

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.

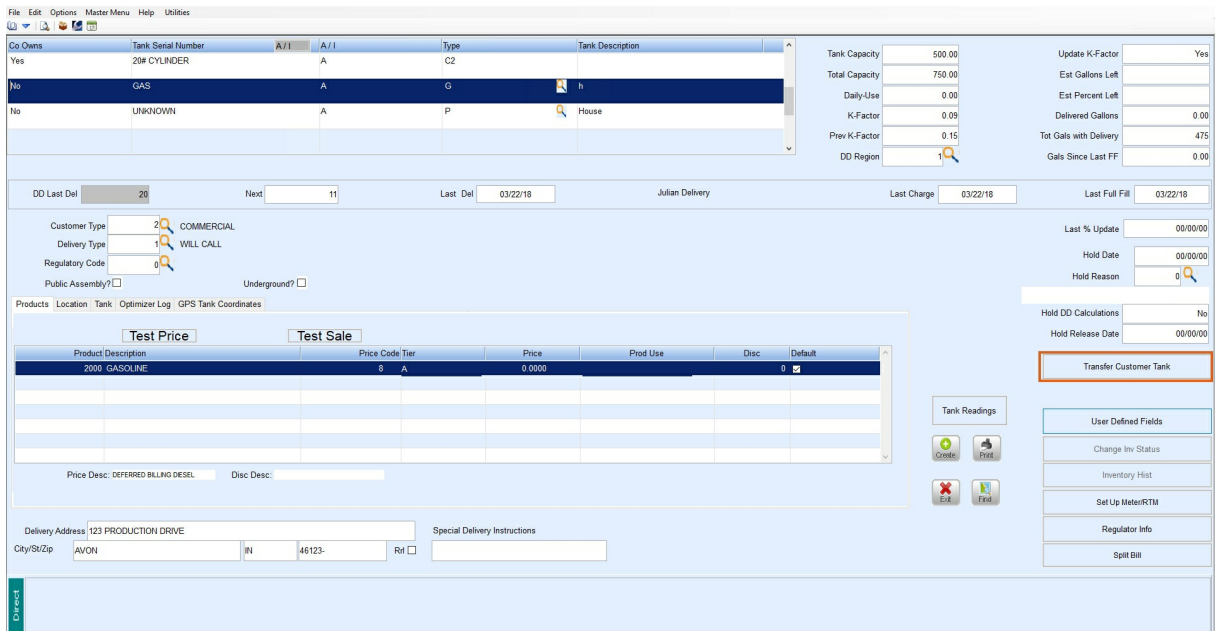
To avoid duplication errors in Agvance, utilize the following procedures to transfer Company and Customer Owned Tanks.

Customer Owned Tanks (Co Owns = No)

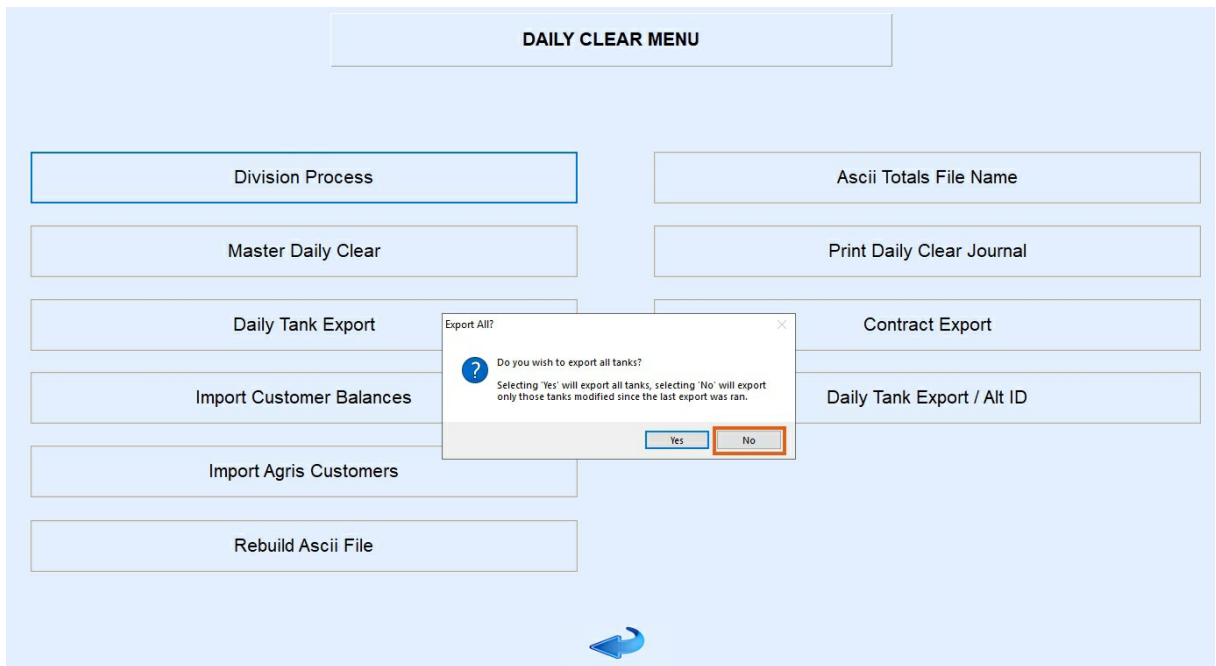
1. Open Agvance Energy to select the tank to be transferred in Energy Force by choosing the yellow file folder then *Tank Information*. Select the customer and choose **Edit**.
2. Modify the *Serial #* on the tank by inserting an X in front of the current number.
3. **Save** the tank.

