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

File	e Edit	Options Master	Menu E	commerce Site Help							
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	Div	Customer Number		Bill To Name	Address	Phone ^					
	1	520549		520549 SMITH, ADAM & LINDA	213 3RD AVE	(406) 676-4206					
	1	701475		701475 SMITH, ALEX	1089 TAMMANY LANE	(406) 363-3151					
	1	406253		406253 SMITH, ARCHIE	1106 RIVERBEND RD	(406) 822-4324					
			_		and a star of a second star and star and stars.						



- 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.

File Edit	Options Master Menu	Ecommerce Site Help				
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Div	Customer Number	Bill To Name		Address	Phone	^
1	520549	520549 SMITH,ADAM &	INDA	213 3RD AVE	(406) 676-4206	
1	701475	701475 SMITH, ALEX	×	1089 TAMMANY LANE	(406) 363-3151	
1	406253	406253 SMITH, ARCHIE		1106 RIVERBEND RD	(406) 822-4324	
				Click Here and begin entering Last Name, F first name of the business account.	irst Name, or	

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

File Edit	Options Master Menu	Ecommerce Site Help	Click on the ar	row
Div C	ustomer Number	Bill To <mark>Name</mark>	Address	Phone ^
1	520549	520549 SMITH,ADAM & LINDA	213 3RD AVE	(406) 676-4206
1	701475	701475 SMITH, ALEX	1089 TAMMANY LANE	(406) 363-3151
1	406253	406253 SMITH ARCHIE	1106 RIVERBEND RD	(406) 822-4324

- 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.

🖳 Custom Filter				×
Show Rows Where a	ud:Name:			
Contains 🗸				
Contains Is Equal To Is Greater Than Is Less Than Is Between	6	ок	Cano	el

- 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.

🖳 Custom Filter	•
Show Rows Where aud:Name:	
Contains ~ SMITH	
Case Sensitive	OK Cancel
	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~

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

I Q	ile Edit Options Master Menu Ecommerce Site Help								
	Div Cu	istomer Number	Bill T	Name	☑ ▼ Address	Phone	^		
	1	119144	119144	SMITH,NATHAN	33683 GARNET COURT	(406) 244-6924			
	1	587147	587147	SMITH,MONA	808 12TH AVENUE EAST	(406) 883-4663			
	1	563676	563676	SMITH, MILLY	41904 ST MARYS LAKE RD	() -			
	4	704040	704040			(400) 004 4077			

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.

Address		Phone
100 S MAIN S	iT.	(586) 493-9588
16675 MAIN S	STREET	(406) 529-2802
	e Custom Filter Show Rows Where aud:Address: Contains ✓ MAIN ST	ОК Сало

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.

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Div Cus	stomer Number	Bill To Name			Address			Phone	^
1	520549	520549 SMITH,A	DAM & LIN	IDA	213 3RD AVE			(406) 676-4206	
1	701475	701475 SMITH,A	LEX		1089 TAMMANY	' LANE		(406) 363-3151	
1	406253	406253 SMITH,A	RCHIE		1106 RIVERBEN	ID RD		(406) 822-4324	
1	709510	709510 SMITH,A	RTHUR & .	JUDITH	368 WYANT LAI	VE		(406) 375-9949	
1	554261	554261 SMITH,B	ARNABY		403 7TH AVE SV	N		(406) 260-1112	
1	709388	709388 SMITH,C	HAD		4032 WAKANTA	NKA WAY		(406) 777-1102	~
ccounts Re	eceivable Address	& Information Budget	Information	Landlord Tank	Rent			Tank Info	
	Credit I	Limit	\$0.00	Status	Active	Date	00/00/00	Credit Information	
	Current Ba	lance	\$0.00		Inactive Reason Code	0 🔍		Appliances	
	30 Day Ba	lance	\$0.00					Contract Gas	
	60 Day Ba	lance	\$0.00		Turned Over To Collection	No		History Inquiry	
	90 Day Ba	lance	\$0.00		Number Of Tanks	1		Purged Inquiry	
	Total Bal	ance	\$0.00		Sales XTD All Tanks		\$0.00	Tank Readings	
Call	In History			c	Sallons Used YTD All Tanks		0.00	Efficiency	
	Last Payment	Date	00/00/00		Safety Info Received Date	00/00/00		Payment Arrangemen	nt
	Last Payment An	nount	\$0.00					Tickler Information	n
	Last Statement Ba	lance	\$0.00		₽ ₽			Meter/RTM Informatio	on
	Last Statement	Date	07/31/20					Print Information	
	Alternate	e ID # SMIADA						Print Label	
	0	OD						Work Ordere	
	C							WORK Orders	

