

# Energy Force / Agvance Tank Transfer Procedure

Last Modified on 04/22/2024 11:18 am EDT

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 displays the 'Edit Customer LP Tank Information' window for customer 'AdeJa' and tank 'X250156'. The window is divided into several tabs: Profile, Delivery Info, User Defined, Regulators, Rent / Lease, Fuelware, and Energy-Force. The 'Profile' tab is active, showing fields for Tank Size (500), Location (00MAIN), Description (Home Heat), Owner (James Ade), Driver (678RT), Route (North), Region (East), Billing Comments, <Site ID>, Site Description, Tank Address (2110 E 350 North Rd), Tank City (Pana), State (IL), Zip (62557), <Product> (Propane - Home Heating), Default Terms (N15), InActive checkbox, Latitude (39397201), Longitude (-89136009), and Map. The 'Equal Billing Info' section shows Cycle (Monthly), <Product> (Monthly Budget Bill/Level Pe), Misc00 (00MAIN), and Amount (50.00). The 'Directions/Notes' field is empty. The 'Edit' button on the right sidebar and the 'Save' button at the bottom right are highlighted with red boxes.

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 Options Master Menu Help Utilities

Co Owns	Tank Serial Number	A / I	Type	Tank Description
Yes	20# CYLINDER	A	C2	
No	GAS	A	G	h
No	UNKNOWN	A	P	House

Tank Capacity: 500.00  
Total Capacity: 750.00  
Daily-Use: 0.00  
K-Factor: 0.09  
Prev K-Factor: 0.15  
DD Region: 1

Update K-Factor: Yes  
Est Gallons Left:   
Est Percent Left:   
Delivered Gallons: 0.00  
Tot Gals with Delivery: 475  
Gals Since Last FF: 0.00

DD Last Del: 20 Next: 11 Last Del: 03/22/18 Julian Delivery Last Charge: 03/22/18 Last Full Fill: 03/22/18

Customer Type: 2 COMMERCIAL  
Delivery Type: 1 WILL CALL  
Regulatory Code: 0  
Public Assembly? ☐ Underground? ☐

Products Location Tank Optimizer Log GPS Tank Coordinates

Test Price Test Sale

Product Description	Price Code Tier	Price	Prod Use	Disc	Default
2000 GASOLINE	8 A	0.0000			

Price Desc: DEFERRED BILLING DIESEL Disc Desc:

Delivery Address: 123 PRODUCTION DRIVE  
City/St/Zip: AVON IN 46123- Rt ☐

Special Delivery Instructions:

Tank Readings:   
Green Print   
Exit Find

User Defined Fields:   
Change Inv Status   
Inventory Hist   
Set Up Meter/RTM   
Regulator Info   
Split Bill

Transfer Customer Tank

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

**DAILY CLEAR MENU**

Division Process

Master Daily Clear

Daily Tank Export

Import Customer Balances

Import Agri Customers

Rebuild Ascii File

Ascii Totals File Name

Print Daily Clear Journal

Contract Export

Daily Tank Export / Alt ID

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.

Agvance Energy

File Operations Reports Deliveries Equal Bills Transfers Setup Utilities PinPoint Help

Import Export

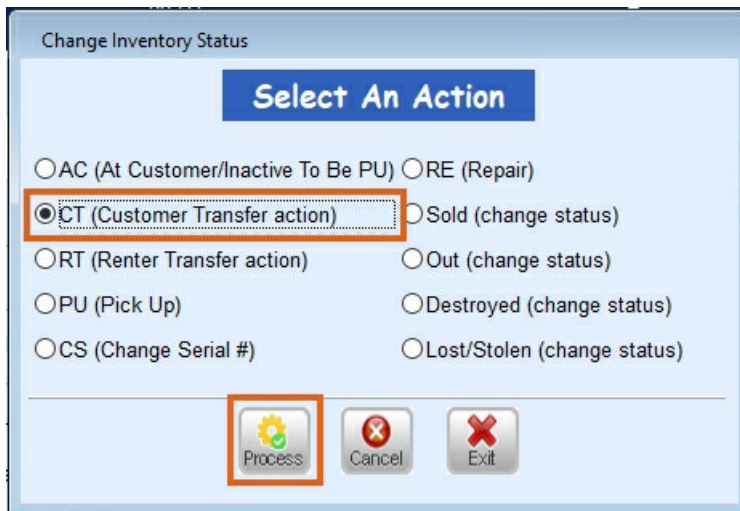
Mobile Energy  
Fuelware  
Energy-Force  
EZ Count

Daily Clear  
Daily 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.

