Tank Rental Processing

Last Modified on 07/21/2025 4:53 pm EDT

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.
- 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/1	Туре	Tank Description		^	Tank Capacity	500.00		Update K-Factor	Yes
Yes	9SF123456 4	А		house			Total Capacity	500.00		Est Gallons Left	
							Daily-Use	0.00		Est Percent Left	
							K-Factor	0.00		Delivered Gallons	0.00
						~	Prev K-Factor	0.00	Tot C	Gals with Delivery	335
							DD Region	1 Q	Ga	als Since Last FF	0.00
							5				
DD Last D	el O	Next	0 Last D	el 06/06/18	Julian Delivery			Last Charge	06/06/18	Last Full F	ill 06/06/18
Customer T	ype 1 🔍 RES	IDENTIAL								Last % Update	05/17/18
Delivery T	ype 1 🔍 VVILL	CALL									
Regulatory C	ode 1 🔍 REG	FEE								Hold Date	00/00/00
Public Assen	und Und	derground? 🗌								Hold Reason	0 🔍
Products Loc	tion Tank Optimizer	Log GPS Tank (Coordinates						Hold	DD Calculations	No
										ald Dalaasa Data	00/00/00
Master Asse	tID 1		Tank Rental	Management	9		Tests			olu Release Dale	00/00/00
Company P	aints		Manufacture Date	00/00/00	Cathoo	dic Tes	t 00/00/00	Ta	nk Readings	Transfer (Customer Tank
Year Pa	inted	0	Deposit Amt	\$0.00	Pa	iss/Fa	il				
Type Of	Paint		Deposit Date	00/00/00			YTD	Creat	e Print	User De	efined Fields
Tank Con	lition	Good	Date Tank Set	00/00/00						Chang	e Inv Status
Price C	hgs? Yes		Gas Check	00/00/00	:	Sales	\$2,348.00	Exit	Find	chang	
			Leak Test Date	00/00/00	Gallons	Used	4,304.00			inver	itory Hist
										Set Up	Meter/RTM
Delivery Address	123 DOZIER WAY			Special D	elivery Instructions	PO	Number			Reg	ulator Info
City/St/Zip 🔍	AVON	IN	46123-	Rrl 🗌 do not driv	e on lawn	I				S	plit Bill
FIRST HOUS	SE ON THE LEFT AFTE	ER CROSSING 26	7 & 36								
ā											

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

Manage Tank Rental			
Rental Status	Active	O In Active	
Bill to Customer ID	23456	JACOBS, BRADY	
Billing Type	⊖ Gallons	Billing Frequency	⊖Monthly (●)Yearly
Bill Month Rental Pricing Code	7	50.00 per Year	
Don't Bill After	Lease to O	wn	
Lease Status	Pending	OReceived	
Lease Number			
Asset ID	1	Tank ID	101
Save	Modify 💕	Cancel	Exit

- 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.

			Co	mplete form and Change	to Query Mode	to Process	3		
Division	Process Date	Created By	Description		(D)[Dol / (G)Gal	File Name		
1	07/21/25	Laura.Bejo	July 2025 Tank Rent			D	JULY25		
	Save	Cancel	OPrompt for Printer		Tank Sel Cycle Location Tank Rental I	et Date 04/01 e Code 0 n Code 7 Month 8	0 For All 1 0 For All	Posting Division	1
	Pro	cess Tank Re	ental				Writ	e to Excel File	e
	E	dit Tank Ren	tal						

- 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

Division Bill To	No. Tank RRN	Date Set	Rent Amt.	Gal Del.	^		
1	23456	101 00/00/00	50.00			JACOBS, BRADY	
						123 DOZIER WAY	
						AVON, IN 46123	
						Cycle Code 1	
						Location Code 1	
						Tank Serial Number	
						9SF123456	
						Tank Capacity	500.0
						Total Tank Capacity	500.0
						Billing Freg.	Y
						Task Dashel Masth	7
						Tank Rental Month	1
						Rental Code	1
						Ca	3

17. Select Print Tank Rental button to review or print a tank rental report.

07/21/25	15:50	15:50 Energy-Track									
			Tank Rental	Print Lis	st						
	Division 1 Rental Month 7 Cycle Code 0 Loc. Code 1 Limit for Date Tank Se							nk Se 04/01/2	04/01/25		
Cust#	Customer Name		Tank Serial #	т тур	Loc.	Size	Date Set	Rent Amt	Sales Tax		
	Rental Pricin	g Code									
23456	JACOBS, BRADY		9SF123456	P	1	500	00/00/00	\$50.00			
	1 500 GAL	TANK-USAGE BAS	SED								
				Tota	al Rer	nt& Ta	x	\$50.00	\$0.00		

18. Review the data for accuracy.

- a. If data appears to be correct, proceed to Step 19.
- b. If data is incorrect, close the report and choose Edit Tank Rental on the Tank Rental Statements screen.
 - i. Press Ctrl+M to modify information as needed and then press Ctrl+Q to save.
 - ii. Select **Cancel** to return to the *Tank Rental Statements* screen.
 - iii. Choose Print Tank Rental to review changes and ensure accuracy.
 - iv. If data is still incorrect, repeat Steps i iii.
- 19. Select **Update Tank Rentals**. This will apply the charges to the customer accounts and update accounts receivable.
- 20. Close the Tank Rental Statements menu when completed.

Additional Information:

- The option to *Print Rental Statements* (Step 17) 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.