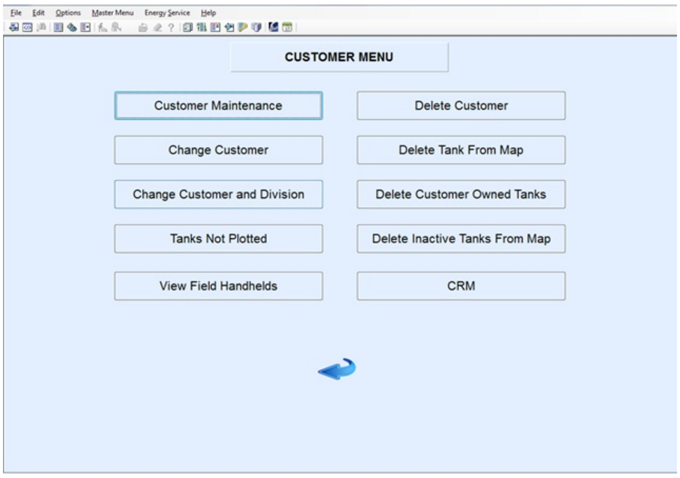
Customer Maintenance

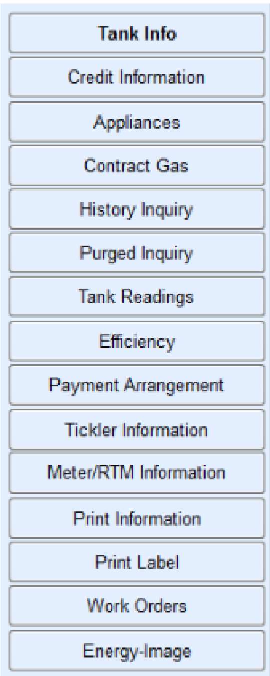
Last Modified on 04/29/2025 12:12 pm EDT

Customer Menu

The *Customer Menu* houses various modules related to the customer database such as contracts, tanks, and appliances. Customer accounts can be added manually or imported by the Customer Import program if an alternative accounting system is used (Agris, MOCA, SSI, Etc).

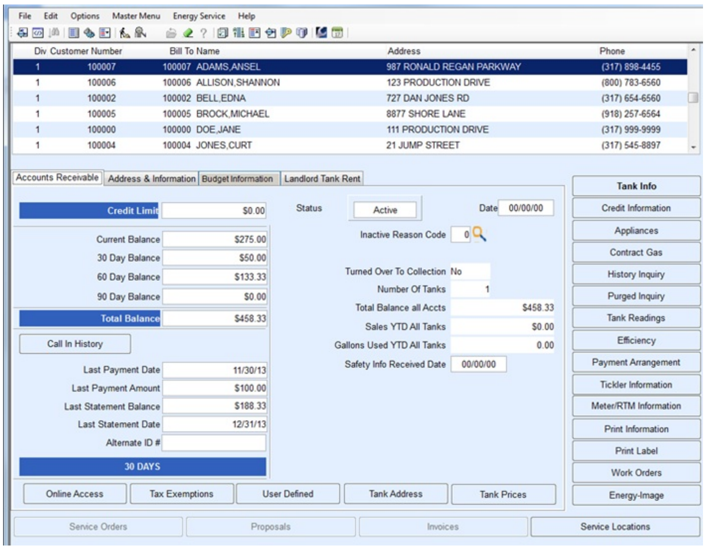


There are a number of customer-related options located within the *Customer Maintenance* screen referred to as the *Customer Maintenance Quick Menu*.

