Tank Management

Pages

- Customer Inquiry
 - How to Open a Customer Inquiry Record
 - ^o How to Print a Customer Label
 - How to Link a Contract
 - How to Print Mass Labels
 - How to View Customer Credit Information
- Consumption Sites
 - How to Open a Consumption Sites record
 - How to Add a New Site
 - ° How to Copy a Customer Bill Address to Site
 - How to Deactivate a Site
 - How to Attach a Customer Owned device
 - ° How to Attach a Company Owned device
 - How to Detach or Remove a Device
 - How to Put a Delivery On Hold
 - How to Put a Delivery Off Hold
 - How to Reassign a Consumption Site
 - How to Print an Efficiency report
 - How to Manually Correct a Burn Rate
 - Route
 - Hold Reason
 - Fill Method
 - Fill Group
 - Tank Township
 - Meter Reading History
 - Delivery History
 - Delivery Detail
 - Julian Calendar
 - How to Open the Julian Calendar screen
 - Julian Recurrence
 - How to Create a New Interval Recurring Calendar
 - · How to Create a New Monthly Recurring Calendar
 - How to Create a New Single Recurring Calendar
 - How to Create a New Weekly Recurring Calendar
 - How to Edit a Julian Calendar
 - How to Delete a Julian Calendar
 - Associate Site
 - How to Open the Associate Site screen
 - How to Associate a Site
 - How to Delete an Associated Site
 - Contracts
 - How to Add an Appliance
 - How to Delete an Appliance
 - Appliance Type
 - Call Entry
 - - How to Create a Call Order
 - How to Print a Call Order
 - How to Cancel a Call Order
 - Call Entry Parameters
 - Search Contract
 - Sales Tax and Special Pricing
 - How to View Open Orders
 - How to Export Prices
 - How to Export Quantities
 - How to Recalculate Order Price
 - How Call Order Status is Updated
 - How to Print Delivery Tickets
 - How to Reassign a Driver
 - How to Open the Delivery History screen
 - How to Open the Delivery Detail screen
 - How to Open the Meter Reading History screen
 - Device Actions
 - How to Open the Device Action screen
 - How to Perform 'At Customer to be Transferred Back to Bulk Plant Location' Device Action
 - How to Perform 'Pick up and Transfer Back to Bulk Plant Location' Device Action
 - How to Perform 'Cancel Pick up and Transfer Back to Bulk Plant Location' Device Action
 - How to Perform 'Transfer to Another Consumption Site' Device Action
 - How to Perform 'Enter Repair Notes' Device Action
 - How to Perform 'Sold' device action
 - How to Perform 'Bought' device action
 - Event History
 - How to Open an Event History record
 - How to Create a Consumption Sites Event

- How to Create a Device Event
- How to Delete an Event History record
- Work Order
 - How to Add a Work Order
 - How to Print a Work Order
 - How to Close a Work Order
 - How to Add the To Do Item to a Work Order
 - How to Delete a To Do Item of a Work Order
 - Work To Do Items
 - Close Reason
 - Work Status
 - Work Order Category How to View Open Work Orders
- Summary List
- Clock Reading

 - How to Open Clock Reading record
 How to Add New Daily Clock Reading
 - How to Edit a Daily Clock Reading
 - Calculate Degree Day
- Synchronize Delivery History
 O How to Synchronize Data from i21 AR to Tank Management
 - How to Synchronize Data from Origin to Tank Management
 - Updated TM Fields After Synchronization
- Lease
 - How to Open the Lease screen
 - How to Create a Device Lease
 - How to Print Lease Agreement
 - How to Generate Leased Equipment Usage Analysis
- Lease Billing Incentive · How to Create a Lease Billing Incentive
- Lease Billing
 - How to Generate a Device Lease Invoice
 - Failed Lease Billings
 - Batch Number
- Dispatch Deliveries
 - How to Dispatch a Delivery
 - How to Cancel a Dispatch
 - Cancel Dispatch
 - How to Change the Dispatch Driver
 - Search Driver
 - ° How to Send an Email to Driver for Dispatch Delivery
- Exported File Via Digital Dispatcher Generate Orders
 - How to Dispatch Generated Orders
 - How to Generate an Order
 - How to Recap Totals
- Tank Monitor
 - ° How to Import Tank Monitor Readings From Wesroc
 - How to Import Tank Monitor Readings From Anova Gaslog
- Generate Work Orders
- **Budget Calculation** ٠
 - How to Generate Customer Budgets
 - How to Update Budgets
 - How to Print Budget Letters
- Virtual Meter Billing
 - How to Generate a Virtual Meter Invoice
 - **Degree Day Clock**
 - How to Create a new Degree Day Clock
- Season Reset ٠
 - · How to Change Season From Winter to Winter
- Devices
 - How to Open a Device record
 - How to Create a new Device
 - Regulator Type
 - Inventory Status
 - Tank Type
 - How to Duplicate a Device
 - Manufacturer
 - How to Add a Manufacturer How to Open the Manufacturer Screen
- Device Type
 - How to Open the Device Type screen
- . Event Type
- Lease Code
 - How to Open the Lease Code Screen
- Event Automation
 - ° How to Automate the Creation of Events
- Meter Type
 - How to Open the Meter Types screen

- Renew Julian Deliveries
- How to Renew Expired Julian Calendar
- Resolve Sync Conflict
 - How to Edit the COBOLWRITE Data Via Resolve Sync Conflicts Screen • How to Purge a Record in the Sync List
- Clock Reading History
 O How to Open Clock Reading History screen
- How to Add a New Record in Maintenance Screens •
- How to Delete a Record in Maintenance Screens
- TM Reports
 - Call Entry Printout
 Customer List By Route

 - Delivery Fill Report
 Device Actions Report
 - Fill Group Report

 - How to Preview a Tank Management Report
 Leak Check/Gas Check

 - Missed Julian Deliveries
 - On Hold Detail
 - Open Call Entries
 - Out of Range Burn Rates
 - Tank Inventory
 - Two-Part Delivery Fill Report
 Work Order Status
- TM Usability •
- TM Search
 - How to View Deliveries Search
 How to View Efficiency Search

 - How to View Leak or Gas Check Search • How to View Out of Range Burn Rate Search
- Customer Portal Access
 - How to Setup Customer Portal
 - How to Access Customer Portal
 - How to Create a Portal Order
 - How to Approve/Reject a Portal Order
 - How to Request and Pay an Order