

TM Usability

Module	Description		How To
Tank Management	1. Create a Tank Device		Go to Tank Management menu > Devices
			Click the New toolbar button. Enter the Serial Number and Tank Capacity. Select the Tank Type Fill in the other fields and click the Save button
	2. Create a Consumption Site		Go to Tank Management menu > Customer Inquiry

Note: The highlighted are the required fields for Devices screen. Serial Number can't be duplicated. If serial number exist, kind number and save.

Select a customer and click **View** toolbar button

Customer Inquiry

Layout  Filter Records (F3) 79,382 records (2 selected)

	Customer No	First Name	Last Name	Address	City	Phone
☐	0000000018		CASH CUSTOMER		FORT WAYNE	2600000000
☒	0000000021		SHELL PROPANE	GREEN ROAD	CHISAGO CITY	1000000000

On Customer Inquiry screen, click **Site** button

Customer Inquiry

General Contracts

Customer: 0000000021 SHELL PROPANE Comment Type: 

Address: GREEN ROAD Comments: 

Zip/Postal Code: 55013 City: CHISAGO CITY Future: 0.000000

State/Province: MN Country:  Current: 0.000000

Phone 1: 1000000000 Phone 2:  11-30 Days: 0.000000

Business Location:  Terms: 20 - COD 31-60 Days: 0.000000

61-90 Days: 0.000000

Over 90 Days: 0.000000

Regular Credit: 0.000000

Prepaid: 0.000000

Balance: 0.000000

Budget Amount: 0.000000 Due: 0.000000

Budget Month: 0 Thru: 0

Financial Information

YTD Sales: 494,953.410000 Last Payment: 1,287.50000

Last Year Sales: 537,883.410000 Last Payment Date: 01/10/2014

Last Statement: 0.000000 Pending Invoice: 0.000000

Last Statement Date: 01/31/2013 Pending Payment: 0.000000

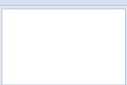
Credit Limit: 1.000000

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Click the **New Site** button to add a site. This is the **+** button on the Site Address panel.

Consumption Sites - 0000000021

Customer: SHELL PROPANE Customer No: 0000000021 Current: 0.000000 Credit Note: 

Address: GREEN ROAD CHISAGO CITY, MN 55013 Terms: 20 - COD Total Past Due: 0.000000

Regular Credit: 0.000000 Budget Amt Due: 0.000000

Phone: 1000000000 Credit Limit: 1.000000 Prepaid Balance: 0.000000

Showing 0 Consumption Site  Filter Records (F3)

Address Description

Location Information

Site No:  Billing By:  Flow Meter 

Description: 

Address: 

Zip Code:  City: 

State:  Country: 

Latitude:  Longitude: 

Driver:  Route: 

Sequence: 

On Hold Information

On Hold: ☐ Hold DD Calc: ☐

Reason: 

On Hold Start:  End: 

Site Information

Location:  Total Capacity: 

Clock:  Total Reserve: 

Account Status:  Price Reduction: 

Sales Tax: ☐ Class Fills: 

Tax State ID:  Recurring PO No: 

Tax Locale 1:  Print AR Balance: ☐ Energy Trac

Tax Locale 2:  Item: 

Degree Day Information

Fill Method:  Fill Group: 

DD Between Delivery:  Next Julian Delivery: 

Summer Daily Rate:  Winter Daily Rate: 

Burn Rate:  Previous Burn Rate: 

Prompt for % Full: ☐ Adjust Burn Rate: ☐

Ready Page 1 of 1

Enable/Check **Sales Tax** Option.

On **Details** tab, enter details for **Instructions** and **Comments** field. Click **Save** toolbar button and close the screen.

