

4.29 Propane Inspection

Introduction

The Propane Inspection tool is used to capture Propane Gas Appliance information, safety checks, etc from the Android Handheld and stored on the desktop for each customer site. These have also been known as “Form 4” Inspection forms.

Overview

The major steps to do:

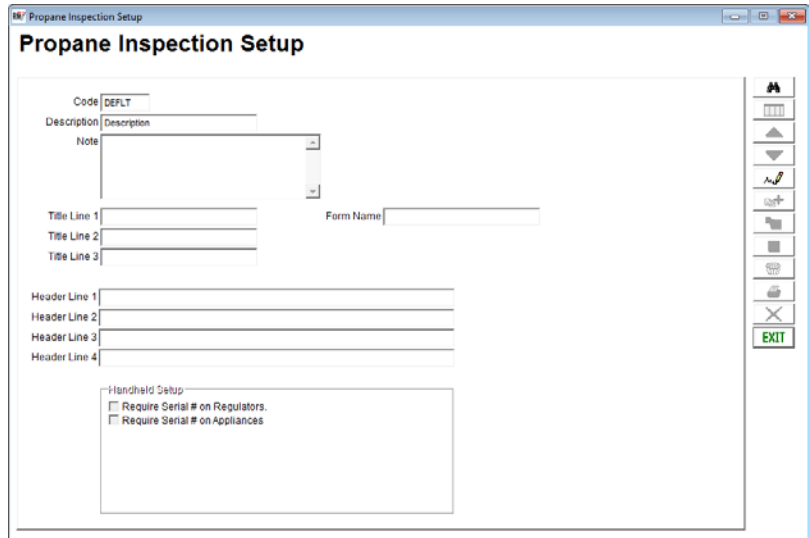
1. Propane Inspection Code
2. Equipment Manufacturers
3. Regulator Types
4. Appliance List
5. Appliance Locations
6. Enable on Handheld

Setup Items

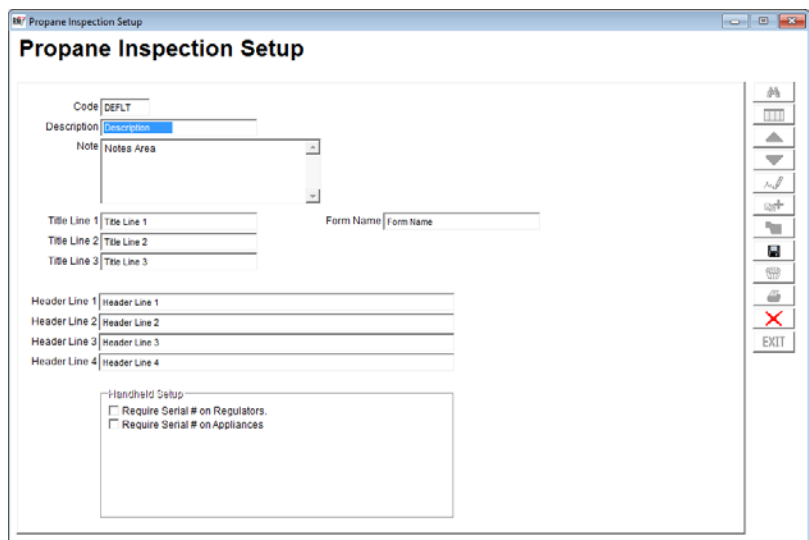
Propane Inspection Codes

The first item to setup is the Propane Inspection Code. This basically defines the Report Header information. Such as, Company Info, Form Title, etc.

Navigate to *Modules > Propane Inspection > Propane Inspection Setup* which will open the following screen:



Next, select the *Modify* button so you can begin filling in the details. The Title Lines, Header Lines and Form Name are printed at the top of the Propane Inspection Report.



For training purposes, the field names are displayed below in the location they are printed. Dealer Address is automatically filled in based on the Branch Information and Customer Address/Phone is taken from the Account information. Example Inspection Form report header:

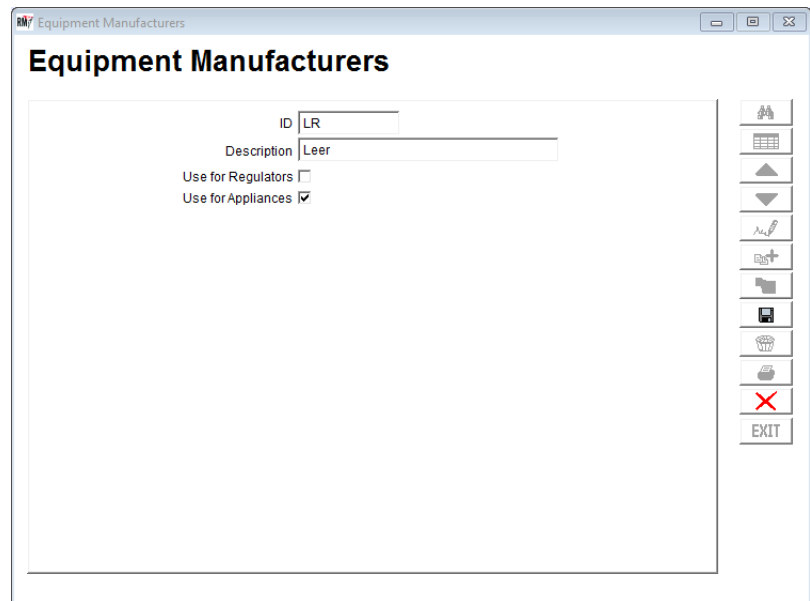
Title Line 1	Header Line 1	Form Name
Title Line 2	Header Line 2	
Title Line 3	Header Line 3	
	Header Line 4	
DEALER ADDRESS	Advantage Propane 3201 Liberty Square Parkway Turlock, CA 95380 209-632-1122	CUSTOMER ADDRESS Santos Fabrication 1900 Acme Ct Turlock, CA 95380 PHONE 209-632-1122

Once you have entered in all the valid information required for your Inspection form select the *Save* button to save all the changes.

Equipment Manufacturers

Next you will need to define the Regulator and Appliance Manufacturers. You can do this by navigating to the *List > Equipment > Manufacturers List* screen. You will want to either *Modify* (if the Manufacturer already exists) or *Add* a new manufacturer. Then select whether they are a Regulator or Appliance manufacturer, or both.

Simply select the Check Box next to each type this manufacturer provides:



The screenshot shows a software window titled "Equipment Manufacturers". Inside the window, there is a form with the following fields and controls:

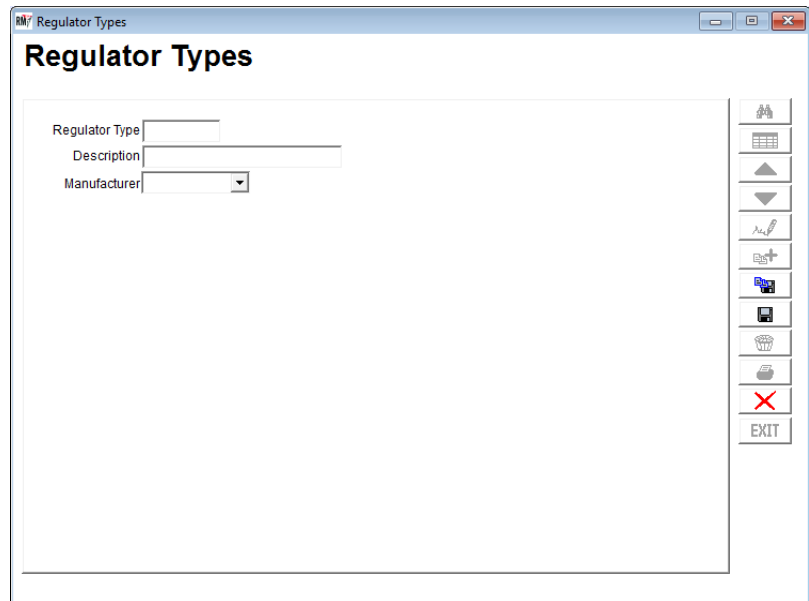
- ID:** A text input field containing "LR".
- Description:** A text input field containing "Leer".
- Use for Regulators:** A checkbox that is currently unchecked.
- Use for Appliances:** A checkbox that is currently checked.

