Change Inventory Status

Last Modified on 01/16/2025 2:57 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	J) ORE (Repair)							
OCT (Customer Transfer action)	⊖Sold (change status)							
OPU (Pick Up)	OOut (change status)							
OCS (Change Serial #)								
Process Car	icel Exit							

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.

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A O	n 🗉 🏇 💽 🐔 🖳	₿ ∉ ?		2 👂 🗊	1 🛃 🕻	12							
Co Owns	Tank Serial Number	(A/I	Туре		Tank Descripti	on	^	Tank Capacity	500.00	Up	date K-Factor	Yes
Yes	12345		A -AC	Р		House			Total Canacity	500.00		A College Left	440.00
Yes	NONE		A	CY	-	33 LB CYL			Total Capacity	500.00	E:	st Gallons Lett	440.00
No	UNKNOWN		A	P	ų	shop			Daily-Use	0.00	Es	st Percent Left	88
									K-Factor	4.00	Del	ivered Gallons	197.00
									Prev K-Factor	0.00	Tot Gals	s with Delivery	442
								*	DD Region	10	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
Cu E Regu	Istomer Type 1 Delivery Type 2 ulatory Code 0	RESIDENTIAL					Sales Gallons Used	YTO	0 \$0.0 0 0.0	00	L	ast % Update Hold Date Hold Reason	00/00/00 00/00/00 0 Q
Products	Location Tank Optim	izer Log GPS T	ank Coordina	ites									
											Hold D	D Calculations	
		est Price			Te	est Sale				_	Hold	Release Date	00/00/00
Produ	uct Description		Price C	Code Tier		Price	Prod Use	Di	sc Default	^			
100	00 RESIDENTIAL PROP	ANE	1	A		1.0000			0 🜌			Transfer Cu	stomer Tank
										Tan	k Readings	User Defi	ned Fields
										- 0		Change I	nv 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*.

ANK Trans to another	custome	r									
Sustomer Informa	tion		© Ci	istomer at a diffe	rent address				Appliances		
			OC	stomer at this ac	ddress						
Old Customer		100006	ALLIS	ON,SHANNON			Div 1				
New Customer	Q	0					Div 0				
Please provide t	he followi	ing information	for the ne	ew customer							
Tank Description							County	Q	0		
Daily-Use		0.00 K-F	actor	0.00			Township	9	0		
DD Region	Q	0					School District	Q	99		
Customer Type	Q	0					Default Dept	Q	0		
Delivery Type	Q	0					Date Tank Set		00/00/00	Gas Check Date	00/00/00
Price Code/Tier	٩	0					Leak Check Date		00/00/00		
elivery Instruction	ns										
Route	Q	0					Special Delivery Instruc	tions			
Delivery Addr.											
City/State/Zip	Q										
Directions:											
					Tank P	ontol	Process Cancel				
					Tank R	ental					

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

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.

TANK Trans to anoth	er custom	er					
Customer Inform	ation		 Customer at a different address Customer at this address 				Appliances
Old Customer New Customer	٩	100005 0	ALLISON, SHANNON		Div 1 Div 0		
Please provide Customer Type Price Code/Tier Delivery Instructio	Q Q Q	wing information 0 0	or the new customer		Date Tank Sr	ot	00/00/00
			Tank Rent	tal Receipt	cancel		

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.

TANK Pick up
Division 0
New Location Number 0 Q
Est Gallons Left In Tank 0.00
Process Cancel

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.

Change Serial #	
New Serial Number	
Process	Capcel
FIOLESS	Calicer

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



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**.

Edit Options	<u>M</u> aster Menu Energy <u>S</u> ervice <u>H</u> elp			
» ↓00 <u> </u> 45 [E 🐁 🔍 👘 🖉 ? 🖾 🏪 🖻 🔊	1		
Action Date	Action Type		Customer Division	
05/06/14	Tank Set		Customer Division	
05/06/14	Inactive, needs to be picked up		Customer Number	100006
03/05/14	Tank Set		Customer Humber	10000
03/05/14	Transfer between Customers		To Division	0
02/19/14	Tank Set			
01/14/14	New record		To Location	0
			Tank Type	P
			Tank Capacity	500.00
			o :	
			Serial Number	12345
			Meter Type	
		E		0
			Last Changed by, on, at:	SHANNON (05/06/14 15:30)
			Tank status changed from	AC (At Customer) to OUT
		-		
			•	
		t o Noto	Exit	
	Inser	a Note		