Consumption Sites - 0000000021

[New](#)
[Save](#)
[Find](#)
[Undo](#)
[Add Site](#)
[Site Action](#)
[Print Call Entry](#)
[Call Entry](#)
[Dispatch](#)
[Contract](#)
[Create Event](#)
[Summary List](#)
[Work Order](#)
[Print Efficiency](#)
[Close](#)

Customer: SHELL PROPANE Customer No: 0000000021 Current: 0.000000 Credit Note:
 Address: GREEN ROAD Terms: 20 - COD Total Past Due: 0.000000
 CHICAGO CITY, MN 55013 Regular Credit: 0.000000 Budget Amt Due: 0.000000
 Phone: 1000000000 Credit Limit: 1.000000 Prepaid Balance: 0.000000

Showing 1 Consumption Site [Filter Records \(F3\)](#)

Address	Description
GREEN ROAD	Site 1

[Sites](#)
[Detail](#)
[Devices](#)
[Associated Sites](#)
[Appliances](#)
[Call Entry](#)
[Delivery History](#)
[Event History](#)
[Work Orders](#)

Delivery Details

Last Delivery:

Last Delivery Degree Day:

Last Delivered Gallons:

Next Delivery Degree Day:

Estimated Gallons Left:

Estimated Percent Left:

Last Gallons in Tank:

YTD Gallons This Season:

YTD Gallons Last Season:

YTD Gallons 2 Seasons Ago:

YTD Sales This Season:

YTD Sales Last Season:

YTD Sales 2 Seasons Ago:

Other Details

Instructions: sample instructions

Comments: sample comment

Go to Tank Management menu > **Consumption Site**

a. Attach Customer Owned

Select the site you have created on **Search Consumption Site** screen. Click **View** toolbar button to open the site.
Attach a customer owned device on the site by clicking **Attach Device** menu button and select **Attach Customer Owned**.

Consumption Sites - 0000000021

New Save Search Undo Attach Device Site Action Print Call Entry Call Entry Dispatch Contract Create Event Summary List Work Order Print Efficiency Close

Customer: SHELL PROPANE
Address: GREEN ROAD
CHISAGO CITY, MN
Phone: 1000000000

00000021
COD
0.000000
1.000000

Current: 0.000000
Total Past Due: 0.000000
Budget Amt Due: 0.000000
Prepaid Balance: 0.000000

Credit Note:

Attach Customer Owned
Attach Company Owned

Enter details and select a **Tank Type**. Click **Save** button.

Devices

Save Undo Close

Device Type: Tank Inventory Status: Out

Manufacturer ID: Comment:

Manufacturer Name: Installed on Tank:

Model Number: Lease Number:

Serial Number: SN4567 Tank Capacity: 200.000000

Bulk Plant Number: Tank Reserve: 0.000000

Description: sample customer owned Tank Type: P

Ownership: Customer Owned Est Gallons in Tank: 0.000000 Underground: ☐

Asset Number: Meter Type:

Purchase Date: Meter Cycle: 0

Purchase Price: 0.000000 Meter Status:

Manufactured Date: Meter Reading: 0.000000

Regulator Type:

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The device will be displayed on the **Devices** tab grid.

Consumption Sites - 0000000021

New Save Search Undo Attach Device Site Action Print Call Entry Call Entry Dispatch Contract Create Event Summary List Work Order Print Efficiency Close

Customer: SHELL PROPANE Customer No: 0000000021 Current: 0.000000 Credit Note:

Address: GREEN ROAD CHISAGO CITY, MN 55013 Terms: 20 - COD Total Past Due: 0.000000

Phone: 1000000000 Regular Credit: 0.000000 Budget Amt Due: 0.000000

Credit Limit: 1.000000 Prepaid Balance: 0.000000

Showing 1 Consumption Site

Filter Records (F3)

Address Description

GREEN ROAD Site 1

Site Detail Devices Associated Sites Appliances Call Entry Delivery History Event History Work Orders

View Remove Layout Filter Records (F3)

Device Type	Serial No.	Ownership	Manufacturer	Tank Capac...	Description
Tank	SN4567	Customer Owned		200.00	sample customer owned

b. Attach Company Owned.

Attach a company owned device on the site by clicking **Attach Device** menu button and select **Attach Company Owned**.

Consumption Sites - 0000000021

Customer: SHELL PROPANE
Address: GREEN ROAD, CHISAGO CITY, MN
Phone: 1000000000

Attach Device menu:
Attach Customer Owned
Attach Company Owned (highlighted)

Site Information:
Customer No: 0000000021
Current: 0.000000
Total Past Due: 0.000000
Budget Amt Due: 0.000000
Prepaid Balance: 0.000000

Search for the tank that has been created in Step #1. Select the device and click **Open Selected** button to attach the device.
The device will be displayed on the **Devices** tab grid.

