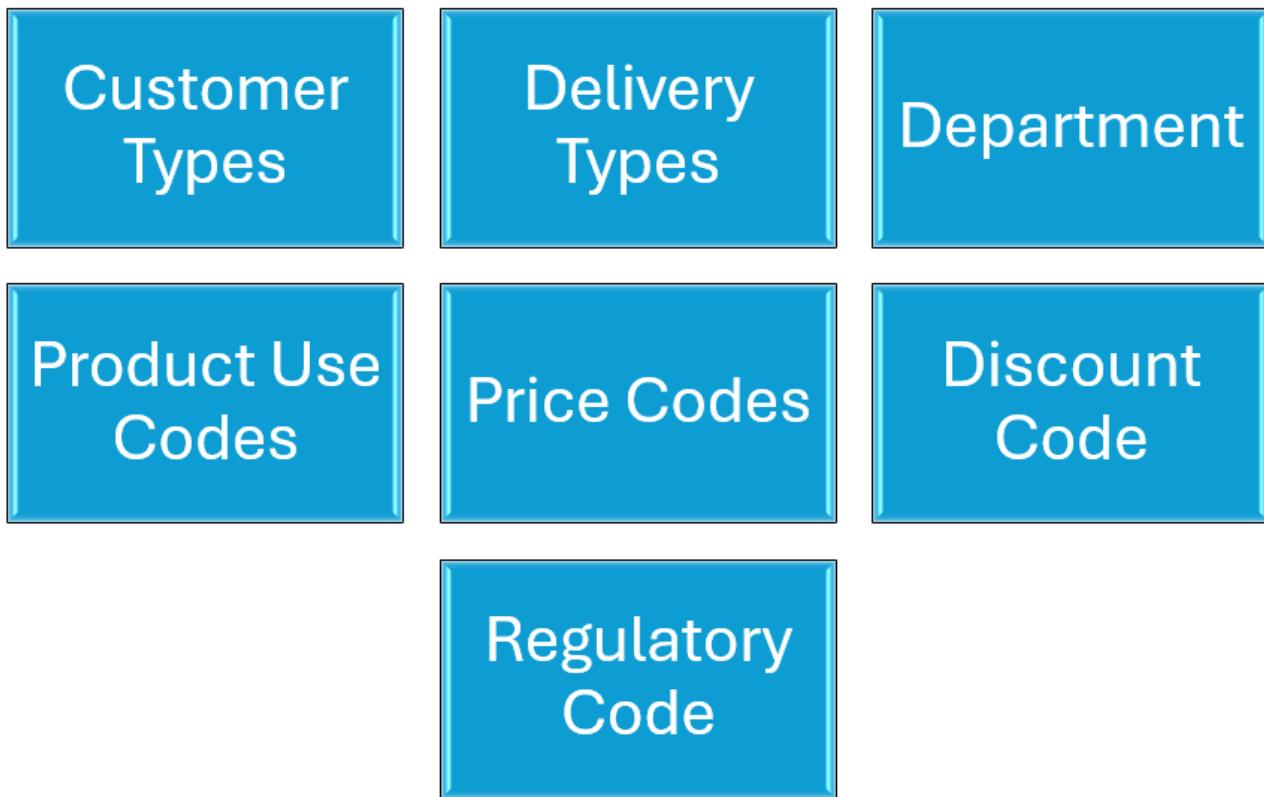
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Templates

There are two types of templates that can be defined for the daily use of Energy Force: Tank Setup and Julian Schedules. This document will outline how to create and deploy each type of template.

Tank Template Maintenance Tables

Before a tank template can be defined, the following maintenance tables must exist in Energy Force:



Customer Types, Delivery Types, Department, and Price Codes are standard maintenance tables that all users must have in order to add a tank to Energy Force. *Product Use Codes, Discount Codes* and *Regulatory Codes* are typically optional, however, if using tank templates, a maintenance file must exist. If you do not have any of the three maintenance codes, create a code for *None* or *Unknown*.

