

# Mobile Energy Setup

Last Modified on 10/13/2022 2:13 pm CDT

The *Manage Mobile Energy* window can be found by going to *Energy / Setup / Mobile Energy*.

The screenshot shows the 'Manage Mobile Energy' window with the 'Setup' tab selected. The window is divided into several sections:

- Database Connection Information:** Fields for IP Address (00.000.00.000), Port Number (12345), and Instance Name (SQL2017).
- Classifications to Sync:** Dropdown menus for Product (AME), Customer, and Tank (Inter Company Tanks).
- Additional comment to print on inspection checklist:** A text area for entering a comment.
- Product / Cross Reference:** A table with columns for Agvance Dept. ID, Agvance Prod. ID, Agvance <Product Name>, Cross Reference Dept. ID, Cross Reference Prod. ID, and Cross Reference <Product Name>. The table contains 20 rows of product data.

Buttons for 'Save' and 'Cancel' are located at the bottom right of the window.

## Setup Tab

### General

- **IP Address** – This is the IP address of the computer which holds the Agvance database. This must be an external IP Address.
- **Port Number** – This is the port number that is open on the data server to allow communication outside the network. Additional firewall ports may need to be opened as well.
- **Instance Name** – This is the name of the SQL server that holds the Agvance database. If there is a named instance of SQL, this should be that named instance.
- **Product** – AME will sync any product on a tank. Additional products can also be synced by linking them the product classifications selected here.
- **Customer** – Customers who do not have tanks can be synced with AME by linking them to a customer classification set here. Those customers would be available for adding a payment by choosing **Add Payment**.
- **Additional comment to print on inspection checklist** – Any message typed into the *Additional comment to print on inspection checklist* field will print between the checklist items and the driver signature line.
- **Tank** – Tanks tied to the specified tank classification can be used for Intercompany Transfers.
- **Allow metered product to be replaced on a Void/Rebill** – Checking this box gives drivers the ability to void and rebill deliveries prior to syncing tickets back.

- **Product / Cross Reference**

- **Agvance <Product Name>** – select each product that could be considered a sales product to be delivered off the truck. This is for products that have the same inventory product but multiple instances for sales purposes such as LP for Home Heat and LP for ag use.
- **Cross Reference <Product Name>** – This is the inventoried product that will be actually loaded into the truck compartment.

## Questions

The screenshot shows a software window titled 'Manage Mobile Energy' with a close button (X) in the top right corner. The window has a tabbed interface with tabs for 'Setup', 'Drivers', 'Vehicles', 'Documents', and 'Import'. The 'Questions' tab is selected, and it contains a sub-tab for 'General'. Below the sub-tab, there is a text prompt: 'Setup questions to be included on driver inspection checklist'. A table with a 'Question' column and a list of items is displayed. The items are numbered 1 through 9: Brakes, Hazard Lights, Headlights, Horn, Hoses, Tires, Turn Signal, Windshield, and Wipers. Below the table is an 'Add Row' button. A 'Cancel' button is located at the bottom right of the window.

|   | Question      |
|---|---------------|
| 1 | Brakes        |
| 2 | Hazard Lights |
| 3 | Headlights    |
| 4 | Horn          |
| 5 | Hoses         |
| 6 | Tires         |
| 7 | Turn Signal   |
| 8 | Windshield    |
| 9 | Wipers        |

- **Question** – Any item that needs to be included on the inspection checklist should be added into the *Question* area.
- **Add Row** – Select **Add Row** to add items into the *Question* list.

## Drivers Tab

### Preferences

Setup Drivers Vehicles Documents Import

Preferences Sync Log Inspection Checklist Reports

Driver Preferences

|   | User ID | Driver ID | Next Ticket # | Overwrite<br>Next Ticket # | Next Payment # | Overwrite<br>Next Payment # | Require Truck<br>Ticket Signature | Require Payment<br>Receipt Signature | Require Inspection<br>Checklist Signature | Hide Inspection<br>Pass Checkbox    |
|---|---------|-----------|---------------|----------------------------|----------------|-----------------------------|-----------------------------------|--------------------------------------|---|-------------------------------------|
| 1 | M/W     | 123A      | 1000          | <input type="checkbox"/>   | 100            | <input type="checkbox"/>    | <input type="checkbox"/>          | <input type="checkbox"/>             | <input type="checkbox"/>                  | <input checked="" type="checkbox"/> |
| 2 | A/H     | A/H       | 3000          | <input type="checkbox"/>   | 3000           | <input type="checkbox"/>    | <input type="checkbox"/>          | <input type="checkbox"/>             | <input type="checkbox"/>                  | <input checked="" type="checkbox"/> |
| 3 | BL      | BL        | 2000          | <input type="checkbox"/>   | 2000           | <input type="checkbox"/>    | <input type="checkbox"/>          | <input type="checkbox"/>             | <input type="checkbox"/>                  | <input checked="" type="checkbox"/> |

