

How to Create a Device Lease

- Via Lease menu

- 1. [Open the Lease screen.](#)
- 2. Enter the lease details. **Lease No** is auto generated while **Billing Type** is a required field. Make sure to fill out the necessary details in **Info** and **Billing Panel** since those values is needed when generating invoice from Lease Billing screen. Refer to [Lease](#) for the field description.

Lease

New Save Delete Undo Billing Incentive Print Close

Details

Devices

Attachment (0)

Info

Lease No:LEASE-11

Start Date:7/1/2015

Lease Code

Lease - 500

Rental Status:Active

Lease Status:Received

Agreement

Agreement Letter:L1Print Value in Agreement: ☒

Evaluation Method:Site Product

Billing

Bill Customer:0001005078Name:Customer A

Billing Frequency:Yearly

Billing Month:7Billing Type:Gallons

Lease To Own:☐Don't Bill After:

Last Lease Billing Date:

Edited

Page 1 of 1

- 4. Navigate to **Devices** tab. Select a device from the dropbox to assign the lease created. You can have multiple devices linked in one lease.
- 5. Click **Save toolbar button** to save the created lease.

Lease

New Save Delete Undo Billing Incentive Print Close

Details

Devices

Attachment (0)

Remove

Layout

Filter Records (F3)

<input type="checkbox"/>	Serial Number	Device Type	Manufacturer	Tank Capacity	Description
<input checked="" type="checkbox"/>	Tank1234	Tank	iRely	500.00	Tank 1
<input type="checkbox"/>					

Saved

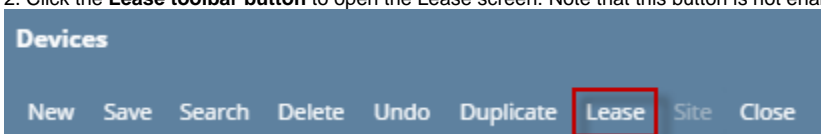
Page 1 of 1

6. The Lease should be visible in Lease Search screen and Consumption Site's attached device.

- **Via Devices screen**

1. [Open the Device record where the Lease will be attached.](#)

2. Click the **Lease toolbar button** to open the Lease screen. Note that this button is not enabled in a Customer Owned device.



3. Enter the Lease details. **Lease No** is auto generated while **Billing Type** is a required field. Make sure to fill out the necessary details in **Info** and **Billing Panel** since those values are needed when generating invoice from Lease Billing screen. Refer to [Lease](#) for the field description.

A screenshot of the 'Lease' form. The form has a title bar 'Lease' with a close button. Below the title bar is a toolbar with 'New', 'Save', 'Delete', 'Undo', 'Billing Incentive', 'Print', and 'Close'. The form is divided into three tabs: 'Details' (selected), 'Devices', and 'Attachment (0)'. The 'Details' tab contains three sections: 'Info', 'Agreement', and 'Billing'. The 'Info' section has fields for 'Lease No' (LEASE-11), 'Start Date' (7/1/2015), 'Rental Status' (Active), and 'Lease Status' (Received). The 'Agreement' section has fields for 'Agreement Letter' (L1), 'Print Value in Agreement' (checked), and 'Evaluation Method' (Site Product). The 'Billing' section has fields for 'Bill Customer' (0001005078), 'Name' (Customer A), 'Billing Frequency' (Yearly), 'Billing Month' (7), 'Billing Type' (Gallons), 'Lease To Own' (unchecked), 'Don't Bill After' (empty), and 'Last Lease Billing Date' (empty). At the bottom of the form is a status bar with icons for help, refresh, lightbulb, and email, followed by the text 'Edited', and a pagination bar showing 'Page 1 of 1'.

4. Navigate to **Devices tab**. The device serial number should automatically display on the grid. You can have multiple devices linked in one lease.

5. **Save** then Close the screen. The Lease No will be displayed in the **Devices > Lease Number field**.