Consumption Sites - 0000000021

Customer: SHELL PROPANE
Address: GREEN ROAD, CHISAGO CITY, MN 55013
Phone: 1000000000

Terms: 20 - COD
Regular Credit: 0.000000
Credit Limit: 1.000000

Showing 1 Consumption Site

Device Type	Serial No.	Ownership	Manufacturer	Tank Capac...	Description
Tank	SN4567	Customer Owned		200.00	sample customer owned
Tank	Tank 1	Company Owned		500.00	Test tank

Under Site tab

Navigate to **Site** tab.
Total Capacity and **Total Reserve** will display the sum of the devices attached to the site.

Consumption Sites - 0000000021

Site tab selected

Location Information:
Site No: 0001
Billing By: Tank
Description: Site 1
Address: GREEN ROAD
Zip Code: 55013
City: CHISAGO CITY
State: MN
Country: United States
Latitude: 0.000000
Longitude: 0.000000
Driver: Company
Route: 063

Site Information:
Location: 063
Clock: C1
Account Status: A
Sales Tax: ☒
Tax State ID: MN
Tax Locale 1:
Tax Locale 2:
Item: PROPANE

Total Capacity: 700.000000
Total Reserve: 200.000000

Under
Events
tab

Navigate to **Event History** tab.

History of the devices attached will be displayed in grid.

Site	Detail	Devices	Associated Sites	Appliances	Call Entry	Delivery History	Event History	Work Orders
View Remove Layout Filter Records (F3)								
Date	Type	Description	User ID	Serial No.				
06/09/2015	Event-009	Device Installed	AGADMIN	Tank 1				
06/09/2015	Event-009	Device Installed	AGADMIN	SN4567				

Select an event and click **View** button. **Event History** form for the selected device event will display.

Event History

Close

Date:06/09/2015Device Type:Tank

Type:Event-009Device Serial Number:SN4567

Level:Consumption SiteDevice Ownership:Customer Owned

Consumption Site ID:69464Performer ID:

Device ID:197760User ID:AGADMIN

Customer Number:0000000021

Description:Device Installed

c.
Add
a
Lease

Go back to **Devices** tab and select the Company Owned device on the grid.

Click **View** button.This will open the Devices screen.

Click **Lease** button. Enter and fill in the needed details and **Save**.

Close the Lease screen. **Lease No** will display in **Lease Number** field of the Devices form.

Lease

Save Delete Undo Close

Lease No:LEASE-2

Start Date:06/09/2015Lease Code:3

Bill Customer:0000000021Name:SHELL PROPANE

Rental Status:Active

Lease Status:Pending

Billing Frequency:Yearly

Billing Month:6Billing Type:Dollars

Lease To Own:Don't Bill After:06/09/2020

Last Lease Billing Date:

4. Add
Appliances

Navigate to **Appliances** tab.

Add and select 2 appliance type and enter the remaining details on the grid. **Save** the site form.

Site	Detail	Devices	Associated Sites	Appliances	Call Entry	Delivery History	Event History	Work Orders
View Type Remove Layout Filter Records (F3)								
Type	Description	Manufacturer N...	Model Nu...	Serial No.	Purchased	Manufactured	Comment	
Appliance 1	appliance 1	iRely	123456	SN88965	05/01/2015		sample appliance	
Appliance 2	appliance 2	iRely	78901	336951400	06/01/2015		sample appliance 2	

5. Create a Call in Order

Using the same customer site, click **Call Entry** toolbar button.

Tab focus will be on the Call Entry tab. Enter details in **Comments** field. Click **Save** toolbar button.

