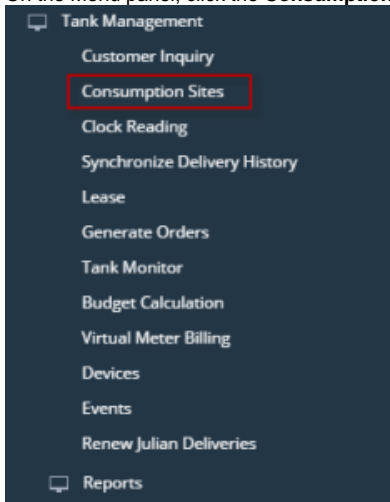


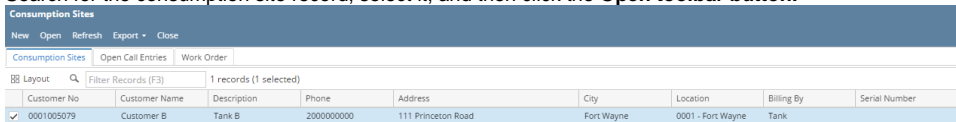
How to Open a Consumption Sites record

- Via Menu panel:

1. On the Menu panel, click the **Consumption Sites** menu. This will open the Search Consumption Sites screen.



2. Search for the consumption site record, select it, and then click the **Open toolbar button**.



3. Consumption Site Record will display.

A screenshot of the 'Consumption Sites - 0001005079' record form. The form is divided into several sections. The top section contains customer information: Customer B, Customer No: 0001005079, Current: 0.00, Email: CustomerB@irely.com, Address: 654 Downtown Street, Fort Wayne, IN 46808, Terms: Net 15, Total Past Due: 0.00, Credit Note: (empty), Regular Credit: 0.00, Budget Amt Due: 0.00, Phone: (empty), Credit Limit: 0.00, Prepaid Balance: 0.00. Below this is a 'Showing 1 Consumption Site' list with one entry: 654 Downtown Street, Tank B. The main form area is divided into 'Location Information' and 'Site Information'. 'Location Information' includes Site No: 0001, Billing By: Tank, Description: Tank B, Address: 654 Downtown Street, Zip/Postal Code: 46808, City: Fort Wayne, State/Province: IN, Country: United States, Latitude: 0.000000, Longitude: 0.000000, Driver: Customer C, Route: 001-NW, Sequence: (empty). 'Site Information' includes Location: 0001 - Fort Wayne, Total Capacity: 0.00, Clock: 001, Total Reserve: 0.00, Account Status: A, Delivery Terms: Net 15, Price Level: Reseller, Price Adjustment: 0.00, Sales Tax: (empty), Recurring PO No: (empty), Tax Group: IN SST, Print AR Balance: (empty), Class Fills: Any Item, Item: Propane. The bottom section is 'Degree Day Information' with fields for Fill Method, Will Call, Fill Group, Julian Calendar, Next Julian Delivery, Summer Daily Rate, Winter Daily Rate, Burn Rate, Previous Burn Rate, DD Between Delivery, Adjust Burn Rate, and Prompt for % Full.

- Via Customer Inquiry screen:

1. [Open a Customer Inquiry record.](#)

2. Click the **Site toolbar button**. This will open the Consumption Sites record of the customer.

The screenshot shows the 'Customer Inquiry - 0001005079' window. The 'Site' button in the top toolbar is highlighted with a red box. The window contains various tabs like 'General', 'Contracts', and 'Financial Information'. The 'General' tab is active, showing customer details such as 'Customer: 0001005079', 'Address: 111 Princeton Road', 'City: Fort Wayne', 'State/Province: IN', 'Phone 1: 2000000000', 'Business Location: Location B', and 'Terms: Net 30'. The 'Financial Information' section includes fields for 'YTD Sales', 'Last Year Sales', 'Last Statement', 'Last Statement Date', 'Credit Limit', 'Last Payment', 'Last Payment Date', 'Pending Invoice', 'Pending Payment', 'Future', 'Current', '11-30 Days', '31-60 Days', '61-90 Days', 'Over 90 Days', 'Regular Credit', 'Prepaid', 'Balance', 'Budget Amount', 'Due', 'Budget Month', and 'Thru'.

- **Via Devices screen:**

1. On the Menu panel, click the **Devices menu**. This will open the Search Devices screen.
2. Select a device with Inventory Status = Out. Click **New toolbar button** to open the device.