Lease

New Save Delete Undo Billing Incentive Print Close

Details **Devices** Attachment (0)

✕ Remove Layout 🔍 Filter Records (F3)

Serial Number	Device Type	Manufacturer	Tank Capacity	Description
<input checked="" type="checkbox"/> Tank1234	Tank	iRely	500.00	Tank 1

☐

🔍 🌐 💡 ✉️ **Saved** ⏪ ⏩ Page 1 of 1 ⏪ ⏩

0001005078 - Customer A Site: 1

New Save Search Delete Undo Duplicate Lease Site Close

Details

General	Asset Info
Device Type: Tank	Serial Number: Tank1234
Description: Tank 1	Manufacturer ID:
Ownership: Company Owned	Manufacturer Name: iRely
Bulk Plant Number:	Manufactured Date:
Inventory Status: Out	Model Number:
Comment: Tank 1	Asset Number:
Installed on Tank:	Purchase Price: 0.00
Regulator Type:	Purchase Date:
Lease Number: LEASE-11	

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	Meter Reading: 0.00

🔍 🌐 💡 Ready ⏪ ⏩ Page 1 of 1 ⏪ ⏩

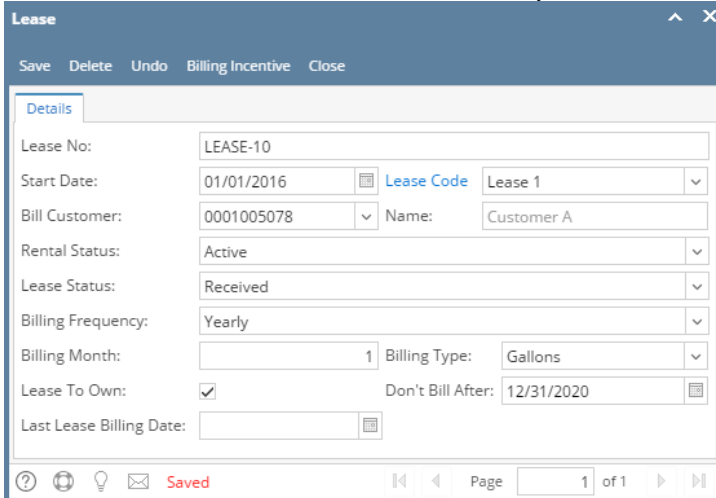
1. Open the Device record where the Lease will be attached.

2. Click the **Lease toolbar button** to open the Lease screen. Note that this button is not enabled in a Customer Owned device.



The screenshot shows the top toolbar of the 'Devices' window. The buttons are 'New', 'Save', 'Search', 'Delete', 'Undo', 'Lease', 'Site', and 'Close'. The 'Lease' button is highlighted with a red rectangle.

3. Enter the Lease details. You can be as detailed as necessary. The **Lease No field** is auto generated. Refer to [Lease](#) for the field description.

