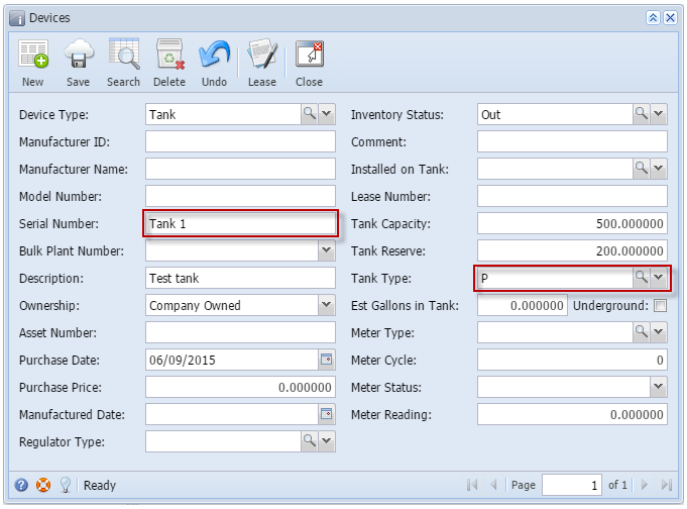
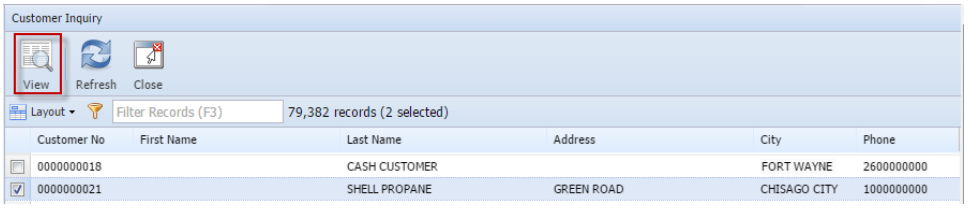
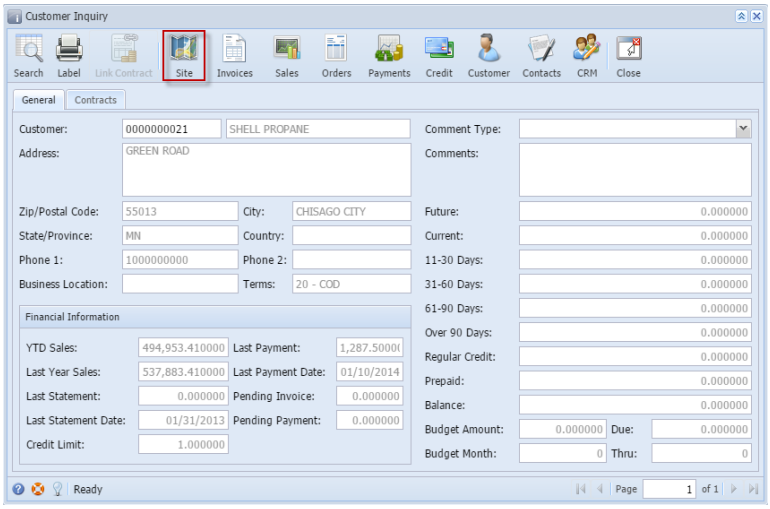
TM Usability

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  *Note: The highlighted are the required fields for Devices screen. Serial Number can't be duplicated. If