- 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)

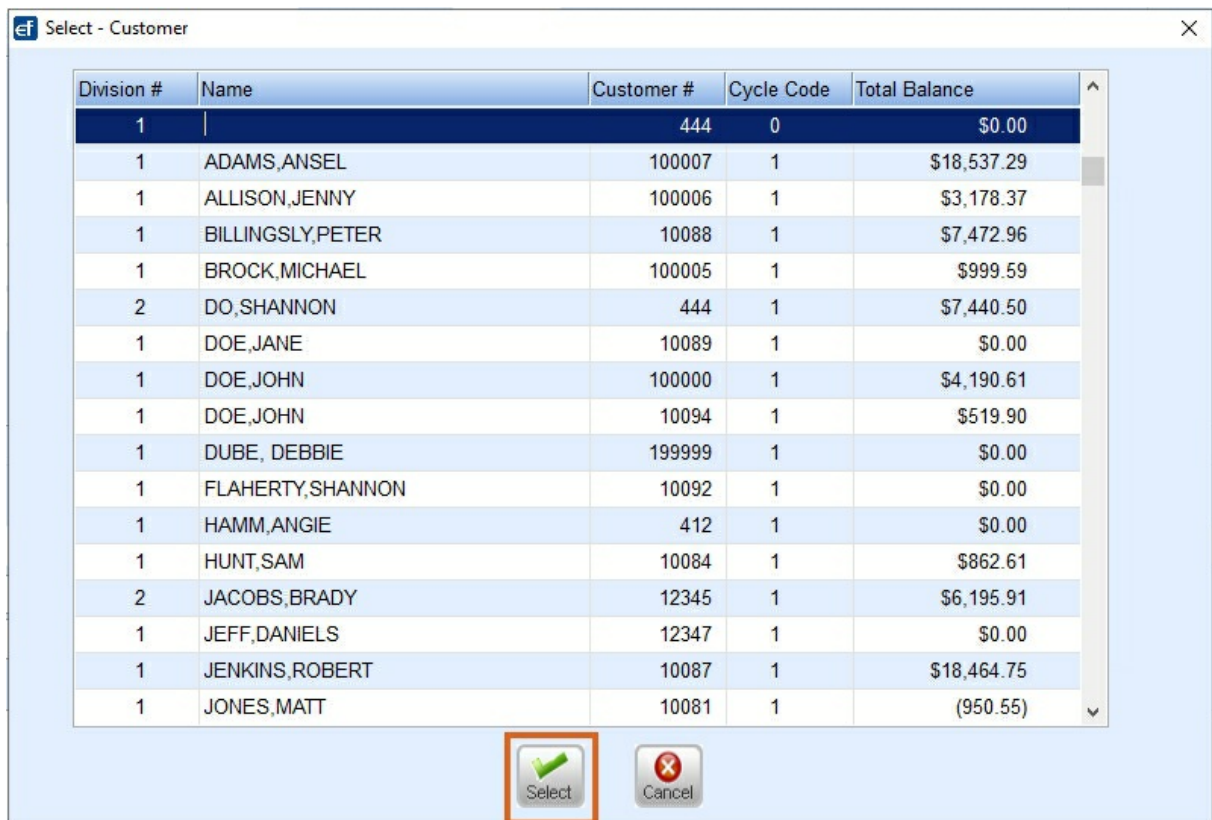
☒ **CT (Customer Transfer action)**
☐ Sold (change status)

☐ RT (Renter Transfer action)
 ☐ Out (change status)

☐ PU (Pick Up)
 ☐ Destroyed (change status)

☐ CS (Change Serial #)
 ☐ Lost/Stolen (change status)

- 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)

- 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:   
Customer Type:   
Delivery Type:   
Price Code/Tier:

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

Delivery Instructions

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

Tank Rental  

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?  
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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.

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Import Export

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Fuelware  
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Daily Clear  
Daily Tank