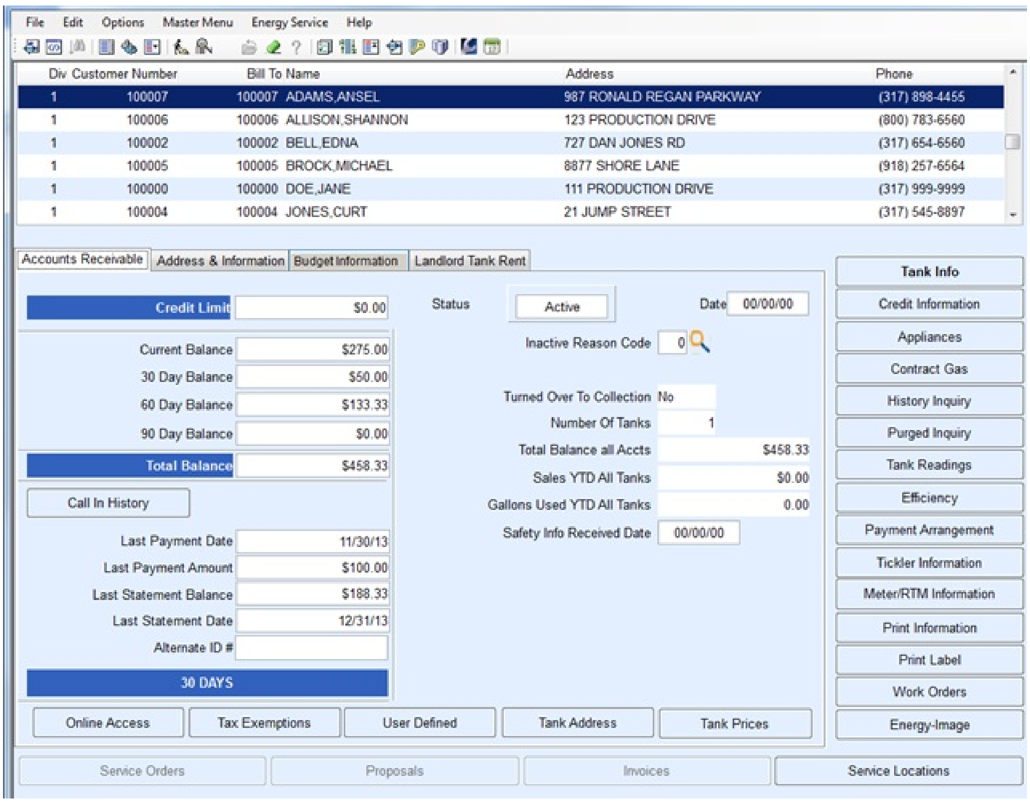


Press **Tab** to move through the different fields.

Add New Customer Account



1. From the Main Menu, select **Customer Menu**.
2. From the *Customer Menu*, select **Customer Maintenance**.
3. On the *Customer Maintenance* window, press **CTRL+C** to create.
4. In the *Division* field, enter the Division number and press **Tab**.
5. In the *Customer #* field, enter the customer number or, if Energy Force is set to auto-assign numbers, press the **Tab** key and the number will automatically appear.
6. The *Bill To* number will automatically default to the customer number entered. If this is not correct, enter the correct Bill To customer number. Press **Tab** when finished. This will automatically navigate to the *Address & Information* tab.



7. Enter the *First Name* of the customer. If the customer is a business, press **Tab** in the *First* and *Last Name* fields and enter the full name of the Business in the *Name* field.
8. Enter the *Last Name* of the customer.
9. The *Name* field at the top of the screen will automatically default to the Last, First Name or will display the full name of the business.
10. In the *Address* field, enter the address for the customer (this will be Address Line 1).
11. Enter the primary *Phone* number for customer.
12. In the Address2 field, enter the second line for the address.
13. Enter City name in *City* field.
14. In the *State* field, enter the two-character postal code.
15. The *Zip Code* field should auto-populate based on the city and state that has been entered but can be modified if necessary.
16. Enter *Contact* information.
17. Select the *Phone Type* in the drop-down (this is in reference to the phone number entered in step 5)
18. Enter work telephone number in the *Work Phone* field. Include the extension in the *Extension* field if applicable.
19. Select the type of work telephone number in the drop-down below the *Work Phone* field.
20. In the *Send Statement* field, enter *Yes* to send statements or enter *No* to not send statements to the customer.
21. In the *Statement Cycle Code* field, enter the Statement Cycle Code for the customer. Optionally press **F5** or select the **Lookup** icon, choose the Statement Cycle Code from the list, and choose **Select**.
22. In the *Terms Code* field, enter the Terms code for the customer. Optionally press **F5** or select the **Lookup** icon, choose the Terms code from the list, and choose **Select**.
23. The *Invoice Cycle Code* field is not being used at this time. Be on the lookout for future enhancements.
24. In the *Salesman Code* field, enter the Salesman code for the customer. Optionally press **F5** or select the **Lookup** icon, choose the Salesman code from the list, and choose **Select**.
25. After exiting the *Salesman Code* screen, the customer account will automatically save. Press **Ctrl+M** to modify any defaulted information that may need to be changed.
    a. In the *Allow Disconnects* field, enter *Yes* to allow the customer to be disconnected or *No* to not allow the customer to be disconnected.
    b. In the *Service Charge* field, enter *Yes* if this customer will be charged monthly Service Charges on past due statement balances or *No* if this customer will not be charged monthly Service Charges.
    c. In the *Minimum Finance* field, enter *Yes* if the calculated Service Charges are less than the minimum Finance Charge in the *Division Maintenance* window. The minimum Finance Charge amount will apply to the customer. Enter *No* if the calculated Service Charges apply to the customer.
    d. In the *Print Invoice* field, enter *Yes* to generate invoices for the customer using the *Print Single Invoice* and *Invoices by Journal* options. Input *No* to not generate invoices for the customer using the *Print Single Invoice* and *Invoices by Journal* options.
    e. The *Member ID* is an optional field that can be used to record the membership identification number for the customer.

