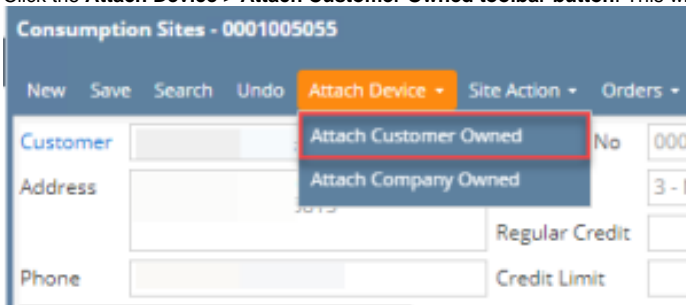


How to Attach a Customer Owned device

1. Open a [Consumption Sites record](#).
2. Click the **Attach Device > Attach Customer Owned** toolbar button. This will open the Devices screen.



Consumption Sites - 0001005055

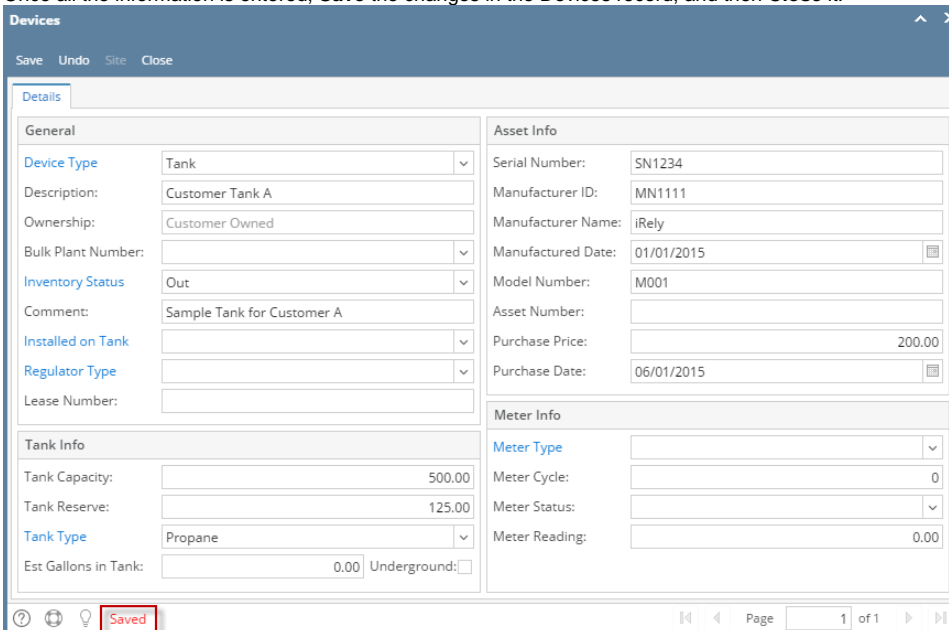
New Save Search Undo **Attach Device** Site Action Orders

Customer [] No 000

Address [] 3 - 1

Phone [] Regular Credit [] Credit Limit []

3. Enter the device's details. You can be as detailed as necessary. Refer to [Devices](#) for the field description.
4. Once all the information is entered, **Save** the changes in the Devices record, and then **Close** it.



Devices

Save Undo Site Close

Details

General

Device Type: Tank

Description: Customer Tank A

Ownership: Customer Owned

Bulk Plant Number: []

Inventory Status: Out

Comment: Sample Tank for Customer A

Installed on Tank: []

Regulator Type: []

Lease Number: []

Asset Info

Serial Number: SN1234

Manufacturer ID: MN1111

Manufacturer Name: iRely

Manufactured Date: 01/01/2015

Model Number: M001

Asset Number: []

Purchase Price: 200.00

Purchase Date: 06/01/2015

Meter Info

Meter Type: []

Meter Cycle: 0

Meter Status: []

