

Add Tank to Customer Account

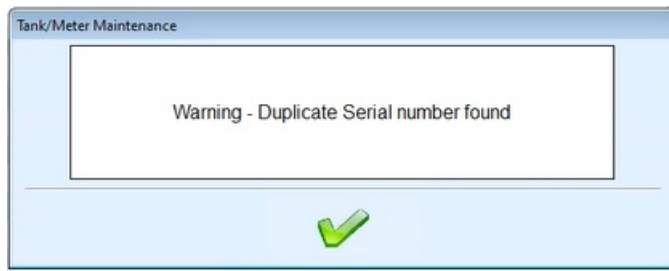
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Pressing **Tab** moves through the fields.

Step 1: Tank Info

1. Press **Ctrl+C** or select **Create**.
2. In the **Co Owns** field, enter **Y** for company-owned or **N** for customer-owned.
 - a. If **Y** is entered, highlight the tank from the *Tank/Meter Maintenance* window and choose **Select**.
 1. The *Tank Serial Number* and *Type* will autofill based on the tank selected from inventory.
 2. Enter *Est Gallons Left* in the Tank if applicable and select **OK**.
 - b. If **N** is entered:
 1. Enter the *Tank Serial Number*.

Note: If the serial number matches the serial number of another active tank, a message stating it is a duplicate serial number will display. Once the message is acknowledged the tank can be entered.



2. Select the Tank Type by pressing **F5** or by selecting the **Browse** button.
3. In the *Tank Description* field, enter a description for the tank.
4. In the *Total Capacity* field:
 - o A company-owned tank will automatically display the tank size.
 - o Non company-owned tanks require the size of the tank to be entered manually.
5. Enter the *Total Capacity* of the tank.
6. Enter *Daily-Use* gallons (gallons used on a daily basis for non-heating appliances).
7. Enter the *K-Factor*. Press **F5** in this field if the K-Factor is unknown to navigate to a *Calculation* screen.

House Information

Enter Length and Width or Square Feet

Length X Width = Square Feet In House X Ceiling Height = Cubic Feet

Heat Loss (7 BTU Per CuFt)Hr

Insulation Deductions Example: Good insulation plus storm windows and doors = 50

Fuel Type Propane Oil

Average Insulation = 35
 Good Insulation = 40
 Super Insulation = 50
 Storm Windows and Doors = 10

Degree Days Annually

Gross Heating Gallons

Net Heating Gallons

Daily Use Gallons

Cooking

Water Heating (40 gals per person)

Clothes Dryer

Other (Estimated Usage)

Total Add On

Daily Use Estimated Annual Usage

K-Factor

8. If using the K-Factor Calculator, enter known *House Information*. *Daily-Use* gallon information (non-heating appliance usage) can be entered as well to calculate a more accurate daily usage. Choose **Select** when finished to return to the *Tank* screen. The *K-Factor* and *Daily-Use* will automatically populate.
9. Tab through the *Prev K-Factor* field. This information will auto-populate as deliveries are made.
10. In the *DD Region* field, enter the degree day region the tank is in.
11. In the *Update K-Factor* field, enter Y to update the K-Factor automatically during sales ticket posting or N so the system does not update the K-Factor automatically.
12. The system automatically updated the *Est Gallons Left* and *Est Percent Left* fields based on the value entered in Step 4.
13. **Tab** through *Delivered Gallons*, *Tot Gals with Delivery*, *Gals Since Last FF*, *DD Last Del*, *Next*, *Last Del*, *Last Charge*, and *Last Full Fill*. These fields automatically get updated at the time of the delivery posting.
14. In the *Customer Type* field, press **F5** or select the **Search** button and choose accordingly. This information can

be entered manually as well.

15. Press **F5** or the **Search** button to select the *Delivery Type*. This information can be entered manually as well.

16. The *Regulatory Code* is an optional field. Press **F5** to select a Fee or **Tab** to the next field.

Step 2: Location Tab

This area is very important as it ensures the correct taxing will be applied if based on *County, Township, or School District*.

| | | |
|-----------------|-----|-----------|
| Route | 3 | MIKE |
| Route Seq # | 0 | |
| Location | 1 | AVON |
| County | 1 | HENDRICKS |
| Township | 999 | NONE |
| School District | 999 | UNKNOWN |

1. Enter the *Route* code.
2. Enter the *Route Seq #* if there is a particular time this customer needs to have a delivery.
3. Enter the *Location* code if tanks are validated by location
4. Enter the *County*. Use **F5** or select the **Browse** icon and choose from the list.
5. Enter the *Township*. Use **F5** or select the **Browse** icon and choose from the list.
6. Enter the *School District*. Use **F5** or select the **Browse** icon and choose from the list.

