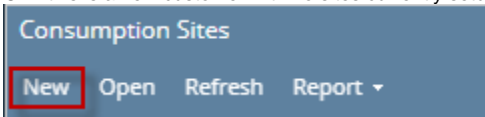


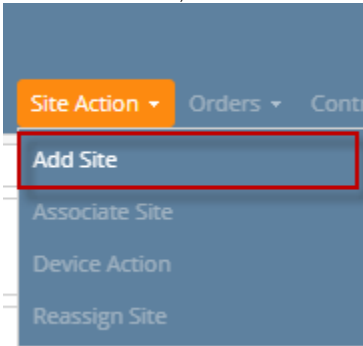
How to Add a New Site

- **Via Add Site button:**

1. [Open a Consumption Sites record](#) for an existing customer with sites.
Or If this is a new customer with no sites currently setup. Click the **New toolbar button** on the **Search Consumption Sites**.



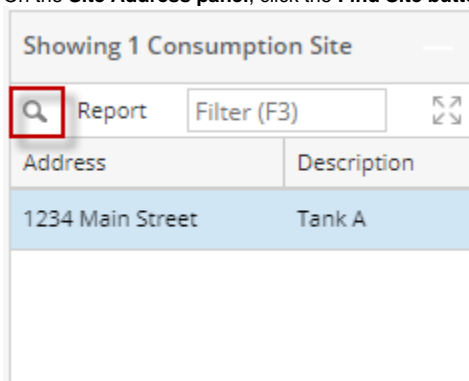
2. On the **Site toolbar**, click the Site Action drop down button and select **Add Site button**. This will add a new row on the Address grid.



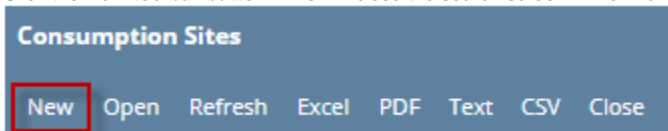
3. Enter the necessary information on the Site and Detail tab. Some of the fields on these tabs has a default value, but most of these are editable. Also, please take note of the **required fields** (see *Note section at the bottom of this page*) that must be filled in when adding a site. You can be as detailed as you see necessary.
4. **Save** the changes. Consumption Site for the customer will be added.

- **Via Find Site button:**

1. [Open a Consumption Sites record](#).
2. On the **Site Address panel**, click the **Find Site button**. This will open the Search Consumption Sites screen.



3. Click the **New toolbar button**. This will close the search screen. A new row will be added at the end of the Address grid.



4. Enter the necessary information on the Site and Detail tab. Some of the fields on these tabs have a default value, but most of these are editable. Also, please take note of the required fields that must be filled in when adding a site. You can be as detailed as you see necessary.
5. **Save** the changes in the Consumption Sites record.



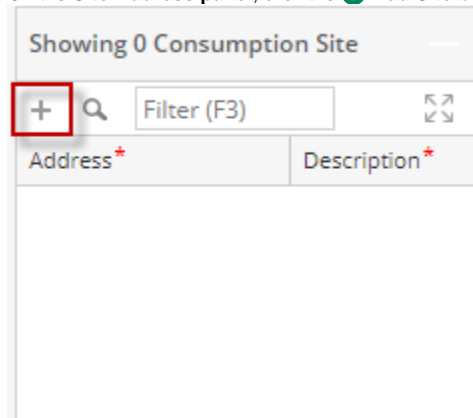
These fields are **required** –Description, Address, Zip Code, City, State, Country, Latitude, Longitude, Driver, Route, Location, Clock, Account Status, and Product – thus the record will not be saved if any of these is left blank.

- **Via Add Site button:**

1. Open a [Consumption Sites record](#) for an existing customer with sites.
Or If this is a new customer with no sites currently setup. Click the **New** toolbar button on the **Search Consumption Sites**.



2. On the **Site Address** panel, click the **+ Add Site** button. This will add a new row at the end of the Address grid.



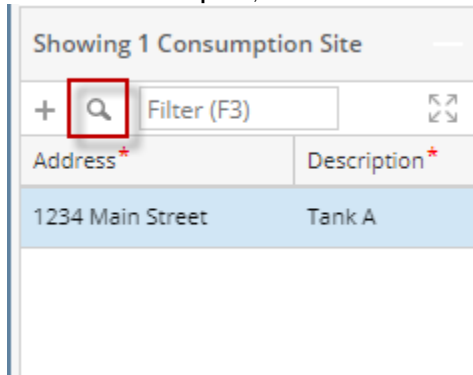
3. Enter the necessary information on the Site and Detail tab. Some of the fields on these tabs has a default value, but most of these are editable. Also, please take note of the required fields that must be filled in when adding a site. You can be as detailed as you see necessary.