Meter Reading: 0.00

Tank Info

Tank Capacity: 500.00

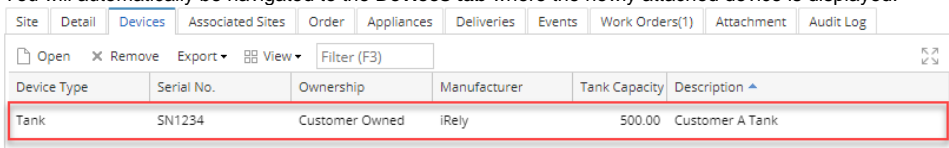
Tank Reserve: 125.00

Tank Type: Propane

Est Gallons in Tank: 0.00 Underground: []

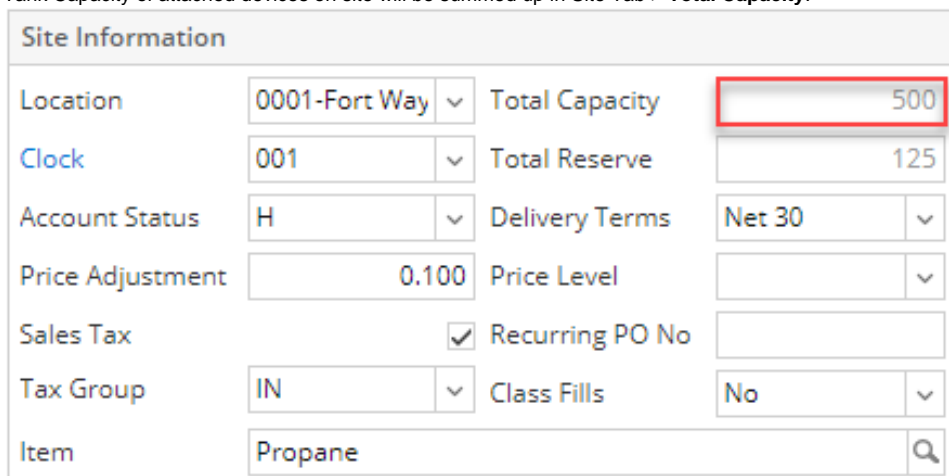
Saved

5. You will automatically be navigated to the **Devices** tab where the newly attached device is displayed.



Site	Detail	Devices	Associated Sites	Order	Appliances	Deliveries	Events	Work Orders(1)	Attachment	Audit Log
Open	X Remove	Export	View	Filter (F3)						
Device Type	Serial No.	Ownership	Manufacturer	Tank Capacity	Description					
Tank	SN1234	Customer Owned	iRely	500.00	Customer A Tank					

6. **Save** the changes in the Consumption Sites record.
7. Tank Capacity of attached devices on site will be summed up in Site Tab > **Total Capacity**.



Site Information

Location: 0001-Fort Way

Clock: 001

Account Status: H

Price Adjustment: 0.100

Sales Tax: []

Tax Group: IN

Item: Propane

Total Capacity: 500

Total Reserve: 125

Delivery Terms: Net 30

Price Level: []

Recurring PO No: []

Class Fills: No

1. Open a [Consumption Sites record](#) .
2. Click the **Attach Device > Attach Customer Owned** toolbar button. This will open the Devices screen.

Consumption Sites - 0001005078

New Save Search Undo **Attach Device** Site Action Print Call Entry Add Call Entry Dispatch Contract Customer

Customer: Customer A **Attach Customer Owned** No: 0001005078 Current:

Address: 1234 Main St. Fort Wayne, IN 46801 **Attach Company Owned** Due on Receipt: Total Past Due:

Phone: 1000000000 Regular Credit: 0.00 Budget Amt Due:

Credit Limit: 0.00 Prepaid Balance:

Showing 1 Consumption Site

+ Filter Records (F3)

Address	Description
1234 Main St.	Tank A

Location Information

Site No: 0001 Billing By: Tank ☒ Active

Description: Tank A

Address: 1234 Main St.

3. Enter the device's details. You can be as detailed as necessary. Refer to [Devices](#) for the field description.
4. Once all the information is entered, **Save** the changes in the Devices record, and then **Close** it.