Step 3: Tank Tab

| | | | |
|-----------------|------|------------------|------------|
| Master Asset ID | 3 | Tank Rental | Management |
| Company Paints | Yes | Manufacture Date | 00/00/00 |
| Year Painted | 2012 | Deposit Amt | \$0.00 |
| Type Of Paint | ALUM | Deposit Date | 00/00/00 |
| Tank Condition | Good | Date Tank Set | 12/31/13 |
| Price Chgs? | Yes | Gas Check Date | 12/31/13 |
| | | Leak Test Date | 12/31/13 |

1. Enter *Yes* or *No* to indicate if the *Company Paints*.
2. *Year Painted* and *Type of Paint* automatically displays from the *Tank/Meter Maintenance* screen if company-owned. Otherwise, enter the information accordingly.

3. Enter the *Tank Condition* (*Good, Needs Painting, etc.*).
4. Indicate if price changes are allowed by entering *Yes* or *No* in the *Price Chgs?* field.
5. The *Manufacture Date* is automatically populated from the *Tank/Meter Maintenance* screen.
6. Enter the *Date Tank Set*.
7. Enter the last date the gas was checked in the *Gas Check Date* field.
8. Enter the last date the leak test was performed in the *Leak Test Date* field.

Step 4: Products Tab

| Product | Description | Price Code | Tier | Price | Prod Use | Disc | Default |
|---------|---------------------|------------|------|--------|----------|------|-------------------------------------|
| 1000 | RESIDENTIAL PROPANE | 1 | A | 2.0000 | | 1 | <input checked="" type="checkbox"/> |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

Price Desc: RESIDENTIAL

Disc Desc: .03 if paid in 10 days

Hide Price On Energy Track Delivery?

1. Press **F5** to Select a *Product Type*.
2. Enter a *Price Code* or press **F5** to choose from a list. (See Step 7 below for information about hiding prices on Delivery Tickets.)
3. Select the *Tier* or press **F5** to select from Tier list. The *Price* will populate when the *Tier* is chosen.
4. Select *Product Use* if special taxing conditions apply. Otherwise, leave this field blank
5. Enter a Discount Code in the *Disc* column or press **F5** to select from a list. If a discount does not apply, leave this field blank.
6. Opt to set as *Default*. More than one product can be listed on the *Products* tab. Be sure to select the correct defaulted product.
7. Energy Track has the ability to hide the price on a Delivery Ticket. This is handled at the Tank level within Energy Force by checking the *Hide Price on Energy Track Delivery?* box in the lower right corner of the *Products* tab, this will apply to all products listed on the tank.
 - a. The Price per Gallon, Taxes and Totals will not display on the Invoice, but they will be priced in the History. For a multi-delivery, if any tank is marked to *Hide the Price on Energy Track Delivery?*, then all deliveries on the Invoice will be hidden. When a split is used on a tank and marked to *Hide the Price on Energy Track Delivery?*, then all Invoices for the split will hide the pricing details. This does not apply to manually entered Invoices. Below is an example of an Invoice with the price hidden.

TEST DIVISION
P.O. BOX 367
AKRON, IN 46910-

(574)893-4733

Customer# 14231
TEST,TEST
1234 TEST AVE
115 CRM FIRMS, NY 11597-
() -

Ticket # 1061385
Date: 03/05/2026
Time 09:11
Split%: 50.00

*** ORIGINAL ***

Delivery Address:
2748S 100E NEWAYGO, MI
Driver: CRAIG ADAMS

| Quantity | Description | | |
|----------|--|--|--|
| 9.7 G | LP RESIDENTIAL BULK | | |
| | Sale # 948/Im changing tank name in ET/250 | | |
| | End %: 80.00 | | |

Net Due

Customer PO #

Customer Signature

This is the corresponding delivery in the customers history.

| | | | | | | | | | | | | | |
|----------|----|----|--------|---------|----|-----|---------------|------|------|--------|---------|--------|---------|
| 03/05/26 | 14 | 14 | 103385 | 1061385 | 13 | 100 | LP RESIDENTIA | 9.65 | 0.00 | 2.5690 | \$24.79 | \$1.49 | \$26.28 |
|----------|----|----|--------|---------|----|-----|---------------|------|------|--------|---------|--------|---------|

- Directly below the *Products* tab is the *Delivery Address*. The address will automatically default to the customer address. Update this information to display the ACTUAL delivery address.
- Enter *Special Instructions* for the driver (i.e. Do not drive on lawn, Key under rock, etc.) up to 30 characters in the *PO Number* field. A user right is required for this field. The *PO Number* will automatically populate onto the *EnergyTrack Invoice* and *Manual Sales Posting* screens and will also print on the Invoice. The *PO Number* can be modified on the *Invoice* screen if necessary.

