

Tank Information

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To add a tank to a customer, select **Add** at *Energy / File / Open / Tank Information*.

Profile

The screenshot shows a software window titled "Edit Customer LP Tank Information AdeJa/250156". The window has several tabs: Profile, Delivery Info, User Defined, Regulators, Rent / Lease, Fuelware, and Energy-Force. The "Profile" tab is active. It contains a "Split" section with a dropdown for "<CustID>" set to "AdeJa" and a search icon. Below this are fields for "Serial #", "Tank Size", "Location", "Description", "Owner", "Driver", "Route", "Region", "Billing Comments", "<Site ID>", "Site Description", "Tank Address", "Tank City", "State", "Zip", "<Product>", and "Default Terms". There is also an "Equal Billing Info" section with "Cycle", "<Product>", "Misc00", and "Amount" fields. A "Directions/Notes" text area is located on the right side. At the bottom, there are buttons for "Tank History", "Map", "Save", and "Cancel".

- **Split** – Both splits default to 100% to the customer on the tank. The *Energy Billing* split is for invoicing deliveries. Any time an Energy Ticket is imported into an Invoice, it looks at the *Energy Billing* area for the split information. The *Rental Billing* is the split used when posting rent/lease invoices.
- **CustID** – Select the customer by double-clicking in the box.
- **? Icon** – Information from the customer file may be viewed.
- **Serial #** – Enter the unique serial number of the tank.
- **Tank Size** – Enter the tank size. This information must be completed before the tank record is saved.
- **Location** – The default location automatically populates, but may be changed if necessary.
- **Description** – Optionally enter a description. It is visible when selecting the tank for deliveries.
- **Owner** – The selected customer’s name defaults but may be changed if necessary.
- **Driver** – Select the driver from the drop-down list. The driver list is maintained at *Hub / Applicators*. The driver information may be used for filtering reports and sending e-mails and text messages from Maintenance Work Orders and Product Delivery Order screens.
- **Note:** For a driver to display in the list, there must be an entry in the *Email Address of the Applicator Information* screen.

- **Route** – Select the route from the list. A new route may be added by typing the information into the box. The route prints on Product Delivery Orders, Maintenance Work Orders, and can be used to filter for tanks at the *Product Delivery Order* screen and on reports. Once a tank has been saved with a new route, that Route is a selection available when adding future tanks.
- **Region** – Select the region from the list. If this is a new region, it can be added by typing the information into the box. The Region prints on Product Delivery Orders, Maintenance Work Orders, and may be used for filtering purposes in the Energy reports. Once a tank has been saved with a new region, that Region is a selection available when adding future tanks.
- **Salesperson ID** – If a salesperson is selected, when an Energy Ticket is imported into an Invoice, the salesperson displays on the *Additional Info* tab of the Invoice. The Salesperson ID also displays on Energy Tickets in Agvance Mobile Energy.
- **Billing Comments** – Billing comments can optionally be added. If entered, these comments print on the Invoice.
- **Site ID** – Double-click to select the tank site ID. The Site IDs are established at *Energy / Setup / Sites*.
- **Site Description** – Automatically fills in based on the Site ID selected.
- **Tank Address, City, State, Zip** – Enter the address for the location of the tank. This address prints on Maintenance Work Orders and Product Delivery Orders. It automatically pulls from the customer address when adding a tank but may be changed if necessary.
- **Product** – The fuel product, set up at *Setup / Preferences*, defaults in but may be changed if necessary. This product defaults when Product Delivery Orders are entered for this tank.
- **Default Terms** – These terms default to the customer Invoice when Energy Tickets for this tank are invoiced. These terms override any terms set in Accounting Preferences or on the Customer File.
- **Inactive** – Tanks marked *Inactive* are not available at the *Product Delivery Order* or *Maintenance Work Order* windows.
- **Directions/Notes** – Directions or notes may optionally be entered. If entered, they print on Maintenance Work Orders and Product Delivery Orders.
- **State Tax Code** – If applicable, select the state tax code for fuel deliveries to this tank. If a State Tax Code is selected on the tank, this rate supersedes the tax code set for the location.
- **Adj Tax Code** – If applicable, select the adjustment tax code for the fuel deliveries to this tank.
- **Equal Billing Info:**
 - **Cycle** – Select the cycle from the drop-down list. If a new cycle is necessary, type the name into the box. The cycle is used to filter for tanks when posting Equal Bills and for reports. Once a tank has been saved with a new cycle, that cycle is a selection available when adding future tanks.
 - **Product** – Select the product for the Equal Billing Invoices. This defaults from *Setup / Preferences*, but may be changed if necessary. This product is used when posting Equal Bills.
 - **Amount** – Enter the amount to be billed on the Equal Billing Invoices.