Consumption Sites - 0000000021

Customer: SHELL PROPANE Customer No: 0000000021 Current: 0.000000 Credit Note:
Address: GREEN ROAD CHISAGO CITY, MN 55013 Terms: 20 - COD Total Past Due: 0.000000
Phone: 1000000000 Regular Credit: 0.000000 Budget Amt Due: 0.000000
Credit Limit: 1.000000 Prepaid Balance: 0.000000

Showing 1 Consumption Site Filter Records (F3)

Address Description
GREEN ROAD Site 1

Percent Left: 0.000000% Calculated Qty: 560.000000 Desired Qty: Driver: Company
Product: PROPANE Substitute: Reg Price: 0.0000 Printed: No
Requested Date: 06/09/2015 Priority: Total: 0.000000
Comments: this is a sample call entry Entered By: AGADMIN
Order Status: Generated Call in Date: 06/09/2015 Dispatched Date: Ticket Assigned: TMO-3

Call Entry Details

Last Delivery: Fill Method: Will Call Total Capacity: 700.000000
Forecast Run Out: Next Delivery DD: 0 Estimated % Left: 0.000000
Route Sequence: 063 Serial Number: SN4567 Estimated Gallons Left: 0.000000
Instructions: sample instructions Comments: sample comment

6. Create a Consumption Site Event

Click **Create Events** toolbar button.

Level will be automatically set to **Consumption Site**.

Select a **Performer ID** and click **Save** button.

Event History

Save Close

Date: 06/09/2015 Device Type:
Type: Event-004 Device Serial Number:
Level: Consumption Site Device Ownership:
Consumption Site ID: 69464 Performer ID: Company
Device ID: User ID: SECURITY
Customer Number: 0000000021
Description: Consumption Site Leak Checked

Edited

Navigate to **Event History** tab.

Event-004 and its description will display on the grid.

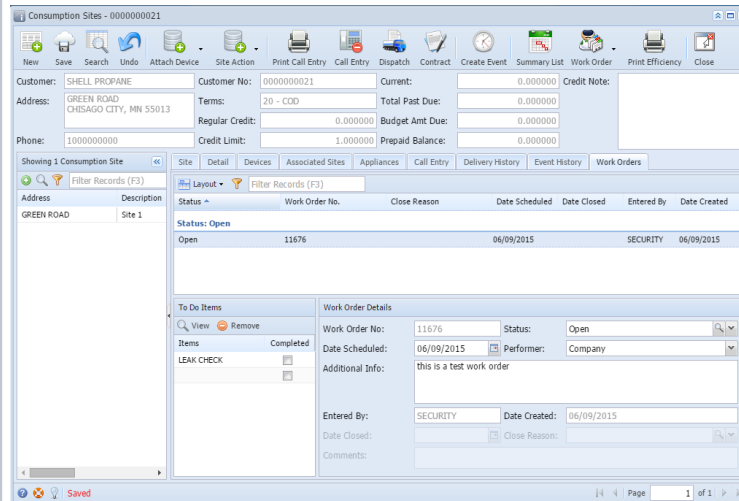
7. Add Work Order

Navigate to **Work Order** tab.

Click **Work Order** and select **Add Work Order**.

Add date in **Date Scheduled** field and enter details in **Additional Info** field.

Select a work order item in **To Do Items** panel. **Save** the work order.



8. Associate a Site

Pre-requisite: There should be 2 or more sites to continue with associating a site. You can associate a site from other or same
If there is 1 or none existing site, repeat Steps # 2 and 3.

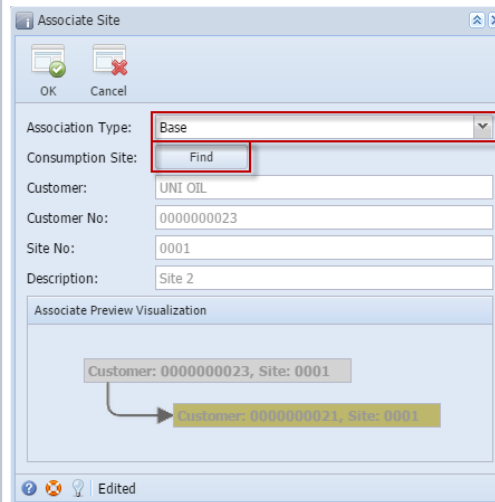
Base Site

Select the site to associate in Site Address panel.