The screenshot shows the 'Edit Customer LP Tank Information' window. The 'Serial #' field is highlighted with a red box and contains 'X250156'. The 'Edit' button in the right-hand panel is also highlighted with a red box. The 'Save' button at the bottom right is highlighted with a red box. The form contains various fields for tank details, including Customer ID (AdeJa), Owner (James Ade), Tank Size (500), Location (00MAIN), Description (Home Heat), Owner (James Ade), Driver (678RT), Route (North), Region (East), Tank Address (2110 E 350 North Rd), Tank City (Pana), State (IL), Zip (62557), and Product (Propane - Home Heating).

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.

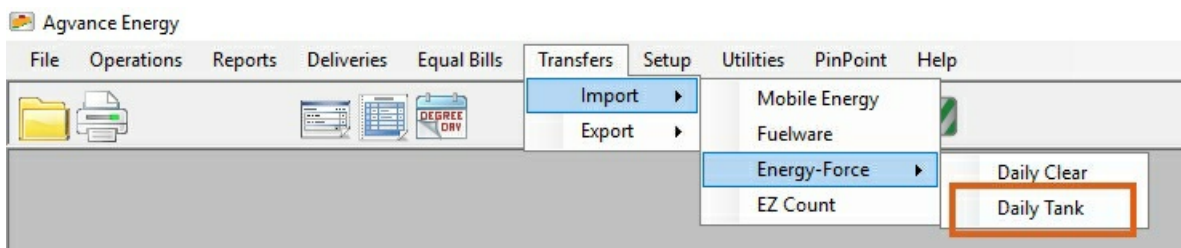


5. Navigate to *Posting Menu / Daily Clear* and select **Daily Tank Export**. Select **No** when prompted.



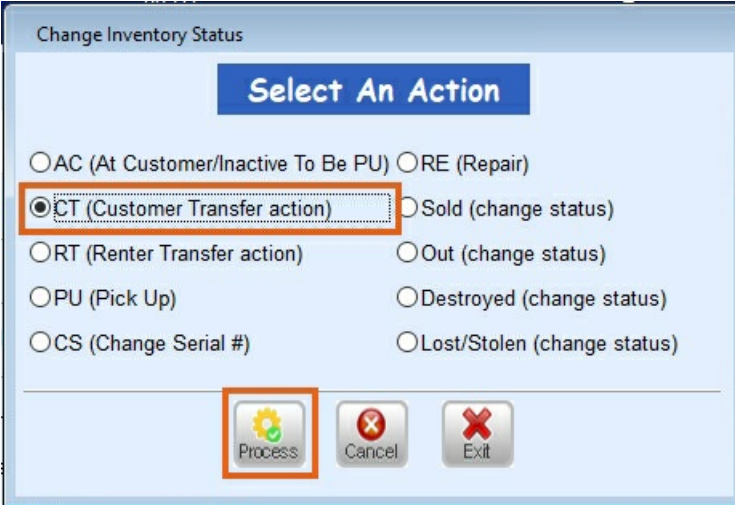
6. Import the tank file into Agvance by selecting *Transfers / Import / Energy Force / Daily Tank*. This will inactivate the original tank and generate a new tank for the customer receiving the transferred tank.

