Creating a Propane Cylinder Exchange Request

Use this workflow to record a one-time cylinder pickup and drop-off request for an existing exchange customer and location.

Steps

1. Search for and open the correct customer and service location.
2. Open **Exchange** and select the correct active drop-off point.
3. Select **New Request**.
4. Select the cylinder type.
5. Enter the number of cylinders to drop off and the number to pick up.
6. Enter a price override only when it applies and you are authorized to use it.
7. Add one-time instructions when needed, then select the date the customer needs the exchange.
8. Create the request.

> **What happens next:** The request is sent to the routing workflow but is not yet assigned. Put permanent access or delivery instructions in the saved operational notes or drop-off-point record; use request instructions only for that one exchange.

Exchange Notes

- When adding a drop-off point, use the address search to place the map pin. Latitude and longitude can also be edited by hand.
- Rental agreements require a drop-off point, which is selected automatically when the customer has only one.
- A recurring drop-off-point schedule creates its requests as soon as it is saved, and every 2, 3, or 4 week schedule follows its own cadence.
- Drivers can have the customer sign a delivery slip at the stop and email the slip to the customer.
- Cylinder rentals bill once a month for the month that just closed, based on the cylinders checked in on site.

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