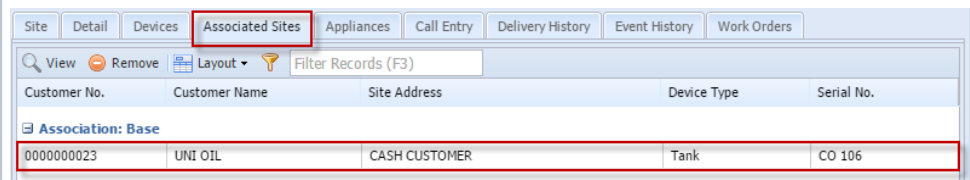
Click **Site Actions** toolbar button and select **Associate Site**.

Select '**Base**' as the **Association Type**.

Click **Find** button and select a site you want to associate. Click **OK** button.



The site will be associated and will display in **Associated Sites** tab under the **Base** group.



Link
Site

Click **Site Actions** menu button and select **Associate Site**.

Select '**Link**' as the **Association Type**.

Click **Find** button and select a site you want to associate. Click **OK** button.

The site will be associated and will display in **Associated Sites** tab under the **Link** group

Site	Detail	Devices	Associated Sites	Appliances	Call Entry	Delivery History	Event History	Work Orders
View Remove Layout Filter Records (F3)								
Customer No.	Customer Name	Site Address	Device Type	Serial No.				
Association: Base								
0000000023	UNI OIL	CASH CUSTOMER	Tank	CO 106				
Association: Link								
0000000025	DEMETRIA, GOMEZ	MAIN STREET	Tank	BE 5748				

Select an associate site and click the **View** button. This will direct you and will let you view the associated customer site. **Close** site form.

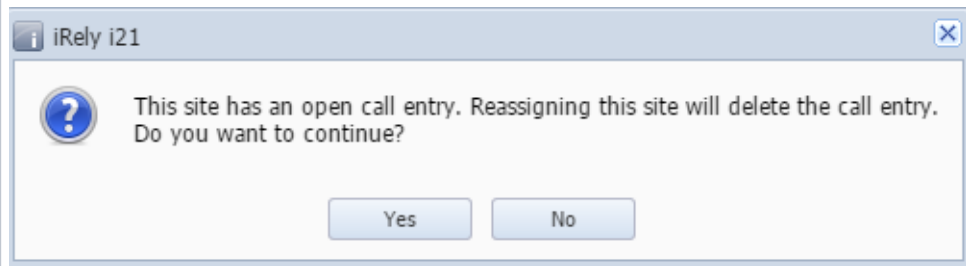
9. Reassign a
Site

Go to Tank Management menu > **Consumption Site**

Select the first site you have created on **Search Consumption Site** screen. Click **View** toolbar button to open the site.

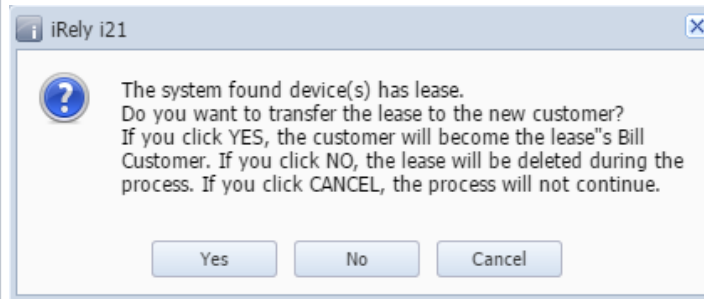
Click **Site Action** menu button and select **Reassign Site** button.

The message below will display since the site you'll reassign has an open call entry. Click **Yes** button.



The confirmation message 'Are you sure you want to re-assign this Site?' will follow. Click **Yes** button.

Since the attached device has a lease, reassigning a site will display this message. Click **Yes** button.



Reassigning Site loading message will display. After that, the message asking if you want to load the new site record will pror

The new site will be loaded. Customer details on the upper panel will display the new customer's info. The Site will display belc existing sites.

