Energy Force / Agvance Tank Transfer Procedure

Last Modified on 10/31/2024 9:54 am EDT

If utilizing Agvance version 7.0.26030 or higher, review Change Inventory Status for instructions on tank transfers.

To avoid duplication errors in Agvance, utilize the following procedures to transfer Company and Customer Owned Tanks.

Customer Owned Tanks (Co Owns = No)

- 1. Open Agvance Energy to select the tank to be transferred in Energy Force by choosing the yellow file folder then *Tank Information*. Select the customer and choose **Edit**.
- 2. Modify the Serial # on the tank by inserting an X in front of the current number.
- 3. Save the tank.

rofile Delivery Info	User Defined Regulators Rent / Lease	e Fuelware Ene	rgy-Force	
Split <custid></custid>	AdeJa ? James Ade		Equal Billing Info	
Serial #	X250156		Cycle Monthly V	
Tank Size	500 Location 00MAIN	~	<product></product>	Add
Description	Home Heat		Monthly Budget Bill/Level Pa	
Owner	James Ade Driver (678RT	~	Misc00 00MAIN	Edit
Route	North Y Salesperson ID		Amount 50.00	View
Region	East v	Directions/Note	es	Delete
Billing Comments			~	
<site id=""></site>				Cancel
Site Description				Include
Tank Address	2110 E 350 North Rd		×	Active ~
Tank City	Pana State IL 🗸	Zip 62557	<state code="" tax=""></state>	Location
<product></product>	Propane - Home Heating	Prop00	00MAIN <adj code="" tax=""></adj>	00MAIN ~
Default Terms	N15 V InActive		.5PCT	

4. In Energy Force, navigate to *Customer Menu / Customer Maintenance* and select the customer. On the Tank Information screen choose **Transfer Customer Tank** to transfer the tank to a new customer account.

File Edit Optic	ns Master Menu Help Utilities													
Co Owns	Tank Serial Numbe	r	A/1	A/I		Туре		Tank Description						
Yes	20# CYLINDER			A		C2				Tank Capacity	500.00		Update K-Hactor	re
No	GAS			A		G	Q.	h	_	Total Capacity	/50.00		Est Gallons Lett	
No	LINKNOWN			A.		P	0	House		Daily-Use	0.00		Est Percent Left	
										K-Factor	0.09		Delivered Gallons	0.0
										Prev K-Factor	0.15		Tot Gals with Delivery	4/
										DD Region	14		Gals Since Last FF	0.0
DD Last I	Del 20	Next		11		Last Del	03/22/18	Julian Deliver	у		Last Charge 0	3/22/18	Last Full Fill	03/22/18
Cust	omer Type 2Q COM	MERCIAL											Last % Update	00/00/01
De	livery Type 1 🔍 WILL	CALL											Hold Date	00/00/00
Regula	itory Code 0												Held Dessen	
Public	Assembly?	Under	ground? 🗖										Hold Reason	
Products Lor	ation Tank Optimizer Log GPS	ank Coordinates											Hold DD Calculations	N
	Test Price		Test	Sale									Hold Release Date	00/00/0
	Product Description			Price C	ode Tier		Price	Prod Use	Disc	Default				
	2000 GASOLINE			8	А		0.0000		0	2			Transfer Custo	omer Tank
											lank H	leadings	User Define	d Fields
											Create	Print	Change Inv	Status
	Price Desc: DEFERRED BILLING DESEL	Disc Des	C:										Inventory	/ Hist
											Ext	Find	Set Up Meb	er/RTM
Delivery Adr	Iress 123 PRODUCTION DRIVE					Special Deliver	y Instructions						Regulato	r Info
City/St/Zip	AVON	IN	46123	ŀ-	Rrl 🗌								Split B	3111
Direct														

5. Navigate to Posting Menu / Daily Clear and select Daily Tank Export. Select No when prompted.

	DAI			
Division Proc	ess		Ascii Totals File Name	
Master Daily 6	Clear		Print Daily Clear Journal	
Daily Tank Ex	Export All?	×	Contract Export	
Import Customer I	Balances	i to export all tanks? s' will export all tanks, selecting 'No' will export anks modified since the last export was ran.	Daily Tank Export / Alt ID	
Import Agris Cus	tomers	Yes No		
Rebuild Ascii	File			

6. Import the tank file into Agvance by selecting *Transfers / Import / Energy Force / Daily Tank*. This will inactivate the original tank and generate a new tank for the customer receiving the transferred tank.