f. In the *Customer Memo* field, enter information about the customer such as comments about a status change on the customer account.

g. Select **Other Phone/Email.**

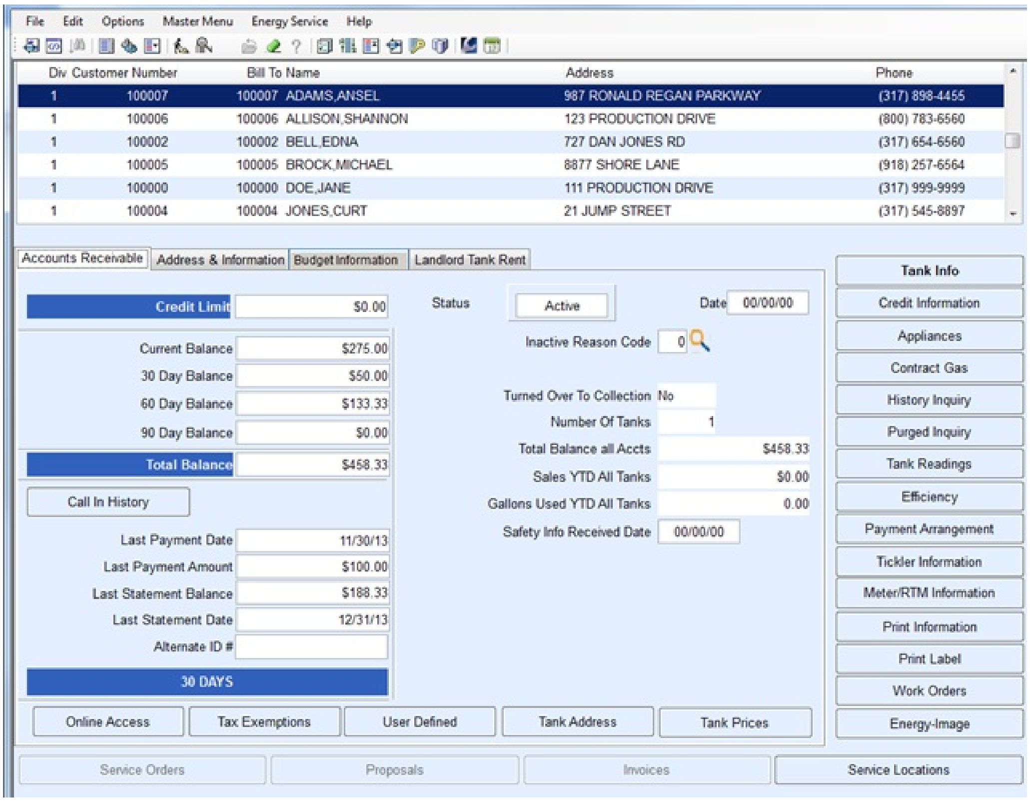
h. On the *Other Phone Numbers/Email Address* window, in the *(E)mail or (P)hone* area, input *E* to enter email addresses or *P* to enter phone numbers.

i. In the *Phone/Email* field, type the telephone number or email address.

j. Key in a description about the telephone number or email address in the *Description* field.

k. Select **Save** then choose **Exit**.

l. Go to the *Accounts Receivable* tab.



m. **Credit Limit** – Enter dollar amount if applicable. The system will notify by highlighting the field with a red box if the customer exceeds the credit limit.

n. **Status** – This field will default to *Active* during the customer creation process.

o. Enter *Yes* or *No* for *Turned Over To Collection*.

p. *Number of Tanks, Total Balance all Accts, Sales YTD All Tanks,* and *Gallons Used YTD All Tanks* automatically gets updated with each sale.

q. If this account is tax exempt, select the **Tax Exemptions** button. Refer to the Tax Exemptions article for further information.

r. **Tank Address** is used to look up any address.

s. **Tank Prices** shows all tanks and their associated prices.