serial number exist, kindl number and save.*
	2. Create a Consumption Site			Go to Tank Management menu > **Customer Inquiry**

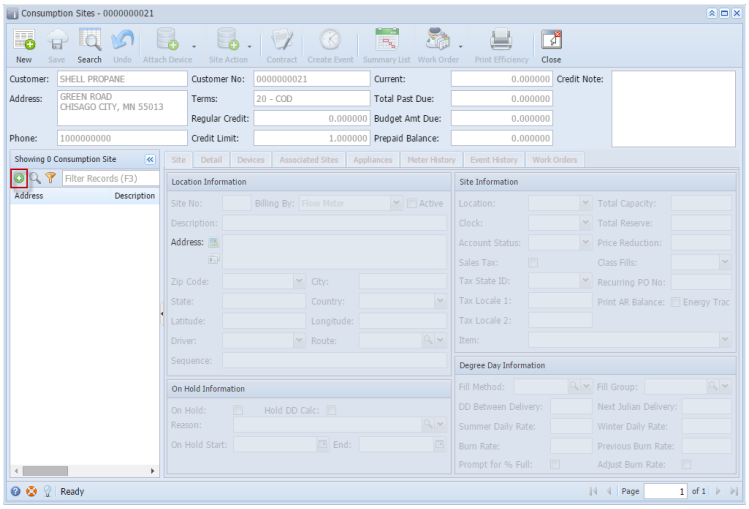
Select a customer and click **View** toolbar button

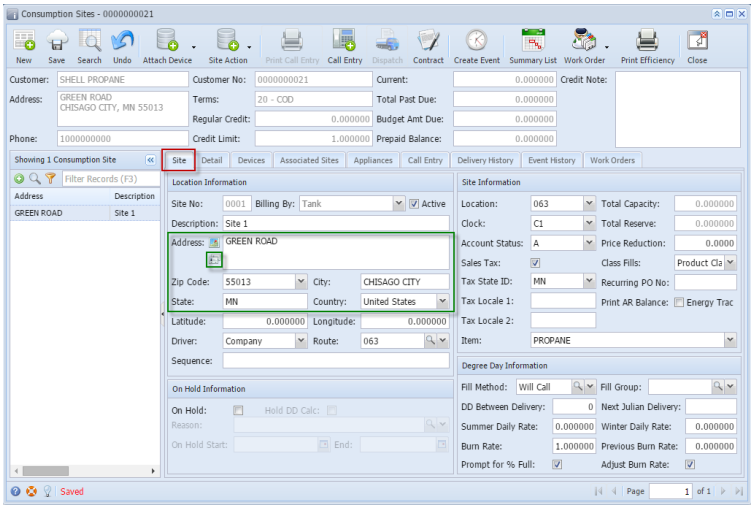