On the right side of the form, there is a vertical toolbar with several icons: a list icon, an add icon, an edit icon, a delete icon, a save icon, a refresh icon, a search icon, and a red 'X' icon. Below these icons is an "EXIT" button.

Once complete, save the changes. Repeat for each additional manufacturer.

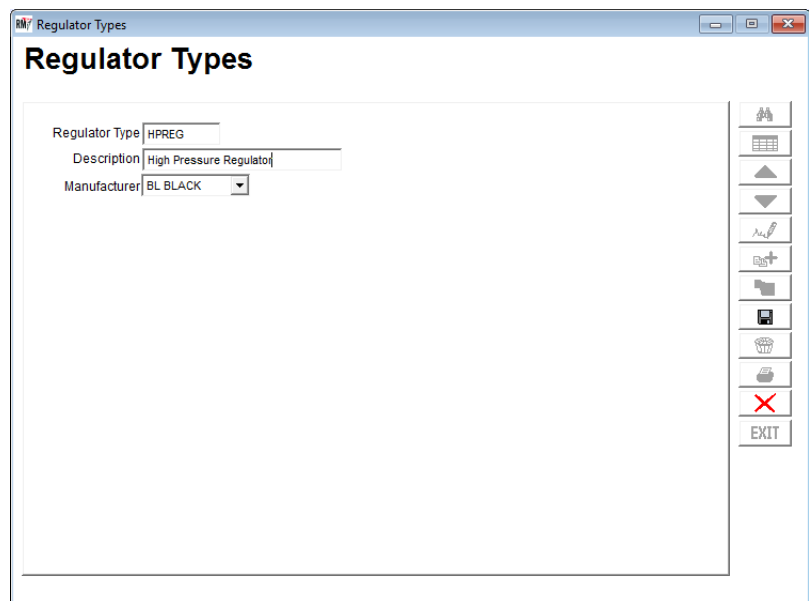
Regulator Types

Now that the Manufacturers have been entered into the system, we can proceed to adding in the specific types of Regulators. Navigate to the *Modules > Propane Inspection > Regulator Types* screen and select the *Add* button.



The screenshot shows a software window titled "Regulator Types". Inside the window, there are three input fields: "Regulator Type", "Description", and "Manufacturer". The "Regulator Type" and "Description" fields are empty text boxes, while the "Manufacturer" field is a dropdown menu. To the right of the form is a vertical toolbar containing several icons: a list view icon, a grid view icon, a refresh icon, a save icon, a print icon, a delete icon, and an "EXIT" button.

Enter a Regulator Type, a Description and then choose a Manufacturer from the drop down menu.

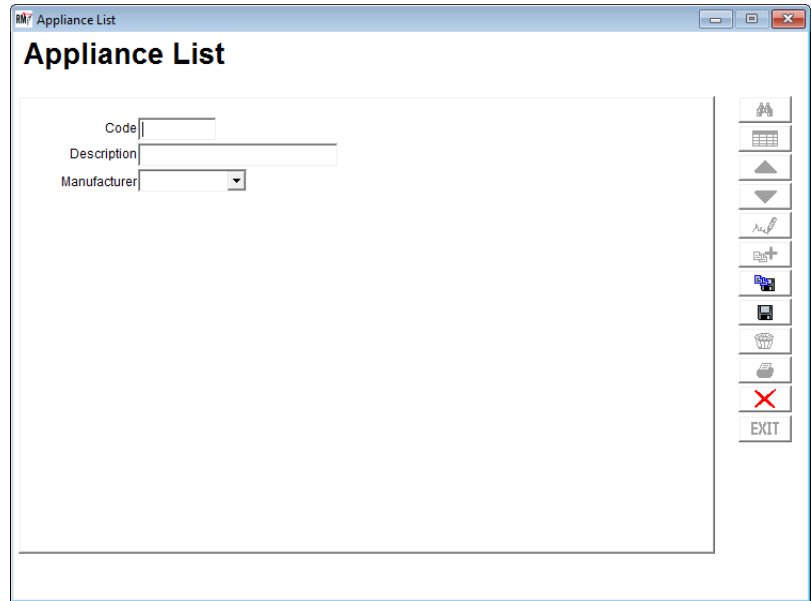


This screenshot shows the same "Regulator Types" window, but now the input fields are filled. The "Regulator Type" field contains "HPREG", the "Description" field contains "High Pressure Regulator", and the "Manufacturer" dropdown menu is set to "BL BLACK". The rest of the interface, including the toolbar on the right, remains the same as in the previous screenshot.

Select the *Save* button to save the changes. Repeat for each additional type of Regulator that may be used.

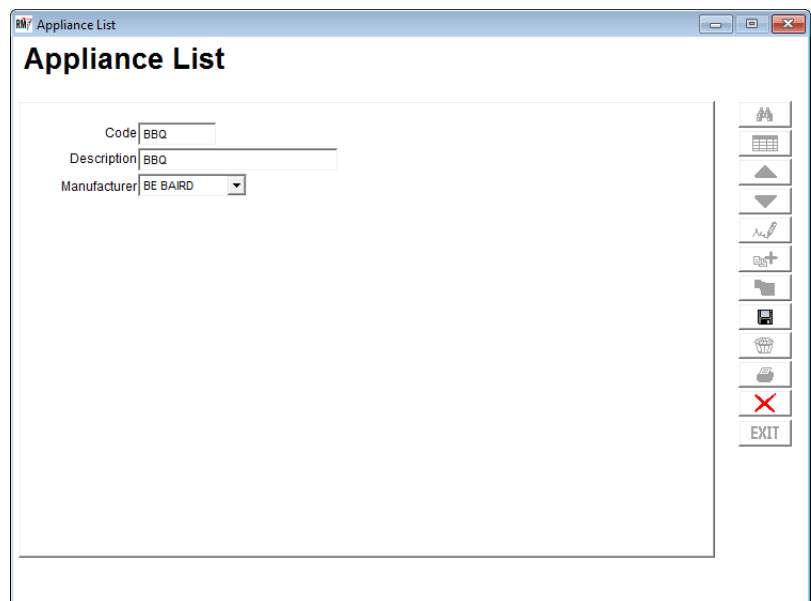
Appliance List

Similar to the process used to enter Regulator types, we will now need to enter the list of Appliances that the drivers may see out in the field. Navigate to the *Modules > Propane Inspection > Appliance List* screen and select the *Add* button.