The screenshot shows the 'Devices' screen. The 'Open' button in the top toolbar is highlighted with a red box. Below the toolbar is a search bar with 'Filter Records (F3)' and '1 records (1 selected)'. A table lists the device details:

	Serial Number	Device Type	Manufacturer ID	Manufacturer Name	Inventory Status	Bulk Plan
<input checked="" type="checkbox"/>	Tank1234	Tank		iRely	Out	

3. Click **Site toolbar button**. This will open the specific Consumption Site where the device is attached.

The screenshot shows the '0001005079 - Customer B Site: 1' window. The 'Site' button in the top toolbar is highlighted with a red box. The window contains tabs like 'Details', 'General', 'Asset Info', 'Meter Info', and 'Tank Info'. The 'Details' tab is active, showing device information such as 'Device Type: Tank', 'Description: Tank 1', 'Ownership: Company Owned', 'Bulk Plant Number', 'Inventory Status: Out', 'Comment: Test Tank', 'Installed on Tank', 'Regulator Type', and 'Lease Number'. The 'Asset Info' section includes fields for 'Serial Number: Tank1234', 'Manufacturer ID', 'Manufacturer Name: iRely', 'Manufactured Date', 'Model Number', 'Asset Number', 'Purchase Price: 0.00', and 'Purchase Date'. The 'Meter Info' section includes fields for 'Meter Type', 'Meter Cycle: 0', 'Meter Status', and 'Meter Reading: 0.00'. The 'Tank Info' section includes fields for 'Tank Capacity: 500.00', 'Tank Reserve: 125.00', 'Tank Type: Propane', and 'Est Gallons in Tank: 0.00'.

- **Via Generate Orders screen:**

1. On the Menu panel, click the **Generate Orders** menu. This will open the Generate Orders screen.
2. Fill in the Selection Criteria to filter specific sites.
3. Click the **Generate toolbar button**. This will display the consumption sites based on the criteria that has been entered.
4. Select the record and click the **Site toolbar button** to open the consumption site record.

Generate Orders

Generate Recap Totals Finalize Orders Dispatch **Site** Close

Details

Orders Detail

Requested Date: 04/22/2016

Selection Criteria

Fill Method:
 Product: LPG

Customer No.	Name	Site No.	Site Description	Delivery Address	Location	Route	Driv
0001005079	Customer B	0001	Tank B	111 Princeton Road Fort Wayne, IN 46808	0001 - Fort Wayne	001-NW	Cus

- **Via Virtual Meter Billing**

1. On the Menu panel, click the **Virtual Meter Billing** menu. This will open the Virtual Meter Billing screen.
2. Fill in the Selection Criteria to filter specific sites.
3. Click the **Generate Invoice toolbar button**. This will display the consumption sites based on the entered criteria.
4. Select the record and click the **Site toolbar button** to open the consumption site record.

Virtual Meter Billing

Search Generate Invoice **Site** Export Close

Details

Selection Criteria

Invoice Date: 07/01/2016
 Bill To Customer: Between
 Location: 0000 - Home Office 0001 - Fort Wayne

Site Customer No.	Site Customer Name	Site No.	Site Description	Site Address	Site Location No.	Item	% in Tank Last Bill	Gallons Since L	% in Tank This Bill	Calculated Gall
0001005080	Customer C	0001	Virtual Meter Site	111 Princeton Road	0001 - Fort Way...	LPG	0.00	0.0	0.00	0.00

- **Via Customer Entity screen**

1. On the Sales Menu panel, click the **Customers** menu. This will open the Search Customer Entity screen.

Sales

- Sales Orders
- Invoices
- Receive Payments
- Receive Payment Details
- Batch Posting
- Batch Printing
- Import Invoices from Origin
- Import Billable from Help Desk
- Calculate Service Charge
- Service Charge Invoice
- Import Transactions from CSV
- Import Logs
- Quote Page Builder
- Customers**
- Customer Contact List
- Sales Reps

2. Search for a specific customer. Click Open toolbar button.

Customer Entity							
New Open Import Refresh Export ▾ Close							
Customer Entity Pricing Transport Quote Transport Mileage Tax Exemptions							
Layout Filter Records (F3) 30 records (1 selected)							
	Entity No	Name ▲	Phone	Address	City	State	Zip C
<input checked="" type="checkbox"/>	0001005078	Customer A	1000000000	1234 Main St.	Fort Wayne	IN	4680
<input type="checkbox"/>	0001005079	Customer B	2000000000	111 Princeton Road	Fort Wayne	IN	4680
<input type="checkbox"/>	0001005080	Customer C	3000000000	654 Downtown Street	Fort Wayne	IN	4681

3. Customer Entity screen will display. Click the **Additional toolbar button > Consumption Site**. This will open the specific site of the customer.