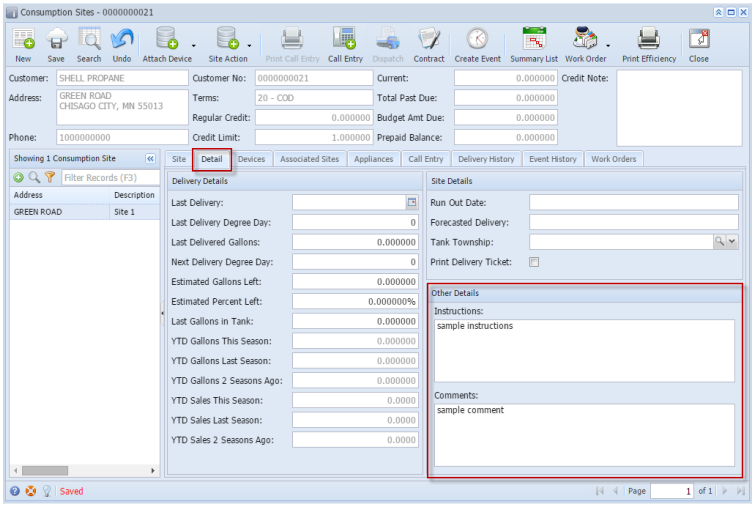


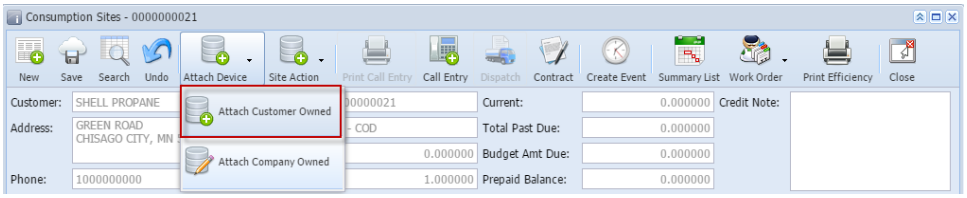
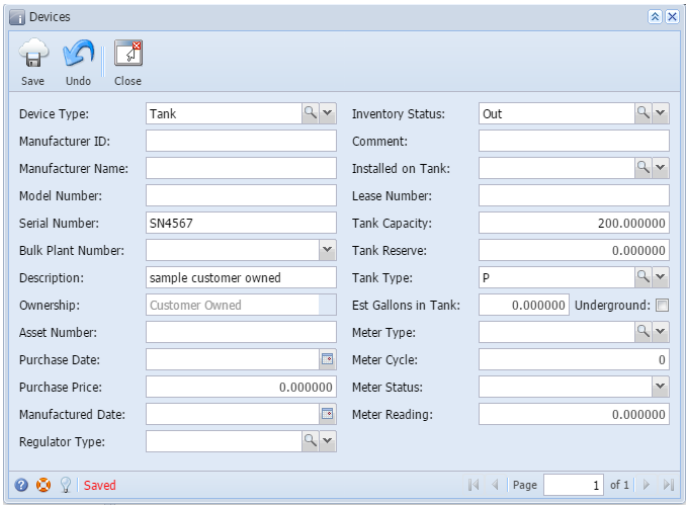
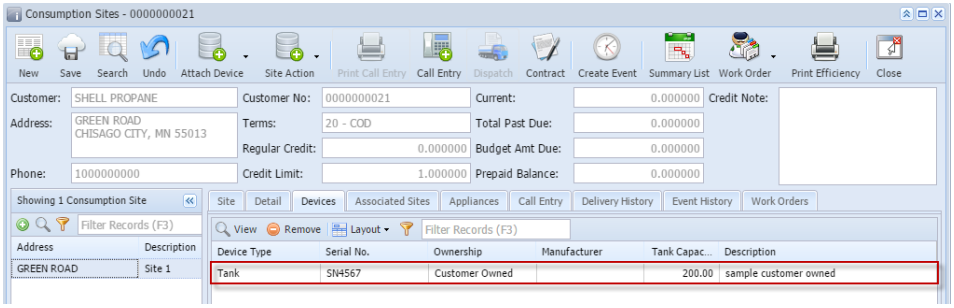
On Customer Inquiry screen, click **Site** button

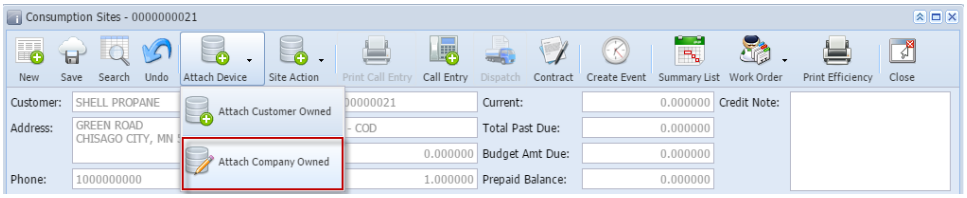
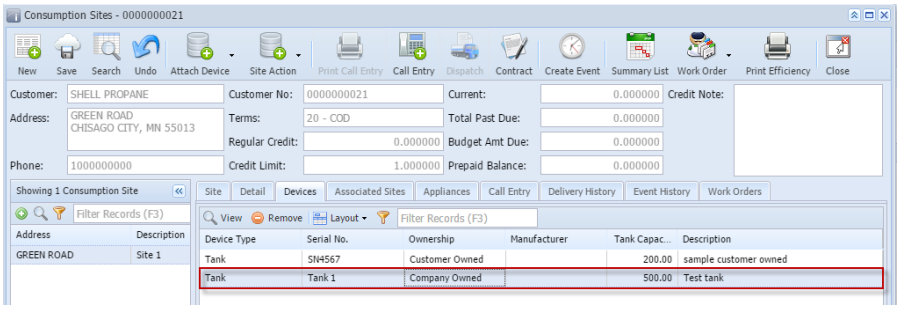
