

General

This directory contains comprehensive guides for managing customer systems, equipment, and delivery window strategies (delivery estimation methods).

Core System Management

[Adding Equipment](#)

Learn how to add tanks, boilers, furnaces, and other equipment to a system. Includes detailed instructions for multi-tank configurations.

Key topics:

- Equipment types (tanks, boilers, furnaces, appliances)
- Multi-tank/manifolded tank setup
- Capacity and monitoring configuration
- Linking equipment to systems

[Editing a System](#)

Modify existing systems safely with guidance on which changes are safe vs. those requiring caution.

Key topics:

- Safe edits (name, notes, metadata)
 - Cautious changes (window strategy, fuel type, status)
 - Reassigning equipment between systems
 - Deactivating vs. deleting systems
-

Delivery Window Strategies (Estimation Methods)

Window Strategies

Choose and configure the delivery estimation method for each system. Window strategies determine how the system calculates when deliveries are needed.

Key topics:

- Degree Day, Monitored, and Calendar strategies
- Selecting the right strategy for each customer type
- Configuring strategies in the system dialog
- Auto Delivery toggle behavior

Degree Day System

Temperature-based consumption estimation using heating degree days and usage rates.

Key topics:

- Winter and summer usage rates
- Visual degree day windows
- Target DD and forced delivery
- Reset DD and Reset Window actions

Monitoring

Real-time tank level tracking using IoT monitoring devices identified by serial numbers.

Key topics:

- Monitor serial numbers and barcodes
- Real-time level readings
- Validation requirements for monitored systems

Calendar Scheduling

Time-based recurring delivery schedules with seasonal controls and frequency settings.

Key topics:

- Frequency and units (days, weeks, months, years)
- Preferred day of week

- Seasonal start/end dates
- Active/inactive schedule management
- One active schedule limit

Getting Started

1. **Create a system:** Start with the [Add System Guide](#)
 - Choose system name and fuel type
 - Select a window strategy (Degree Day, Monitored, or Calendar)
 - Configure strategy-specific settings
 - Enable Auto Delivery toggle if needed
2. **Add equipment:** Follow [Adding Equipment](#) to add tanks and appliances
3. **Configure delivery:** Your window strategy determines how deliveries are triggered:
 - [Degree Day](#) for temperature-based estimation
 - [Monitoring](#) for IoT device-driven deliveries
 - [Calendar](#) for recurring time-based schedules

Quick Reference

System Concepts

- **System:** A group of equipment that all share the same fill connection
- **Equipment:** Physical components (tanks, boilers, furnaces, etc.)
- **Multi-tank:** Multiple tanks manifolded to a single fill (add to same equipment)
- **Fill Group:** Equipment in a system all connect to the same delivery fill point
- **Window Strategy:** The delivery estimation method (Degree Day, Monitored, or Calendar)
- **Auto Delivery:** Toggle that enables/disables automatic delivery request generation

Window Strategy Comparison

Strategy	Configured In	Triggers On	Requires
Degree Day	Degree Day tab	Temperature data + usage rates	Winter/summer rates, window boundaries
Monitored	Tank Monitor tab	Tank level readings	Monitor serial number
Calendar	Calendar tab	Time intervals + rules	Active schedule with frequency/dates

Configuration Locations

All window strategy settings are configured in the **Add/Edit System dialog**:

- **Basic settings**: System name, Active toggle, Auto Delivery toggle, Fuel selector, Window Strategy selector
 - **Degree Day tab**: Usage rates, window start/target/end, Reset actions
 - **Tank Monitor tab**: Serial number, barcode
 - **Calendar tab**: Schedule frequency, units, day of week, seasonal dates, volume
-

Common Workflow

1. **Navigate to Systems** from Customer Dashboard
 2. **Click Add System** or Edit existing system
 3. **Enter system name** and select fuel type
 4. **Choose window strategy**: Degree Day, Monitored, or Calendar
 5. **Configure in the appropriate tab**:
 - Degree Day: Set usage rates and windows
 - Monitored: Enter serial number
 - Calendar: Save system first, then add schedules
 6. **Enable Auto Delivery toggle** if deliveries should be automatic
 7. **Add custom attributes** as needed
 8. **Enter notes** for drivers, routers, and office
 9. **Submit** to save
 10. **Add equipment** to the system
-

Related Documentation

- [Creating a New Customer](#) — Full onboarding flow
 - [Location Management](#) — Managing service locations
 - [Add Services](#) — Services can be applied to locations or systems
 - [Add System](#) — Creating and configuring new systems
-

Revision #6

Created 10 December 2025 16:13:00 by Kozy Operations

Updated 30 December 2025 14:16:44 by Kozy Operations