

Change Inventory Status

Last Modified on 12/15/2025 2:52 pm EST

To change the inventory status of a company-owned tank, select the tank and then choose **Change Inv Status**. A menu will appear with several options to choose from.

Change Inventory Status

Select An Action

☐ AC (At Customer/Inactive To Be PU)

☐ RE (Repair)

☐ CT (Customer Transfer action)

☐ Sold (change status)

☐ PU (Pick Up)

☐ Out (change status)

☐ CS (Change Serial #)

AC - At Customer

This indicates that the tank has been flagged to be picked up. When chosen, the TankA/I will display an A-AC indicating *Active/At Customer*.

Generally, a Work Order will be created and given to a service team member to pick up the tank. Once the tank has been picked up, go back into *Tank Inv Status* and *Pick Up* the tank.

File Edit Options Master Menu Energy Service Help

Co Owns

Tank Serial Number

A/I

Type

Tank Description

Yes	12345	A -AC	P	House
Yes	NONE	A	CY	33 LB CYL
No	UNKNOWN	A	P	shop

Tank Capacity

500.00

Update K-Factor

Yes

Total Capacity

500.00

Est Gallons Left

440.00

Daily-Use

0.00

Est Percent Left

88

K-Factor

4.00

Delivered Gallons

197.00

Prev K-Factor

0.00

Tot Gals with Delivery

442

DD Region

1

Gals Since Last FF

0.00

DD Last Del

10

Next

1370

Last Del

02/19/14

Julian Delivery

Last Charge

02/19/14

Last Full Fill

02/19/14

Customer Type

1

RESIDENTIAL

Delivery Type

2

KEEP FULL

Regulatory Code

0

Sales YTD

\$0.00

Last % Update

00/00/00

Gallons Used YTD

0.00

Hold Date

00/00/00

Hold Reason

0

Products

Location

Tank

Optimizer Log

GPS Tank Coordinates

Test Price

Test Sale

Product Description	Price Code Tier	Price	Prod Use	Disc	Default
1000 RESIDENTIAL PROPANE	1 A	1.0000		0	<input checked="" type="checkbox"/>

Hold DD Calculations

Hold Release Date

00/00/00

Transfer Customer Tank

Tank Readings

User Defined Fields

Change Inv Status

CT - Customer Transfer Action

This option gives the ability to transfer the tank from one customer account to another. Two options are given: *Customer at a different address* or *Customer at this address*.

If *Customer at a different address* is selected, the information in this image will need to be entered.

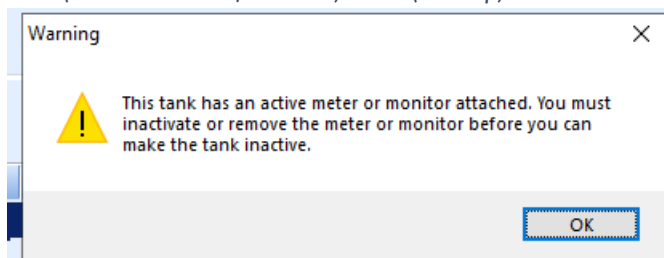
The screenshot shows the 'TANK Trans to another customer' form. The 'Customer Information' section has two radio buttons: 'Customer at a different address' (selected) and 'Customer at this address'. Below these are fields for 'Old Customer' (100006 ALLISON, SHANNON Div 1) and 'New Customer' (0 Div 0). A section titled 'Please provide the following information for the new customer...' contains fields for 'Tank Description', 'Daily-Use' (0.00), 'K-Factor' (0.00), 'DD Region' (0), 'Customer Type' (0), 'Delivery Type' (0), and 'Price Code/Tier' (0). To the right of this section are fields for 'County' (0), 'Township' (0), 'School District' (99), 'Default Dept' (0), 'Date Tank Set' (00/00/00), 'Gas Check Date' (00/00/00), and 'Leak Check Date' (00/00/00). The 'Delivery Instructions' section includes 'Route' (0), 'Special Delivery Instructions', 'Delivery Addr.', 'City/State/Zip', and a 'Directions' text area. At the bottom are 'Process' and 'Cancel' buttons, and a 'Tank Rental' button.

