# Energy Force / Agvance Tank Transfer Procedure

To avoid duplication errors in Agvance, utilize the following procedures to transfer Company and Customer Owned Tanks.

**Customer Owned Tanks (Co Owns = No)**

1. Open Agvance Energy to select the tank to be transferred in Energy Force by choosing the yellow file folder then *Tank Information*. Select the customer and choose **Edit**.

2. Modify the *Serial #* on the tank by inserting an X in front of the current number.

3. **Save** the tank.



4. In Energy Force, navigate to *Customer Menu / Customer Maintenance* and select the customer. On the Tank Information screen choose **Transfer Customer Tank** to transfer the tank to a new customer account.

5. Navigate to *Posting Menu / Daily Clear* and select **Daily Tank Export**. Select **No** when prompted.



6. Import the tank file into Agvance by selecting *Transfers / Import / Energy Force / Daily Tank*. This will inactivate the original tank and generate a new tank for the customer receiving the transferred tank.

> **Note**: Budget Billing Tanks will not be set to Inactive upon importing from Energy Force.

**Company Owned Tanks (Co Owns = Y)**

1. Transfer the tank to the new customer account in Energy Force by first navigating to *Customer Menu / Customer Maintenance* and select the customer.

2. On the Tank Information screen choose **Change Inv Status** then the *CT (Customer Transfer action)* option to transfer the tank to a new customer account. Select **Process**.



3. On the *TANK Trans to another customer* window, double click in the *New Customer* field to select the new customer then choose **Select**.

4. Provide the appropriate tank information and *Delivery Instructions* then choose **Process**.



5. Navigate to *Posting Menu / Daily Clear* and select **Daily Tank Export**. Select **No** when prompted.

**DAILY CLEAR MENU**

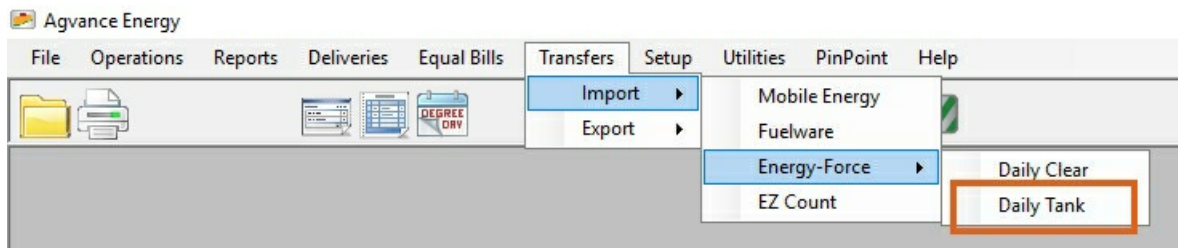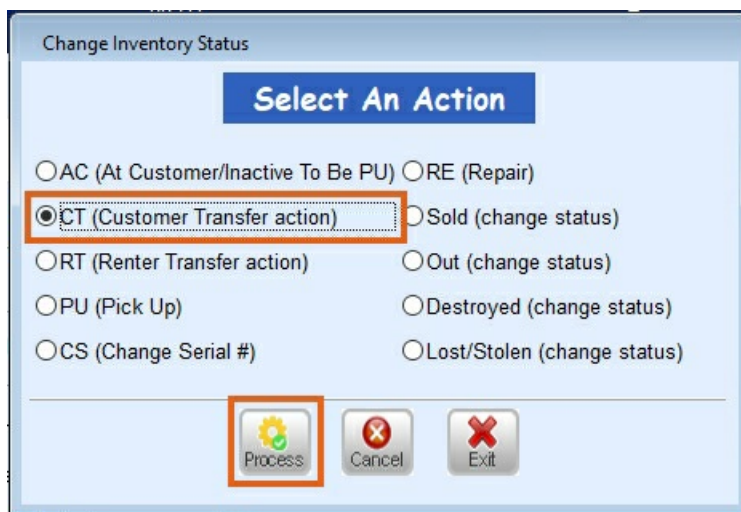| | |
|---|---|
| Division Process | Ascii Totals File Name |
| Master Daily Clear | Print Daily Clear Journal |
| Daily Tank Export | Contract Export |
| Import Customer Balances | Daily Tank Export / Alt ID |
| Import Agris Customers | |
| Rebuild Ascii File | |

Export All?

Do you wish to export all tanks?

Selecting 'Yes' will export all tanks, selecting 'No' will export only those tanks modified since the last export was ran.

Yes　　No

6. Import the tank file into Agvance by selecting *Transfers / Import / Energy Force / Daily Tank.* This will inactivate the original tank and generate a new tank for the customer receiving the transferred tank.

> **Note**: Budget Billing Tanks will not be set to Inactive upon importing from Energy Force.