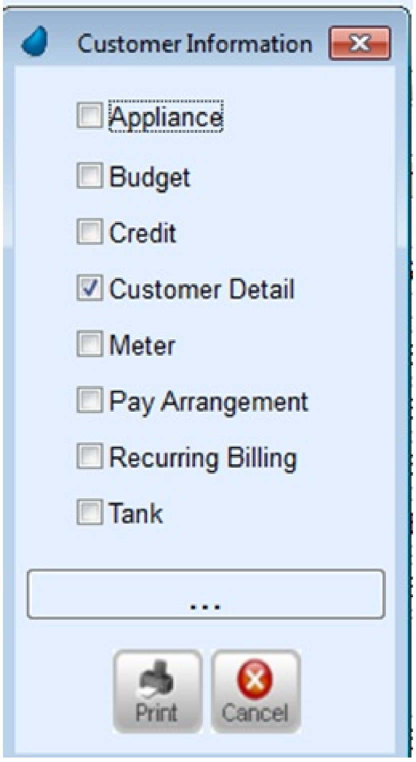
t. Press **CTRL+Q** to save.

u. Go to the *Budget* tab.

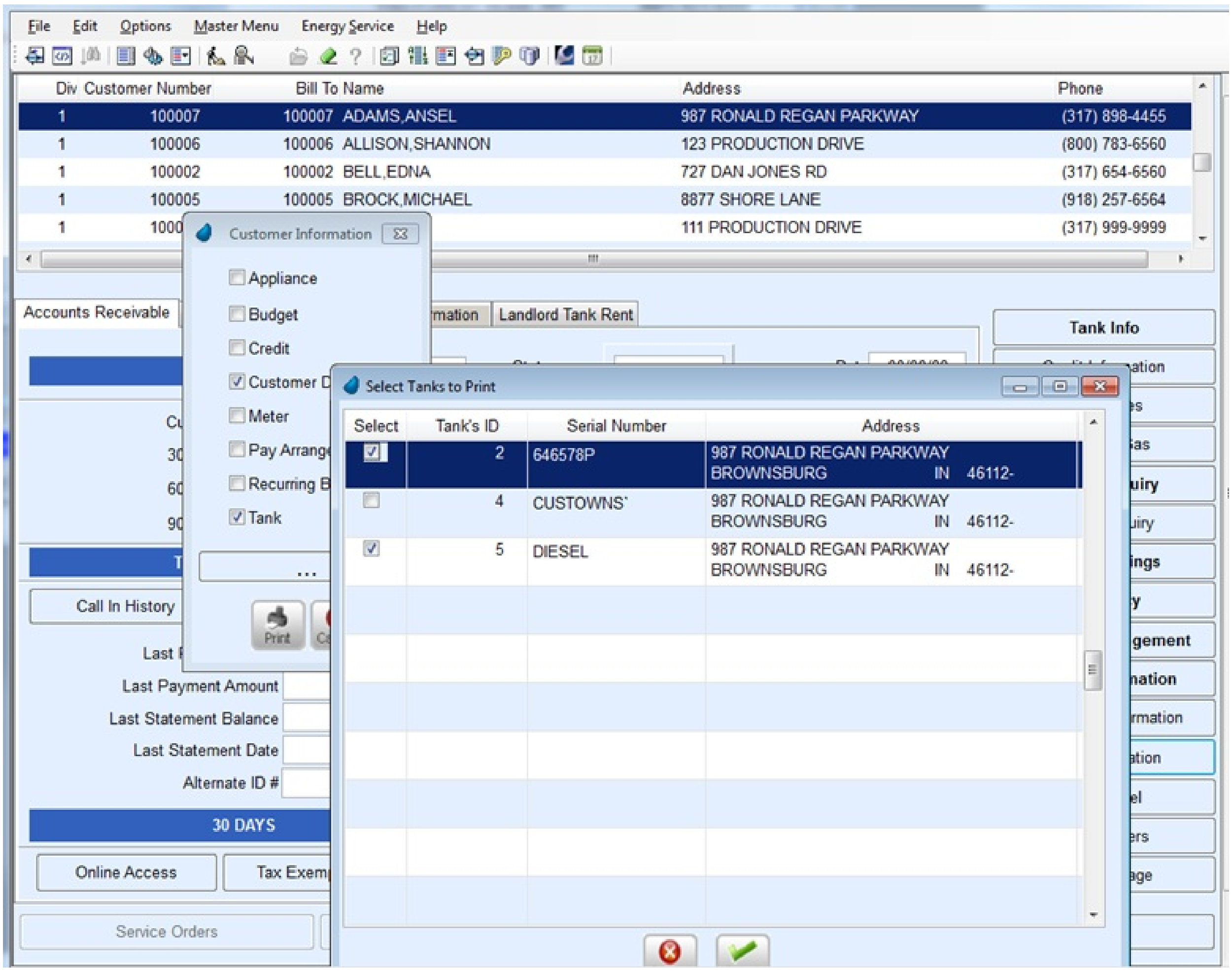
v. Budget information can either be entered manually as shown above or by the budget calculator located in the *Reports* menu. For more information see here.