The screenshot shows a window titled "Appliance List" with a title bar containing a small icon and standard window controls. The main area has a header "Appliance List" and a form with three fields: "Code" (empty text box), "Description" (empty text box), and "Manufacturer" (empty dropdown menu). To the right of the form is a vertical toolbar with icons for adding, deleting, and other actions, and an "EXIT" button at the bottom.

Enter an Appliance Code, a Description and then choose a Manufacturer from the drop down menu.

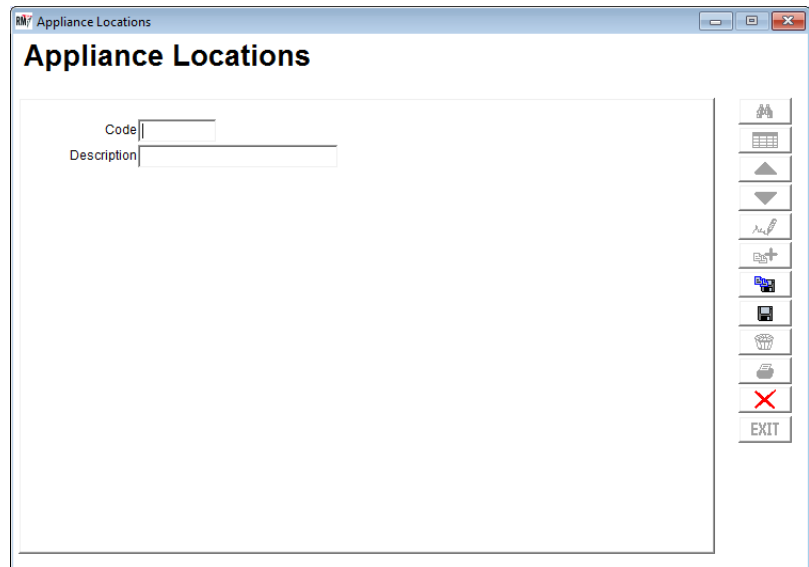


The screenshot shows the same "Appliance List" window, but now the "Code" field contains "BBQ", the "Description" field contains "BBQ", and the "Manufacturer" dropdown menu is open, showing "BE BAIRD" as the selected option. The rest of the interface remains the same.

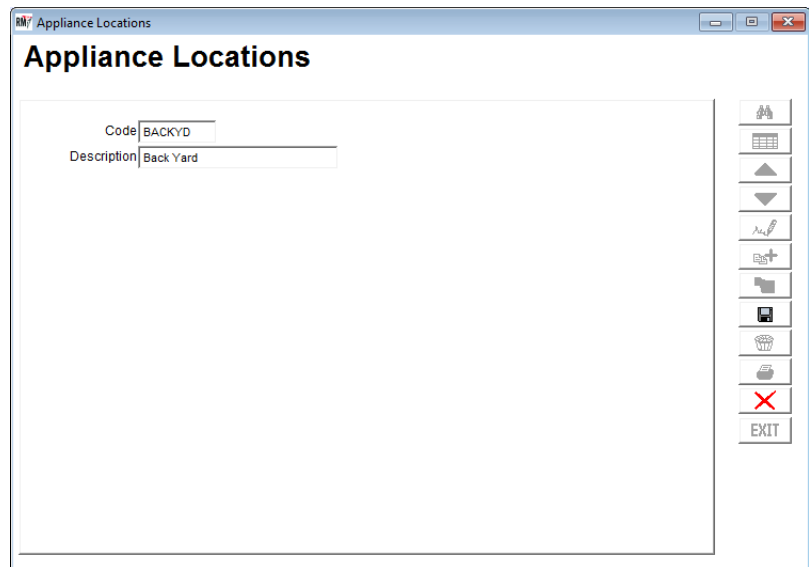
Select the *Save* button to save the changes. Repeat for each additional appliance that may be found at a customer's site.

Appliance Locations

Next, we will want to enter the various locations the drivers will find the Appliances. Locate the *Modules > Propane Inspection > Appliance Locations* screen and select the *Add* button.



Enter a Code and a Description for the Appliance Location.

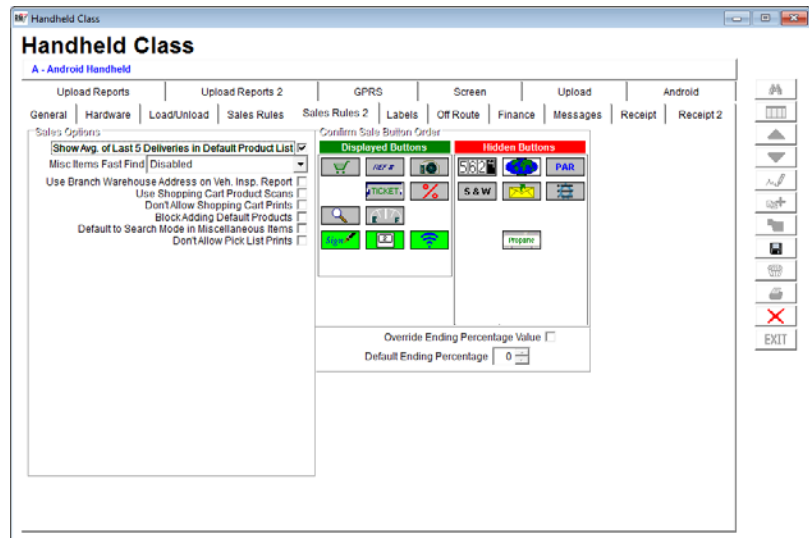


Select the *Save* button to save the changes. Repeat for each additional appliance location that may be found at a customer's site.

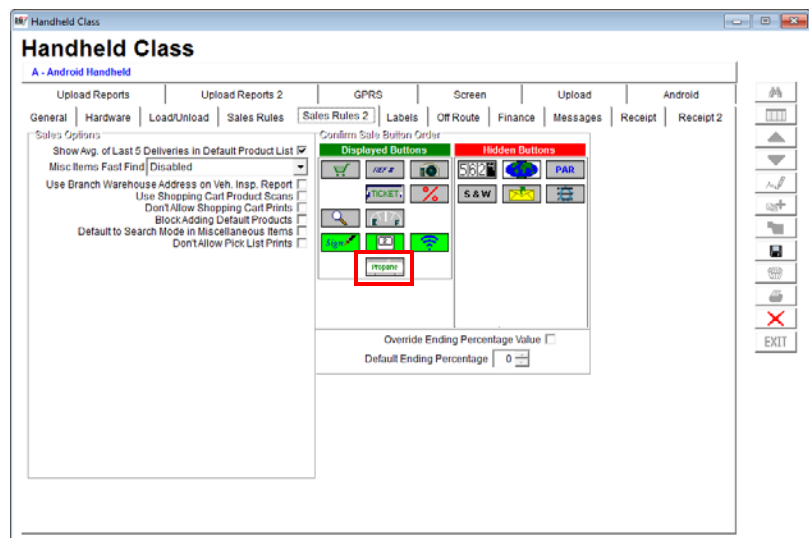
Handheld Setup

Now that we have all the various data points entered into the system, we can enable the feature on the Handheld so the drivers can start to use the Propane Inspection feature.

Navigate to the *List > Routes > Handheld Class > Sales Rules 2 > Confirm Sale* tab. Locate the handheld class you would like to adjust to allow this feature and select the *Modify* button.



Locate the *Propane Tank* button under the *Hidden Buttons* section of the *Confirm Sale Button Order* area. *Left Click and Drag* the button from the *Hidden Buttons* section over to the *Displayed Buttons* section.

