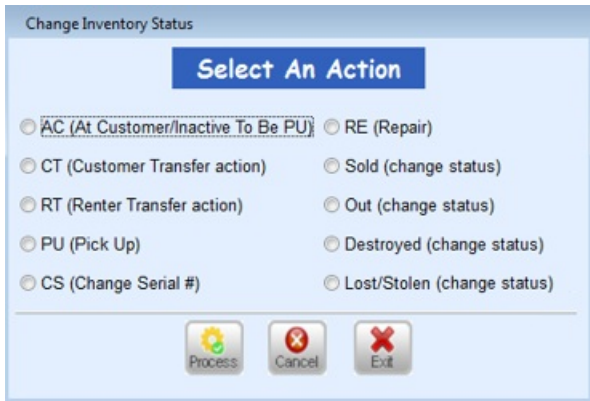


# Change Inventory Status

Last Modified on 07/14/2023 5:55 pm EDT

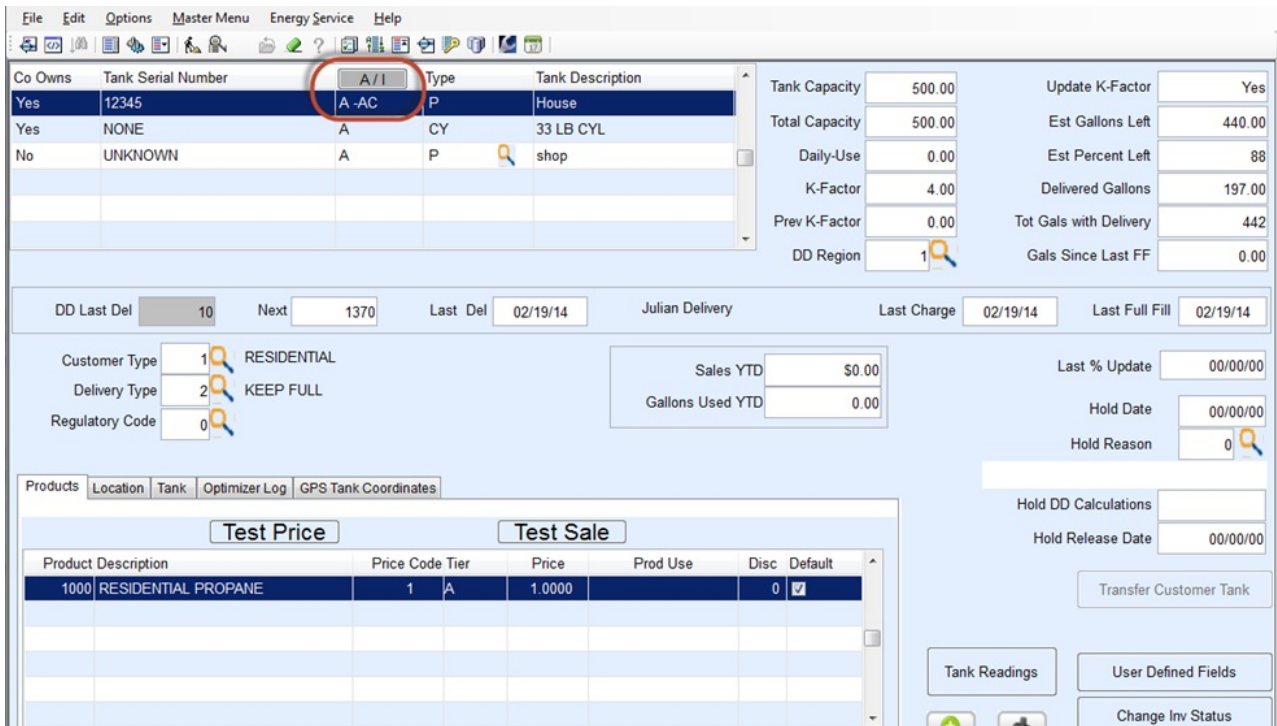
To change the inventory status of a company-owned tank, select the tank and then choose **Change Inv Status**. A menu will appear with several options to choose from.



## AC - At Customer

This indicates that the tank has been flagged to be picked up. When chosen, the Tank A/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.



