

Tank Rental Processing

Last Modified on 11/18/2024 10:02 am EST

Proper Rental Codes and Tank Rental Amounts must be set up at *Supervisor Menu / Maintenance Menu / Maintenance Tables*. It is also recommended to confirm that the proper Rental Department code has been set up on the *Division Maintenance* screen. Please refer to [File Management](#) for proper instructions on setting up these items.

Setting Up Tank Rent on Customer Tank

1. Go to *Main Menu / Customer Menu / Customer Maintenance*.
2. Search to select the customer name needing Tank Rent applied.
3. Select **Tank Info**. This will bring display the *Tank Information* screen.
4. All available tanks assigned to the customer will appear in the top left corner of the screen. Select the tank to apply a rental to by selecting the name of the *Tank Description*.
5. Once the correct tank has been selected, go to the *Tank* tab located on the table in the middle of the screen.

Co Owns	Tank Serial Number	A/I	Type	Tank Description
Yes	646578P	A	P	house
Yes	998U77	A	P	house
No	CUSTOWNS'	A	P	shop
No	DIESEL	A	DD	barn

Tank Capacity: 1000.00
Total Capacity: 1000.00
Daily-Use: 0.00
K-Factor: 1.20
Prev K-Factor: 2.00
DD Region: 1

DD Last Del: 10 Next: 958 Last Del: 02/24/14 Julian Delivery Last Charge: 02/24/14

Customer Type: 1 RESIDENTIAL
Delivery Type: 2 KEEP FULL
Regulatory Code: 0

Sales YTD: \$3,634.17
Gallons Used YTD: 2,203.00

Products Location Tank Optimizer Log GPS Tank Coordinates

Test Price Test Sale

Product Description: 1000 RESIDENTIAL PROPANE

Master Asset ID: 3

Tank Rental: Management

Company Paints: Yes
Year Painted: 2012
Type Of Paint: ALUM
Tank Condition: Good

Price Desc: RESIDENTIAL
Price Chgs?: Yes

Delivery Address: 987 RONALD REGAN PAI
City/St/Zip: BROWNSBURG IN 46112
Rrl: Do not drive on lawn

Manufacture Date: 00/00/00
Deposit Amt: \$0.00
Deposit Date: 00/00/00
Date Tank Set: 12/31/13
Gas Check Date: 12/31/13

6. Choose **Management** in the *Tank Rental* area. This displays the *Manage Tank Rental* screen.

7. Select **Modify** and move the *Rental Status* radial selection to *Active*.
8. *Bill to Customer ID* will default based on the original customer account selected.
 - If *Bill to Customer ID* is incorrect (such as a landlord/tenant scenario), press **F5** to select the appropriate customer to be billed.
9. Select the *Billing Type* (*Gallons* or *Dollars*).
 - If *Gallons* is selected, proceed to Step 12. *Gallons* will bill the customer based on the quantity consumed at the tank level.
 - If *Dollars* is selected, proceed to Step 11. *Dollars* will bill the customer based on the set amount for the tank size regardless of the number of gallons being consumed.
 - Select the *Billing Frequency* (*Monthly* or *Yearly*).
10. Enter the *Bill Month* the customer will be billed for the tank rent.
11. Press **F5** in the *Rental Pricing Code* field to review a list of Rental Pricing Code options. Choose the option that will apply to the customer and choose **Select**. This compares the tank size in the tank file to the tank size in the Tank Rental Amount file, which must match.
12. Indicate if the tank is on *Lease to Own* status. If the tank is *Lease to Own*, enter the date that the tank is scheduled to be paid off so that the customer will no longer be billed in the *Don't Bill After* field.
13. Select the *Lease Status* as it applies to the customer.
14. Enter the *Lease Number* if applicable.
15. *Asset ID* will default based on the tank selected from the *Tanks for Customer* screen.
16. *Tank ID* will default based on the tank selected from the *Tanks for Customer* screen.
17. Choose **Save** and **Exit** when completed.

