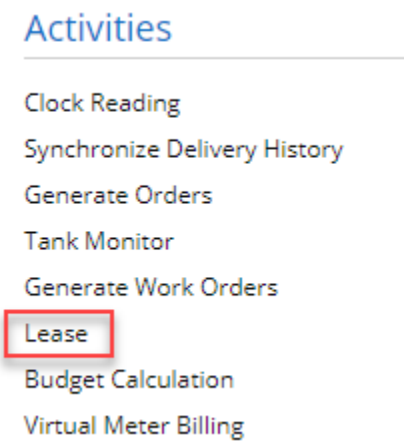


How to Generate Leased Equipment Usage Analysis

Equipment Usage Analysis screen is used to evaluate usage levels and profitability of leased equipment.

- 1. From Tank Management, click the **Lease menu**. This will open the Leases Search screen.



- 2. Click the **Equipment Usage Analysis toolbar button**. This will display the Equipment Usage Analysis screen.

A screenshot of the 'Equipment Usage Analysis' window. The window has a title bar with 'Equipment Usage Analysis' and standard window controls. Below the title bar is a toolbar with 'Generate' and 'Close' buttons. The main area is divided into sections. The first section is 'Option' with 'From' and 'To' date pickers. Below that is 'Sales Date Range' with two date pickers. The next section is 'Leased Equipment Usage Analysis' which contains a 'Layout' button, a search icon, and a 'Filter Records (F3)' input field. Below this is a table with columns: Customer No., Site No., Item Number, Item Description, Lease Number, Lease Amount, Sales Quantity, and Profit Margin. The table is currently empty. At the bottom of the window is a status bar with icons for help, home, and search, and the text 'Ready'.

- 3. Enter the **Sales Date Range** and click the **Generate toolbar button**. This will display the customer's lease and the summary of sales activity based on the entered date range.

Equipment Usage Analysis

Generate Close

Details

Option

From To

Sales Date Range 04/01/2020 05/31/2020

Leased Equipment Usage Analysis

Export View Filter (F3)

Customer No.	Site No.	Item Number	Item Description	Lease Number	Lease Amount	Sales Quantity	Profit Margin
0001005043	0001	LPG	Propane	LEASE-2	75.00	0	0
0001005010	0001	D2D	#2 Dyed Diesel (low su...	LEASE-20	150.00	6	0.281082
0000000021	0001	PRO1	Propane1	LEASE-21	25.00	10	0.2

? Ready

The screen displays the details by column:

- **Customer No** - Displays the customer number in hyperlink. Clicking the link will open the customer entity.
- **Site No** - Displays the site number that contains the lease. Clicking the link will open the specific consumption site.
- **Item Number** - Displays the site's item number.
- **Item Description** - This is the item number description.
- **Lease Number** - Displays the lease number of the lease that has been generated.
- **Lease Amount** - This is based on the selected Lease code of the lease.
- **Sales Quantity and Profit Margin** - The calculation is based on Lease > Usage Evaluation Method field. Note: Sales and Margin can be also checked via Sales Analysis Report.

Lease

New Save Delete Undo Billing Incentive Print Close

Details Devices Attachment

Info

Lease No LEASE-20

Start Date 01/01/2019 Lease Code * Lease - 100

Rental Status Active

Lease Status Received

Agreement

Agreement Letter LoanedEquipment-v1 Print Value in Agreement ☒

Evaluation Method Site Product

Billing

Bill Customer * 0000000030 Name Dionne Davenport

Tax Group MN

Billing Frequency * Yearly

Billing Month 1 Billing Type * Gallons

Lease To Own ☐ Don't Bill After

Last Lease Billing Date 01/30/2019

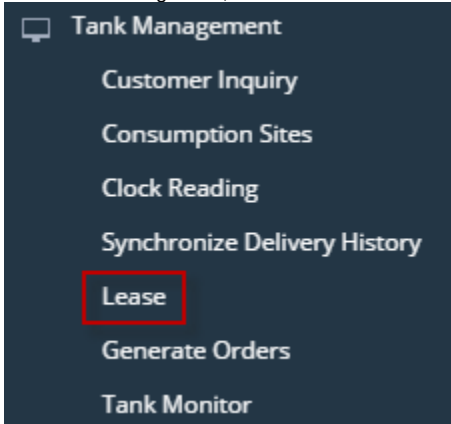
? 0.43s Ready Page 1 of 1 Refresh

- **Site Product** - Sum all Sales and Margin of Products where the Site was selected on a transaction.
- **Site Product/Category** - Sum Quantities and Profit for all Products in the same Category as the Item on the Site for the customer and All Sites

- **All Products** - Sum Quantities and Profit for all Products for the Customer and All Sites

Equipment Usage Analysis screen is used to evaluate usage levels and profitability of leased equipment.

1. From Tank Management, click the **Lease menu**. This will open the Leases Search screen.



2. Click the **Equipment Usage Analysis toolbar button**. This will display the Equipment Usage Analysis screen.

 A screenshot of the "Equipment Usage Analysis" screen. The window has a title bar "Leases" and a menu bar with "New", "Open", "Billing Incentive", "Lease Billing", "Equipment Usage Analysis" (highlighted with a red rectangle), "Refresh", "Export", and "Close". Below the menu bar is a toolbar with "Generate" and "Close" buttons. The main area is titled "Equipment Usage Analysis" and contains a "Details" tab. Under the "Details" tab, there is an "Option" section with "From" and "To" date pickers. Below that is a "Sales Date Range" section with two date pickers. Further down is a "Leased Equipment Usage Analysis" section with a "Layout" button and a "Filter Records (F3)" search box. Below this is a table with columns: Customer No., Site No., Item Number, Item Description, Lease Number, Lease Amount, Sales Quantity, and Profit Margin. The table is currently empty. At the bottom of the window is a status bar with icons for help, search, and email, and the text "Ready".

3. Enter the **Sales Date Range** and click the **Generate toolbar button**. This will display the customer's lease and the summary of sales activity based on the entered date range.

Equipment Usage Analysis

Generate Close

Details

Option

From To

Sales Date Range 7/1/2015 7/30/2016

Leased Equipment Usage Analysis

Layout Filter Records (F3)

	Customer No.	Site No.	Item Number	Item Description	Lease Number	Lease Amount	Sales Quantity	Profit Margin
	0001005055	0002	LPG	Propane	LEASE-1	75.00	300	221.52
	0001005043	0001	LPG	Propane	LEASE-2	75.00	286	187.4018
	0001005078	0001	LPG	Propane	LEASE-11	75.00	1000	176.362

Ready

The screen displays the details by column:

- **Customer No** - Displays the customer number in hyperlink. Clicking the link will open the customer entity.
- **Site No** - Displays the site number that contains the lease. Clicking the link will open the specific consumption site.
- **Item Number** - Displays the site's item number.
- **Item Description** - This is the item number description.
- **Lease Number** - Displays the lease number of the lease that has been generated.
- **Lease Amount** - This is based on the selected Lease code of the lease.
- **Sales Quantity and Profit Margin** - Calculation is based on Lease > Usage Evaluation Method field.