How to Attach a Company Owned device

- 1. Open a Consumption Sites record.
- 2. Click the Attach Device > Attach Company Owned toolbar button. This will open the Search Devices screen. This search screen will display the devices where Ownership is Company Owned only.

1,000.00 Sample Tank Device



3. Search for the device, select it on the grid, and then click the **Open Selected toolbar button**.

Devices												
Devices	s											
	n Selected	🕁 Export 👻 🔲	Columns • 🔠 View •								1 record (1 s	elected
Q. Ser	rial Number	~ Contain	s Y		🕂 Add F	ilter					× Cle	ar Filter
Ser	ial Number	Manufacturer	r ID Manufacturer Nam	e Device Ty	pe Invento	ry Status 1	ank Type	Meter Type	Regulator Type	Tank Capacity	Bulk Plant Loc	cation
🖌 tan	ik01	MI0011	iRely	Tank	In	F	ropane			1,000.00	0001-Fort Wa	yne
✓ tan YOU V	will be a	automat	ically navigate	Tank ed to th	e Device	es tab wh	ere the	newly atta	ached devi	ce is displ	ayed.	yne
Site	Detail	Devices	Associated Sites	Order	Appliances	Deliveries	Events	Work Orde	rs(1) Attach	ment Audit	Log	
🗅 o	pen ×	Remove	Export - 🔠 View	• Filter	(F3)							K N K N
Devic	e Type	Ser	rial No.	Ownershi	D	Manufacture	er	Tank Capacity	Description			

iRely

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

tank01

Tank

6. Tank Capacity of attached devices on site will be summed up in Site Tab > Total Capacity.

Company Owned

Site Information			
Location	0001-Fort Way 🗸	Total Capacity	1,000
Clock	001 ~	Total Reserve	225
Account Status	Н ~	Delivery Terms	Net 30 v
Price Adjustment	0.100	Price Level	~
Sales Tax	\checkmark	Recurring PO No	
Tax Group	IN v	Class Fills	No ~
ltem	Propane		Q,

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Consumpti	on Sites -	0001005	078								
New Save	Search	Undo	Attach Device	• Si	ite Action 👻			Add Call E	i ntry Dispato	h Contract	Customer
Customer:	Customer	r A	Attach Custon	ner Ov	vned	No:	00010050)78		Current:	
Address:	1234 Mai	n St. De IN 46	Attach Compa	ny Ov	vned		Due on R	eceipt		Total Past [Due:
	1 ore may	ne, mi -re			Regular C	redit:			0.00	Budget Am	t Due:
Phone:	1000000	000			Credit Lin	nit:			0.00	Prepaid Ba	lance:
Showing 1	Consump	tion Sit	e	Site	Detail	Devices	Associa	ated Sites	Appliances	Call Entry	Delivery Hi
+ 9	Filter Reco	rds (F3)		Loca	tion Inform	nation					
Address		Des	ription	Site I	No: 00	01 B	lling By:	Tank		~	 Active
1234 Main	St.	Tank	(A	Desc	ription: Ta	nk A					
				Addr	ess: 🛛 12	34 Mai	n St.				

c. Search for the device, select it on the grid, and then click the **Open Selected toolbar button**.

	Оре	en Selected Refre	sh Export - Close	:							
	Q,	Filter Records (F	3) x 1 recor	ds (1 selected)							
I		Serial Number	Manufacturer ID	Manufacturer Name	Device Type	Inventory Status	Tank Type	Meter Type	Regulator Type	Tank Capacity	Bulk Plant Location
	~	Tank1234		iRely	Tank	In	Propane			500.00	
I											

d. You will be automatically 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 (4)

🔍 Open 🛛 🗙 Remove	문 Layout Q Fi	ilter Records (F3)			
Device Type	Serial No.	Ownership	Manufacturer	Tank Capacity	Description
Tank	Tank1234	Company Owned	iRely	500.00	Tank 1

e. Save the changes in the Consumption Sites record.

