

Energy Force Templates

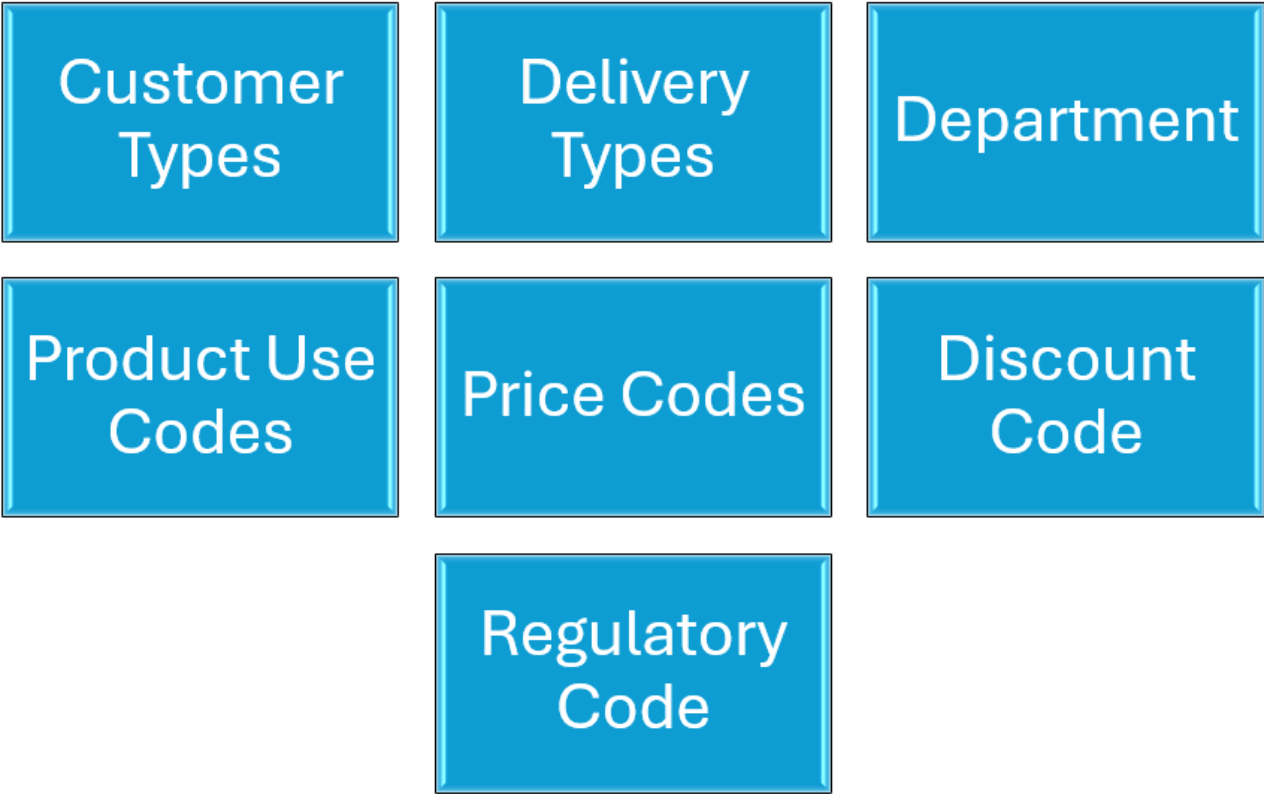
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Templates

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 Define Templates
 Age Limits for Mapping
 30 Day Limit \$0.00 60 Day Limit \$0.00 90 Day Limit \$0.00

- 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

- 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**.

The screenshot shows a software interface for creating a template. On the left, a vertical progress bar lists steps: Start (green square), Customer Type (black square), Delivery (red square), Product (red square), Pricing (red square), Regulatory (red square), and Finish (red square). The main area has a title bar 'Creating Propane Residential'. Below it, the 'Customer Type' is set to '6 RESIDENTIAL' in a dropdown menu. At the bottom, there are four buttons: 'Cancel', 'Back', 'Next' (highlighted with a red border), and '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** KEEP FULL

Cancel Back **Next** Finish

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** RESIDENTIAL PROPANE

Product Use **9** NONE

Cancel Back **Next** Finish

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' form. On the left, a vertical list of steps is shown: Start (green), Customer Type (green), Delivery (green), Product (green), Pricing (green), Regulatory (red), and Finish (red). The main form area has a title bar 'Creating Propane Residential'. Below it, the 'Price' section is active, showing a dropdown menu set to 'RESIDENTIAL'. To the right of this dropdown is a list of price tiers (A through H) with corresponding values. A red circle with the number '10' is next to the 'Price Tier' label. Below the price tiers, the 'Discount' section shows a dropdown menu set to '.03 if paid in 10 days' with a red circle and the number '11' next to it. Below the discount, the 'Apply Discount with' section has two radio buttons: 'Delivery' and 'Payment', with 'Payment' selected and a red circle and the number '12' next to it. At the bottom of the form, there are four buttons: 'Cancel', 'Back', 'Next' (highlighted with a red border), and 'Finish'.

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' form. On the left, the vertical list of steps is the same as in the previous screenshot. The main form area has a title bar 'Creating Propane Residential'. Below it, the 'Regulatory' section is active, showing a dropdown menu set to 'REG FEE' with a red circle and the number '13' next to it. At the bottom of the form, there are four buttons: 'Cancel', 'Back', 'Next' (highlighted with a red border), and 'Finish'.

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

Maintenance screen.