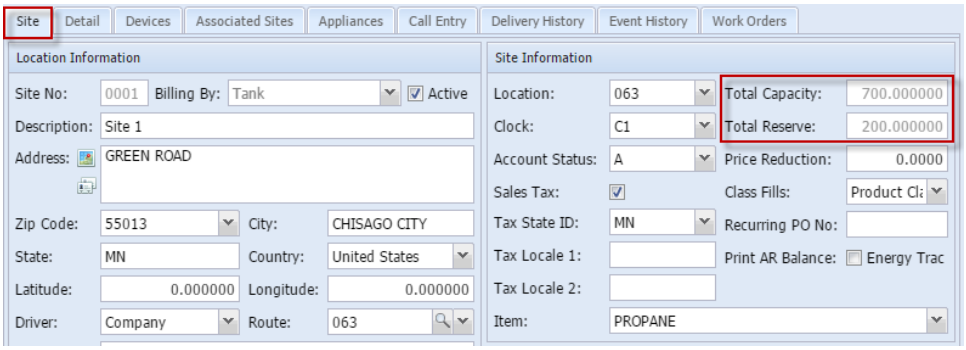


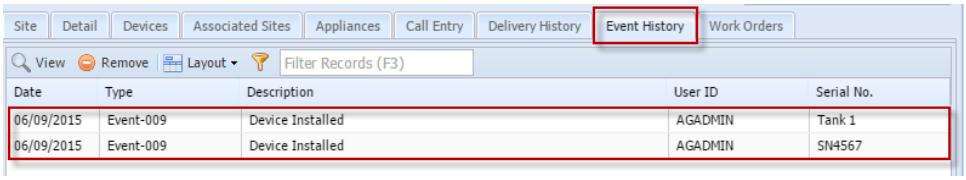
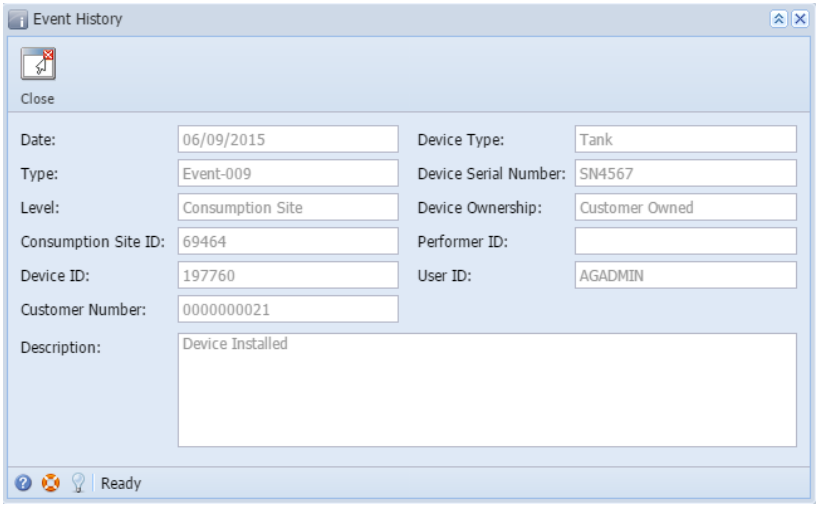
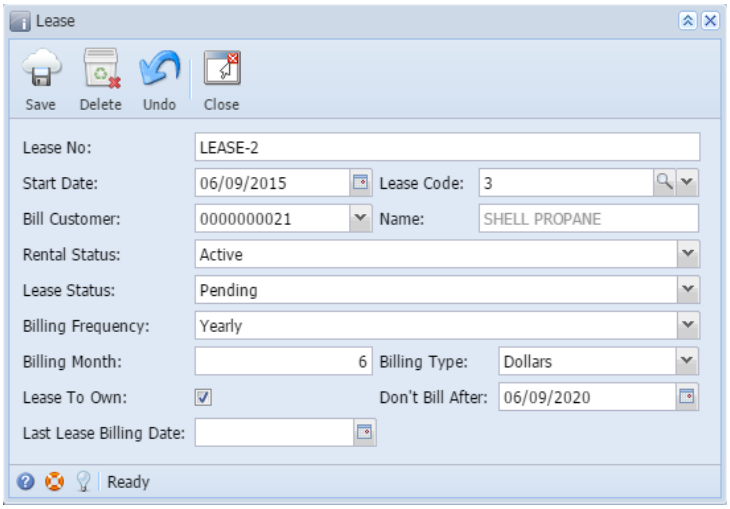
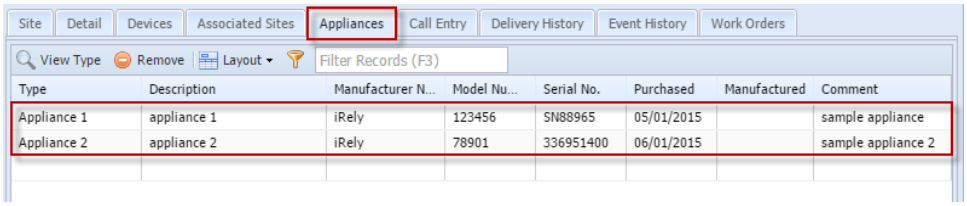
Click the **New Site** button to add a site. This is the + button on the Site Address panel.