Company Owned Tanks (Co Owns = Y)

- 1. Transfer the tank to the new customer account in Energy Force by first navigating to *Customer Menu / Customer Maintenance* and select the customer.
- 2. On the Tank Information screen choose **Change Inv Status** then the *CT* (*Customer Transfer action*) option to transfer the tank to a new customer account. Select **Process**.

Change Inventory Status	
Select	An Action
OAC (At Customer/Inactive To Be	e PU) ORE (Repair)
CT (Customer Transfer action)	OSold (change status)
ORT (Renter Transfer action)	Out (change status)
OPU (Pick Up)	ODestroyed (change status)
OCS (Change Serial #)	OLost/Stolen (change status)
Process	Cancel Exit

3. On the TANK Trans to another customer window, double click in the New Customer field to select the new

customer then choose **Select**.

Division #	Name	Customer #	Cycle Code	Total Balance	^
1		444	0	\$0.00	
1	ADAMS, ANSEL	100007	1	\$18,537.29	
1	ALLISON, JENNY	100006	1	\$3,178.37	
1	BILLINGSLY,PETER	10088	1	\$7,472.96	
1	BROCK, MICHAEL	100005	1	\$999.59	
2	DO,SHANNON	444	1	\$7,440.50	
1	DOE,JANE	10089	1	\$0.00	
1	DOE,JOHN	100000	1	\$4,190.61	
1	DOE, JOHN	10094	1	\$519.90	
1	DUBE, DEBBIE	199999	1	\$0.00	
1	FLAHERTY, SHANNON	10092	1	\$0.00	
1	HAMM,ANGIE	412	1	\$0.00	
1	HUNT,SAM	10084	1	\$862.61	
2	JACOBS, BRADY	12345	1	\$6,195.91	
1	JEFF, DANIELS	12347	1	\$0.00	
1	JENKINS,ROBERT	10087	1	\$18,464.75	
1	JONES, MATT	10081	1	(950.55)	~

4. Provide the appropriate tank information and *Delivery Instructions* then choose **Process**.

TANK Trans to another customer			
Customer Information			Appliances
	Customer at a different address Customer at this address		
Old Customer 10088 BILLINGSLY,PETER	Div		
New Customer Q 100007 ADAMS ANSEL	Div		
Please provide the following information for the new customer Tank Description Daily-Use DD Repoin Customer Type Delivery Type Price Code/Tirer Q D			Location 0 Country 0 Tomship 0 Default Dept 0 Date Tank Set 000000 Date Tank Set 000000 Case Check Date 0000000 Leak Check Date 0000000
Delivery Instructions Route Q 0		Special Delivery Instructions	
Delivery Addr. City/State/Zip Q			
Directions:			
	Tank Renta	Process Cancel	

5. Navigate to Posting Menu / Daily Clear and select Daily Tank Export. Select No when prompted.

	DAILY			
Division Process	\$		Ascii Totals File Nam	ie
Master Daily Clea	ar		Print Daily Clear Jour	nal
Daily Tank Expo	t Export All?	×	Contract Export	
Import Customer Bala	ances	xport all tanks? Il export all tanks, selecting 'No' will export modified since the last export was ran.	Daily Tank Export / Alt	ID
Import Agris Custon	ners	Yes No		
Rebuild Ascii File	9			

6. Import the tank file into Agvance by selecting *Transfers / Import / Energy Force / Daily Tank*. This will inactivate the original tank and generate a new tank for the customer receiving the transferred tank.