If *Customer at this address* is selected, only *New Customer*, *Customer Type*, *Price Code/Tier*, and *Date Tank Set* information will need to be entered.

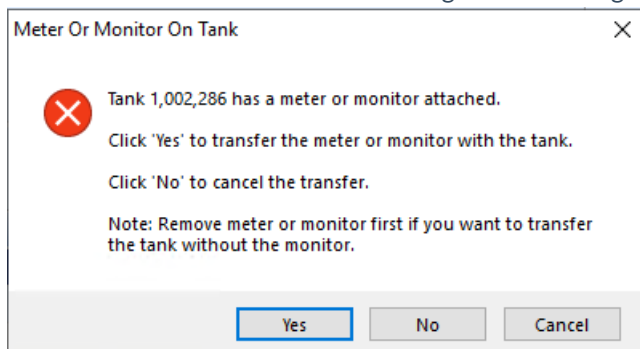
The screenshot shows the 'TANK Trans to another customer' form with the 'Customer at this address' radio button selected. The 'Old Customer' field remains '100006 ALLISON, SHANNON Div 1', and the 'New Customer' field is '0 Div 0'. The 'Please provide the following information for the new customer...' section now only contains fields for 'Customer Type' (0), 'Price Code/Tier' (0), and 'Date Tank Set' (00/00/00). The 'Delivery Instructions' section and the bottom buttons ('Process', 'Cancel', 'Tank Rental') are the same as in the previous screenshot.

Before clicking **Process**, make sure the tank rental details are accurate for the new customer. Review the **Tank Rental** section closely and update any fields that need to reflect the new account—especially *Rental Amounts*, *Billing Month*, and *Lease Status*. A quick verification here saves cleanup later.

Transferring, inactivating or picking up tanks will display a notification if there is an active monitor\meter attached, eliminating monitors or meters left on inactive tanks. Company owned tanks will receive this message if *CT (Customer Transfer action)* or *PU (Pick Up)* is selected.



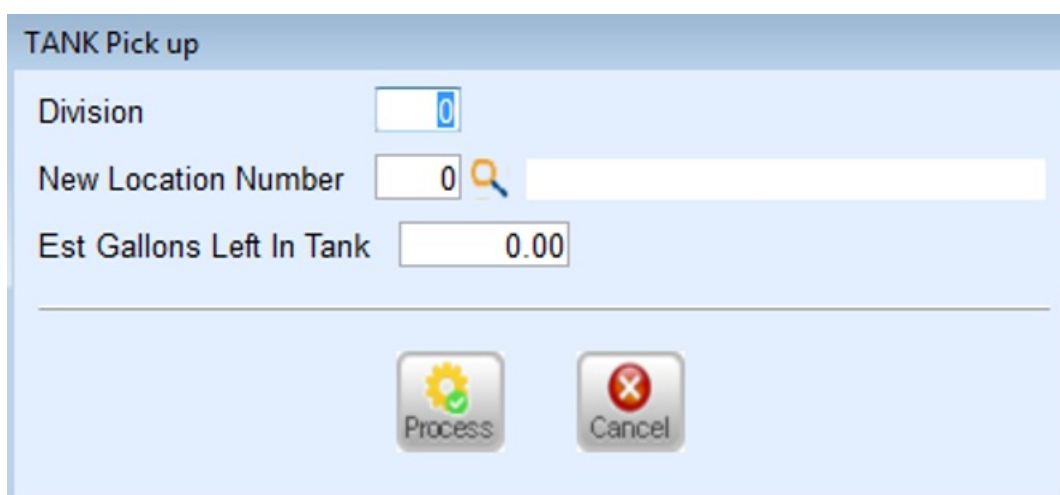
Selecting **Yes** to transfer an attached monitor once the pickup or transfer of the tank is complete displays the *Change Inventory Status* box for the monitor or meter. When **No** is selected the *Change Tank Inventory Status* box will close. Customer owned tanks will display this message to let them know that the monitor or meter needs to be removed before inactivating or transferring the tank.



