

# General

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

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## 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
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## 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
<b>Degree Day</b>	Degree Day tab	Temperature data + usage rates	Winter/summer rates, window boundaries
<b>Monitored</b>	Tank Monitor tab	Tank level readings	Monitor serial number
<b>Calendar</b>	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
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## 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
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## 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
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