Entity - Customer A

New Save Search Refresh Delete Undo **Additional ▾** Close

Entity Customer Split Farm Salesperson Export

Name: Customer A Phone: 1000000000 Entity No: 0001005078

Contact Name: Customer A EFT Information Email: customer@irely.com Mobile: 1000000000

Location Name: Location A Card Fueling Origination Date: 04/12/2016

Address: 1234 Main St.

Zip/Postal: 46801 City: Fort Wayne

State/Province: IN Country: United States

Timezone: (UTC-08:00) Pacific Time (US & Canada)

Print 1099: ☐ 1099 Name:

1099 Form:

1099 Type:

Federal Tax ID:

W9 Signed:

Internal Notes:

Contact Information

+ Insert X Remove Types

☐ Type Details

Entity Type

+ Insert X Remove

☐ Entity Type

☐ Customer

☐ Salesperson

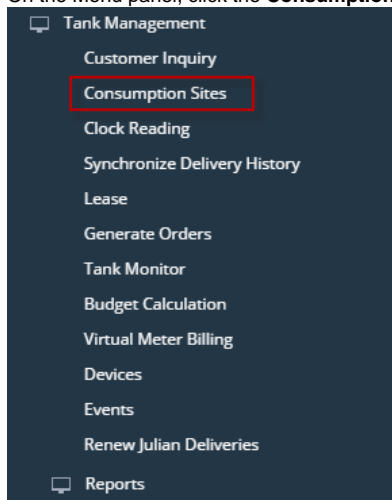
User Portal

Portal Access: ☐ Portal Admin: User Role

Ready

- **Via Menu panel:**

1. On the Menu panel, click the **Consumption Sites menu**. This will open the Search Consumption Sites screen.



2. Search for the consumption site record, select it, and then click the **Open toolbar button**.

Consumption Sites							
New Open Refresh Export ▾ Close							
Consumption Sites Open Call Entries Work Order							
Layout Filter Records (F3) 1 records (1 selected)							
	Customer No	Customer Name	Description	Phone	Address	City	Location
<input checked="" type="checkbox"/>	0001005079	Customer B	Tank B	2000000000	111 Princeton Road	Fort Wayne	0001 - Fort Wayne
			Tank				

3. Consumption Site Record will display.

- Via Customer Inquiry screen:

1. Open a Customer Inquiry record.
2. Click the **Site** toolbar button. This will open the Consumption Sites record of the customer.

- Via Devices screen:

1. On the Menu panel, click the **Devices** menu. This will open the Search Devices screen.
2. Select a device with Inventory Status = Out. Click **New** toolbar button to open the device.

Devices						
New Open Refresh Export Close						
Layout		Filter Records (F3)		1 records (1 selected)		
Serial Number	Device Type	Manufacturer ID	Manufacturer Name	Inventory Status	Bulk Plan	
✓ Tank1234	Tank		iRely	Out		

3. Click **Site** toolbar button. This will open the specific Consumption Site where the device is attached.

0001005079 - Customer B Site: 1

New Save Search Delete Undo Duplicate Lease **Site** Close

Details

General

Device Type: Tank
Description: Tank 1
Ownership: Company Owned
Bulk Plant Number:
Inventory Status: Out
Comment: Test Tank
Installed on Tank:
Regulator Type:
Lease Number:

Asset Info

Serial Number: Tank1234
Manufacturer ID:
Manufacturer Name: iRely
Manufactured Date:
Model Number:
Asset Number:
Purchase Price: 0.00
Purchase Date:

Tank Info

Tank Capacity: 500.00
Tank Reserve: 125.00
Tank Type: Propane
Est Gallons in Tank: 0.00 Underground:

Meter Info

Meter Type:
Meter Cycle: 0
Meter Status:
Meter Reading: 0.00

Ready Page 1 of 1

- **Via Generate Orders screen:**

1. On the Menu panel, click the **Generate Orders** menu. This will open the Generate Orders screen.
2. Fill in the Selection Criteria to filter specific sites.
3. Click the **Generate** toolbar button. This will display the consumption sites based on the criteria that has been entered.
4. Select the record and click the **Site** toolbar button to open the consumption site record.