| Co Owns | Tank Serial Number | A / I A / I | Type | Tank Description | Master Asset# |
|---------|--------------------|-------------|------|------------------|---------------|
| No | 123 | A | P | House | 0 |
| No | BARN | A | DD | FIELDTANK | 0 |
| No | SHOP | A | DD | SHOP | 0 |
| No | SHOP867 | A | P | SHOP | 0 |

| | | | |
|----------------|--------|------------------------|--------|
| Tank Capacity | 500.00 | Update K-Factor | Yes |
| Total Capacity | 500.00 | Est Gallons Left | 100.00 |
| Daily-Use | 0.45 | Est Percent Left | 20 |
| K-Factor | 1.44 | Delivered Gallons | 230.00 |
| Prev K-Factor | 2.40 | Tot Gals with Delivery | 400 |
| DD Region | 1 | Gals Since Last FF | 0.00 |

| | | | | | | | | | | |
|-------------|----|------|----|----------|----------|-----------------|-------------|----------|----------------|----------|
| DD Last Del | 30 | Next | 30 | Last Del | 07/15/20 | Julian Delivery | Last Charge | 07/15/20 | Last Full Fill | 07/15/20 |
|-------------|----|------|----|----------|----------|-----------------|-------------|----------|----------------|----------|

| | | | | | | | |
|------------------|--------------------------|---------------|--------------------------|----------------------|---------------|-------------------|----------|
| Customer Type | 1 RESIDENTIAL | RTM | Last Read | 07/17/2020 | Last % Update | 11/10/21 | |
| Delivery Type | 2 KEEP FULL | Target Refill | 25% | Critical Refill | 15% | Read Information | |
| Regulatory Code | 0 | Hold Date | 00/00/00 | Hold Reason | 0 | | |
| Public Assembly? | <input type="checkbox"/> | Underground? | <input type="checkbox"/> | Hold DD Calculations | No | Hold Release Date | 00/00/00 |

| Product Description | Price Code | Tier | Price | Prod Use | Disc | Default |
|--------------------------|------------|------|--------|----------|------|-------------------------------------|
| 1000 RESIDENTIAL PROPANE | 1 | A | 2.0000 | | 1 | <input checked="" type="checkbox"/> |

| | | | |
|-------------|-----------------------|--------------------------------------|--------------------------|
| Price Desc: | RESIDENTIAL | Hide Price On Energy Track Delivery? | <input type="checkbox"/> |
| Disc Desc: | 03 if paid in 10 days | | |

| | | | |
|------------------|------------------|---|-------------|
| Delivery Address | 123 MAIN | Special Delivery Instructions | PO Number |
| City/St/Zip | WINNER SD 57580- | Rf <input type="checkbox"/> OWNERS TANK | PT#73970-65 |

- Enter driving *Directions* for how to get to the delivery address.

11. Press **Ctrl+Q** to save or select the **Save** button.

Additional Notes

On the *Products* tab, a feature called *Test Sale* allows the option to test a 100 gallon sale to see if taxes are applied properly. If there is more than one product, select the item in question and select **Test Sale**.

If the customer is not being taxed properly, look to see that the delivery address is correct.

Step 5: GPS Tank Coordinates

The *GPS Tank Coordinates* tab displays the coordinates associated to a tank that has been plotted on the EnergyMap. To modify this information, press **Ctrl+M** and manually input the information. Press **Ctrl+Q** to save. Use the **Plot** button on the *Tank* screen (if the tank has never been plotted before) and it will open EnergyMap to manually plot. Manual plots and handheld postings from handhelds with internal GPS will automatically update the *GPS Tank Coordinates* tab.

| Co Owns | Tank Serial Number | A / I | Type | Tank Description |
|---------|--------------------|-------|------|------------------|
| Yes | 1033490 | A | P | DRYER |
| No | 2ND ACCT - S1 T2 | A | G | MOMS PLACI |
| No | 2ND ACCT - S1 T1 | A | DD | MOMS PLACI |
| No | 2ND ACCT - S2 T1 | A | DD | DIESEL |
| Yes | 630341 | A | P | HOME |
| No | HTB | A | HL | HTB |
| No | S1 T1 | A | DD | DIESEL |
| No | TMS 15W40 | A | L | TMS 15W40 |

| | | | | | | |
|-------------|----|------|------|----------|----------|-----------------|
| DD Last Del | 30 | Next | 2030 | Last Del | 07/10/13 | Julian Delivery |
|-------------|----|------|------|----------|----------|-----------------|

| | | |
|-----------------|----|-------------|
| Customer Type | 14 | CORN DRYING |
| Delivery Type | 4 | CORN DRYERS |
| Regulatory Code | 0 | |