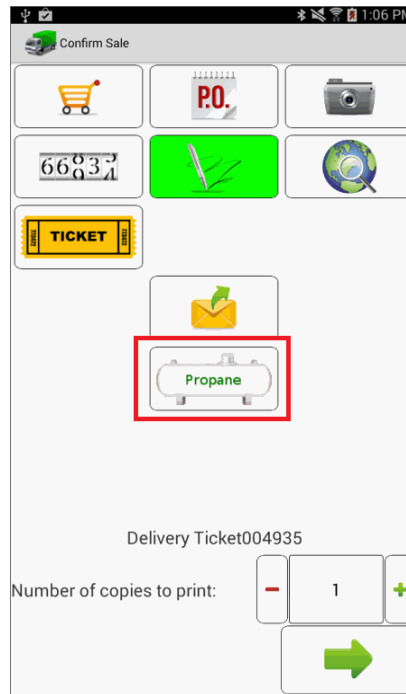


Select the *Save* button to enable the *Propane Inspection* feature for this handheld class. Repeat as necessary for each additional handheld class. Now, the next time a morning card is downloaded to the handheld for any driver assigned to this class, they will be able to start using the *Propane Inspection* form from the *Confirm Sale* screen on each stop.

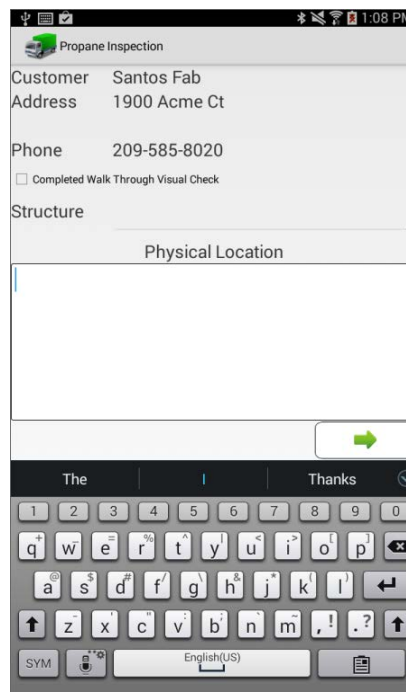
Handheld Use

As mentioned in the previous section, the drivers will find the Propane Inspection feature on the *Confirm Sale* screen on their handhelds.

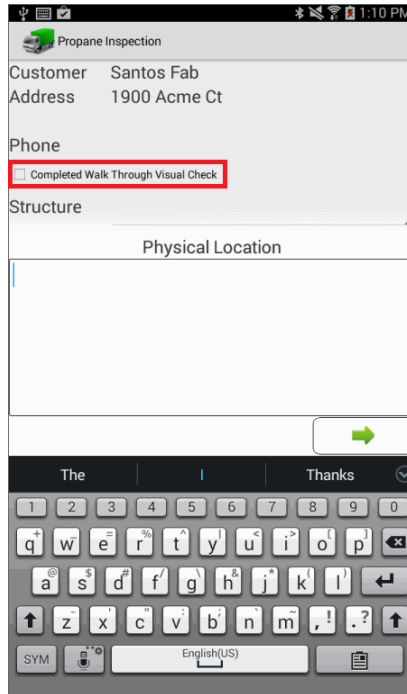
Locate the *Propane Tank* button on the *Confirm Sale* screen section:



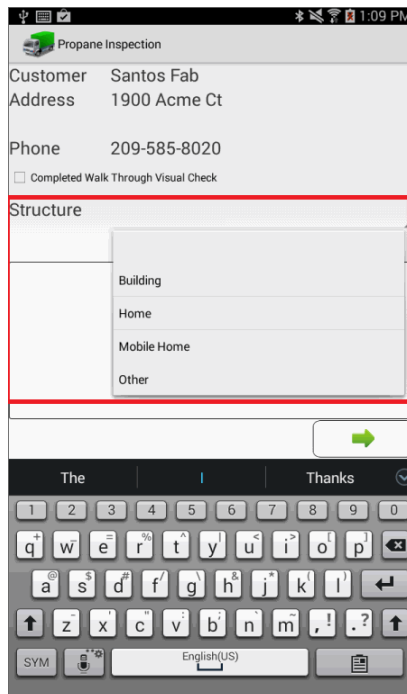
Tap the button to open the first screen of the Propane Inspection:



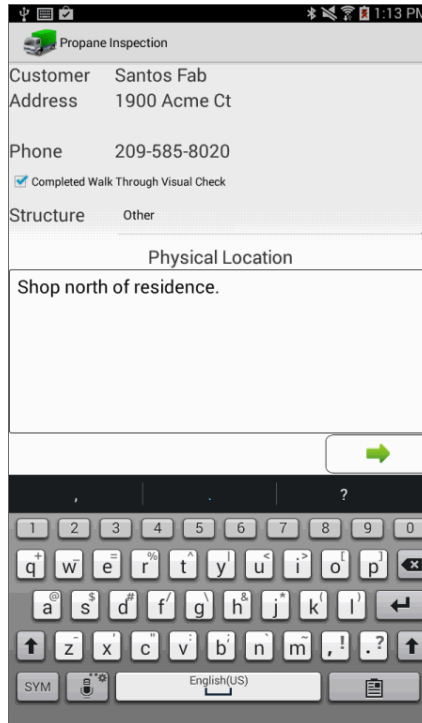
After the driver has completed the walk through visual check at the customer location he will need to select the *checkbox* next to the *Completed Walk Through Visual Check* section.



Then from the *Structure* drop down list, choose a structure.

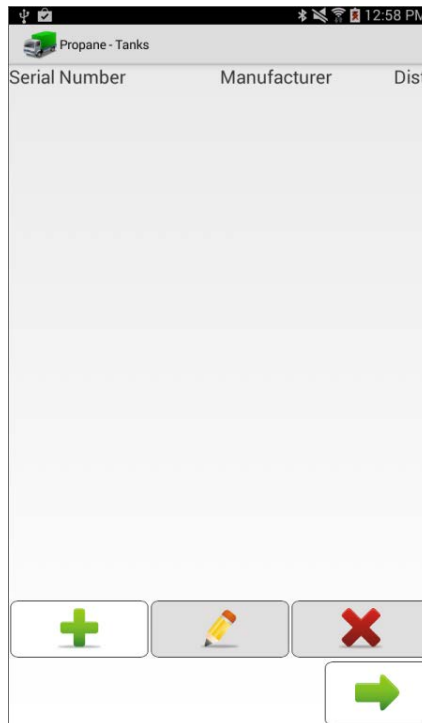


Then the driver can enter any additional comments in the *Physical Location* text box below.

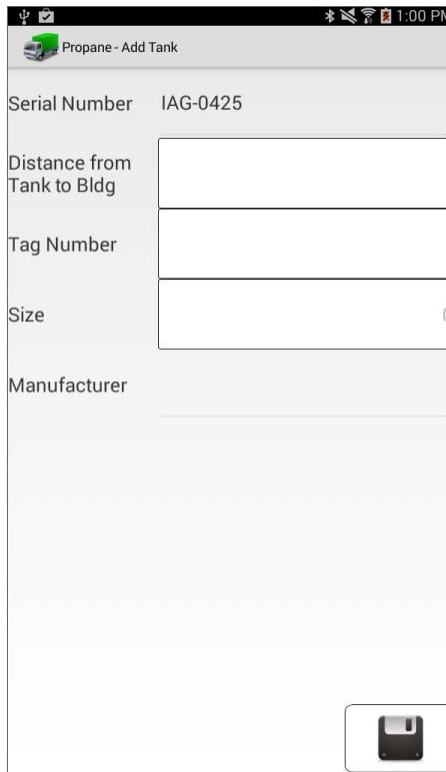


When completed, select the Green arrow in the lower right corner to continue on to the next screen.