The screenshot shows a software interface for creating a propane residential template. On the left, a vertical progress bar indicates the steps: Start, Customer Type, Delivery, Product, Pricing, Regulatory, and Finish. The 'Finish' step is currently selected. The main area displays a 'Template Summary' with the following information:

With the following information	
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

Below the summary, a message states: 'If the information is correct, press Finish, otherwise press Back to correct the data, or Cancel.' At the bottom, there are four buttons: 'Cancel', 'Back', 'Next', and 'Finish'. The 'Finish' button is highlighted with a red border.

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.

Co Owns	Tank Serial Number	A / I	A / I	Tank Description	Master Asset#
Yes	J2233	A	P	house	16

Tank Capacity	500.00	Update K-Factor	Yes
Total Capacity	500.00	Est Gallons Left	
Daily-Use	0.00	Est Percent Left	
K-Factor	0.00	Delivered Gallons	0.00
Prev K-Factor	0.00	Tot Gals with Delivery	0
DD Region	1	Gals Since Last FF	0.00

DD Last Del	0	Next	0	Last Del	00/00/00	Julian Delivery	01/01/01	Last Charge	00/00/00	Last Full Fill	00/00/00
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Customer Type	1	RESIDENTIAL	Last % Update	00/00/00
Delivery Type	3	JULIAN	Hold Date	00/00/00
Regulatory Code	1	REG FEE	Hold Reason	0
Public Assembly?	<input type="checkbox"/>	Underground?	<input type="checkbox"/>	

Products | Location | Tank | Optimizer Log | GPS Tank Coordinates

Route	1	WEST AVON	Schedule
Route Seq #	0		
Location	1	AVON	
County	1	HENDRICKS	
Township	999	NONE	
School District	999	UNKNOWN	

Tank has no future scheduled delivery date



Delivery Address	2484 STONEHAVEN DR			Special Delivery Instructions	PO Number
City/St/Zip	AVON	IN	46123-	Rtl <input type="checkbox"/>	

Direct

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

Records not found

There are no scheduling rules defined for this tank.
Do you want to create a new rule?

4. Select **Start Empty**.

ef Get Template Name

Template Name

- 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 [Dropdown]

Interval # of Days 90

Schedule based on last delivery ☒

Method for Date Generation

☐ Weekly ☒ Interval ☐ Monthly ☐ Single

Delivery Preference ☐ AM ☐ PM

Start Date 02/05/2026 Thursday


Renew Automatically?

☒ Automatic Renewal every year

☐ Definite Ending Date

Effective Period 1 1 Until 12 31

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**.

Scheduling Rules

Customer [Redacted] ☐ See Active Only

Route WEST AVON Tank 589

Effective Start	Effective End	Auto Renewed	Description
02/05/2026	12/31/2026	<input checked="" type="checkbox"/>	Every 90 days starting 02/05/2026 - Renewed every year.

Activity Information

Last Time Populated 02/05/2026

Populated Until 02/05/2026

Repeating period

From January 1

To December 31

Modify Populate View Dates

New Delete Terminate

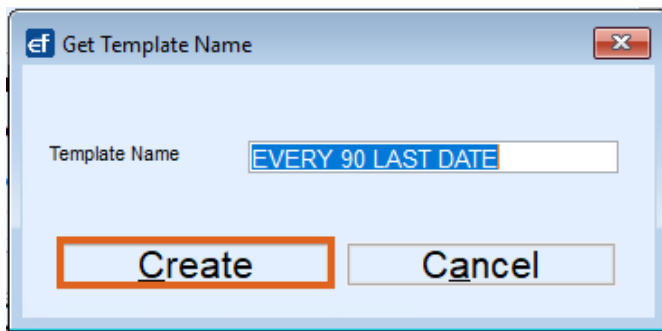
Template [Dropdown]

Save Current Rule as Template

Create New Rule From Template

Delete Current 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.

Customer Type: 1 RESIDENTIAL
 Delivery Type: 3 JULIAN
 Regulatory Code: 0
 Public Assembly? ☐ Underground? ☐

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

Route: 3 BROWNSBURG
 Route Seq #: 0
 Location: 2 BROWNSBURG
 County: 1 HENDRICKS
 Township: 999 NONE
 School District: 999 UNKNOWN

Schedule

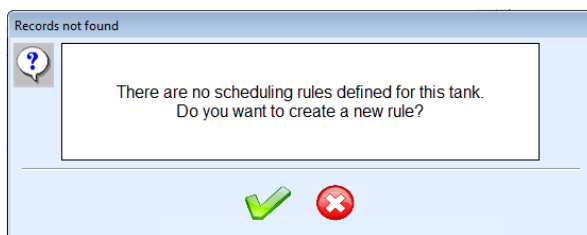
Tank has no future scheduled delivery date

Address: 555 MAIN ST
 Special Delivery Instructions:
 PO Number:

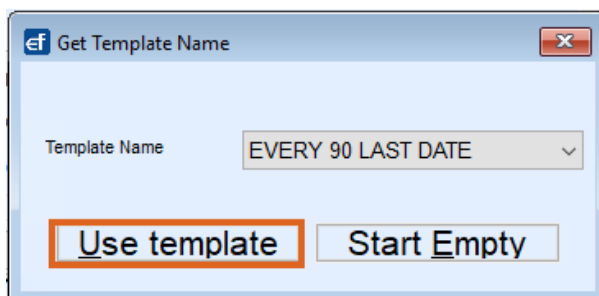
CUSTOMER
 Hold I
 Hol

Tank Readings
 Create Print
 Exit Plot

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 ▼

Interval # of Days

Method for Date Generation

☐ Weekly ☒ Interval

☐ Monthly ☐ Single

Start Date Thursday

Delivery Preference ☐ AM ☐ PM


Renew Automatically?

☒ Automatic Renewal every year

☐ Definite Ending Date

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

Effective Period Until



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