

Tank Switch Out Process

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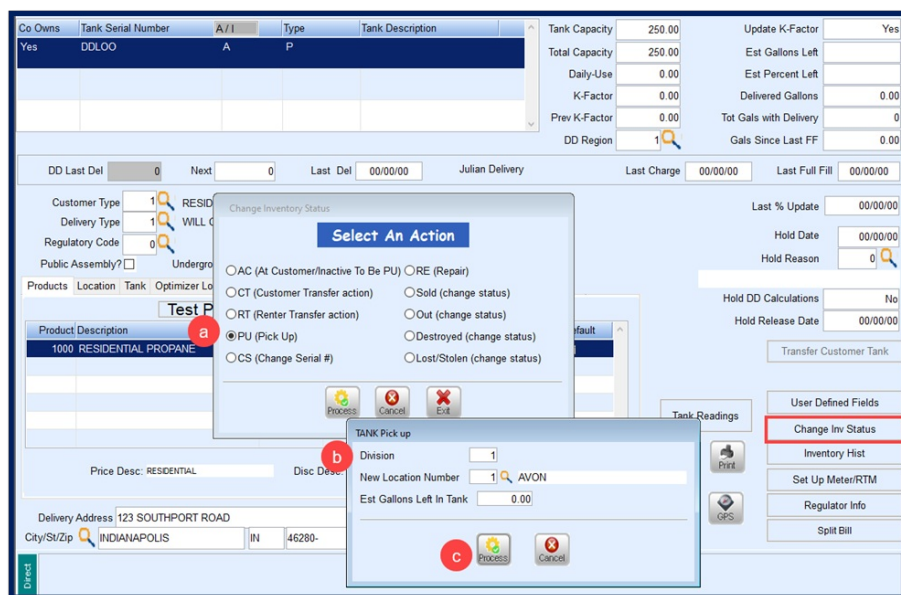
Whether intending to swap a smaller tank for a larger tank or a larger tank for a smaller tank, the process is the same. Steps are to be completed in Energy Force on the same day.

Process

1. Navigate to *Customer Menu / Customer Maintenance / Tank Info*.

1. Search for and select the customer account.
2. Select **Tank Info**.
3. Highlight the tank to be swapped.

2. Select **Change Inv Status**.



a. Select **PU (Pick Up)** and then **Process**.

b. Enter the **Tank Division**, **New Location Number**, and **Est Gallons Left In Tank** if applicable.

c. Select **Process**. This will inactivate the current tank and place it back into inventory.

3. Set the new tank on the customer account as usual.

- o This tank will typically be a different sized tank than what was previously tied to the customer account.

Tank Switchout Report



1. Navigate to *Main Menu / Tank and Meter Inventory Menu / Report Menu*.

2. Select *T/M Tank Switchout History*.

1 Tank Inventory Status
 2 Meter Inventory Status
 3 T/M Possible Recall List
 4 T/M Tank History
 5 T/M Meter History
 6 Tank Purchased Price
 7 Underground Tank Listing
 8 T/M Tank Switchout History

Division: ABC PROPANE COMPANY
 Tank Type: PROPANE
 Action Date: To:
 Location (0 for All):

Video
 Printer
 Use Default Printer
 Prompt for Printer

3. Enter the *Tank Type*, *Action Date* range, and *Location* (or leave 0 for all).
4. Select **Print**.
5. The report will process and display as follows:

06/21/21 15:54 Energy-Track Page 1

T/M TANK SWITCHOUT DETAIL LISTING

Division: 1 ABC PROPANE COMPANY Fuel Type: PROPANE
 Date: 06/15/21 To: 06/21/21 Location: All Locations

Customer No./Name	Tank Size	Tank Serial#	Type	Date Changed	Active	Loc#
10088 BILLINGSLY,PETER	250	9SF98700	PU	06/21/21	A	1
10088 BILLINGSLY,PETER	1000	DDLOO	TS	06/21/21	I	1
10090 [REDACTED]	500	99887	PU	06/18/21	A	1
10090 [REDACTED]	250	223366	TS	06/18/21	I	1
REPORT TOTAL		2				

250 to 1,000 = 1 switchouts
 500 to 250 = 1 switchouts

- a. Customer Information
- b. Tank size and serial number
- c. Picked Up or Tank Set indicator
- d. Date of the tank switch
- e. The current tank status of *Active* or *Inactive*
- f. Overall Switch Out count for the date range of the report
- g. Summary of tank sizes switched