Once on the next screen, you will need to assign/choose the Propane Tank(s) installed at the customer's site:



Select the Green Add button to select a Propane Tanks:



Propane - Add Tank


Serial Number IAG-0425

Distance from Tank to Bldg

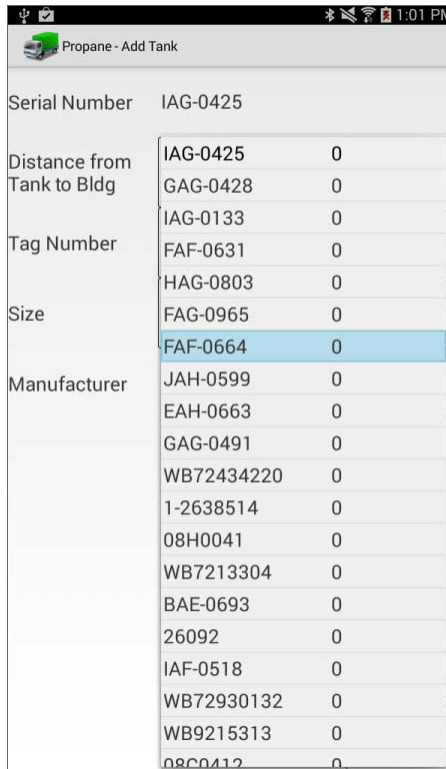
Tag Number

Size 0

Manufacturer



From the Serial Number field, tap the field to open the drop down menu of all equipment, and select one:



Propane - Add Tank

Serial Number IAG-0425

Distance from Tank to Bldg

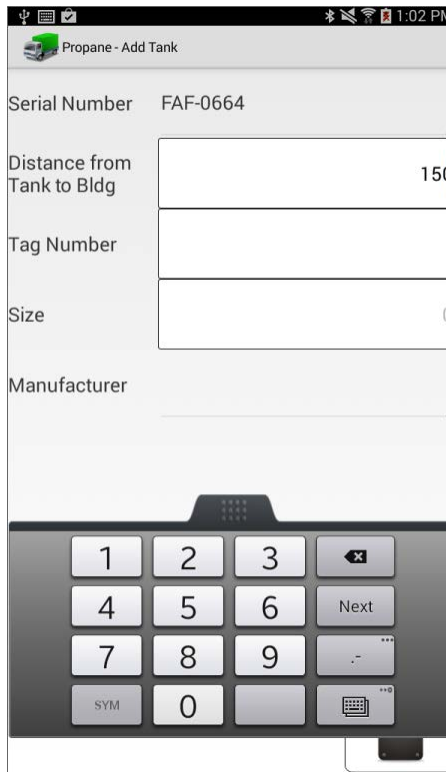
Tag Number

Size 0

Manufacturer

IAG-0425	0
GAG-0428	0
IAG-0133	0
FAF-0631	0
HAG-0803	0
FAG-0965	0
FAF-0664	0
JAH-0599	0
EAH-0663	0
GAG-0491	0
WB72434220	0
1-2638514	0
08H0041	0
WB7213304	0
BAE-0693	0
26092	0
IAF-0518	0
WB72930132	0
WB9215313	0
08C0412	0

Then enter the Distance from Tank to Building:



Propane - Add Tank

Serial Number FAF-0664

Distance from Tank to Bldg 150

Tag Number

Size 0

Manufacturer

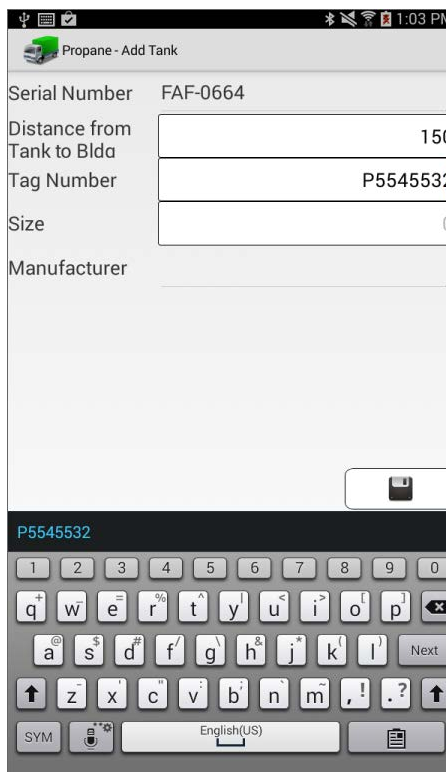
1 2 3 [Back]

4 5 6 Next

7 8 9 .

SYM 0 [Keyboard]

Then enter a Tag Number:



Propane - Add Tank

Serial Number FAF-0664

Distance from Tank to Bldg 150

Tag Number P5545532

Size 0

Manufacturer

P5545532

1 2 3 4 5 6 7 8 9 0

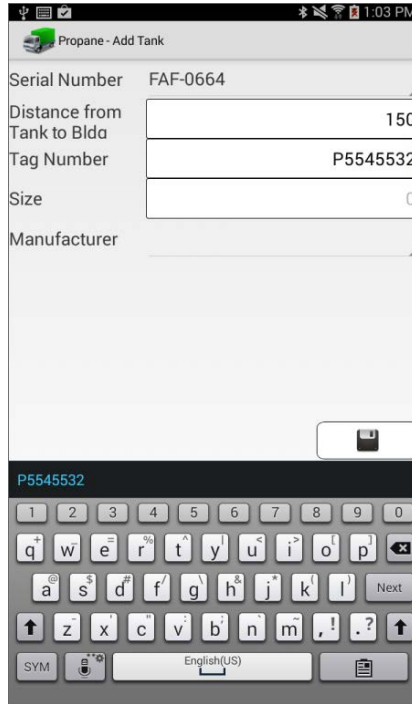
q w e r t y u i o p [Back]

a s d f g h j k l Next

↑ z x c v b n m , ! . ? ↑

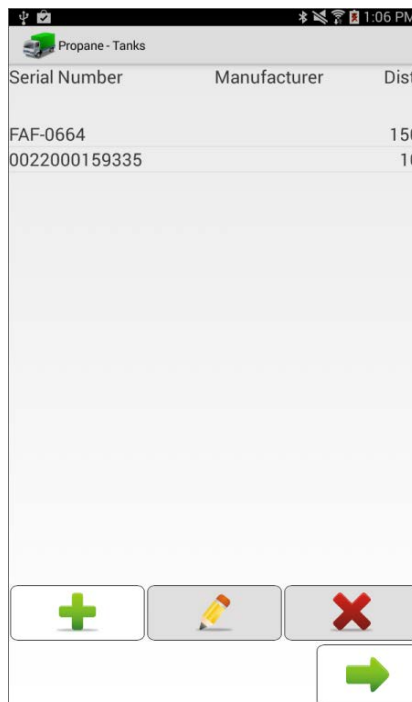
SYM [Microphone] English(US) [Clipboard]