Generate Orders

Generate Recap Totals Finalize Orders Dispatch **Site** Close

Details

Orders Detail

Requested Date: 04/22/2016

Selection Criteria

Fill Method:
Product: LPG

Filter Records (F3)

Customer No.	Name	Site No.	Site Description	Delivery Address	Location	Route	Driv
0001005079	Customer B	0001	Tank B	111 Princeton Road Fort Wayne, IN 46808	0001 - Fort Wayne	001-NW	Cus

- **Via Customer Entity screen**

1. On the Sales Menu panel, click the **Customers** menu. This will open the Search Customer Entity screen.

Sales

- Sales Orders
- Invoices
- Receive Payments
- Receive Payment Details
- Batch Posting
- Batch Printing
- Import Invoices from Origin
- Import Billable from Help Desk
- Calculate Service Charge
- Service Charge Invoice
- Import Transactions from CSV
- Import Logs
- Quote Page Builder
- Customers**
- Customer Contact List
- Sales Reps

2. Search for a specific customer. Click Open toolbar button.

Customer Entity							
New Open Import Refresh Export ▾ Close							
Customer Entity Pricing Transport Quote Transport Mileage Tax Exemptions							
Layout Filter Records (F3) 30 records (1 selected)							
	Entity No	Name ▲	Phone	Address	City	State	Zip C
<input checked="" type="checkbox"/>	0001005078	Customer A	1000000000	1234 Main St.	Fort Wayne	IN	4680
<input type="checkbox"/>	0001005079	Customer B	2000000000	111 Princeton Road	Fort Wayne	IN	4680
<input type="checkbox"/>	0001005080	Customer C	3000000000	654 Downtown Street	Fort Wayne	IN	4681

3. Customer Entity screen will display. Click the **Additional toolbar button > Consumption Site**. This will open the specific site of the customer.

Entity - Customer A

New Save Search Refresh Delete Undo **Additional ▾** Close

Entity Customer Split Farm Salesperson Export

Name: Customer A Phone: 1000000000 Entity No: 0001005078

Contact Name: Customer A EFT Information Email: customer@irely.com Mobile: 1000000000

Location Name: Location A Card Fueling Origination Date: 04/12/2016

Address: 1234 Main St.

Zip/Postal: 46801 City: Fort Wayne

State/Province: IN Country: United States

Timezone: (UTC-08:00) Pacific Time (US & Canada)

Print 1099: ☐ 1099 Name:

1099 Form:

1099 Type:

Federal Tax ID:

W9 Signed:

Internal Notes:

Contact Information

+ Insert X Remove Types

☐ Type Details

Entity Type

+ Insert X Remove

☐ Entity Type

☐ Customer

☐ Salesperson

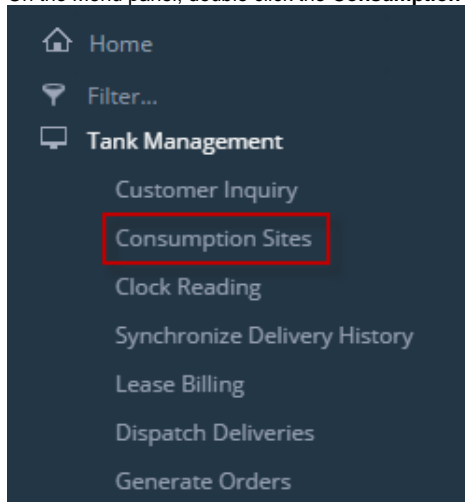
User Portal

Portal Access: ☐ Portal Admin: User Role

Ready

- **Via Menu panel:**

1. On the Menu panel, double click the **Consumption Sites** menu. This will open the Search Consumption Sites screen.



2. Search for the consumption site record, select it, and then click the **Open toolbar button**.

Consumption Sites								
New Open Refresh Export ▾ Close								
Consumption Sites Open Call Entries Work Order								
Layout Filter Records (F3) 1 records (1 selected)								
	Customer No	Customer Name	Description	Phone	Address	City	Location	Serial Number
<input checked="" type="checkbox"/>	0001005079	Customer B	Tank B	2000000000	111 Princeton Road	Fort Wayne	0001 - Fort Wayne	Tank

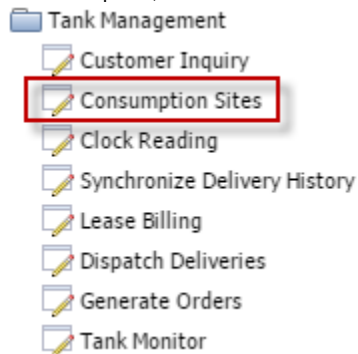
3. Consumption Site Record will display.

