

Energy Force Search Features

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There are multiple ways to search for items in Energy Force. This article focuses on how to search for items on the *Customer Maintenance* screen. The search methods defined will work in any searchable field within Energy Force.

Search by Account Number or Bill To

Div	Customer Number	Name	Address	Phone
1	10084	HUNT,SAM	8675 CO ROAD 50	(555) 555-5555
2	12345	JACOBS,BRADY	123 DOZIER WAY	(317) 999-5050
1	12347	JEFF,DANIELS	2488 STONEHAVEN WAY	(317) 345-8899

1. Select directly in a field under the column header titled *Customer Number*.
2. Begin typing the customer number. The system will begin to filter based on the numbers entered.
3. If an error is made when entering the account number, press the **Down Arrow** key or choose the next line to begin again.
4. If searching by Bill To, select in the *Bill To* column and follow steps 2 and 3.

Search by Name

There are different methods that can be used to search for a customer by name.

Div	Customer Number	Name	Address	Phone
1	10084	HUNT,SAM	8675 CO ROAD 50	(555) 555-5555
2	12345	JACOBS,BRADY	123 DOZIER WAY	(317) 999-5050
1	12347	JEFF,DANIELS	2488 STONEHAVEN WAY	(317) 345-8899

The standard method to search for a customer is to search by Last Name, First Name or begin typing the first name of the business.

1. Select directly in a field under the column header titled *Name*.
2. Begin typing the last name of the customer or the first name of the business account. The system will begin to filter based on the characters being entered.
3. If an error is made when entering the account number, press the **Down Arrow** key or choose the next Name to begin again.

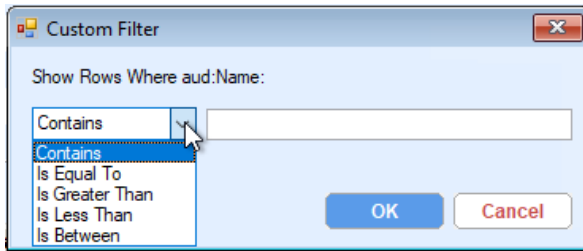
If searching by name and Last Name, First Name does not produce desired results, an alternative method for searching can be utilized based on column filters.

Search by Column Header Filters

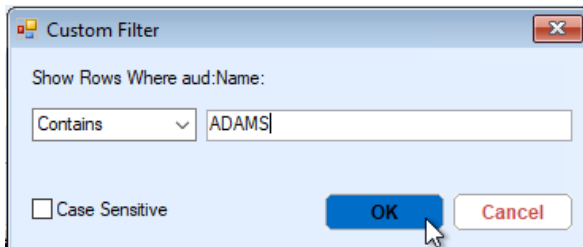
Div	Customer Number	Name	Address	Phone
1	100007	ADAMS,ANSEL	345 PRODUCTION DRIVE	(317) 999-4444
1	100006	ALLISON,JENNY	8855 SHOWME DRIVE	(800) 783-6560
1	10088	BILLINGSLEY,PETER	123 SOUTHPORT ROAD	(317) 555-1212
1	100005	BROCK,MICHAEL	123 ANYWHERE ST	(317) 555-1212
2	111	DO SHANNON	88 FREEMAN LANE	(317) 555-1212

1. Hover over the column header. By doing so, a small arrow will appear on the right side of the header.
2. Select the **Blue Arrow**. A drop-down list will display.

3. Select *Custom Filter*.
4. The Customer Filter screen defaults to *Contains*. This means the program will bring back any account that contains the name entered.



- **Contains** – Any account with the search word that has been entered will display (recommended).
 - **Is Equal To** – Results specific to what is entered display.
 - **Is Greater Than** – Search for values greater than what is entered.
 - **Is Less Than** – Search for values less than what is entered.
 - **Is Between** – Enter *Starting* and *Ending Value* and the system will bring back results.
5. Type in the last name of the customer or name of the business and select **OK**.