The size will be automatically filled in based on the equipment settings entered on the desktop. Next, choose or confirm the Manufacturer of this particular piece of equipment from the Manufacturer drop down menu:

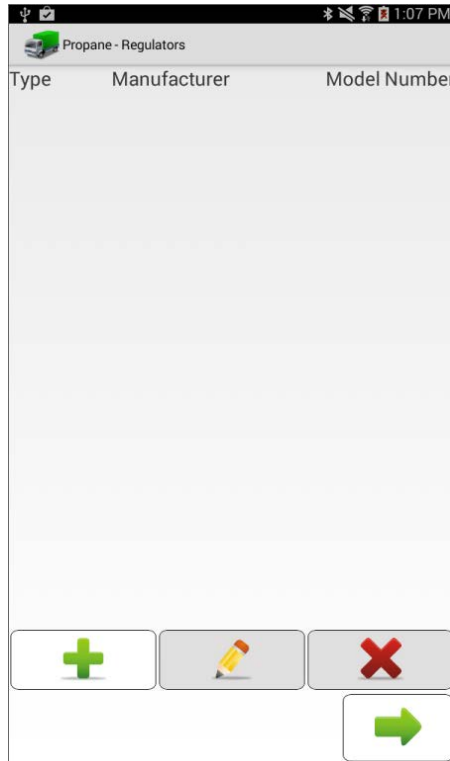


Next, Select the *Save* button to save the Add Tank changes. Repeat for each additional tank on site.

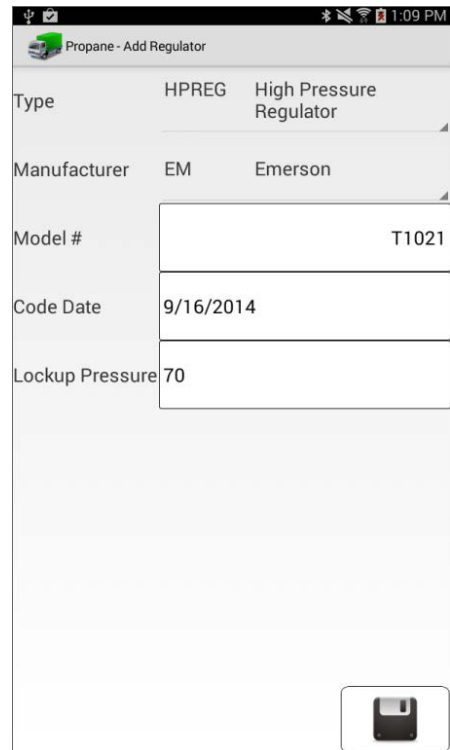
Once all Propane Tanks have been entered, select the Green Arrow to proceed:



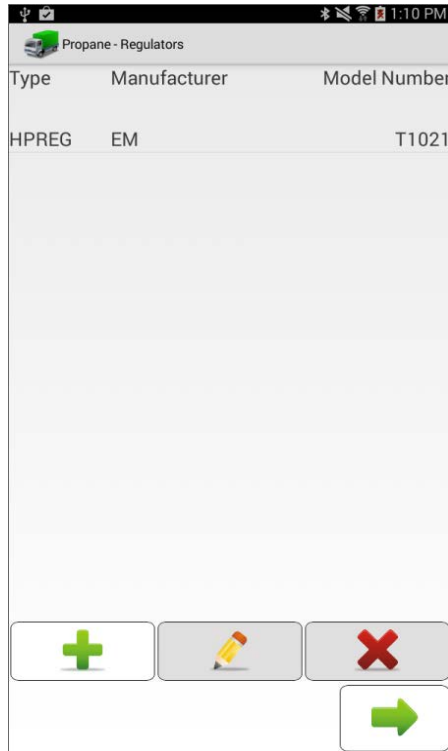
The next section will assist us in adding the Regulators at this customers location. Similar to the Tanks screen, press the Green Add button to start adding Regulators.



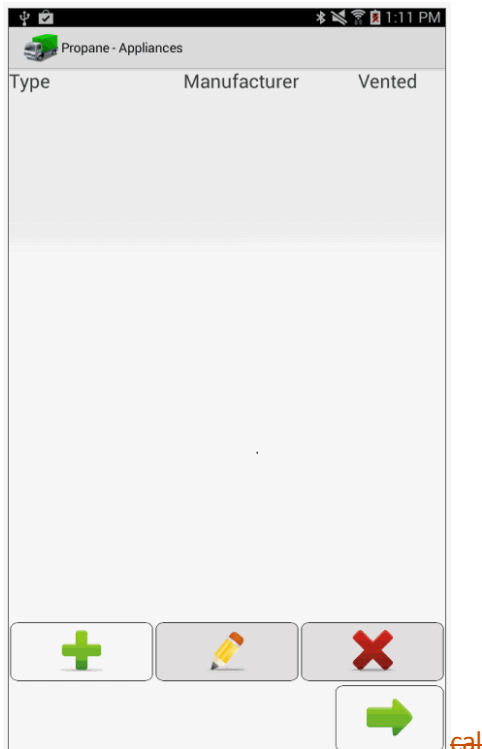
On the Add Regulator screen, choose a Type and Manufacturer from the drop down menus, then enter the Model #, Code Date and Lockup Pressure amounts:



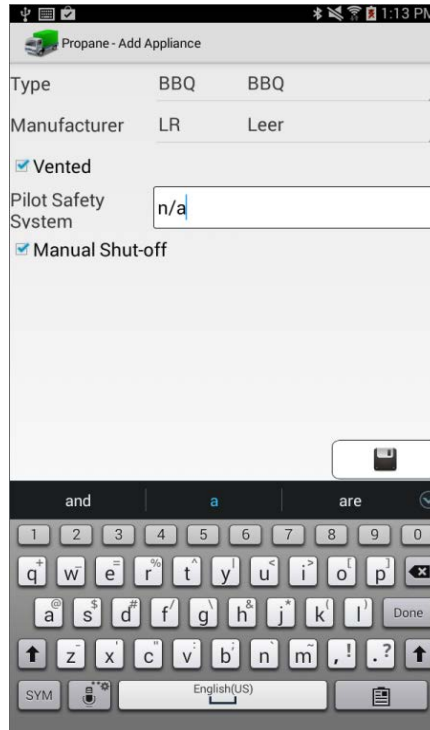
Select the save button to save the new regulator, and be taken back to the Regulators list screen. Repeat for additional regulators.



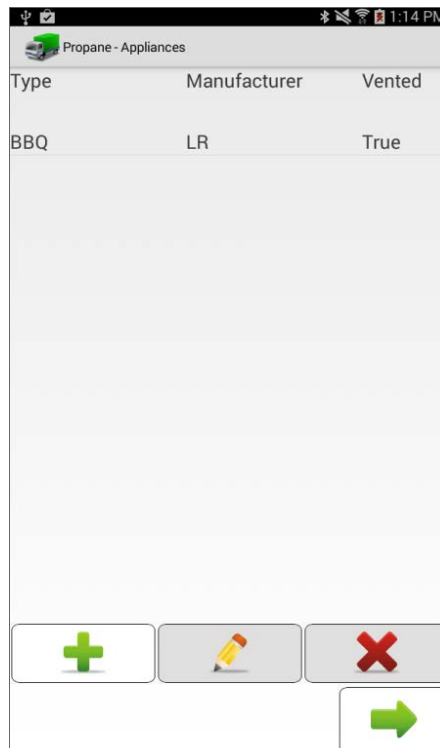
Select the Green Arrow to proceed to the Appliance Summary page, and then select the Green Add button to add a new appliance.