- **Tank History** – Select to view history. For each Product Delivery Order and Maintenance Work Order, an entry is made to the tank history. The tank history is available in a report. Tank history information may be purged by date range.
- **Latitude/Longitude/Map** – If the user is set to auto geocode, the tank’s location may be viewed by selecting **Map** or selecting a new location on the map. When saving the tank, if the lat/lon is zero or blank and there is an active internet connection, the program attempts to automatically retrieve a lat/lon for the specified tank address. If no valid address is returned, an option is given to select the location on a map. Alternately, tanks may also be geo-coded in the Agvance Hub by using the *Geocode Agvance Data* utility.

Delivery Info

- **Scheduled Delivery** – If this option is marked, the *Estimated Tank Gauge* and *Last Delivery Gauge %* update as Product Delivery Orders are imported into Invoices. For tanks with the *Update K Factor* option selected, a new K Factor is also calculated. The amount needed to fill the tank to the desired level is automatically calculated when making deliveries for *Scheduled Delivery* tanks.
- **Calendar Days** – This option allows scheduling deliveries based on a number of days. Selecting this option enables a grid. Selecting **Add Row** allows entering a starting and ending month and day, along with the number of days between deliveries. This number is used in conjunction with the *Last Delivery Date* to determine when the next delivery is due.
- **Will Call** – This option is for customers who call to request a delivery. *Last Delivery Date*, *Gauge %*, *Delivery Amount*, and *Truck Ticket* will update from the *Process Energy Order* window.

- **K-Factor** – Used in calculating *Estimated Tank Gauge* and number of gallons needed to fill the tank to the desired level. This automatically updates only if the *Update K Factor* box is marked.
- **Update K Factor** – If this is selected, the K-Factor automatically calculates using heating degree days and % full amounts.
- **Last Monitor Reading** – This is populated with the percent and date if one exists in the database.
- **Heating Usage Factor** – Automatically calculated by multiplying the *K-Factor* by the *Tank Size*.
- **Auxiliary Usage Factor** – This is the factor for how much fuel other appliances use. This is not a calculated amount. If entered, it is taken into consideration when calculating of the number of gallons needed for a fill and updating the *K-Factor*.
- **Last Delivery Date** – This information is required to save the tank information when adding a new tank. This date is used in calculating the number of gallons needed when adding Product Delivery Orders for *Scheduled Delivery* tanks. The date is updated when Product Delivery Orders are invoiced for both *Will Call* and *Scheduled Delivery* customers.
- **Last Delivery Gauge %** – This amount updates if the *Tank %* is entered at the *Process Energy Order* window when Product Delivery Orders are invoiced. The percentage is used in calculating *Amount Needed* for deliveries.
- **Last Delivery Amount** – This displays the number of gallons on the last delivery. This amount updates each time an Energy Ticket for this tank is imported into an Invoice.
- **Last Delivery Truck Ticket** – This number is updated if the *Truck Ticket* number is entered on the *Process Energy Order* screen when invoicing the Product Delivery Order. This information is not required.

User Defined

This information is updated manually. It may be used as filters on some reports. These labels are defined at *Setup / User Defined Tank Data Headings*.

- **Classifications** – This provides ways to group tanks. Classifications are defined at *Energy / Setup / Preferences*.
- **Attributes** – A value may be assigned to an attribute. The attribute can also be set as *Required*. If required, the tank is not able to be saved without the attribute information completed. An example might be “Tank Color.” Attributes are defined at *Energy / Setup / Preferences*.

Regulators

This area allows tracking regulators. Each *Regulator ID* entered must be a unique number. The *Serial #*, *Model*, and *Manufacturer* default from the setup of the Regulator. There is a Regulator Reference List report available in the *Energy / Reports / Reference Setup* menu option.

Profile Delivery Info User Defined **Regulators** Rent / Lease Fuelware Energy-Force

Regulators

	<Regulator ID>	Serial #	Model	Manufacturer
1	Stock1	05/2002	SinglePhase	Fisher

When you add a Regulator to the grid, it will automatically be assigned to the tank. If you do not wish to assign the Regulator to the tank, click the row number of the Regulator you wish to delete and press the 'Delete' key.

Tank History Latitude 39430515 Longitude -88888536 Map Save Cancel

- **Regulator ID** – Double-click to select the regulator. Regulators are established at *Setup / Regulators*.

