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

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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

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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