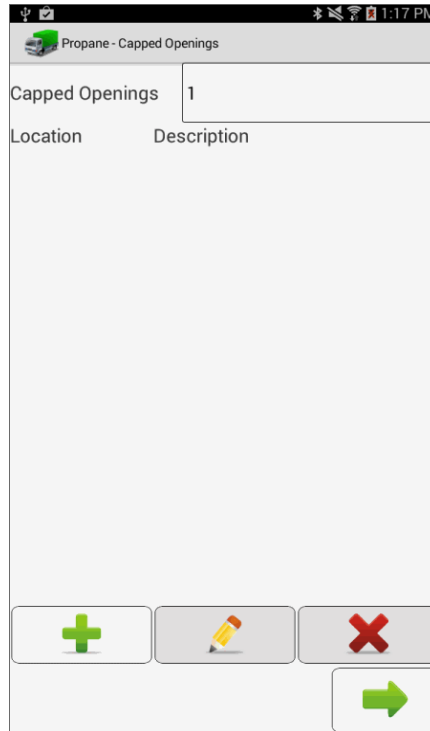
Next, choose an Appliance Type, Manufacturer, whether its vented or not, what Pilot Safe System is on it and if it has manual or auto shut off:



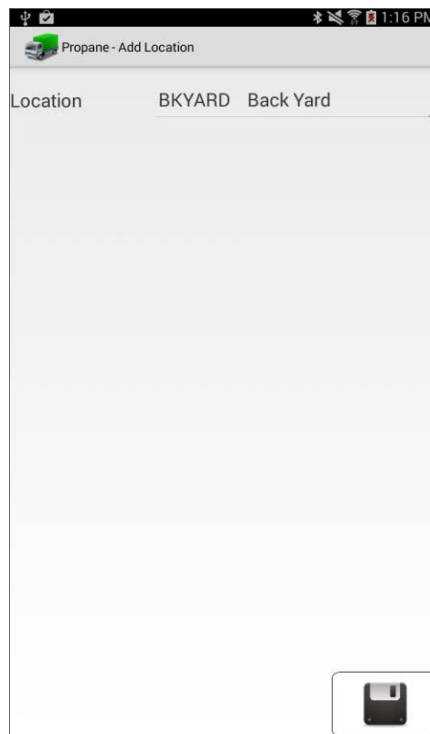
Select the Save button to save the changes, and be taken back to the list of all Appliances. Repeat for each additional appliance. Then select the Green Arrow to proceed to the next step.



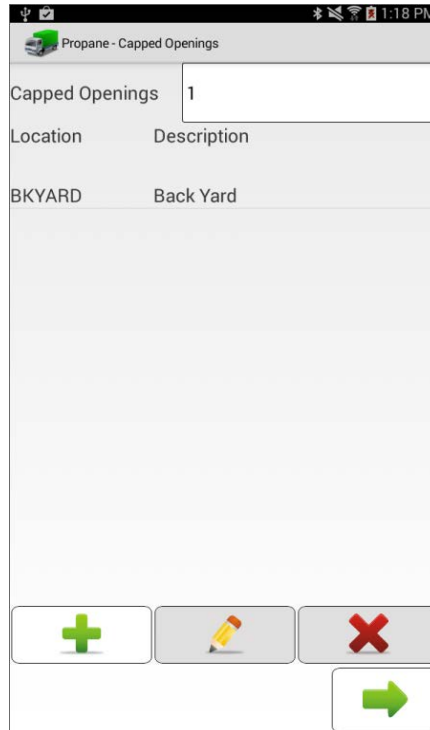
Next, enter the number of Capped Openings at the customers location:



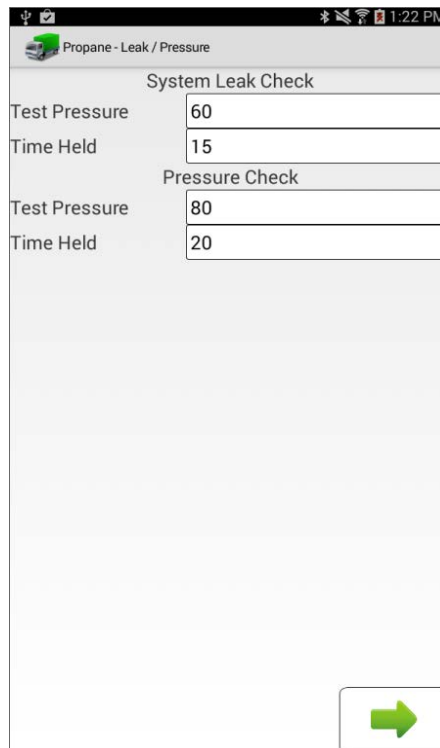
Then select the Green Add button to add the location for EACH capped opening. Then choose a Location from the drop down menu, and press the Save button to proceed.



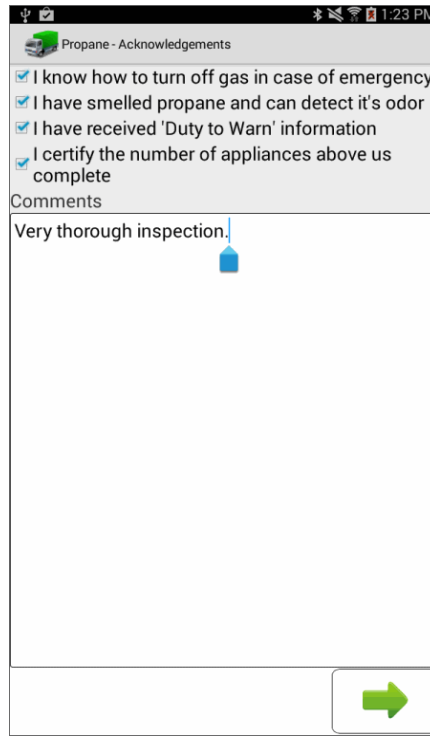
Select the Save button to proceed back to the Capped Openings screen. Repeat process for each opening found.