Rent / Lease

Profile Delivery Info User Defined Regulators **Rent / Lease** Fuelware Energy-Force

Rent Lease Owned

<Product> Tank Rent/Lease Misc00 00MAIN

Cycle Annual

Amount 400

Default Terms (None)

Begin Date 11/01/2020

End Date

Lease Amt 0

Lease Payments 0

Net Lease Bal 0

Buyout/Payoff Amt 0

Tank Cost 0

Depreciation Amt 0

Accum Depreciation 0

Net Tank Value 0

<State Tax Code> IL

<Adj Tax Code> .SPCT

Tank History Latitude 39430515 Longitude -88888536 Map Save Cancel

- **Rent / Lease / Owned** – When adding a tank, *Owned* is the default, but may be changed if necessary. These options are used when filtering on the *Post Rent/Lease Invoices* screen.
- **Product** – The product to be used when the Rent/Lease Invoices are processed. This should be a product in a

Service or Miscellaneous department.

- **Cycle** – This is a user-defined field used to populate the grid when posting Rent/Lease Invoices.
- **Amount** – This is the amount for the Invoice created when posting Rent/Lease Invoices. The amount entered should be the amount per cycle to be invoiced.
- **Default Terms** – These terms are used on the Invoices created by the *Post Rent/Lease Invoices* function. This term overrides the terms on the customer file and/or location.
- **Begin Date** – This is the date the lease agreement begins.
- **End Date** – This is the date the lease agreement ends.
- **Lease Amt** – This is the total amount of the lease to be collected from customer.
- **Lease Payments** – This is the total of the lease invoices that have been posted.
- **Net Lease Bal** – This is the calculated remaining balance on the lease.
- **Buyout/Payoff Amt** – This is the amount the customer would owe if fully paid right now. This amount is entered manually.
- **Tank Cost** – This is the amount it cost to purchase the tank.
- **Depreciation Amt** – This is the amount to be depreciated per cycle. It is calculated by dividing *Tank Cost* by the number of cycles. For example, if the lease bills are posted annually for 5 years, divide the *Tank Cost* by 5.
- **Accum Depreciation** – This is the total amount of depreciation that has posted for the tank.
- **Net Tank Value** – This is the cost of the tank less the accumulated depreciation.
- **State Tax Code** – If tank rent/lease Invoices are sales taxable, the state sales tax rate must be selected in this area.
- **Adj Tax Code** – Most often used for local sales tax rates, which is in addition to the state tax code selected above, double-click and select the Adjustment Code if applicable to the Rent/Lease Invoices.

Fuelware

This tab is visible if the Motor Fuel module is activated.

The screenshot shows a software window titled "Edit Customer LP Tank Information CowBo/350124". The window has several tabs: Profile, Delivery Info, User Defined, Regulators, Rent / Lease, Fuelware, and Energy-Force. The "Energy-Force" tab is selected. Inside this tab, there are two main sections: "Motor Fuel" and "Destination".

Motor Fuel Section:

- Schedule: MS (dropdown)
- Tax Type: MFT-Free UST/EIF-pd (dropdown)
- Mode of Transportation: J (dropdown)
- Tax Group: (empty dropdown)

Destination Section:

- City: Shelbyville (text input)
- State: IL (dropdown)

At the bottom of the window, there are fields for Latitude (0) and Longitude (0), a "Map" button, and "Save" and "Cancel" buttons.

- **Motor Fuel**
 - **Schedule** – Select the schedule from the schedule list in Motor Fuel setup.
 - **Tax Type** – Choose the tax type from the hard-coded list of types.
 - **Mode of Transportation** – Select the Mode of Transportation. These are setup in Motor Fuel setup.
- **Destination**
 - **City** – Enter the destination city.
 - **State** – Select the state from the drop-down list.
- **Tax Group** – If the tank should be included in a tax group, select it from the drop-down list. The tax groups are established on the **Setup Taxes** in the *Setup / Fuelware* area.

Energy-Force

This tab is visible if the Energy-Force and Motor Fuel modules are activated.

Edit Customer LP Tank Information CowBo/350124

Profile Delivery Info User Defined Regulators Rent / Lease Fuelware Energy-Force

Motor Fuel

Schedule MS

Tax Type MFT-Free UST/EIF-pd

Mode of Transportation J

Destination

City Shelbyville

State IL

Tank History Latitude 39430515 Longitude -88888536 Map Save Cancel

- **Schedule** – Select the schedule from the schedule list in Motor Fuel setup.
- **Tax Type** – Choose the *Tax Type* from the hard-coded list of types.
- **Mode of Transportation** – Select the Mode of Transportation. These are setup in Motor Fuel setup.
- **Destination**
 - **City** – Enter the destination city.
 - **State** – Select the state from the drop-down list.