6. The *Customer Maintenance* screen will now only display accounts matching the entry made, narrowing the list down for selection.

Div	Customer Number	Name	Address	Phone
1	100007	ADAMS, ANSEL	346 PRODUCTION DRIVE	(317) 999-4444

7. To turn off the filter, hover over the column header and select the **Blue Arrow** again. Uncheck the *Filter* method. This will return to all customer accounts in Energy Force.
 - Exiting the *Customer Maintenance* screen and reopening will also turn the filter method off.

Search by Address or Phone Number

When searching by a billing address or phone number, it is important to note that the system requires specific information to be entered. This means the phone number needs to be entered with an area code and addresses require house numbers.

1. Select in the field under the *Address* or *Phone* column header.
2. Begin typing the address or phone number.
3. The system will begin to filter automatically to display the account information entered.

If searching by an address or phone number does not produce the desired results, an alternative method for searching can be utilized based on filters as described above.

Div	Customer Number	Address	Phone
1	10089	123 MAIN STREET	(231) 723-5555
1	9876543210	555 MAINT ST	(555) 555-5555

Custom Filter

Show Rows Where Address:

Contains

Using the filter method will allow searching without requiring a house number or specific information.

Search by Delivery Address

The ability to search by a customer delivery address rather than billing address also exists within the *Customer Maintenance* screen.

1. Select **Tank Address** located at the bottom of the screen.

Div	Customer Number	Name	Address	Phone
1	100007	ADAMS,ANSEL	345 PRODUCTION DRIVE	(317) 999-4444
1	100006	ALLISON,JENNY	8855 SHOWME DRIVE	(800) 783-5560
1	10088	BILLINGSLEY,PETER	123 SOUTHPORT ROAD	(317) 555-1212
1	100005	BROCK,MICHAEL	123 ANYWHERE ST	(317) 555-1212
2	444	DO,SHANNON	88 FREEWAY LANE	(317) 555-1212
1	10089	DOE,JANE	123 MAIN STREET	(231) 723-5555

☐ Include Inactive Customers

Accounts Receivable Address & Information Budget Information Landlord Tank Rent

Credit Limit Status Date

Current Balance Inactive Reason Code

30 Day Balance Turned Over To Collection No

60 Day Balance Number Of Tanks

90 Day Balance Total Balance all Accts

Total Balance Sales YTD All Tanks

Gallons Used YTD All Tanks

Safety Info Received Date

Call In History

Last Payment Date

Last Payment Amount

Last Statement Balance

Last Statement Date

Bill To

COD

Automatic Payment Type Tax Exemptions User Defined **Tank Address**

Service Orders Proposals Invoices Service Locations

Tank Info

Safety Form

Appliances

Contract Gas

History Inquiry

Purged Inquiry

Tank Readings

Efficiency

Payment Arrangement

Tickler Information

Meter/RTM Information

Payment Methods

Print Label

Work Orders

Energy-Image

2. Select in the **Address** field and begin typing the delivery address.

Div	Customer #	Name	Type	Tank Name	Address	Active / Inactive?
1	88888		P	shop	123	A
1	88888		P	sf	123	A
1	10094	DOE,JOHN	C2	exch	123 ANYWHERE ST	A
1	100005	BROCK,MICHAEL	CD	Read Diesel	123 ANYWHERE ST	A
2	12345	JACOBS,BRADY	P	house	123 DOZIER WAY	A
1	10084	HUNT,SAM	P	House	123 MAIN	A
1	10084	HUNT,SAM	DD	SHOP	123 MAIN	A
1	10084	HUNT,SAM	P	SHOP	123 MAIN	A
1	10084	HUNT,SAM	DD	FIELDTANK	123 MAIN	A
1	10089	DOE,JANE	P	HOUSE	123 MAIN STREET	A
1	10089	DOE,JANE	P	shop	123 MAIN STREET	A
1	100006	ALLISON,JENNY	G	h	123 PRODUCTION DRIVE	A
1	100006	ALLISON,JENNY	C2		123 PRODUCTION DRIVE	A
1	100007	ADAMS,ANSEL	DD	Farm Tractor	123 PRODUCTION DRIVE	A
1	100006	ALLISON,JENNY	P	House	123 PRODUCTION DRIVE	A
1	10088	BILLINGSLEY,PETER	P	HOUSE	123 SOUTHPORT ROAD	A
1	10088	BILLINGSLEY,PETER	P	HOUSE	123 SOUTHPORT ROAD	A
1	10088	BILLINGSLEY,PETER	P	barn	123 SOUTHPORT ROAD	A