- Via Customer Inquiry screen:

1. Open a [Customer Inquiry record](#).
2. Click the **Site** toolbar button. This will open the Consumption Sites record of the customer.

- Via Menu panel:

1. On the Menu panel, double click the **Consumption Sites** menu. This will open the Search Consumption Sites screen.



2. Search for the consumption site record, select it, and then click the **View toolbar button**.

Consumption Sites

New View Refresh Close

Layout 2 records

Customer No	Customer Name	Description	Phone	Address	City	Location	Billing By
0000000018	RICHE INC.	Site 1	1000000000	ADDRESS 1	DECATUR	063	Tank
0000000021	SHELL PROPANE	Site 1	1000000000	GREEN ROAD	CHISAGO CITY	063	Tank

3. Consumption Site Record will display.

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: 0.000000
 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 11 Filter Records (F3)

Address GREEN ROAD Site 1

Location Information
 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:

Site Information
 Location: 063 Total Capacity: 0.000000
 Clock: C1 Total Reserve: 0.000000
 Account Status: A Price Reduction: 0.0000
 Sales Tax: Tax State ID: MN Recurring PO No:
 Tax State 1: Tax Locale 1: Print AR Balance: Energy Trac
 Tax State 2: Tax Locale 2:
 Item: PROPANE

On Hold Information
 On Hold: Hold DD Calc:
 Reason:
 On Hold Start: End:

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:

Ready Page 1 of 1

- Via **Customer Inquiry** screen:
 1. Open a **Customer Inquiry** record.
 2. Click the **Site toolbar button**. This will open the Consumption Sites record of the customer.

Customer Inquiry

Search Label Link Contract Site Invoices

- Via **Menu panel**:
 1. On the Menu panel, double click the **Consumption Sites** menu. This will open the Search Consumption Sites screen.

Tank Management

Activities

- Customer Inquiry
- Consumption Sites
- Clock Reading
- Synchronize Delivery History
- Lease Billing
- Dispatch Deliveries

Maintenance

Reports

2. Search for the consumption site record, select it, and then click the **Open Selected toolbar button**.

Search Consumption Sites

New Open Selected Refresh Close

Filter Records (F3) 2 records (1 selected)

Customer No	Customer Name	Phone	Address	City	Billing By
0000000018	RICHE INC.	1000000000	ADDRESS 1	DECATUR	Tank
0000000021	SHELL PROPANE	1000000000	GREEN ROAD	CHISAGO CITY	Tank

3. Consumption Site Record will display.

Consumption Sites - 0000000021

Customer: SHELL PROPANE Customer No: 0000000021 Current: 0.00 Credit Note:

Address: GREEN ROAD CHISAGO CITY, MN 55080 Terms: 20 - COD Total Past Due: 0.00

Phone: 1000000000 Regular Credit: 0.00 Budget Amt Due: 0.00

Credit Limit: 1.00 Prepaid Balance: 0.00

Showing 1 Consumption Site

Site Information

Site No: 0001 Billing By: Tank ☒ Active

Description: Site 1

Address: GREEN ROAD

Zip Code: 55080 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: 0.00

Clock: C1 Total Reserve: 0.00

Account Status: A Delivery Terms: 20 - COD

Sales Tax: Price Reduction: 0.0000

Tax State ID: Class Fills: Any Item

Tax Locale 1: Recurring PO No:

Tax Locale 2: Print AR Balance: ☐ Energy Trac

Item: Premium Diesel

Degree Day Information

Fill Method: Will Call Fill Group:

DD Between Delivery: 0 Next Julian Delivery:

Summer Daily Rate: 0.00 Winter Daily Rate: 0.00

Burn Rate: 1.00 Previous Burn Rate: 0.00

Prompt for % Full: ☒ Adjust Burn Rate: ☒

• Via Customer Inquiry screen:

1. Open a [Customer Inquiry record](#).
2. Click the **Site** toolbar button. This will open the Consumption Sites record of the customer.

Customer Inquiry - 0000100005

Search Label Link Contract **Site** Invoices Sales