The image shows a detailed form for 'Consumption Sites - 0001005078'. The form has multiple tabs: 'Site', 'Detail', 'Devices', 'Associated Sites', 'Appliances', 'Call Entry', 'Delivery History', 'Event History', 'Work Orders', 'Attachment (0)', and 'Audit Log (0)'. The 'Site' tab is active, showing fields for 'Location Information' (Site No, Billing By, Description, Address, Zip/Postal Code, City, State/Province, Country, Latitude, Longitude, Driver, Route, Sequence) and 'Site Information' (Location, Clock, Account Status, Price Level, Sales Tax, Tax Group, Class Fills, Item, Degree Day Information, Fill Method, Will Call, Fill Group, Julian Calendar, Summer Daily Rate, Winter Daily Rate, Burn Rate, DD Between Delivery, Prompt for % Full). The 'Detail' tab is also visible, showing fields for 'On Hold Information' (On Hold, Reason, On Hold Start, End).

4. **Save** the changes. Consumption Site for the customer will be added.

○ **Via Find Site button:**

1. Open a [Consumption Sites record](#).
2. On the **Site Address** panel, click the **Find Site** button. This will open the Search Consumption Sites screen.



- Click the **New toolbar button**. This will close the search screen. A new row will be added at the end of the Address grid.

Search Consumption Sites

New Open Refresh Report ▾ Close

- Enter the necessary information on the Site and Detail tab. Some of the fields on these tabs have a default value, but most of these are editable. Also, please take note of the required fields that must be filled in when adding a site. You can be as detailed as you see necessary.

Consumption Sites - 0001005078

New Save Search Undo Attach Device Site Action Print Call Entry Add Call Entry Dispatch Contract Customer Create Event Summary List Work Order Print Efficiency Close

Customer: Customer A Customer No: 0001005078 Current: 0.00 Email: CustomerA@irely.com
 Address: 1234 Main St, Fort Wayne, IN 46801 Terms: Due on Receipt Total Past Due: 0.00 Credit Note:
 Regular Credit: 0.00 Budget Amt Due: 0.00
 Phone: Credit Limit: 0.00 Prepaid Balance: 0.00

Showing 1 Consumption Site

Site Detail Devices Associated Sites Appliances Call Entry Delivery History Event History Work Orders Attachment (0) Audit Log (0)

Location Information

Site No: 0001 Billing By: Tank ☒ Active
 Description:
 Address:
 Zip/Postal Code: City:
 State/Province: Country:
 Latitude: 0.000000 Longitude: 0.000000
 Driver: Route:
 Sequence:

Site Information

Location: Total Capacity: 0.00
 Clock: Total Reserve: 0.00
 Account Status: Delivery Terms: Due on Receipt
 Price Level: Price Adjustment: 0.00
 Sales Tax: ☐ Recurring PO No:
 Tax Group: Print AR Balance: ☐ Energy Trac
 Class Fills: No Item:
 Degree Day Information

On Hold Information

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

Fill Method Will Call: Fill Group:
 Julian Calendar: Next Julian Delivery:
 Summer Daily Rate: 0.00 Winter Daily Rate: 0.00
 Burn Rate: 5.00 Previous Burn Rate: 0.00
 DD Between Delivery: 0.00 Adjust Burn Rate: ☒
 Prompt for % Full: ☒

- Save the changes in the Consumption Sites record.



These fields are required –Description, Address, Zip Code, City, State, Country, Latitude, Longitude, Driver, Route, Location, Clock, Account Status, and Product – thus the record will not be saved if any of these is left blank.

◦ Via Add Site button:

- Open a Consumption Sites record for an existing customer with sites.

Or If this is a new customer with no sites currently setup. Click the **New toolbar button** on the **Search Consumption Sites**.

Consumption Sites

New Open Refresh Export Close

Consumption Sites Open Call Entries Work Order

Layout Filter Records (F3) 3 record(s)

Customer No	Customer Name	Description	Phone	Address	City	Location	Billing By	Serial Number
<input type="checkbox"/> 0001005078	Customer A	Tank A	1000000000	1234 Main St,	Fort Wayne	0001 - Fort Wayne	Tank	
<input type="checkbox"/> 0001005079	Customer B	Tank B	2000000000	111 Princeton Road	Fort Wayne	0001 - Fort Wayne	Tank	Tank4567
<input type="checkbox"/> 0001005080	Customer C	Tank A	3000000000	1234 Main St,	Fort Wayne	0001 - Fort Wayne	Tank	Tank1234

- On the **Site Address** panel, click the **+ Add Site button**. This will add a new row at the end of the

Address grid.