City Tank Serial Number ☐ Include Inactive Tanks?

3. Once the address is located, choose **Select**. This will return to the customer account on the *Customer Maintenance* screen.
4. Search filters can also be applied in this program. Please refer to the *Search By Column Header Filters* section above.

Search by Alternate ID

In some instances, the customer will have an Alternate ID that can be utilized to find an account. The *Alternate ID* is located in the lower section of the *Accounts Receivable* tab.

1. Select in the *Alternate ID* field and press **Ctrl+R** on the keyboard. The *Range* selection option will appear and defaults to look for *Alternate ID* field values that are *Equal To* the *Values* entered.

The screenshot shows the 'Accounts Receivable' tab with various fields. The 'Alternate ID' field is highlighted with a red box, and a red arrow points to it from the text 'Click in this field and press Ctrl+R'. The 'Alternate ID' field contains the value 'BRAKEI'.

Div	Customer Number	Bill To Name	Address
1	810633	810633 AT & T FA-10139572	100 S MAIN ST
1	142604	142604 BRANT,KEITH	16675 MAIN STREET
1	705009	705009 CORVALLIS SCHOOL DISTRICT #1	1045 MAIN STREET
1	370858	370858 DOGZ & SUDZ	1803 MAIN ST E
1	703733	703733 DOTSON	114 MAIN STREET
1	731505	731505 FRANKLAND,NORMAN	108 SOUTH MAIN STREET

Accounts Receivable | Address & Information | Budget Information | Landlord Tank Rent

Credit Limit: \$0.00 | Status: Active | Date: 00/00/00

Current Balance: (918.24) | Inactive Reason Code: 0

30 Day Balance: \$0.00 | Turned Over To Collection: No

60 Day Balance: \$0.00 | Number Of Tanks: 0

90 Day Balance: \$0.00 | Total Balance all Accts: (918.24)

Total Balance: (918.24) | Sales YTD All Tanks: \$0.00

Call In History | Gallons Used YTD All Tanks: 0.00

Last Payment Date: 06/23/20 | Safety Info Received Date: 00/00/00

Last Payment Amount: \$0.00

Last Statement Balance: (918.24)

Last Statement Date: 07/24/20

Alternate ID # BRAKEI

- o The column range is based on where the cursor currently resides. Select the **Drop-Down Arrow** under *Column* to modify to a different area of the program as needed.
2. Enter the *Alternate ID* and select **OK**.

The screenshot shows the 'Rng' dialog box. The 'Column' dropdown is set to 'aud:Alternate Id Nur'. The 'Filter Type' is set to 'Equals to'. The 'Values' field contains 'LECERI'. A red arrow points from the 'Values' field to the 'Ok' button.

Rng

Column: aud:Alternate Id Nur | Filter Type: Equals to | Values: LECERI

Expression | Cancel | Ok

3. The system will filter to display the account specified.

The screenshot shows the 'Accounts Receivable' tab with the filtered results. The table displays one account with the Alternate ID '163614'.

Div	Customer Number	Bill To Name	Address
1	163614	163614 &ALICIAECHLEITNER,ERIC	13471 HARPERS BRIDGE ROAD

4. To exit the search, close the *Customer Maintenance* screen and reopen.