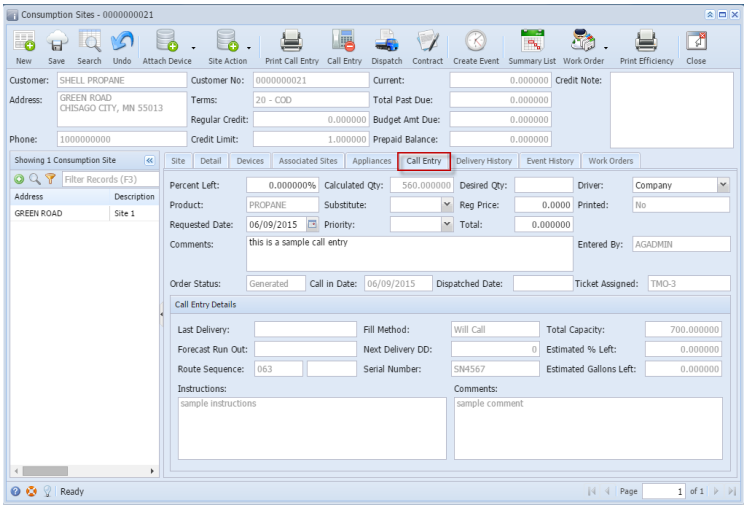
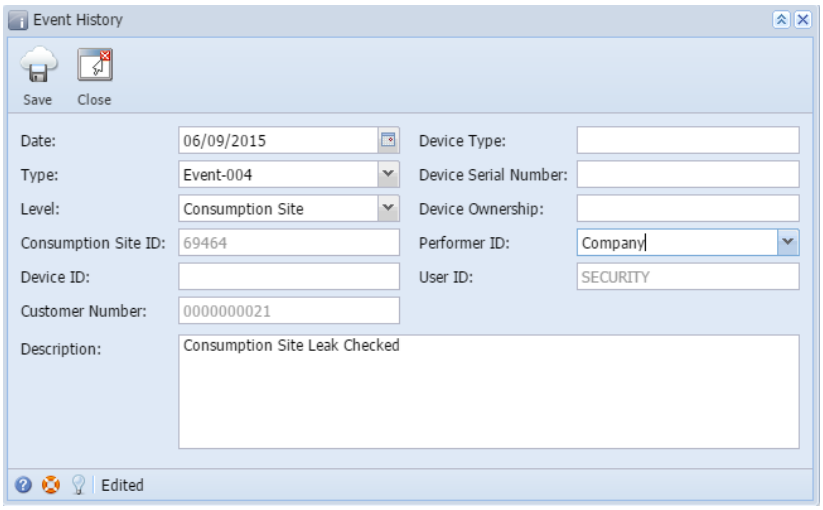


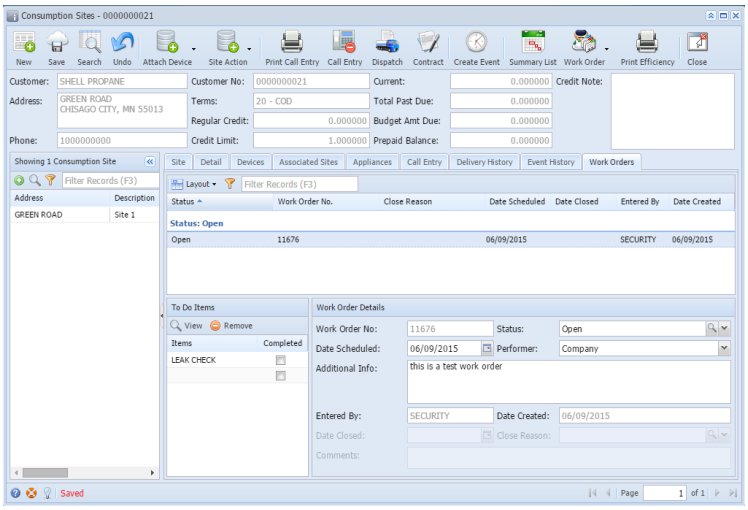
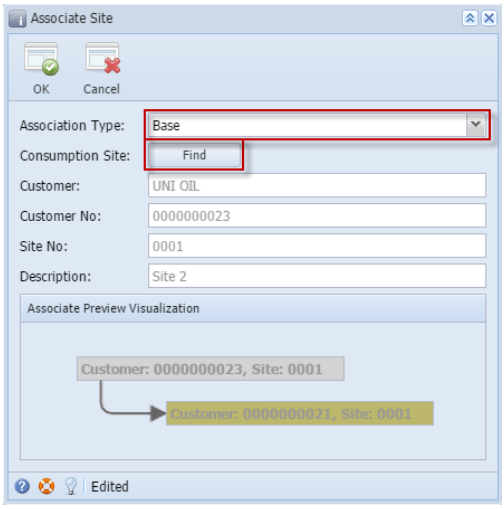
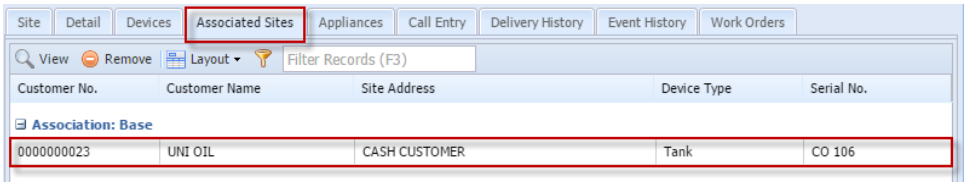
				Enter the details on **Site** tab. The **Description** and **Address** entered on the site tab should be the same with the Description and Address displayed on the Address panel. Use **Copy Customer Address** button to copy the Address, Zip Code, City, State and Country of the customer on the site fields Select a value for the ff: Driver, Route, Location, Clock, Account Status, Tax State ID, Class Fills, Item and Fill Method. Enable/Check **Sales Tax** Option.  On **Details** tab, enter details for **Instructions** and **Comments** field. Click **Save** toolbar button and close the screen. 