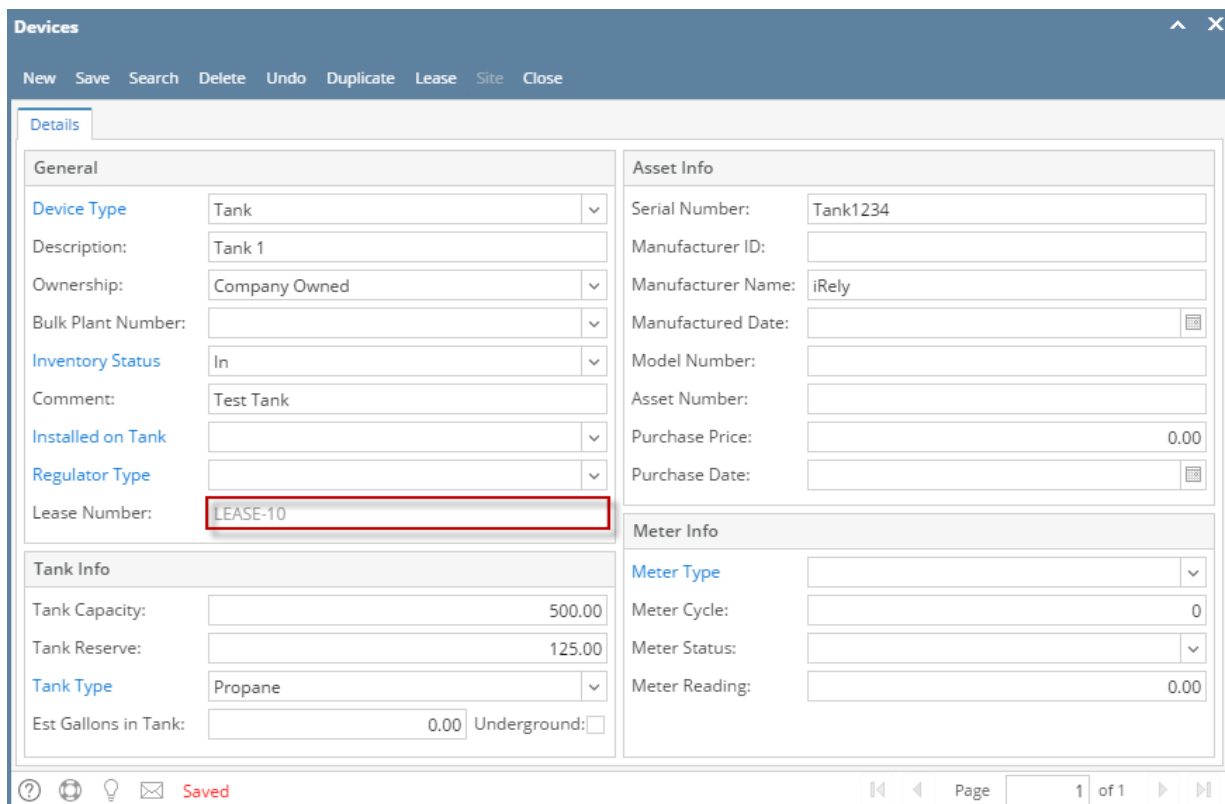


The screenshot shows the 'Lease' window with the 'Details' tab selected. The fields are as follows:

Lease No:	LEASE-10		
Start Date:	01/01/2016	Lease Code	Lease 1
Bill Customer:	0001005078	Name:	Customer A
Rental Status:	Active		
Lease Status:	Received		
Billing Frequency:	Yearly		
Billing Month:	1	Billing Type:	Gallons
Lease To Own:	<input checked="" type="checkbox"/>	Don't Bill After:	12/31/2020
Last Lease Billing Date:			

At the bottom, there is a status bar with a 'Saved' message and a page indicator 'Page 1 of 1'.

4. **Save** then Close the screen. The Lease No will be displayed in the **Devices > Lease Number field**.

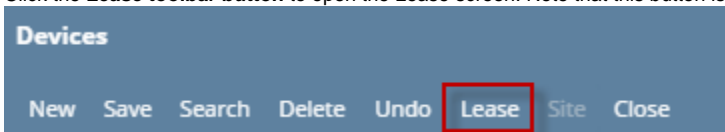


The screenshot shows the 'Devices' window with the 'Details' tab selected. The 'Lease Number' field is highlighted with a red rectangle and contains the value 'LEASE-10'.

General		Asset Info	
Device Type	Tank	Serial Number:	Tank1234
Description:	Tank 1	Manufacturer ID:	
Ownership:	Company Owned	Manufacturer Name:	iRely
Bulk Plant Number:		Manufactured Date:	
Inventory Status	In	Model Number:	
Comment:	Test Tank	Asset Number:	
Installed on Tank		Purchase Price:	0.00
Regulator Type		Purchase Date:	
Lease Number:	LEASE-10		
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	Meter Reading:	0.00
	Underground:		

At the bottom, there is a status bar with a 'Saved' message and a page indicator 'Page 1 of 1'.

1. [Open the Device record where the Lease will be attached.](#)
2. Click the **Lease toolbar button** to open the Lease screen. Note that this button is not enabled in a Customer Owned device.



The screenshot shows the top toolbar of the 'Devices' window. The buttons are 'New', 'Save', 'Search', 'Delete', 'Undo', 'Lease', 'Site', and 'Close'. The 'Lease' button is highlighted with a red rectangle.

3. Enter the Lease details. You can be as detailed as necessary. The **Lease No** field is auto generated. Refer to [Lease](#) for the field description.

The screenshot shows the 'Lease' form with the following fields and values:

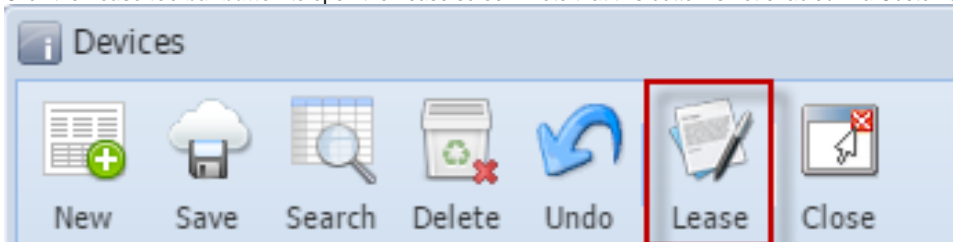
Field	Value
Lease No:	LEASE-10
Start Date:	01/01/2016
Lease Code:	Lease 1
Bill Customer:	0001005078
Name:	Customer A
Rental Status:	Active
Lease Status:	Received
Billing Frequency:	Yearly
Billing Month:	1
Billing Type:	Gallons
Lease To Own:	<input checked="" type="checkbox"/>
Don't Bill After:	12/31/2020
Last Lease Billing Date:	

4. **Save** then Close the screen. The Lease No will be displayed in the **Devices > Lease Number** field.

