

Energy Force / Agvance Tank Transfer Procedure

Last Modified on 06/18/2024 12:35 pm CDT

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.

The screenshot displays the 'Edit Customer LP Tank Information' window for customer 'AdeJa' and tank 'X250156'. The window is divided into several tabs: Profile, Delivery Info, User Defined, Regulators, Rent / Lease, Fuelware, and Energy-Force. The 'Profile' tab is active, showing fields for Tank Size (500), Location (00MAIN), Description (Home Heat), Owner (James Ade), Driver (678RT), Route (North), Region (East), Billing Comments, Site ID, Site Description, Tank Address (2110 E 350 North Rd), Tank City (Pana), State (IL), Zip (62557), <Product> (Propane - Home Heating), Default Terms (N15), and InActive checkbox. The 'Serial #' field is highlighted with a red box, showing 'X250156'. The 'Save' button is also highlighted with a red box. To the right of the window, a vertical toolbar contains buttons for Add, Edit, View, Delete, and Cancel, with the 'Edit' button highlighted with a red box.

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.

File Edit Options Master Menu Help Utilities

Go Oms	Tank Serial Number	A / I	Type	Tank Description
Yes	20# CYLINDER	A	C2	
No	GAS	A	G	h
No	UNKNOWN	A	P	House

DD Last Del: 20 Next: 11 Last Del: 03/22/18 Julian Delivery Last Charge: 03/22/18 Last Full Fill: 03/22/18

Customer Type: 2 COMMERCIAL Delivery Type: 1 WILL CALL Regulatory Code: 0 Public Assembly? ☐ Underground? ☐

Products Location Tank Optimizer Log GPS Tank Coordinates

Test Price Test Sale

Product Description	Price Code Tier	Price	Prod Use	Disc	Default
2000 GASOLINE	8 A	0.0000		0	

Price Desc: DEFERRED BILLING DIESEL Disc Desc:

Delivery Address: 123 PRODUCTION DRIVE City/St/Zip: AVON IN 46123- Rtl ☐ Special Delivery Instructions:

Tank Capacity: 500.00 Total Capacity: 750.00 Daily-Use: 0.00 K-Factor: 0.09 Prev K-Factor: 0.15 DD Region: 1 Update K-Factor: Yes Est Gallons Left: Delivered Gallons: 0.00 Tot Gals with Delivery: 475 Gals Since Last FF: 0.00

Last % Update: 00/00/00 Hold Date: 00/00/00 Hold Reason: 0 Hold DD Calculations: No Hold Release Date: 00/00/00

Transfer Customer Tank

Tank Readings: Create Print Exit Find

User Defined Fields: Change Inv Status Inventory Hist Set Up Meter/RTM Regulator Info Split Bill

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	

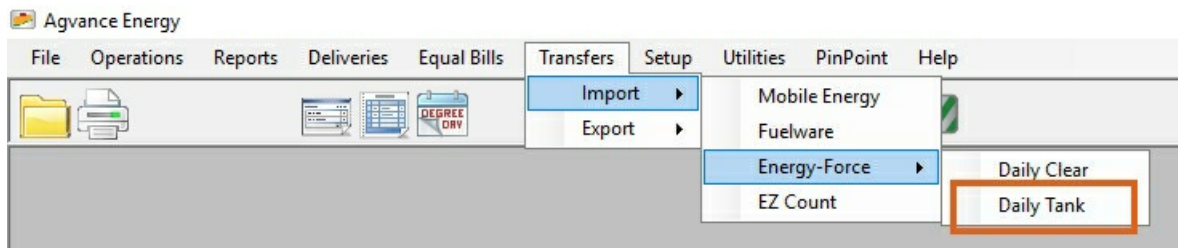
Export All?

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

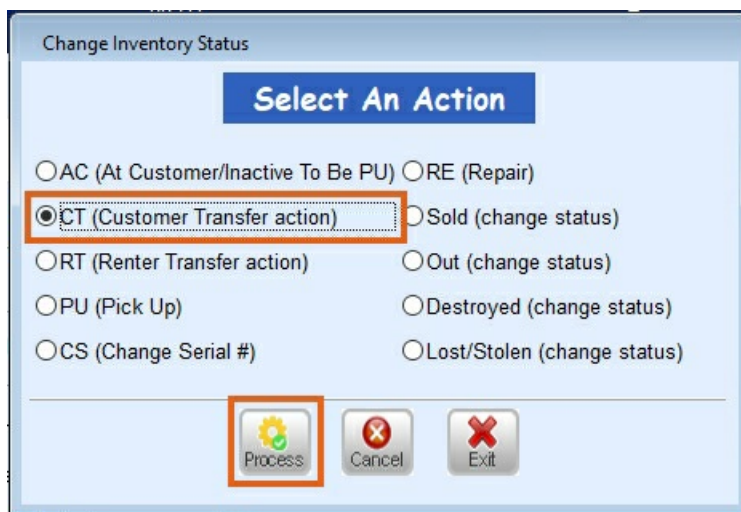
6. Import the tank file into Agvance by selecting *Transfers / Import / Energy Force / Daily Tank*. This will inactivate the original tank and generate a new tank for the customer receiving the transferred tank.

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



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**.

Select - Customer

Division #	Name	Customer #	Cycle Code	Total Balance
1		444	0	\$0.00
1	ADAMS, ANSEL	100007	1	\$18,537.29
1	ALLISON, JENNY	100006	1	\$3,178.37
1	BILLINGSLEY, PETER	10088	1	\$7,472.96
1	BROCK, MICHAEL	100005	1	\$999.59
2	DO, SHANNON	444	1	\$7,440.50
1	DOE, JANE	10089	1	\$0.00
1	DOE, JOHN	100000	1	\$4,190.61
1	DOE, JOHN	10094	1	\$519.90
1	DUBE, DEBBIE	199999	1	\$0.00
1	FLAHERTY, SHANNON	10092	1	\$0.00
1	HAMM, ANGIE	412	1	\$0.00
1	HUNT, SAM	10084	1	\$862.61
2	JACOBS, BRADY	12345	1	\$6,195.91
1	JEFF, DANIELS	12347	1	\$0.00
1	JENKINS, ROBERT	10087	1	\$18,464.75
1	JONES, MATT	10081	1	(950.55)

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

TANK Trans to another customer

Customer Information

☒ Customer at a different address
☐ Customer at this address

Old Customer

10088 BILLINGSLEY, PETER

Div 1

New Customer

100007 ADAMS, ANSEL

Div 1

Please provide the following information for the new customer...

Tank Description

Daily-Use 0.00 K-Factor 0.00

DD Region

Customer Type

Delivery Type

Price Code/Tier

Location

County

Township

School District

Default Dept

Date Tank Set 00/00/00 Gas Check Date 00/00/00

Leak Check Date 00/00/00

Delivery Instructions

Route

Delivery Addr

City/State/Zip

Directions

Special Delivery Instructions

Tank Rental

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

DAILY CLEAR MENU

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Daily Tank Export	Contract Export
Import Customer Balances	Daily Tank Export / Alt ID
Import Agris Customers	
Rebuild Ascii File	

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