Post Tank Rent to Customer Accounts

1. Go to *Main Menu / Month End Menu*.

2. Select **Tank Rental Menu / Tank Rental Statements**. This will display the *Tank Rental Journal Entry* screen.

Division	Process Date	Created By	Description	(D)Dol / (G)Gal	File Name
1	08/12/22	Carol	August 2022 Tank Rent	D	AUG22

Tank Set Date: 07/31/22
 Cycle Code: 0 0 For All
 Location Code: 43 0 For All Posting Division: 1
 Tank Rental Month: 8

Use Default Printer Prompt for Printer

3. Choose **Create**.

4. Enter the *Division Code* for the Tank Rentals that are to be processed and press **Tab**.

5. The *Posting Date* that the charges will apply automatically defaults. Adjust accordingly if necessary and press **Tab**.

- The Posting Journal will be created by this date as well.

6. *Created By* automatically defaults with the user name signed into Energy Force. Press **Tab**.

7. Enter a *Description* for the tank rental file. This name should be unique to be easily identified if an issue arises.

8. In the *(D)Dol/(G)Gal* section, enter *D* to process tank rentals by *Tank Set Date*.

1. If billing a specific amount based on tank size, choose *(D) Dol*.
2. If billing tank rent based on gallons consumed, select *(G) Gal*.

9. Enter the *Tank Set Date*.

- If using today's date as the *Tank Set Date*, the system will perform a search to query all tanks set prior to this date. This will ensure that all customers with Rentals are billed accordingly.

10. Enter the *Cycle Code* for billing. Press **F5** for a complete listing of codes.

- The *Cycle Code* must match the *Statement Cycle Code* applied to the customer *Address & Information* tab.

11. Enter the *Location Code*. Press **F5** for a complete listing of codes.

- The *Location Code* must match the *Location Code* entered under *Tank Info*.

12. Enter the *Tank Rental Month* to process tank rentals. This month corresponds to the month assigned on the *Tank Rental Setup* screen.

13. If processing by gallons, it will be required to enter the *History Start Date* and *History End Date*. This will calculate all gallons delivered during that time frame and should be used consistently on a yearly basis.

History Start Date: 00/00/00
 History End Date: 00/00/00

14. Choose **Save** or press **Ctrl+Q** to save the information.

15. Choose **Process Tank Rental**.

16. Once the program has finished processing, select **Edit Tank Rental** to review amounts that may need to be modified. Select **Print Tank Rental** button to review or print a tank rental report.

Division	Bill To No.	Tank RRN	Daet Set	Rent Amt.	Gal Del.
1	100007	2	01/01/13	72.00	

Cust #	Customer Name	Rental Pricing Code	Tank Serial #	T Typ	Loc.	Size	Date Set	Rent Amt	Sales Tax
100007	ADAMS, ANSEL	1 1000 GALLON TANK	646578P	P	1	1000	01/01/13	\$72.00	
Total Rent & Tax								\$72.00	\$0.00

17. Review the data for accuracy.

- If data appears to be correct, proceed to Step 18.
- If data is incorrect, close the report and choose **Edit Tank Rental** on the *Tank Rental Statements* screen.
 - Press **Ctrl+M** to modify information as needed and then press **Ctrl+Q** to save.
 - Select **Cancel** to return to the *Tank Rental Statements* screen.
 - Choose **Print Tank Rental** to review changes and ensure accuracy.
 - If data is still incorrect, repeat Steps i - iii.

18. Select **Update Tank Rentals**. This will apply the charges to the customer accounts and update accounts receivable.

19. Close the *Tank Rental Statements* menu when completed.

Additional Information:

- The option to *Print Rental Statements* (Step 16) is only on plain paper. No other charges or payment information will display.
- Tank Rental Charges* will also print on the next normal statement with other charges and payments.
- If a tank rental file has already been updated, the **Update Tank Rental** button will not be available.