Print Information

Customer information can be printed when the *Print Information* tab is selected. This information can be useful to give to a driver for new customer information or as a hard copy to place in a customer file. Select the *Report* type (more than one item can be selected) and choose **Print**.



If printing tank information, multiple tanks tied to the account can be selected and printed in one report.



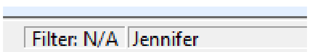
Filter View

Energy Force has a feature that filters customers to specific Locations or Divisions. A system setting is automatically generated and set to *N* at *Supervisor Menu / Maintenance Menu / Division Maintenance / System Settings*. Modify this setting to *Y* to display a status label at the bottom of the screen (to the left of the username) with a default label of *Filter: N/A*. If logged into Energy Force when filtering is turned on, exit and login again to use the filtering option.

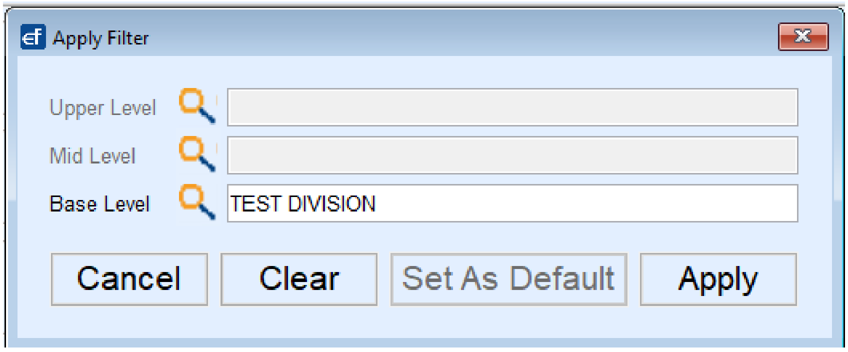
Category	Setting Name	Actual Value
Filter	FilteredViews	Y

A button is also enabled at *Main Menu / Supervisor Menu / Setup Options* labeled **Filtered View Setup** that opens a read only view showing the base level filtering options. This will be pre-populated based on the Division table.

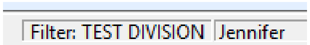
Prior to setting a filter value, navigate to *Main Menu / Customer Menu / Customer Maintenance* to verify the customer list contains all customers.



To select the Location or Division, left click in the status label and select the *Base Level* magnifying glass to display the *Apply Filter* window. Highlight the Location or Division and choose **Select**. Returning to the *Apply Filter* window, select **Apply** to apply the *Base Level* filtering for the Location or Division selected and the name will display on the status label. To return to all Locations or Divisions once a filter is set, select the filter again and choose **Clear**.



When the filter is turned on and a Location or Division is selected, only customers that have at least one tank or service location with the selected Location or Division or customers with no active tanks or service locations will display in Customer Maintenance. If a customer has tanks or service locations that are in different Locations all of the tanks and service locations will be displayed as long as one of those is in the filtered Location.



Note: The filter will need to be set each time users log into Energy Force. Setting Default filters, Mid and Upper Level filtering are not available at this time.