000400507

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b. Click the Attach Device > Attach Company Owned toolbar button. This will open the Search Devices screen. This search screen will display the devices where Ownership is Company Owned only.

~ □ >

consumpti	on sites - (
New Save	e Search	Undo	Attach Devi		Site Action			+ Call Enti	ry Dispatch	Contract	Customer
Customer:	Customer	A	Attach Cust	omer O	wned	No:	0001005	078		Current:	
Address:	1234 Main	n St. De IN 46	Attach Corr	ipany O	wned		Due on F	Receipt		Total Past	Due:
	- ore may				Regular	Credit:			0.00	Budget Ar	nt Due:
Phone:	1000000	00			Credit L	.imit:			0.00	Prepaid B	alance:
Showing 1	Consump	tion Sit	e —	Site	Detail	Devices	Assoc	iated Sites	Appliances	Call Entry	Delivery
+ 9	Filter Reco	rds (F3)		Loc	ation Info	rmation					
Address		Des	cription	Site	No:	0001 B	lling By:	Tank		~	✓ Active
1234 Main	St.	Tan	k A	Des	cription:	Tank A					
				Add	ress: 📎	1234 Mai	n St.				

c. Search for the device, select it on the grid, and then click the Open Selected toolbar button.

Sear	ch Devices									^ 🗆	
Оре	n Selected Refre	sh Close									
Q,	Filter Records (F	3) 1 recor	ds (1 selected)								
	Serial Number	Manufacturer ID	Manufacturer Name	Device Type	Inventory Status	Tank Type	Meter Type	Regulator Type	Tank Capacity	Bulk Plant Location	
\checkmark	SN5678	MN1111	iRely	Tank	In	Propane			500.00	0001 - Fort Wayne	

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

Site Detail Devices	Associated Sites	Appliances Call Entry	Delivery History Event H	listory Work	Orders Audit Log (2)
Q, Open X Remove	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
Tank	SN5678	Company Owned	iRely	500.00	Tank A

- e.~Save the changes in the Consumption Sites record.
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Consump	tion Sites - 0	0000000	021					
6) 🛛	S	Cutoti a	ο.		-		
New Sa	we Search	Undo	Attac	h Device	Site Action	Prin		
Customer:	SHELL PROP	ANE		Attach Ou	stomer Owr	000	0002	1
Address:	GREEN ROAD) TY, MN 5	E C)	atomici om	- 0	OD	
	Cr 1107 1070 C1			Attach Co	mpany Own	ed -		
Phone:	100000000)	Ş,					
Showing 1 0	Consumption Si	te	•	Site D	etail De	víces	Associ	ated :
🗋 🔍 Fil	ter:		٩	Location	Information			
Address		Descrip	tion	Site No:	0001	Billing	By:	Tank
GREEN ROA	D	Site 1		Descripti	on: Site 1			

c. Search for the device, select it in the grid, and then click the Open Selected toolbar button.

1	🛛 Se	earch Devices						
	Open	Selected Refresh	Close					
ľ								
	7	Filter Records (F	3) 1 record	s (1 selected)				
		Serial Number	Manufacturer ID 🔺	Manufacturer Name	Device Type	Inventory Status	Tank Type	Meter Type
		012345678	M111	M-Tank	Tank		Р	

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

		Ereneriotory	Delivery History	Call Lifu y	Appliances	Associated Sites	Devices	Detail	Site
Z Edit 😑 Delete Filter:				٩			ete Filter	it 🤤 De	📝 Ed
Device Type Serial No. Ownership Manufacturer Tank Capacity Description	Description	Tank Capacity	ufacturer	Man	Ownership	No.	Seri	Туре	Device
Tank 012345678 Company Owned M-Tank 1,000.00 Tank 1	Tank 1	1,000.00	ank	ed M-Ta	Company Own	45678	012		Tank

e. Save the changes in the Consumption Sites record.