

How to Access Customer Portal

1. On login screen, enter the customer email and password. Click the **Login** button.

2. Customer Portal available menus will display. Select and open **My Tanks** under Tank Management.

Account

- My Account
- My Company
- User List
- Set Permissions
- Payment Methods
- Change Password
- Balance Inquiry

Grain

- Scale Tickets
- Storage
- Delivery Sheets
- Position Report

Tank Management

- My Tanks**

Transactions

- Sales Orders
- Invoices
- Make a Payment
- Payments
- Payment History
- Contracts

Logistics

- Load / Shipment Schedules

Payroll

- Employee
- Paychecks
- Time Off Request
- Time Off Calendar
- W-2s

Support

- My Tickets
- Open Tickets
- All Tickets

Manufacturing

- Transactions
- Inventory
- Quality
- Sample Entry

Card Fueling

- Transactions
- Card Accounts

3. Consumption Site search screen will display all the site assigned to the customer.

Customer No	Customer Name	Description	Phone	Address	City	Location
1005552	Customer A	Site A	(317) 261-7000	Fort Wayne Avenue	Indianapolis	0001-Fort Wayne

4. Select and open the site by clicking **Open Selected** button.

5. **My Tanks** screen will display. This contains the customer account information on specific tabs:

- a. **Summary** - This tab displays the site information and delivery details. A gauge is also displayed reflecting the value of Estimated Percent Left.

- b. **Devices** - This displays the tanks attached to the site.

Device Type	Serial No.	Ownership	Manufacturer	Tank Capacity	Description
Tank	1057439	Company Owned	Quality Steel Corp	1,000	

- c. **Appliances** - This displays the appliances available in site.

Type	Description	Manufacturer Name	Model Number	Serial No.	Purchased Date	Manufactured Date	Comment
Hot Water Heater	room heater	iRely	112233	SN01234	1/1/2017	10/1/2016	heater
Stove	home stove	iRely	55245	SN8967	2/14/2017	12/1/2016	stove

- d. **Order** - This displays the existing order created for the site. When an order is created through the portal, approval will be automatically assigned to the approval list by default. Orders created by the regular users will not go through the approval process. See [How to Create a Portal Order](#).

- e. **Deliveries** - This tab displays the list of deliveries for the site.

Invoice No.	Bulk Plant Location	Invoice Date	Product Delivered	Qty Delivered	Price	Total Amount
SI-524	0001-Fort Wayne	10/24/2017	LPG - Propane	10.0000	0.0000	0.0000
SI-524	0001-Fort Wayne	10/24/2017	LPG - Propane	10.0000	0.0000	135.0000