Refillable Container Management - Hub

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The Select a Container window is located at Hub / Setup / Refillable Container Management. At this window, Add, Edit, or Delete Containers, add activity information for a specific Container, generate one of the four Container Reports that are available, establish functionality Rules, and set up Materials of Construction or Seal Materials. Several filtering options are available to help isolate specific Containers.

Selecting **Delete** on the *Select a Container* window allows the currently highlighted Container and all related activities to be deleted.

Since the Container record-keeping regulations require records to be kept for three years, Agvance has been coded to only allow the Container to be deleted if the Container does not have any activities within the past three years. However, any Container can be marked *Inactive* to remove it from selection lists.

Select a Contain	ier					_ 0
Container ID 🛛 🔺		Last Activity	Filled Status	Current Location	Capacity Units	Add
10003	03/04/20	Maintenance	Not Filled	OOMAIN	16000.000 Gal	
10004	03/04/20	Inspect	Filled	00MAIN	10000.000 Gal	Edit
						Delete
						Reports
						Rules
						Materials C Construction
c					>	
Co	ntainer ID					Seal Materials
Filter						
Last Activity	All	\sim	Container ID			
Owning Location	All	\sim	O Alt. Cont. ID O Owner ID			
Current Location	All	~ <appr< td=""><td>oved for Product></td><td></td><td></td><td></td></appr<>	oved for Product>			
Filled Status	All	\sim	<current product=""></current>			
Active Status	All	 ✓ <materia< li=""> </materia<>	Of Construction>			
			<seal material=""></seal>			
						Apply
Activity Inspec	t	Add V	Activity			Cancel

Adding a Container

Select **Add** from the *Select a Container* window will displays the *Add a Container* window where the initial setup information for a container is entered.

		0 -	ed By				Current Status
Container ID	10006						
Alt. Cont. ID			ompany				Fill Status: Not Filled
		-0 <	Customer>				Last Activity:
Owner's ID		0 <	Vendor>				Product:
Tank Type	Poly ~	-					EPA.#:
Manufacturer		Appro	ved Produc	ts			Current Location: 00MAIN
			Dept ID	Prod ID	<prod. name=""></prod.>	Required	Scheduled Test Requirements
wning Location	00MAIN ~	1 1	Chem00	Aatrex	Aatrex 4L		Not Required
Current Location	00MAIN ~						O Before every fill
Capacity	115.000 Gai ~						Required Every 180 O Months
Fill Status:	Not Filled 🗸						Last Test:
<material of<="" td=""><td></td><td>1</td><td></td><td></td><td></td><td></td><td>Next Test:</td></material>		1					Next Test:
Construction>							
<seal material=""></seal>							Tamper Evident Device #
							1234
Note							
							Date Of Manufacture _/_/
							Inactive Attachment

The only information required before a container can be saved is the Container ID.

• Container ID – Enter a unique ID used for the container.

Note: If using the Contain app, using a bar code with no alpha characters as the Container ID gives the ability to search within the Contain app by scanning the bar code of the container.

- Alt. Cont. ID This is an optional field for an alternate Container ID.
- Owner's ID This is an optional field.
- Tank Type As tank types are manually entered and saved, those types are added to a list and are available for selection when adding or editing any Container.
- Manufacturer Select the appropriate manufacturer from the drop-down.
- Owning Location If a multi-Location company, select which Location owns the Container.
- Current Location If a multi-Location company, select the Location where the Container is currently located.
- Capacity Enter the holding capacity of the Container and select the capacity unit of measure.
- Fill Status Indicate the Fill Status of the Container from the drop-down.
- Material of Construction Double-click to select from a user-defined list. Materials may be added to this list by selecting Materials of Construction found at *Setup / Refillable Container Management*.
- Seal Material Double-click to select from a user-defined list. Materials may be added to this list by selecting the Seal Materials option found at Setup / Refillable Container Management.
- Note Use this section to enter any additional information regarding the Container.
- **Owned By** Indicate whether this Container is owned by the company, a Customer, or a Vendor. If owned by a Customer or Vendor, double-click to select the appropriate Customer/Vendor.
- Approved Products Select any Products that may be placed in the Container. Choose to be warned or stopped when filling ineligible Products into a Container. To enable this functionality, the Container Fill Validation Rules, found when selecting Rules on the Select a Container window, must be set to either Warn or Stop for the Approved Product for Container line item and the approved Product(s) must be added to the

