

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.

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.

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	<input type="text" value="00/00/00"/>
History End Date	<input type="text" value="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.

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

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Tank Rental Print List									
Division 1		Rental Month 7	Cycle Code 0	Loc. Code 1	Limit for Date Tank Se 04/01/25				
Cust #	Customer Name	Tank Serial #	T Typ	Loc.	Size	Date Set	Rent Amt	Sales Tax	
Rental Pricing Code									
23456	JACOBS, BRADY	9SF123456	P	1	500	00/00/00	\$50.00		
		1 500 GAL TANK-USAGE BASED							
Total Rent & Tax							\$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.
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