Add Row Save Cancel

- **User ID** – Populated from the list of Agvance users.
- **Driver ID** – Populated from *Hub / Setup / Applicators*.
- **Next Ticket #** – Starting ticket number range for this driver.
- **Overwrite Ticket #** – Checking the box will force the ticket numbering to start back with the Next Ticket #.
- **Next Payment #** – Starting payment number for this driver.
- **Overwrite Next Payment #** – Checking the box will force the payment numbering to start back over with the Next Payment #.
- **Require Truck Ticket Signature** – Drivers with this option set will be required to capture the customer signature upon delivery.
- **Require Receipt Signature** – Drivers with this option set will be required to capture the customer signature upon posting a payment.
- **Require Inspection Checklist Signature** – Drivers with this option set will be required to capture a signature upon completing an inspection sheet.
- **Hide Inspection Pass Checkbox** – Drivers with this option set will find checkmarks populated for all items in the inspection checklist. Drivers will have the opportunity to mark items as *Fail* as needed.

## Sync Log

Manage Mobile Energy

Setup Drivers Vehicles Documents Import

Preferences Sync Log Inspection Checklist Reports

Filters

User ID: BL

Start Date: 09/21/2022

End Date: 09/27/2022

Apply

Sync Log

|   | User ID | Entry Date | Sync Start Time | Sync End Time | Sync Failure Table |
|---|---------|------------|-----------------|---------------|--------------------|
| 1 | BL      | 09/27/2022 | 01/01/1900      | 01/01/1900    |                    |
| 2 | BL      | 09/27/2022 | 01/01/1900      | 01/01/1900    |                    |
| 3 | BL      | 09/27/2022 | 01/01/1900      | 01/01/1900    |                    |
| 4 | BL      | 09/27/2022 | 01/01/1900      | 01/01/1900    |                    |
| 5 | BL      | 09/27/2022 | 01/01/1900      | 01/01/1900    |                    |
| 6 | BL      | 09/27/2022 | 01/01/1900      | 01/01/1900    |                    |

Cancel

- **User ID** – Filter sync log by driver to show each time the sync process was attempted.

## Inspection Checklist

Manage Mobile Energy

Setup Drivers Vehicles Documents Import

Preferences Sync Log Inspection Checklist Reports

Filters

User ID: z06

Date: 09/27/2022

Apply

Signature

Inspection Checklist

|   | Question      | Pass                                | Fail                     | Comment | Entry Date | Updated Date |
|---|---------------|-------------------------------------|--------------------------|---------|------------|--------------|
| 1 | Brakes        | <input checked="" type="checkbox"/> | <input type="checkbox"/> |         | 09/27/2022 | 09/27/2022   |
| 2 | Hazard Lights | <input checked="" type="checkbox"/> | <input type="checkbox"/> |         | 09/27/2022 | 09/27/2022   |
| 3 | Headlights    | <input checked="" type="checkbox"/> | <input type="checkbox"/> |         | 09/27/2022 | 09/27/2022   |
| 4 | Horn          | <input checked="" type="checkbox"/> | <input type="checkbox"/> |         | 09/27/2022 | 09/27/2022   |
| 5 | Hoses         | <input checked="" type="checkbox"/> | <input type="checkbox"/> |         | 09/27/2022 | 09/27/2022   |
| 6 | Tires         | <input checked="" type="checkbox"/> | <input type="checkbox"/> |         | 09/27/2022 | 09/27/2022   |
| 7 | Turn Signal   | <input checked="" type="checkbox"/> | <input type="checkbox"/> |         | 09/27/2022 | 09/27/2022   |
| 8 | Windshield    | <input checked="" type="checkbox"/> | <input type="checkbox"/> |         | 09/27/2022 | 09/27/2022   |
| 9 | Wipers        | <input checked="" type="checkbox"/> | <input type="checkbox"/> |         | 09/27/2022 | 09/27/2022   |

Cancel

Inspection checklists that are sent back during the sync process can be viewed based on *User ID* and date range parameters.