Defining a Tank Template

Navigate to: *Supervisor / Maintenance Menu / Division Maintenance / Define Templates*

Division #	Division Name
1	ABC PROPANE COMPANY
2	ABC SUB LOCATION
1234	ABC COMPANY

Address: 5250 US HWY 36

SUITE 100

City/St/Zip: AVON Rural IN 46123

County

Township

School Dist

Master Alternative Account # 0 Phone (317)745-6560 Fax (317)250-1234 800 Phone (800)783-6560

Credit Card Department # 127 Mapping (Y/N) Yes

Cash Sale Department # 300 Update K-factor Yes

Pay On Account Department # 128 Percent K-factor to Change 40

Service Charge Department # 100 Print K-Deviate Report Yes

Service Charge Percent 18.00 Print on K-deviate K-factors +/- 1.00

Minimum Finance Charge 1.00 Clear Accounts on Daily Clear Yes

Rental Department # 9998 Number of Decimals to Round Price 0 (For Rack Pricing)

Charge Regulatory Fee Yes Daily Clear Interface Number 4

Ascending/Descending History D Validate Location Code in Tank File Yes

Auto Assign Customer # Yes Print Price on Ticket Yes

Number to Increment Customer # 1

Last Customer Number 10095

System Settings
Age Limits for Mapping

Define Templates
30 Day Limit \$0.00
60 Day Limit \$0.00
90 Day Limit \$0.00

1. On the *Template Setup* screen, the status bar items will change to green once entries have been made.

Start

Customer Type

Delivery

Product

Pricing

Regulatory

Finish

Please select the operation you wish to perform 2 Create new Template

Division 3 ABC PROPANE COMPANY

Template

New Template Name 4 Propane Residential

To Division

Cancel Back 5 Next Finish

2. Select the dropdown menu in the *Please select the operation you wish to perform* field and choose *Create New Template*.

3. Select the *Template Division*.
 - a. If defining a template for a cooperative, select Division 1, as this is the primary division for all tanks and customers.
 - b. If defining a template for a privately-owned company, create this template for each division separately.
4. Enter a *New Template Name*, such as Propane Residential. This will be an identifier when selecting which type of template to apply when setting up new tanks.
5. Select the **Next** Button.
6. Select the *Customer Type* from the dropdown menu and select **Next**.

Creating Propane Residential

Customer Type 6 RESIDENTIAL

Cancel Back Next Finish

7. Select the *Delivery Type* from the dropdown menu and select **Next**.

Start

Customer Type

Delivery

Product

Pricing

Regulatory

Finish

Creating Propane Residential

Delivery Type **7**

8. Select the *Product/Department* to default to the tank from the dropdown list.
9. Select *Product Use* from the dropdown list and select the **Next** button.
 - a. *Product Use* is not a standard maintenance item that may be utilized. If you do not apply *Product Use* codes, add a maintenance type of **None**.

Start

Customer Type

Delivery

Product

Pricing

Regulatory

Finish

Creating Propane Residential

Product/Department **8**

Product Use **9**

10. Select the *Price description* from the dropdown list and the *Price Tier*.
11. Select the *Discount* code.
 - a. Discounts are not a required maintenance table when setting up a tank, however, a code is required to utilize tank templates. Enter a maintenance code of **None** if your company does not apply term

discounts when a delivery is made.

12. Select *Payment* in the *Apply Discount* selection and press **Next**. This is an indicator that the customer will be eligible for discount if paid within a specific amount of days.

- a. Delivery is no longer a valid option for this program.

The screenshot shows the 'Creating Propane Residential' screen. On the left, a vertical navigation bar lists 'Start', 'Customer Type', 'Delivery', 'Product', 'Pricing', 'Regulatory', and 'Finish'. The 'Pricing' and 'Regulatory' buttons are highlighted with black squares. The 'Price Tier' section is open, showing a dropdown menu with 'RESIDENTIAL' selected. A list of price tiers (A-H) with their respective values is displayed: A (2.0000), B (0.9900), C (0.9800), D (0.9700), E (0.9600), F (0.9500), G (0.9400), and H (0.9300). The 'Price Tier' dropdown is circled with a red oval and labeled '10'. Below the price tier list, the 'Discount' section is shown, with a dropdown menu containing '03 if paid in 10 days 10' circled with a red oval and labeled '11'. The 'Apply Discount with' section is also visible, with a dropdown menu containing 'Delivery' and 'Payment'. The 'Payment' option is selected and circled with a red oval and labeled '12'. At the bottom, there are 'Cancel', 'Back', 'Next' (which is highlighted with an orange border), and 'Finish' buttons.

13. Select a *Regulatory* description from the dropdown list and select **Next**.

- a. Regulatory fees are not a required maintenance table when setting up a tank, however, a code is required to utilize tank templates. Enter a maintenance code of *None* if your company does not apply regulatory fees at the time of delivery.

The screenshot shows the 'Creating Propane Residential' screen. The vertical navigation bar on the left is identical to the previous screenshot, with 'Pricing' and 'Regulatory' highlighted. The 'Regulatory' section is open, showing a dropdown menu with 'REG FEE' selected. The 'Regulatory' dropdown is circled with a red oval and labeled '13'. At the bottom, there are 'Cancel', 'Back', 'Next' (highlighted with an orange border), and 'Finish' buttons.