Approved Products grid. Refer to the *Rules* tab for clarification. The Product line items on Delivery Tickets, AR Invoices, Purchase Receipts, and Purchase Invoices are required to have a Container selected if the *Required* checkbox is selected on a matching item in the *Approved Products* grid.

- Scheduled Test Requirements Indicate the frequency at which scheduled tests are required for a Container. Agvance will use these settings to determine if a Container is due for a scheduled test when filling a Container. A warning level can then be selected for use. Refer to the *Rules* tab for additional information.
- Tamper Evident Device # A number may be added in this area for the tamper evident device on this Container.
- Date of Manufacture Optionally enter the date the Container was manufactured.
- Attachments Selecting Attachments displays the *Attachments* window where files can be stored on the Container, or files that have been previously attached to the Container record can be viewed. An example of a file that might be attached is a picture of the container.
- Add Activity This allows activities to be added for the Container. Activities available are *Inspect*, *Fill*, *Delivery* to Customer, Receive from Customer, Receive from Vendor, Send to Vendor, Cleanout, Information, Maintenance, Unload, Scheduled Test, and Remove from Service.

If the data has the same Product in multiple Inventory Departments (possibly across Locations), then setting up a single Product in the *Approved Products* grid will make any matching Products eligible for refill if:

- 1. The Product ID from any existing department matches the Product ID of any of the Products in the grid, and
- 2. The Product being filled has an Inventory Department Category that matches the Inventory Department Category of the matching Product ID line item in the grid.

🖳 Inventory Department Information for DFrt00 Dry Fert -00							
Profile G/L Posting Patronage Coop Cor	nmission Price Levels Discount Overrides						
Department ID DFrt00 Department Name Dry Fert -00 <location> 00MAIN ~ Category Fertilizer Dry ~</location>	Lot Number Validation Missing Lot Num No Checking Warn Only Stop Sale Department Classifications						
GL Posting Unit Inventory V Blending Information Scale Default to Use 1 V Nutrient Contributor	Misc1 Misc4 Misc2 Misc5 Misc3 Misc6						
 Billing Information ✓ Discount This Department ☐ Do Not Discount Unpaid Bookings 	Cross Ref1 Cross Ref2						
Do Not Discount Downpay Bookings Apply Volume discounts to Full Quantity on Down Paid Items	Cross Ref3 Cross Ref4						
 Print Quantity on Invoice Log Price Overrides Require Reason for Price Overrides 	Auto Update Prices on Cost Change Classifications Disallow Lot Numbers						
	Import Price Levels Save Cancel						

Editing a Container

Selecting **Edit** on the *Select a Container* window opens the container information which can be edited and/or add activity records for a specific container.

Selecting Add Activity allows an activity to be added for the Container. The container activities that are available are: Inspect, Fill, Delivery to Customer, Receive from Customer, Receive from Vendor, Send to Vendor, Cleanout, Information, Maintenance, Unload, Scheduled Test, and Remove from Service.