## 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 is 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 the radio button for 'Customer at a different address' selected. The 'Old Customer' field contains '100006 ALLISON, SHANNON' and 'Div 1'. The 'New Customer' field is empty with 'Div 0'. The 'Appliances' section is empty. The 'Please provide the following information for the new customer...' section contains several fields: 'Tank Description', 'Daily-Use' (0.00), 'K-Factor' (0.00), 'DD Region' (0), 'Customer Type' (0), 'Delivery Type' (0), and 'Price Code/Tier' (0). The 'County', 'Township', 'School District' (99), and 'Default Dept' (0) fields are also present. 'Date Tank Set' and 'Leak Check Date' are both set to '00/00/00'. 'Gas Check Date' is also '00/00/00'. The 'Delivery Instructions' section has 'Route' (0) and 'Special Delivery Instructions' (empty). 'Delivery Addr.' and 'City/State/Zip' are empty. A 'Directions:' label is above an empty text area. At the bottom, there is a 'Tank Rental' button, a 'Process' button, and a 'Cancel' button.

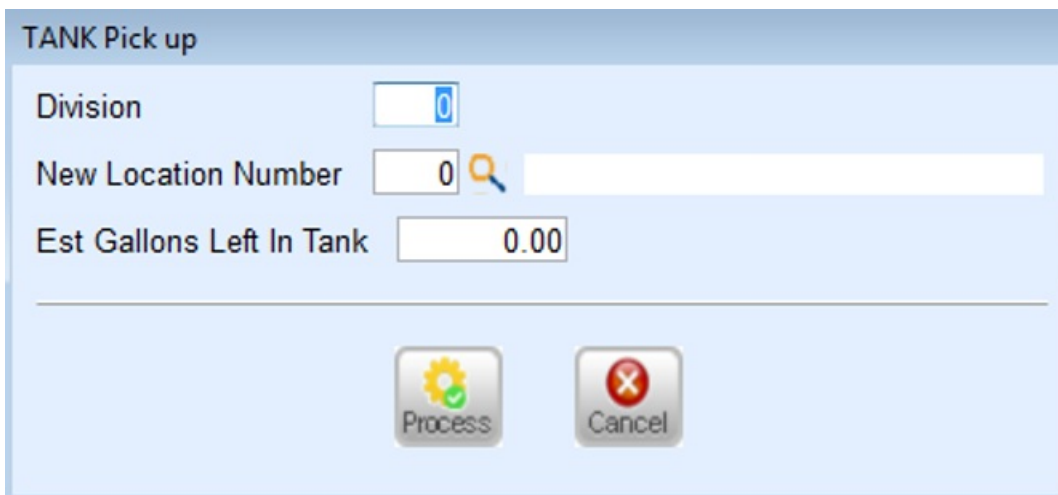
If *Customer at this address* is selected, only *New Customer*, *Customer Type*, *Price Code/Tier*, and *Date Tank Set* information will need to be entered.

The screenshot shows the 'TANK Trans to another customer' form. The radio button for 'Customer at this address' is selected. The 'Old Customer' field contains '100006 ALLISON, SHANNON' and 'Div 1'. The 'New Customer' field is empty with 'Div 0'. The 'Appliances' section is empty. The 'Please provide the following information for the new customer...' section contains 'Customer Type' (0) and 'Price Code/Tier' (0). The 'Date Tank Set' field is set to '00/00/00'. The 'Delivery Instructions' section is empty. At the bottom, there is a 'Tank Rental' button, a 'Process' button, and a 'Cancel' button.

## 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

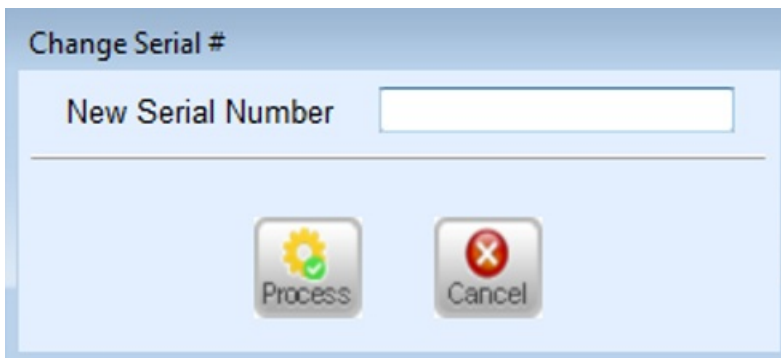
New Location Number  

Est Gallons Left In Tank



## 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

## 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

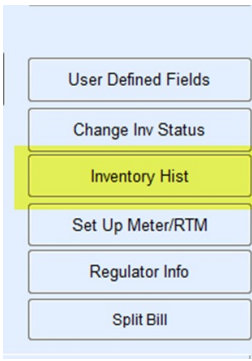
This changes the status of the tank from *Company-Owned* to *Customer-Owned*. Once the tank has been changed, bill the customer for the tank in the *Sales Posting Menu*.

## 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**.