	3. Attach Devices to Consumption Site			Go to Tank Management menu > **Consumption Site**

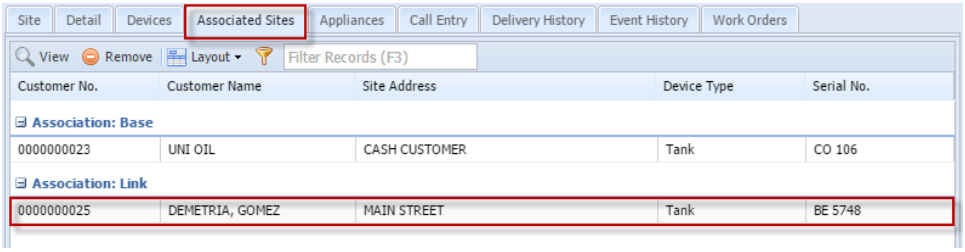
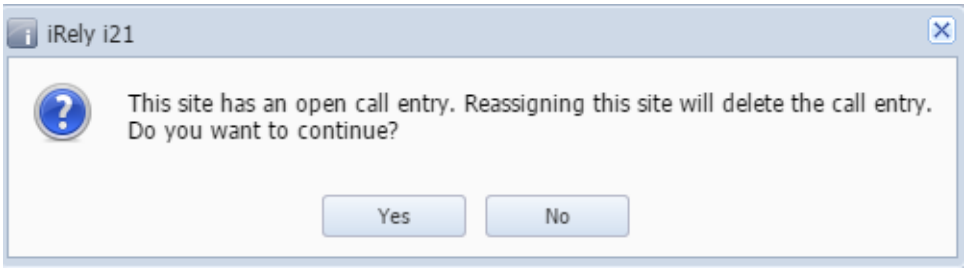
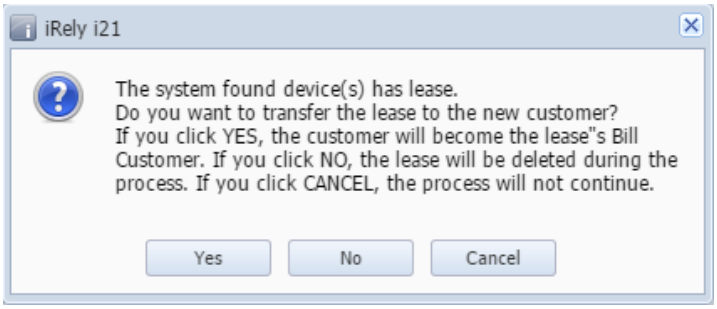
		a. Attach Customer Owned		Select the site you have created on **Search Consumption Site** screen. Click **View** toolbar button to open the site. Attach a customer owned device on the site by clicking **Attach Device** menu button and select **Attach Customer Owned**.  Enter details and select a **Tank Type**. Click **Save** button.  The device will be displayed on the **Devices tab** grid. 