🖳 Edit A Container 10003		
Container Information	Activity	
Container Information A Activity # Date 1 03/04/20	Container Activity Container Activity Container Information Container D 10003 Capacity 16000.000 Gai Use Current Date and Time Activity Inspect Done by Robert Ellis Product: EPA #;	_
filer	New Fill Status Not Filled V Current Location 00MAIN V Current Location: 00MAIN	
Start Date 03/04/20	Inspection	View
	O Pass (Seals and/or One Way Valves Intact) O Fail	
	Note	
Add Activity	Tamper Evident Device # Cancel	ve Cancel .:

When adding a *Fill* activity, a *Transfer inventory from Product* checkbox is available. When this option is selected, a Product can then be selected to transfer. With the checkbox selected, saving the activity will create a Manufactured Inventory entry in the background and update the inventory of the *Fill* Product (finished good on the Manufactured Inventory entry) and relieve inventory of the *Transfer Inventory from Product* (raw good on the manufactured inventory entry). The *Unload* activity has similar but opposite functionality.

When the *Transfer inventory from Product* checkbox is not selected, no manufacture or inventory movement will occur.

Activity Fill		✓ Done by Ro	bert Ellis	Product:	
New Fill Status	s Filled	Current Location	00MAIN	EPA #:	00MAIN
Fill				Current Escation.	
Dept ID F	Prod ID	<product></product>	Qty		
Chem00	8232	Atrazine 4L 2.5G	15		Fill With Current Product
🔽 Transfer i	inventory fr	om Product			
Dept ID F	Prod ID	<product></product>	Qty		
Chem00	8234	Atrazine 4L Blk	15	Gal	

Rules

Choosing **Rules** from the *Select a Container* window displays the *Setup Container Fill Validation Rules* window. In this area, establish *Warning Levels* as validation rules for six different scenarios when filling Containers.

	Rule	Warning Level	
1 ▶	Approved Product for Container	Warn	\sim
2	Exceeding Container Capacity	Stop	\sim
3	Inspection Completed	Warn	\sim
4	Matching Prior Product	Warn	\sim
5	In Compliance with Scheduled Tests	Stop	\sim
6	Already Filled	Stop	\sim

Note: Container Fill Validation rules only apply to the *Refillable Container Management* window and activities. They do not apply to transactions or other activities outside of this window.

Rule scenarios

- 1. Approved Product for Container Attempting to put a Product in a Container that is not on that Container's approved Product list.
- 2. Exceeding Container Capacity Attempting to put a quantity of Product in a Container that exceeds its rated capacity.
- 3. Inspection Completed Attempting to put Product in a Container before an *Inspection* activity has been recorded.
- 4. **Matching Prior Product** Attempting to put an approved Product in a Container that is different than the previous Product that was put into the Container when no *Cleanout* activity has been recorded.
- 5. In Compliance with Scheduled Tests Attempting to put Product into a Container where a pressure test has not been recorded within the required 30 month time frame. (This specific time frame must be set up on each Container that must undergo the test.)
- 6. Already Filled Attempting to fill a Container when the *Status* is already set to *Filled*.
- 7. Use EPA# for matching prior product This checkbox changes the Matching Prior Product functionality to use the EPA# to determine if the Product matches the prior Product in the Container instead of using the Product ID and Inventory Department Category to determine the match. The Matching Prior Product rule will still need to be set to the appropriate Warning Level.

Warning Levels

- 1. None The transaction goes through without receiving a message.
- 2. Warn A warning is given first and then an option to continue.

3. Stop – Saving the transaction is automatically stopped.

Setting up Materials

Materials of Construction

Selecting the **Materials Of Construction** button from the *Select a Container* window allows materials of construction descriptions, based on industry standards, to be added. Materials of construction IDs and descriptions can also be edited or deleted. Materials of construction are available for selection from a list when adding or editing container information or setting report criteria for container reports.

Select a Mate	rial Of Constuction	
ID	△ Description	Add
304 - SS HDPE	304 Stainless Steel High Density Polyethylene	Edit
	Low Density Polyethylene	Delete
🖳 Add A	Material Of Constuction	Cancel
1]
Descriptio	n]
	Save Cancel	
	,	:
	ID	

Seal Materials

Depending on the chemical in the container, seals must be a certain material so as to not deteriorate on contact. Selecting **Seal Materials** button from the *Select a Container* window allow seal material descriptions, based on industry standards, to be added. They can also edit or delete seal material IDs and descriptions. Seal materials are available for selection from a list when adding or editing container information or setting report criteria for container reports.