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



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

AC (At Customer/Inactive To Be PU) RE (Repair)
 CT (Customer Transfer action) Sold (change status)
 RT (Renter Transfer action) Out (change status)
 PU (Pick Up) Destroyed (change status)
 CS (Change Serial #) Lost/Stolen (change status)

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



Select - Customer

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

Customer at a different address
 Customer at this address

Old Customer: 10088 BILLINGSLEY,PETER Div 1
New Customer: 100007 ADAMS,ANSEL Div 1

Please provide the following information for the new customer...

Tank Description: _____
Daily-Use: 0.00 K-Factor: 0.00
DD Region: 0
Customer Type: 0
Delivery Type: 0
Price Code/Tier: 0

Location: 0
County: 0
Township: 0
School District: 99
Default Dept: 0
Date Tank Set: 00/00/00 Gas Check Date: 00/00/00
Leak Check Date: 00/00/00

Delivery Instructions

Route: 0
Delivery Addr: _____
City/State/Zip: _____
Directions: _____
Special Delivery Instructions: _____

Tank Rental [Process] [Cancel]

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

DAILY CLEAR MENU

Division Process Ascii Totals File Name

Master Daily Clear Print Daily Clear Journal

Daily Tank Export Contract Export

Import Customer Balances Daily Tank Export / Alt ID

Import Agris Customers

Rebuild Ascii File

Export All?

Do you wish to export all tanks?
Selecting 'Yes' will export all tanks, selecting 'No' will export only those tanks modified since the last export was ran.

Yes No

↻

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.

Agvance Energy

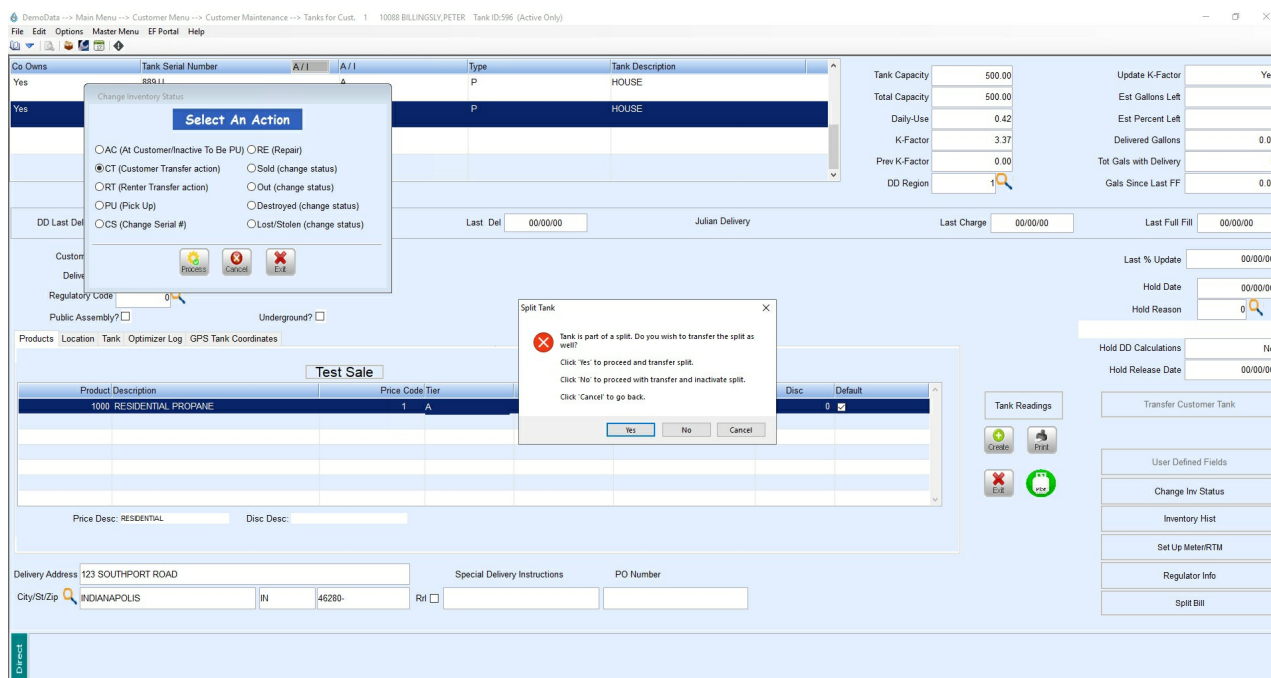
File Operations Reports Deliveries Equal Bills **Transfers** Setup Utilities PinPoint Help

Import Export

Mobile Energy
Fuelware
Energy-Force Daily Clear
EZ Count **Daily Tank**

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.



- 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.