The screenshot shows the '0001005078 - Customer A Site: 2' form with the following fields and values:

Field	Value
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:	LEASE-10
Tank Capacity:	500.00
Tank Reserve:	125.00
Tank Type	P
Est Gallons in Tank:	0.00
Underground:	<input type="checkbox"/>
Serial Number:	Tank1234
Manufacturer ID:	
Manufacturer Name:	iRely
Manufactured Date:	
Model Number:	
Asset Number:	
Purchase Price:	0.00
Purchase Date:	
Meter Type	
Meter Cycle:	0
Meter Status:	
Meter Reading:	0.00

1. Open the [Device](#) record where the Lease will be attached.
2. Click the **Lease** toolbar button to open the Lease screen. Note that this button is not enabled in a Customer Owned device.



3. Enter the Lease details. You can be as detailed as necessary. The **Lease No** field is auto generated. Refer to [Lease](#) for the field description.

The screenshot shows the 'Lease' window with the following fields and values:

Lease No:	LEASE-2		
Start Date:	06/01/2015	Lease Code:	3
Bill Customer:	0000000021	Name:	SHELL PROPANE
Rental Status:	Active		
Lease Status:	Received		
Billing Frequency:	Yearly		
Billing Month:	6	Billing Type:	Dollars
Lease To Own:	<input checked="" type="checkbox"/>	Don't Bill After:	06/09/2020
Last Lease Billing Date:	06/22/2015		

At the bottom, there is a status bar with a question mark, a lightbulb, and the text 'Saved'.

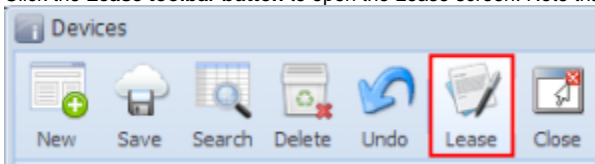
4. **Save** then **Close** the screen. The Lease No will be displayed in the **Devices > Lease Number** field.

The screenshot shows the 'Devices' window with the following fields and values:

Device Type:	Tank	Inventory Status:	Out
Manufacturer ID:		Comment:	
Manufacturer Name:		Installed on Tank:	
Model Number:		Lease Number:	LEASE-1
Serial Number:	Tank 1	Tank Capacity:	500.000000
Bulk Plant Number:		Tank Reserve:	200.000000
Description:	Test tank	Tank Type:	P
Ownership:	Company Owned	Est Gallons in Tank:	0.000000
Asset Number:		Underground:	<input type="checkbox"/>
Purchase Date:	06/01/2015	Meter Type:	
Purchase Price:	0.000000	Meter Cycle:	0
Manufactured Date:		Meter Status:	
Regulator Type:		Meter Reading:	0.000000

At the bottom, there is a status bar with a question mark, a lightbulb, and the text 'Ready'. The page number '1 of 1' is also visible.

1. Open the [Device](#) record where the Lease will be attached.
2. Click the **Lease** toolbar button to open the Lease screen. Note that this button is not enabled in a Customer Owned device.



3. Enter the Lease details. You can be as detailed as necessary. The **Lease No** field is required. Refer to [Lease](#) for the field description.

The 'Lease' form is displayed with the following data:

Lease No:	LEASE-4		
Start Date:	12/01/2014	Lease Code:	1
Bill Customer:	0000000021	Name:	SHELL PROPANE
Rental Status:	Active		
Lease Status:	Received		
Billing Frequency:	Yearly		
Billing Month:	3	Billing Type:	Dollars
Lease To Own:	<input type="checkbox"/>	Don't Bill After:	
Last Lease Billing Date:	03/12/2015		

4. **Save** then Close the screen. The Lease No will be displayed in the **Devices > Lease Number** field.

The 'Devices' form is displayed with the following data:

Device Type:	Tank	Inventory Status:	
Manufacturer ID:		Comment:	
Manufacturer Name:		Installed on Tank:	
Model Number:		Lease Number:	LEASE-4
Serial Number:	SN123456	Tank Size:	0.00
Bulk Plant Number:		Tank Capacity:	500.00
Description:		Tank Reserve:	0.00
Ownership:	Company Owned	Tank Type:	P
Asset Number:		Est Gallons in Tank:	0.00
Purchase Date:		Underground:	<input type="checkbox"/>
Purchase Price:	0.00	Meter Type:	
Manufactured Date:		Meter Cycle:	0
Regulator Type:		Meter Status:	
		Meter Reading:	0.00