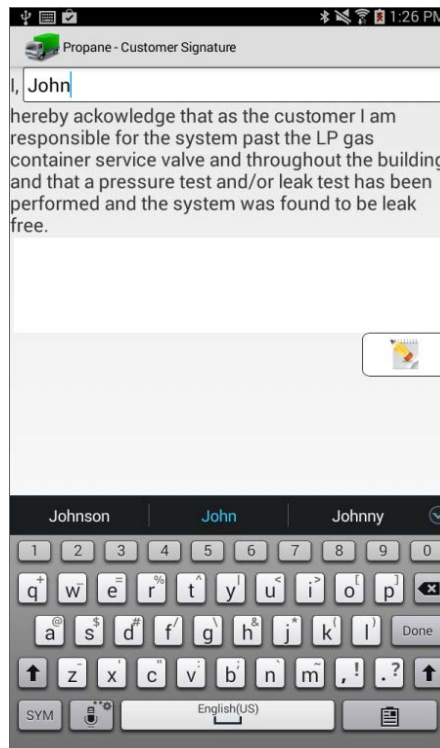
When ready to proceed, press the Green Arrow to be taken to the Leak/Pressure check screen. Perform the checks as normal and enter the values into the relative fields found below:



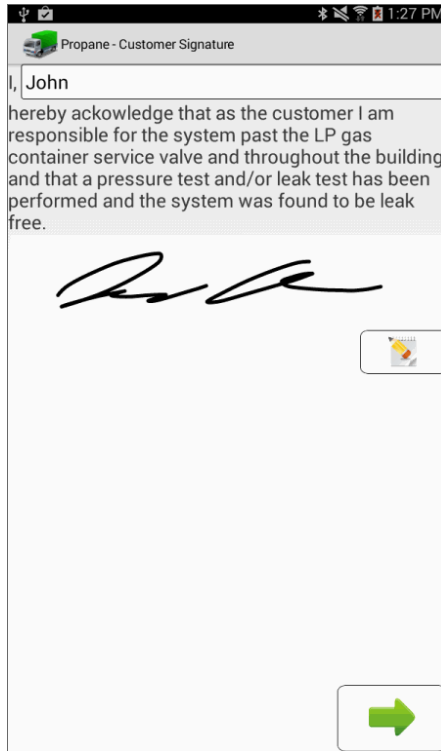
Select the Green Arrow to proceed to the Acknowledgements screen. The customer will then need to check each box and add any additional comments.



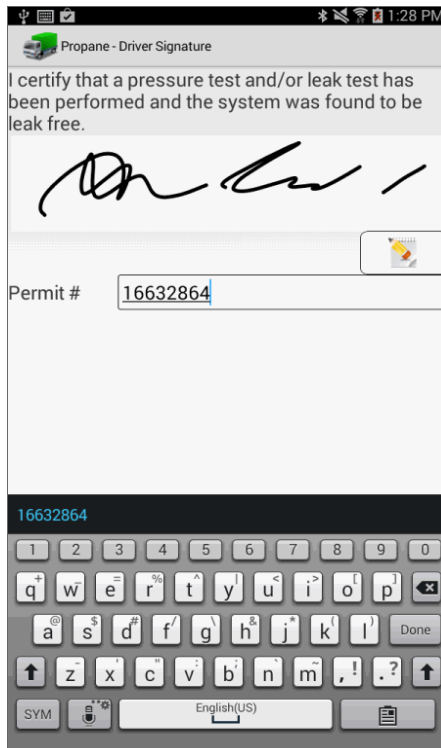
Select the Green Arrow to proceed to the Customer Signature Capture screen. Tap the box at the top to type in the customers name:



Then have the customer sign their name in the box below. Use the Clear Button if necessary to clear the signature capture box.



Then select the Green Arrow to proceed to the Driver Signature screen. Sign in the box and enter the Permit #:



Then select the Save button to finish the Propane Inspection. You will then be redirected back to the Confirm Sale screen where you can finalize your sale.

Repeat for each additional stop on route that requires a Propane Inspection. Then upload the route as normal at the end of the day.

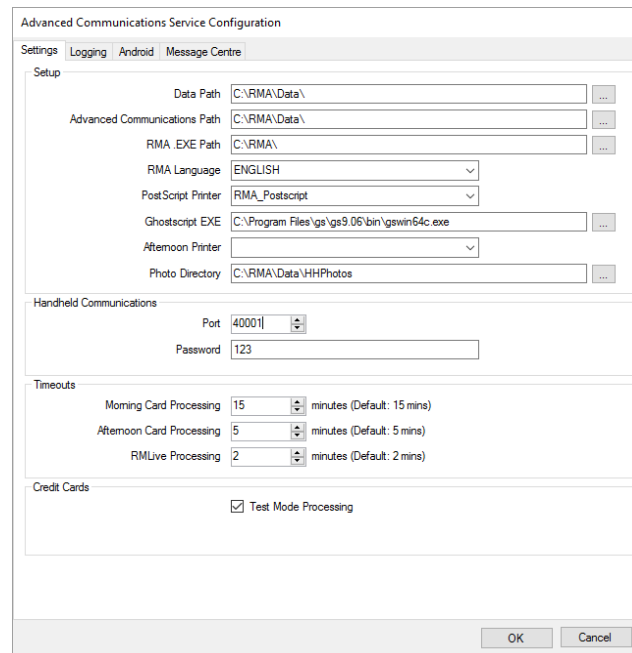
Results

To view the propane inspection PDF for the customer, you must have the two following sections setup.

Advance Communications Configurations

The first item to setup is the Handheld Photo Directory in Advance Communications Configuration. This directory is used to store photos and PDF from the handheld in Route Manager. Such as, driver photos of the sites, or the PDF copy of a Propane Inspection, etc. See Also: Advanced communications manual as a reference for setup items.

Navigate to *List > Routes > Advance Communications Configurations* which will open the following screen:

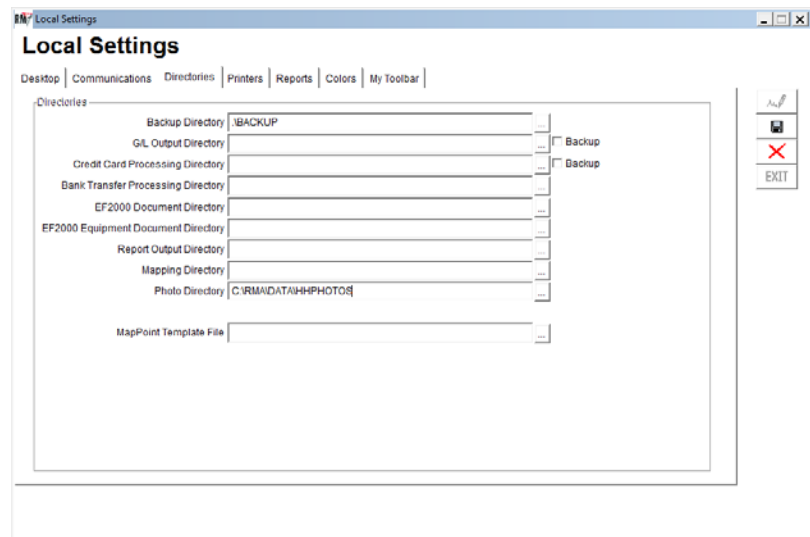


Note: It is best to create the Photo Directory folder in the Data folder of your Route Manager. If you have ARS Backup, this will ensure the photos are backed up as well.

Local Settings

The second item to setup is the Photo Directory in Local Settings. This directory is used to store photos and PDF from the handheld in Route Manager. Such as, driver photos of the sites, or the PDF copy of a Propane Inspection, etc. See Also: User Manual A as a reference for Local Settings Setup (pg 74)


Navigate to *File > Local Settings > Directories tab* which will open the following screen:



Note: Local Settings Photo Directory must be assigned to the same directory as the Advance Communications Configurations Photo directory location above. The following item will not be available if they do not match.

Propane Inspection PDF

Next, to view the Propane Inspection PDF's you need to navigate to the Contacts Tab in Customer Information for the customer in which you wish to view the report for. Then select the Cabinet Icon.

Note:  Select this cabinet icon to view all electronic documents. Propane Inspections are stored as "Propane Inspection Forms". You may preview, print, fax or email from this screen. All Propane Inspection forms are saved as a PDF.

Summary

Using the modules and procedures describe above will allow you create, store, and print Propane Inspection Forms on a regular basis.

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