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

1 1 1 1	804482 803187 802853	TYLER, KEVIN MARCEAU, RICHARD		P P	Home	123 B ST	A
1 1 1	803187 802853			Р	Home	122 CHIRMONIK COURT	
1	802853	WEISENBURGER DUST				123 CHIFWONK COOKT	A
1		WEISENBORGER, DOST	N	Р	Home	123 HAUSER DR	Α
	709061	HEYDEN, PETER		Р	Home	123 LONE WOLF LANE	А
1	810717	CURTISS, BRAD & JEAN	Click in the add	P	Home field and	123 MATTHEW LOOP RD	А
1	703926	BRACE, RON & ALICE	begin typing th	e ^P add	ress	123 MOUNTAIN GOAT ROAD	А
1	779132	SAWMILL SALOON		Р		123 N MAIN STREET	А
1	703113	REYNOSO, JACOB & MIC	HELL	Р	Home	123 POPHAM LANE	А
1	709744	WHITE, GARREN		Р	Home	123 POPHAM LANE	А
1	403314	VIGUE, PETER & LINDA		Р		123 RACHEL RD	А
1	800187	BLAIR, DAVID		Р	Home	123 RAINBOW CT	А
1	803117	DUSTIN, BETTY		Р	Home	123 RIVERS EDGE	А
1	7801 <mark>1</mark> 4	SCHMIDBAUER, HARRY		Р	Home	123 SIZER LANE	А
1	518975	CLONTZ, ELENA		Р	Rent	123 WALL STREET	А
1	134936	MOOG, GRADY		Р		12300 BUFFALO SPEEDWAY	А
	704020						٨

- 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.

A.4. 1						
Div Custon	ner Number	Bill To	Name		Address	
1	810633	810633	AT & T FA-10139572		100 S MAIN ST	
1	142604	142604	BRANT, KEITH		16675 MAIN STRE	ET
1	705009	705009	CORVALLIS SCHOO	L DISTRICT #1	1045 MAIN STREE	T
1	370858	370858	DOGZ & SUDZ		1803 MAIN ST E	
1	703733	703733	DOTSON		114 MAIN STREET	ī
1	731505	731505	FRANKLAND,NORM	IAN	108 SOUTH MAIN	STREET
Accounts Rece	ivable Address & I	nformation	Budget Information	Landlord Tank	Rent	
	Credit Limi	t	\$0.00	Status	Active	Date 00/00/00
	Current Balanc	e	(918.24)		Inactive Reason Code	0 🔍
	30 Day Balanc	e	\$0.00			
	60 Day Balanc	e	\$0.00		Turned Over To Collection No	
	90 Day Balanc	e	\$0.00		Number Of Tanks	0
		-	(040.04)		Total Balance all Accts	(918.24)
	Total Balanc	e	(918.24)		Sales YTD All Tanks	\$0.00
Call In F	History			G	allons Used YTD All Tanks	0.00
	Last Payment Dat	e	06/23/20		Safety Info Received Date	00/00/00
L	ast Payment Amour	nt	\$0.00			
Las	st Statement Balanc	e	(918.24)			
		-	07(24/20			
	Alternate ID	BRAKE		Clic	k in this field and p	ress Ctrl+R

- 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.

🖳 Rng		
Column	Filter Type	Values
aud:Alternate Id Nur $\sim$	Equals to 🗸 🗸 🗸	LECERI
<b>→</b> >		
		Expression Cancel Ok

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

Eil Ma	ile <u>E</u> dit <u>O</u> ptions <u>M</u> aster Menu Ecommerce Site <u>H</u> elp 2								
	Div (	Customer Number	Bill To Name	Address					
	1	163614	163614 &ALICIALECHLEITNER,ERIC	13471 HARPERS BRIDGE ROAD					

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