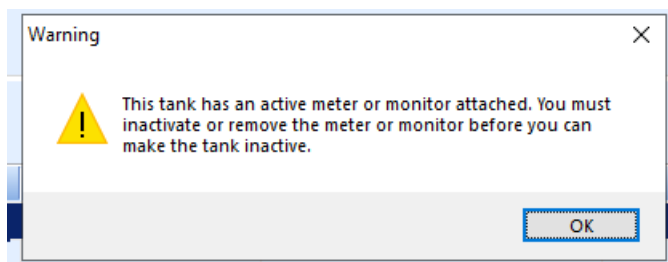
PU - Pick Up

This option indicates that the tank has been picked up from the customer location and put back into the tank/meter inventory.

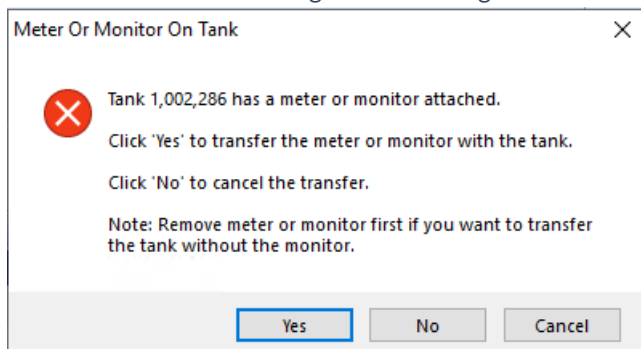
Enter the *Division* number, the *New Location Number* the tank belongs to, and the *Est Gallons Left In Tank*. Select **Process**. This will flip the flag on the tank to *I* for inactive on the *Tank Maintenance* screen.

A form titled "TANK Pick up" with a light blue header. It contains three input fields: "Division" with a dropdown menu showing "0", "New Location Number" with a text input showing "0" and a magnifying glass icon, and "Est Gallons Left In Tank" with a text input showing "0.00". Below the input fields, there are two buttons: "Process" with a green gear icon and "Cancel" with a red 'X' icon.

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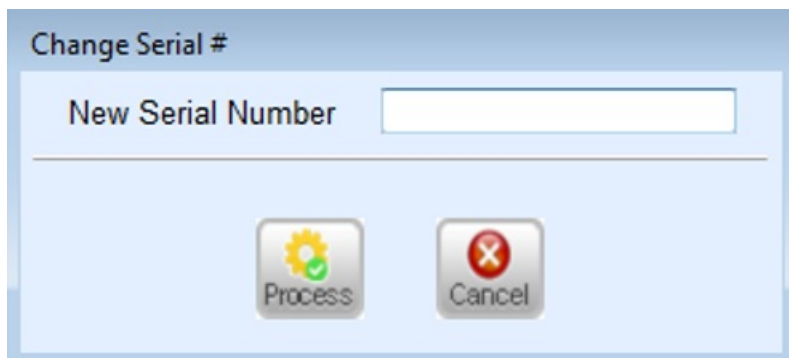


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CS - Change Serial Number

This will change the serial number of the tank. Enter the *New Serial Number* and select **Process**. This will update the serial number in all of the tank tables.



RE - Repair

When this option is selected, enter a *Description of Repair*. This will only write a line to the *Inventory History* that the tank had a repair and will not flag the tank with any special type of code.

Sold

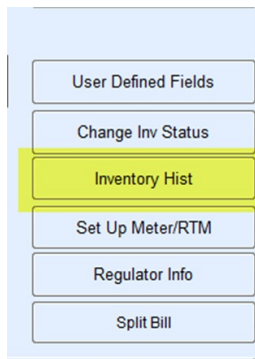
This changes the status of the tank from *Company-Owned* to *Customer-Owned*. Once the tank has been changed, bill the customer for the tank in the *Sales Posting Menu*.