14. Review the *Template Overview* screen for accuracy and select **Finish**. This will return you to the *Division*

Maintenance screen.

You chose to Create the template Propane Residential
With the following information

Template Summary	
Division Name	ABC PROPANE COMPANY
Customer Type	RESIDENTIAL
Delivery Type	KEEP FULL
Department / Product	RESIDENTIAL PROPANE
Product Use	NONE
Price Description	RESIDENTIAL
Price Tier	A 2.0000
Discount	.03 if paid in 10 days
Applied on	Payment
Regulatory Description	REG FEE

If the information is correct, press Finish, otherwise press Back to correct the data, or Cancel.

Applying a Tank Template

Once tank templates have been set up in the Division Maintenance\Define Templates program, you can apply the template to any customer tank.

1. In the *Tank Info* screen, select to add a Company or Customer Owned Tank. Once selected, press the **Use Tank Templates** button.

2. Select the Template from the dropdown list to apply to the customer tank and press **Populate**.

- This will populate all of the fields entered from the Tank Template wizard.
 - The *Product* field will not populate until you physically click in the field after entering all other information in the *Location* and *Tank* tabs.
3. Complete the tank setup by applying required values such as *Route*, *Location*, *County*, etc.

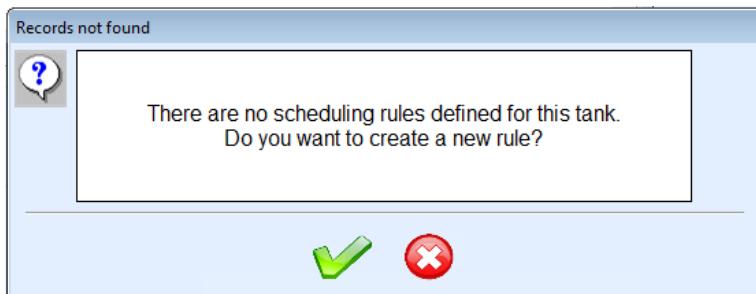
Defining a Julian Schedule Template

The setup of a Julian schedule template is defined at the tank level. You will need to add an initial Julian tank and schedule in Energy Force before you can define a template. Once a template is defined, it can be used on any tank and will help minimize setup time by only requiring a start date for the defined template.

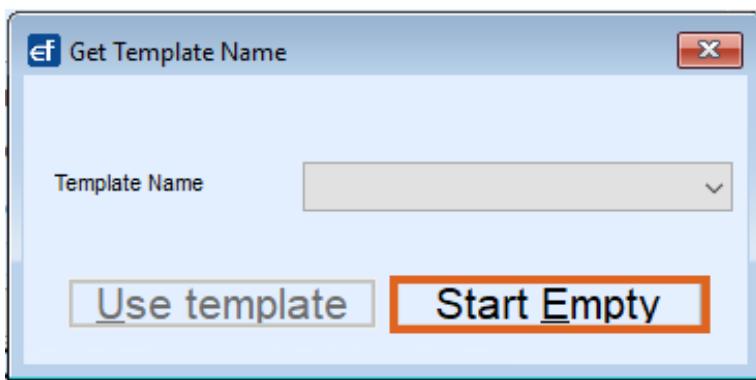
In this setup scenario, start with a tank that has never had a Julian schedule applied:

- In the *Tank Info* screen, using a tank with a schedule delivery type (Julian), select the *Location* tab.
- Select the **Schedule** button.

3. Select the green checkmark to create a new scheduling rule.



4. Select Start Empty.



a. A template has not yet been defined, so this step starts empty.

5. Enter the Method for Date Generation, Start Dates, Effective Period, Interval # of Days and Schedule base on last delivery.

a. This example is for *Interval number of Days* based off of the last delivery. Other schedules may be generated for Monthly, Single and Weekly deliveries.

Based On Rule

Method for Date Generation

Weekly Interval Monthly Single

Start Date 02/05/2026 Thursday

Renew Automatically?

Automatic Renewal every year Definite Ending Date

Effective Period 1 1 Until 12 31

Interval # of Days 90

Schedule based on last delivery

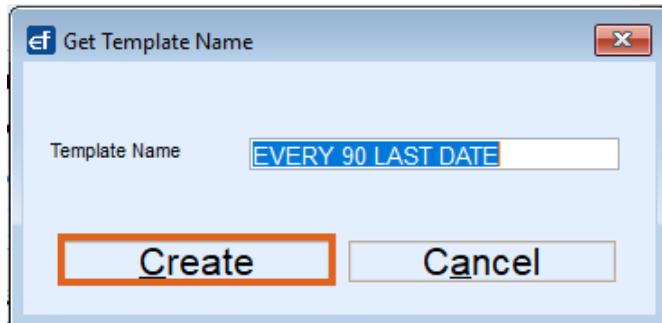
Delivery Preference AM PM

No AM or PM selection indicates no preference - delivered at driver discretion.