Products | Location | Tank | Optimizer Log | **GPS Tank Coordinates**

Enter Tank Longitude / Latitude

Longitude: 0.0000000 deg 0.000 min 0 sec
Latitude: 0.0000000 deg 0.000 min 0 sec
Map Latitude -414634033 Map Longitude -925794267

Values can be entered several ways:
85 deg. 50 min. 30 sec. can be entered in the fields in each respective field. Or the 85 can be in the deg field and 50.5 in the min field. Or you can enter it all in the deg field as 85.8416667.

Step 6: Optimizer Log Tab

The *Optimizer Log* tab displays each time the tank has been scheduled within the last six months. Information will only display in this tab for Optimizer Plus users.

| Co Owns | Tank Serial Number | A / I | Type | Tank Description | |
|---------|--------------------|-------|------|------------------|----------------|
| Yes | 675330 | A | P | HOME | Tank Capacity |
| Yes | 806416 | A | P | RENTAL HOM | Total Capacity |
| No | S1 T1 | A | DD | DIESEL | Daily-Use |
| No | S1 T2 | A | G | SNL TRACTOR | K-Factor |
| | | | | | Prev K-Factor |
| | | | | | DD Region |

DD Last Del: 44 Next: 1147 Last Del: 09/04/13 Julian Delivery: _____

Customer Type: 2 LANDLORD AUTO SCHEDULE Sales YTD: \$332.78
 Delivery Type: 2 TRACK K-FACTOR Gallons Used YTD: 250.40
 Regulatory Code: 0

| Scheduled | Truck | Est % Left | Temp Ticket# | Gallons Delivered |
|------------|-------|------------|--------------|-------------------|
| 09/04/2013 | | 381 | 9 | 189249 |
| 09/03/2013 | | 381 | 9 | 0 |
| 09/02/2013 | | 381 | 9 | 0 |
| 09/01/2013 | | 381 | 9 | 0 |
| 08/31/2013 | | 381 | 9 | 0 |
| 08/30/2013 | | 381 | 9 | 0 |

Step 7: Delivery Information

Delivery Address

The *Delivery Address* listed on the *Tank* screen should reflect the actual address of the tank. Having the correct *Delivery Address* is especially important for taxing purposes and is also transferred to EnergyTrack Re-Engineered.

Delivery Address: 987 RONALD REGAN PARKWAY Special Delivery Instructions

City/St/Zip: BROWNSBURG IN 46112- Rrl Do not drive on lawn

South on US 267 to county road 100 (morriss road). House is on the left.

Special Instructions

This information pertains to special instructions drivers need to follow when making deliveries. This information transfers down to EnergyTrack Re-Engineered.

Delivery Address: 987 RONALD REGAN PARKWAY Special Delivery Instructions

City/St/Zip: BROWNSBURG IN 46112- Rrl Do not drive on lawn

South on US 267 to county road 100 (morriss road). House is on the left.

Directions

This section is for directions on how to get to the customer tank and also displays on EnergyTrack Re-Engineered.

Delivery Address: 987 RONALD REGAN PARKWAY Special Delivery Instructions

City/St/Zip: BROWNSBURG IN 46112- Rrl Do not drive on lawn

South on US 267 to county road 100 (morriss road). House is on the left.

PO

Energy Force stores and processes a standing PO # manually entered in a field to the right of *Special Delivery Instructions* on the Tank screen. A user right is required to modify this field.

| | |
|---|-------------------------|
| Special Delivery Instructions | PO Number |
| Rrl <input checked="" type="checkbox"/> | thisismyponumber1234567 |

The PO # will automatically populate onto the EnergyTrack Invoice and Manual Sales Posting screens and will also print on the Invoice. The PO # can be modified on the Invoice screen if necessary.

| Quantity | Description | Unit Price | Amount |
|----------|--|------------|----------|
| 222.0 G | PROPANE COMMERCIAL Sale # 1/1000 Gal Lp/QA7107 End %: 80.00 | \$1.7000 | \$377.40 |
| 75.0 G | PROPANE RESIDENTIAL Sale # 2/trailer hous/93339 End %: 80.00 Contract # 90840 / L.P. 100% P | \$4.0000 | \$300.00 |
| | PO# thisismyponumber1234567 | | |
| 221.0 G | PROPANE RESIDENTIAL Sale # 4/po#test/PO#TESTING End %: 80.00 | \$2.1000 | \$464.10 |
| | PO# ihaveaponenumberputhere | | |