Out

This changes the Inventory Status.

This option can be used to change the tank status back to *Out/Active*. For example, if a tank to *AC* for *At Customer* to be picked up but then it is decided the tank will remain at the customer, select the tank and perform a **Change Inv Status** to *Out*. This will remove the red block around the *A* code.

Inventory History



User Defined Fields

Change Inv Status

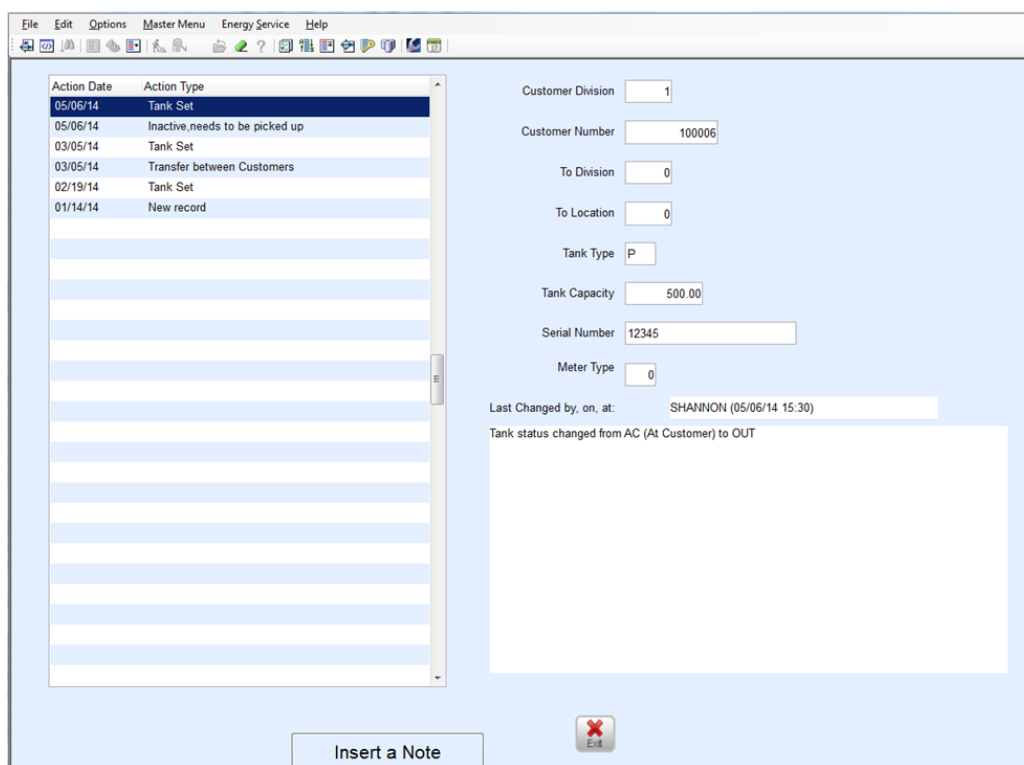
Inventory Hist

Set Up Meter/RTM

Regulator Info

Split Bill

Select **Inventory Hist** in the Tank Maintenance file that will display the history of a tank. It indicates when the tank was set, when the serial number was changed, when it was picked up, etc. This tab is also available in the *Meter/Tank Inventory* menu. All Customer-Owned tanks can be modified by selecting **Modify** on the *Tank Info* screen or pressing **Ctrl+M**.



Action Date	Action Type
05/06/14	Tank Set
05/06/14	Inactive,needs to be picked up
03/05/14	Tank Set
03/05/14	Transfer between Customers
02/19/14	Tank Set
01/14/14	New record

Customer Division

Customer Number

To Division

To Location

Tank Type

Tank Capacity

Serial Number

Meter Type

Last Changed by, on, at: SHANNON (05/06/14 15:30)

Tank status changed from AC (At Customer) to OUT

Insert a Note

Exit