Consumption Sites - 0000000023

Customer: UNI OIL Customer No: 0000000023 Current: 0.000000 Credit Note: 0.000000
Address: CASH CUSTOMER OHISAGO CITY, 55013 Terms: 20 - COD Total Past Due: 0.000000
Phone: 2600000000 Regular Credit: 0.000000 Budget Amt Due: 0.000000
Credit Limit: 1.000000 Prepaid Balance: 0.000000

Showing 3 Consumption Site Filter Records (F3)

Address	Description
CASH CUSTOMER	Site 2
GREEN ROAD	Site 1

Site Information

Site No: 0002 Billing By: Tank ☒ Active Location: 063 Total Capacity: 700.000000
Description: Site 1 Clock: C1 Total Reserve: 200.000000
Address: GREEN ROAD Account Status: A Price Reduction: 0.0000
Zip Code: 55013 City: OHISAGO CITY Sales Tax: ☒ Class Fills: Product Cl:
State: MN Country: United States Tax State ID: MN Recurring PO No:
Latitude: 0.000000 Longitude: 0.000000 Tax Locale 1: Print AR Balance: ☐ Energy Trac
Tax Locale 2: Item: PROPANE
Degree Day Information
Fill Method: Will Call Fill Group:
DD Between Delivery: 0 Next Julian Delivery:
Summer Daily Rate: 0.000000 Winter Daily Rate: 0.000000
Burn Rate: 1.000000 Previous Burn Rate: 0.000000
Prompt for % Full: ☒ Adjust Burn Rate: ☒

Navigate to **Devices** tab. It will display the 2 attached devices from previous customer site.

Select the **Company Owned** device and click the **View** button.

In Devices form, click **Lease** button. **Bill Customer** and **Name** will now display the new customer's info. **Close** the Lease and

Lease

Save Delete Undo Close

Lease No: LEASE-2
Start Date: 06/09/2015 Lease Code: 3
Bill Customer: 0000000023 Name: UNI OIL
Rental Status: Active
Lease Status: Pending
Billing Frequency: Yearly
Billing Month: 6 Billing Type: Dollars
Lease To Own: ☒ Don't Bill After: 06/09/2020
Last Lease Billing Date:

Navigate to **Associated Sites** tab. It will display the associated sites from the previous customer site.

Navigate to **Appliances** tab. It will display the appliances type from the previous customer site.

Navigate to **Call Entry** tab. No call in order will display. It should be removed during the reassignment.

Navigate to **Event History** tab. **Event-001** and **Event-005** will display on the grid.

Navigate to **Work Orders** tab. No work order will display. It should be removed during the reassignment.

Close the form.

Go to Tank Management menu > **Customer Inquiry**

Search for the original customer site you have created and click **View** button.

On **Customer Inquiry** screen, click **Site** toolbar button.

The **Consumption Site** will displayed but it is deactivated. **Active** check box is unchecked.

Consumption Sites - 0000000021

New Save Search Undo Attach Device Site Action Print Call Entry Call Entry Dispatch Contract Create Event Summary List Work Order Print Efficiency Close

Customer: SHELL PROPANE Customer No: 0000000021 Current: 0.000000 Credit Note:
Address: GREEN ROAD CHISAGO CITY, MN 55013 Terms: 20 - COD Total Past Due: 0.000000
Regular Credit: 0.000000 Budget Amt Due: 0.000000
Phone: 1000000000 Credit Limit: 1.000000 Prepaid Balance: 0.000000

Showing 1 Consumption Site Filter Records (F3)

Address	Description
GREEN ROAD	Site 1

Site No: 0001 Billing By: Tank ☒ Active

Description: Site 1

Address: GREEN ROAD

Zip Code: 55013 City: CHISAGO CITY

State: MN Country: United States

Latitude: 0.000000 Longitude: 0.000000

Driver: Company Route: 063

Sequence:

On Hold Information

On Hold: ☐ Hold DD Calc: ☐

Reason:

On Hold Start: End:

Site Information

Location: 063 Total Capacity: 0.000000

Clock: C1 Total Reserve: 0.000000

Account Status: A Price Reduction: 0.0000

Sales Tax: ☒ Class Fills: Product C:

Tax State ID: MN Recurring PO No:

Tax Locale 1: Print AR Balance: ☐ Energy Trac

Tax Locale 2:

Item: PROPANE

Degree Day Information

Fill Method: Will Call Fill Group:

DD Between Delivery: 0 Next Julian Delivery:

Summer Daily Rate: 0.000000 Winter Daily Rate: 0.000000

Burn Rate: 1.000000 Previous Burn Rate: 0.000000

Prompt for % Full: ☒ Adjust Burn Rate: ☒

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