🖳 Select a Sea	l Material	
ID	△ Description	Add
Viton	Seal Material	Edit
🖳 Add A	Seal Material	elete
	D	ancel
Descriptio	on	
		Save Cancel
	D	

Reporting

Selecting **Reports** on the *Select a Container* window, found at *Hub / Setup / Refillable Container Management*, provides access to four types of Container reports that are available to help manage refillable Containers.

🖳 Container Reports		
Container Information	Report Criteria	
Container Activity Container Status	Select Owning	Location All Select
Pressure Test Status	Select Current	
	Select	Container All Select
	Manufacturer	All Print Options Include Manufacturer Info
	Owner	All V Include Wand acturer with
	Туре	All V Include Notes
Print Preview	Filled Status	All V Include Approved Products
	Active Status	All V One Page per Container
Load Set Save Set	Primary Sort	Container ID V
	Secondary Sort	(none) ~
	<material of<br="">Construction></material>	
	<seal material=""></seal>	
	L	OK Cancel

• Container Information – The current information for the selected refillable Containers is displayed.

Container Information

Sorted by Container ID

10003			
Container ID	10003		
Alternate Container ID			
Tank Type	•		
Capacity	16,000.000 Gal		
Test Requirement	Not Required		
Date Last Tested			
Filled Status	Not Filled		
Owning Location	00MAIN		
Current Location	00MAIN		
Current Product			
Inactive	False		
Manufacturer			
Date Of Manufacture			
Owned By	Company		
Owners Container ID			
Approved Products	Dept ID DFrt00	Prod ID Dap	Product Dap (18-46-00)

• Container Activity – Activity history for the selected Containers is displayed.

Container Activity

Sorted by Container ID All Activities

Container ID Activity Type 10003 Maintenance	<u>Pass /</u> <u>Fail</u>	Date Time 03/04/2024 9:38AM	Done by Robert Ellis	Location 00MAIN	<u>Dept ID</u> Prod ID	Product	EPA Number	<u>Qtv</u>	<u>Shipped To /</u> Received From
10004 Inspect Fill Information	Pass	03/04/2024 9:39AM 03/04/2024 10:51AM 03/04/2024 10:51AM	Robert Ellis	00MAIN 00MAIN	Chem0(Aatrex	Aatrex 4L	100-497	2,500.00 Gal	

• Container Status - Details of the last activity on record for the selected Containers is displayed.

Container Status

Sorted by Container ID All Activities

<u>Container ID</u>	Last Activity	<u>Pass /</u> <u>Fail</u> <u>Date</u>	Current Loc.	<u>Filled</u> <u>Status Tank Type</u>	<u>Capacity</u>	Dept ID Prod ID	Product	<u>Shipped To /</u> Received From
10003	Maintenance	03/04/2024	00MAIN	Not Filled	16,000Gal			
10004	Information	03/04/2024	00MAIN	Filled	10,000Gal	Chem0CAatrex /	Aatrex 4L	
10006	No Activity		00MAIN	Not Filled Poly	115Gal			

• Pressure Test Status - Test frequency and dates for the selected Containers are displayed.

Pressure Test Status

Sorted by Container ID

. 115 Gal

Container ID
10003
10004
10006

Current Loc. Filled Status Tank Type 00MAIN Not Filled 00MAIN Filled 00MAIN

 Capacity
 Dept ID Prod ID
 Product

 16,000 Gal
 Chem00Aatrex
 Aatrex 4L

<u>Test Frequency</u> Requirement Not Required Not Required

Last Test Date Next Test Date

Required Every 180 Days

Not Filled Poly