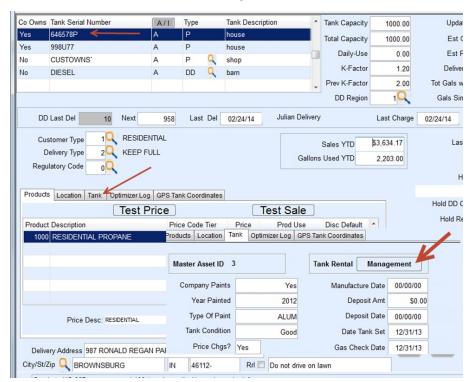# Tank Rental Processing

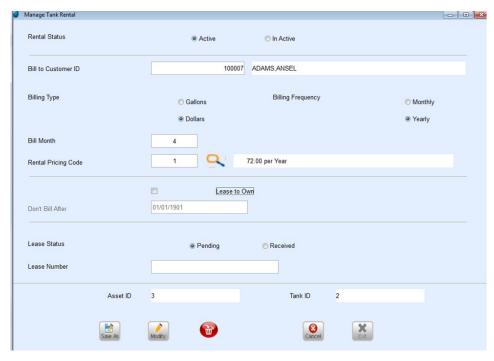Last Modified on 11/18/2024 10:02 am EST

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.

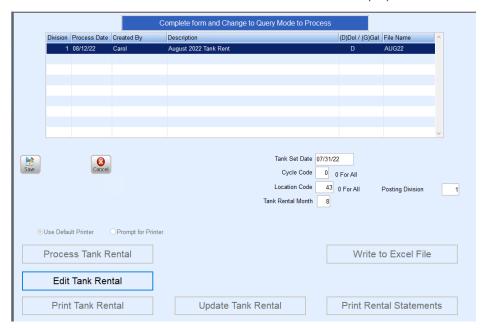6. Choose **Management** in the *Tank Rental* area. This displays the *Manage Tank Rental* screen.

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*.

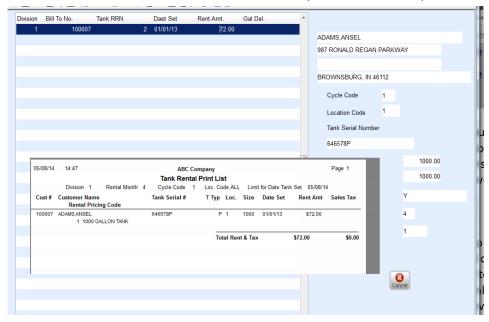2. Select **Tank Rental Menu / Tank Rental Statements**. This will display the *Tank Rental Journal Entry* screen.

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.

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.

17. Review the data for accuracy.

    a. If data appears to be correct, proceed to Step 18.

    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.

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.