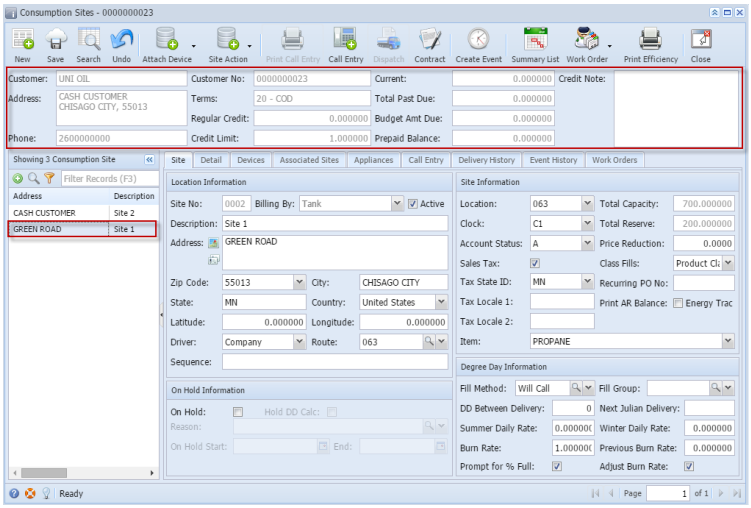
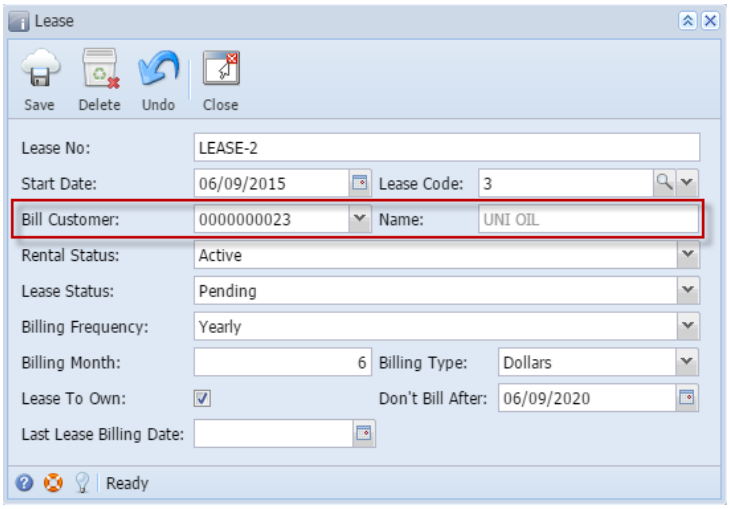
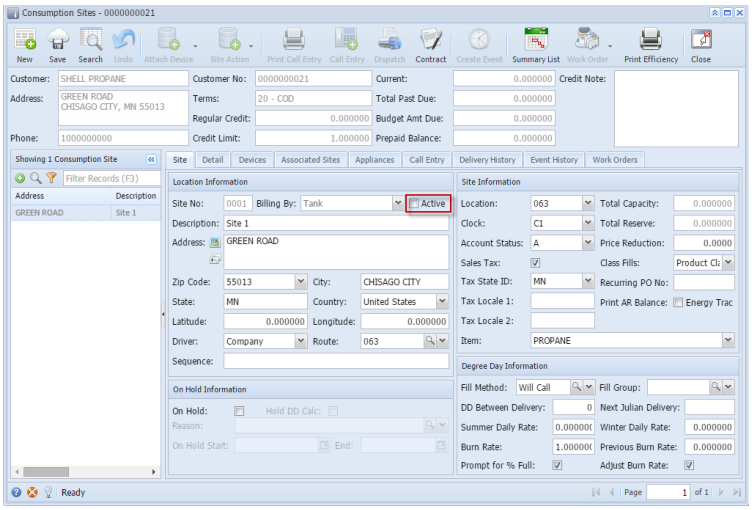
		b. Attach Company Owned.		Attach a company owned device on the site by clicking **Attach Device** menu button and select **Attach Company Owned**.  Search for the tank that has been created in Step #1. Select the device and click **Open Selected** button to attach the device. The device will be displayed on the **Devices tab** grid. 
			Under Site tab	Navigate to **Site** tab. **Total Capacity** and **Total Reserve** will display the sum of the devices attached to the site. 

			Under Events tab	Navigate to **Event History** tab. History of the devices attached will be displayed in grid.  Select an event and click **View** button. **Event History** form for the selected device event will display. 
		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. 
	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. 

	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. 
	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.  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  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.  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 
				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.