Note: Budget Billing Tanks will not be set to Inactive upon importing from Energy Force.

🖻 Agv	ance Energy									
File	Operations	Reports	Deliveries	Equal Bills	Transfers	Setup	Utilities	PinPoint	Help	
	<u> </u>				Impo	rt 🕨	Mob	ile Energy		
				DEGREE	Expor	t 🔸	Fuel	vare		
							Energ	gy-Force	•	Daily Clear
							EZ C	ount		Daily Tank
						L				

Tank Split Export

For Agvance and Energy Force customers running the tank export process, only active splits will be exported with the file. When a tank transfer is attempted, if the tank is part of a split, a message displays to choose how the split should be moved.

Owns	Tank Serial Number	A/1	A/1		Туре		Tank Descript	on	^	Tests Connector	500.0	1	Undets K Faster	V-
ſ	88911		4		P		HOUSE			Tank Capacity	500.0)	Update K-Hactor	Te
	Change Inventory Status				P		HOUSE			Total Capacity	500.0	0	Est Gallons Left	
	Select	An Action							_	Daily-Use	0.4:	2	Est Percent Left	
	OAC (At Customer/Inactive To Be I	PU) ORE (Repair)								K-Factor	3.3	r	Delivered Gallons	0.0
	CT (Customer Transfer action)	O Sold (change s	tatus)							Prev K-Factor	0.0	0	Tot Gals with Delivery	
	ORT (Renter Transfer action)	Out (change st	atus)						*	DD Region	1Q		Gals Since Last FF	0.
	OPU (Pick Up)	ODestroyed (cha	inge status)											
DD Last Del	OCS (Change Serial #)	OLost/Stolen (ch	ange status)		Last Del	00/00/00		Julian Delivery			Last Charge	00/00/00	Last Full Fill	00/00/00
Cuetor		A												
Delive	Process C	ancel Exit											Last % Update	00/00/0
Regulator	Code old												Hold Date	00/00/0
Dublic Ac	ambh 2	Hederground?				Split Tank		>	<				Hold Reason	٥ 🔍
Fublic As	semury C	Caardinates				Tank is i	part of a split. Do you w	ish to transfer the solit as						
oducts Locati	in Tank Optimizer Log GPS Tank	Coordinates				well?							Hold DD Calculations	N
			Test Sale			Click Ye	s' to proceed and trans	fer split.					Hold Release Date	00/00/0
P	roduct Description		P	rice Code Tier		Click N	o to proceed with tran	fer and inactivate split.	Disc	Default				
	1000 RESIDENTIAL PROPANE			1 A		circh cr	inter to go both		0	2	Tan	k Readings	Transfer Custo	mer Tank
							Yes	No Cancel						
									_		Create	Print		
													User Defined	1 Fields
											Exit	Pite	Change Inv	Status
Pric	e Desc: RESIDENTIAL	Disc Desc:											Inventory	Hist
													Set Up Mete	er/RTM
very Address 1	23 SOUTHPORT ROAD				Special Deliver	/ Instructions	PO Number						Regulator	Info
y/St/Zip 🔍 🖪	IDIANAPOLIS	IN	46280-	Rrl 🗌									Solit Bi	III.
													opin bi	

- Tank is part of a split. Do you wish to transfer the split as well?
 - Select Yes to proceed and transfer the split.
 - Select **No** to proceed with transfer and inactivate the split.
 - Select Cancel to go back.
- Based on the choice made:
 - Yes New tank RRN is updated on the split.
 - If the split on the tank contains the Customer the tank is being transferred from, it will be updated to the new Customer.
 - If the split on the tank does not contain the Customer the tank is being transferred from, the Customers on the split will remain the same.
 - No The Split will be set to Inactive and not transferred.
 - **Cancel** Cancels the transfer of the tank.