Devices

Save Undo Site Close

Details

General		Asset Info	
Device Type	Tank	Serial Number	SN1234
Description	Customer Tank A	Manufacturer ID	MN1111
Ownership	Customer Owned	Manufacturer Name	iRely
Bulk Plant Number		Manufactured Date	01/01/2015
Inventory Status	Out	Model Number	M001
Comment	Sample Tank for Customer A	Asset Number	
Installed on Tank		Purchase Price	200.00
Regulator Type		Purchase Date	06/01/2015
Lease Number		Meter Info	
Tank Info		Meter Type	
Tank Capacity	500.00	Meter Cycle	0
Tank Reserve	125.00	Meter Status	
Tank Type	Propane	Meter Reading	0.00
Est Gallons in Tank	0.00	Underground	<input type="checkbox"/>

Saved

5. You will automatically be navigated to the **Devices** tab where the newly attached device is displayed.

Site	Detail	Devices	Associated Sites	Appliances	Call Entry	Delivery History	Event History	Work Orders	Attachment (0)	Audit Log (7)
Q Open	X Remove	Layout	Q Filter Records (F3)							
Device Type	Serial No.	Ownership	Manufacturer	Tank Capacity	Description					
Tank	SN1234	Customer Owned	iRely	500.00	Customer Tank A					

6. **Save** the changes in the Consumption Sites record.

1. Open a [Consumption Sites record](#) .

2. Click the **Attach Device > Attach Customer Owned** toolbar button. This will open the Devices screen.

Consumption Sites - 0001005078

New Save Search Undo **Attach Device** Site Action Print Call Entry + Call Entry Dispatch Contract Customer

Customer: Customer A **Attach Customer Owned** No: 0001005078 Current: ☐
Address: 1234 Main St. **Attach Company Owned** Due on Receipt: ☐ Total Past Due: ☐
Fort Wayne, IN 46801 Regular Credit: 0.00 Budget Amt Due: ☐
Phone: 1000000000 Credit Limit: 0.00 Prepaid Balance: ☐

Showing 1 Consumption Site

+ 🔍 Filter Records (F3)

Address	Description
1234 Main St.	Tank A

Site Detail Devices Associated Sites Appliances Call Entry Delivery History

Location Information

Site No: 0001 Billing By: Tank ☒ Active
Description: Tank A
Address: 1234 Main St.

3. Enter the device's details. You can be as detailed as necessary. Refer to [Devices](#) for the field description.
4. Once all the information is entered, **Save** the changes in the Devices record, and then **Close** it.

Devices

Save Undo Site Close

Details

General	Asset Info
Device Type : Tank	Serial Number: SN1234
Description: Customer Tank A	Manufacturer ID: MN1111
Ownership: Customer Owned	Manufacturer Name: iRely
Bulk Plant Number: 0001 - Fort Wayne	Manufactured Date: 01/01/2015
Inventory Status : Out	Model Number: M001
Comment: Sample Tank for Customer A	Asset Number:
Installed on Tank:	Purchase Price: 200.00
Regulator Type:	Purchase Date: 06/01/2015
Lease Number:	
Tank Info	Meter Info
Tank Capacity: 500.00	Meter Type :
Tank Reserve: 125.00	Meter Cycle: 0
Tank Type : Propane	Meter Status:
Est Gallons in Tank: 0.00 Underground: <input type="checkbox"/>	Meter Reading: 0.00

🔍 📍 📄 **Save** Page 1 of 1

5. You will automatically be navigated to the **Devices** tab where the newly attached device is displayed.

Site	Detail	Devices	Associated Sites	Appliances	Call Entry	Delivery History	Event History	Work Orders	Audit Log (2)
Open	Remove	Layout	Filter Records (F3)						
Device Type	Serial No.	Ownership	Manufacturer	Tank Capa...	Description				
Tank	SN1234	Customer Owned	iRely	500.00	Customer Tank A				

6. **Save** the changes in the Consumption Sites record.

1. [Open a Consumption Sites record](#).