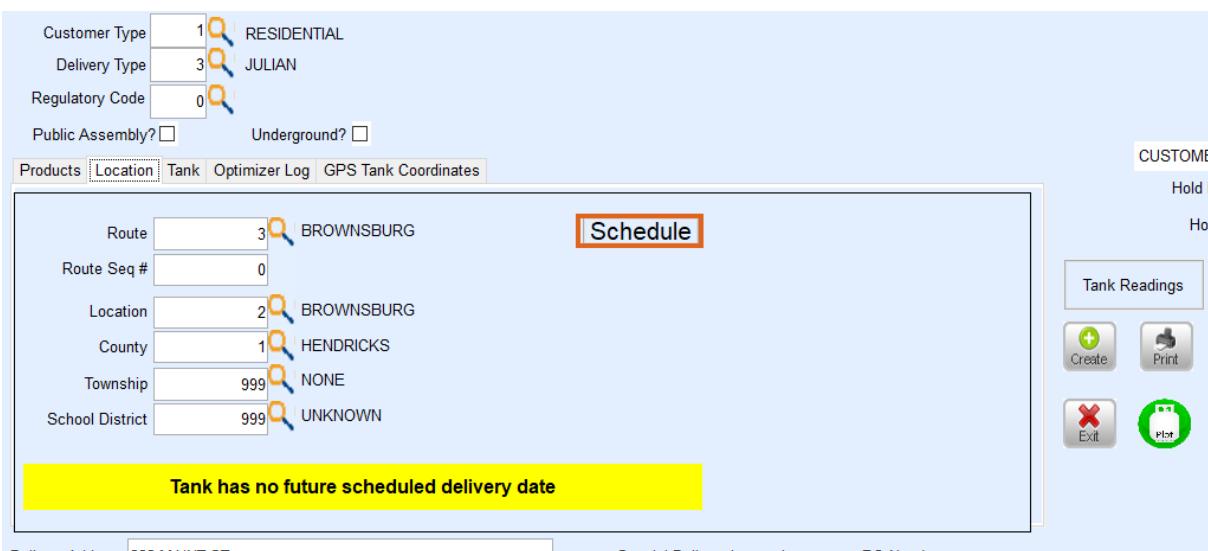
6. Press the green checkmark when finished and allow the schedule to generate.
 7. Select **Save Current Rule as Template**.

8. Enter a *Template Name* and press **Create**. The template is now saved and can be applied to any customer tank in Energy Force that has a Scheduled (Julian) Delivery type.

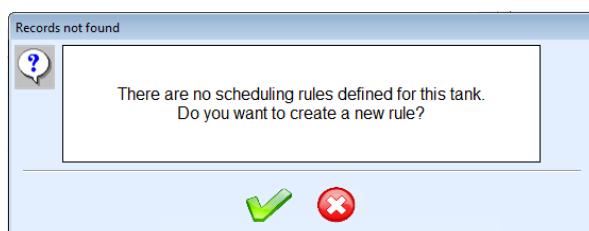


Applying a Julian Template to a Customer Tank

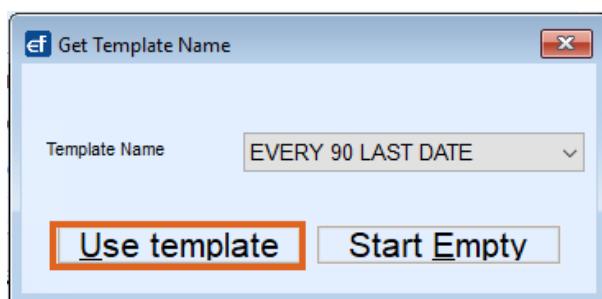
1. In the Tank Info screen, using a tank with a schedule delivery type (Julian), select the **Location** tab.
2. Select the **Schedule** button.



3. Select the green checkmark to create a new scheduling rule.



4. Select the Template Name from the dropdown list to apply and press **Use Template**.



5. The scheduled settings from the original template setup will apply.

- a. Review for accuracy.
- b. Change the *Start Date* if necessary.

Based On Rule

Method for Date Generation

Interval # of Days Schedule based on last delivery

Weekly Interval Monthly Single

Delivery Preference AM PM

Start Date Thursday

Renew Automatically?

Automatic Renewal every year No AM or PM selection indicates no preference - delivered at driver discretion.

Definite Ending Date

Effective Period Until



6. Select the green checkmark to populate the Tank schedule.