Showing 0 Consumption Site

+ Filter Records (F3)

Address	Description
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- Enter the necessary information on the Site and Detail tab. Some of the fields on these tabs have a default value, but most of these are editable. Also, please take note of the required fields that must be filled in when adding a site. You can be as detailed as you see necessary.

Consumption Sites - 0001005078

New Save Search Undo Attach Device Site Action Print Call Entry Add Call Entry Dispatch Contract Customer Create Event Summary List Work Order Print Efficiency Close

Customer: Customer A Customer No: 0001005078 Current: 0.00 Email: CustomerA@irely.com
 Address: 1234 Main St. Fort Wayne, IN 46801 Terms: Due on Receipt Total Past Due: 0.00 Credit Note:
 Regular Credit: 0.00 Budget Amt Due: 0.00
 Phone: Credit Limit: 0.00 Prepaid Balance: 0.00

Showing 1 Consumption Site

+ Filter Records (F3)

Address	Description
1234 Main St.	Tank A

Location Information

Site No: 0001 Billing By: Tank ☒ Active
 Description:
 Address: 1234 Main St.
 Zip/Postal Code: 46801 City: Fort Wayne
 State/Province: IN Country: United States
 Latitude: 0.000000 Longitude: 0.000000
 Driver: Customer C Route: 001-NW
 Sequence:

Site Information

Location: 0001 - Fort Wayne Total Capacity: 0.00
 Clock: 001 Total Reserve: 0.00
 Account Status: R Delivery Terms: Due on Receipt
 Price Level: Price Adjustment: 0.00
 Sales Tax: Recurring PO No:
 Tax Group: IN SST Print AR Balance: ☐ Energy Trac
 Class Fills: No
 Item: Propane

Degree Day Information

Fill Method: Julian Calendar Fill Group: FG1
 Next Julian Delivery:
 Summer Daily Rate: 0.00 Winter Daily Rate: 0.00
 Burn Rate: 5.00 Previous Burn Rate: 0.00
 DD Between Delivery: 960.00 Adjust Burn Rate: ☒
 Prompt for % Full: ☒

On Hold Information

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

Edited Page 1 of 1

- Save the changes.

Consumption Sites - 0001005078

New Save Search Undo Attach Device Site Action Print Call Entry Add Call Entry Dispatch Contract Customer Create Event Summary List Work Order Print Efficiency Close

Customer: Customer A Customer No: 0001005078 Current: 0.00 Email: CustomerA@irely.com
 Address: 1234 Main St. Fort Wayne, IN 46801 Terms: Due on Receipt Total Past Due: 0.00 Credit Note:
 Regular Credit: 0.00 Budget Amt Due: 0.00
 Phone: Credit Limit: 0.00 Prepaid Balance: 0.00

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.
 Zip/Postal Code: 46801 City: Fort Wayne
 State/Province: IN Country: United States
 Latitude: 0.000000 Longitude: 0.000000
 Driver: Customer C Route: 001-NW
 Sequence:

Site Information

Location: 0001 - Fort Wayne Total Capacity: 0.00
 Clock: 001 Total Reserve: 0.00
 Account Status: R Delivery Terms: Due on Receipt
 Price Level: Price Adjustment: 0.00
 Sales Tax: Recurring PO No:
 Tax Group: IN SST Print AR Balance: ☐ Energy Trac
 Class Fills: No
 Item: Propane

Degree Day Information

Fill Method: Julian Calendar Fill Group: FG1
 Next Julian Delivery:
 Summer Daily Rate: 0.00 Winter Daily Rate: 0.00
 Burn Rate: 5.00 Previous Burn Rate: 0.00
 DD Between Delivery: 960.00 Adjust Burn Rate: ☒
 Prompt for % Full: ☒

On Hold Information

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

Saved Page 1 of 1

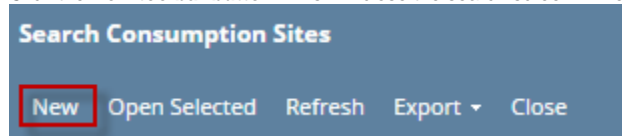
- Via Find Site button:
 - Open a Consumption Sites record.
 - On the Site Address panel, click the Find Site button. This will open the Search Consumption Sites screen.

Showing 1 Consumption Site

+ 🔍 Filter Records (F3)

Address	Description
1234 Main St.	Tank A

- Click the **New toolbar button**. This will close the search screen. A new row will be added at the end of the Address grid.



- Enter the necessary information on the Site and Detail tab. Some of the fields on these tabs have a default value, but most of these are editable. Also, please take note of the required fields that must be filled in when adding a site. You can be as detailed as you see necessary.

- Save the changes in the Consumption Sites record.



These fields are required –Description, Address, Zip Code, City, State, Country, Latitude, Longitude, Driver, Route, Location, Clock, Account Status, and Product – thus the record will not be saved if any of these is left blank.